Clearspan® OpEasy® Advanced Provisioning Guide

SEPTEMBER 2024

RELEASE 24.3

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Release 24.3 – September 2024

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Revision History

The following represents the revision history of this publication:

Date Completed	Description
08/2024	R24.3
05/2024	R24.2
03/2024	R24.1
10/2023	R23.3
06/2023	R23.2
02/2023	R23.1
12/2022	R22.3
09/2022	R22.2
06/2022	R22.1 SP1
04/2022	R22.1
4/2022	R21.2
2/2019	R19.1
10/2018	R4.11
4/2018	R4.10
2/2018	R4.9 SP2
12/2017	R4.9
08/2017	R4.8
04/2017	R4.7
11/2016	R4.6
06/2016	R4.5
04/2016	
09/2015	R4.3
05/2015	R4.2
11/2014	R4.1
08/2014	R4.0
06/2014	R3.10
04/2014	R3.9
09/24/13	R3.6
08/05/13	R3.5 Corrections
06/27/13	R3.5
05/12/13	R3.4 Initial Release of this publication

Overview

OpEasy is a suite of web applications that helps an administrator quickly and easily integrate select models of AudioCodes, Media5, Mitel, Poly/Polycom, Panasonic, Cisco or Grandstream phone devices within an Enterprise on the Clearspan Voice over IP (VoIP) platform and have it ready for use by a specific user. When an administrator sets up a phone using profiles and templates in OpEasy, and then designates a user for that phone, a unique configuration file is generated and made available for download when the phone starts up. The configuration file defines the phone number/extensions and features that are enabled on the phone. Although this file is generated and stored on the Clearspan system, OpEasy controls the content of this file when an OpEasy template is assigned.

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

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

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

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

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

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

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

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

Notes:

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

Initial System-Level Setup

Using the customer's requirements for features and functionality, OpEasy comes set up with an Enterprise, one or more User Groups within the Enterprise, Global Settings for SIP phone devices, and Service Packs (groups of user services) 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 levelsfor a specified phone device family or manufacturer. Clearspan creates the phone device types that OpEasyadministrators can provision and assign to users on the Clearspan platform. A 'device type' typically equates to a phone model, such as the Mitel 6869i SIP phone.

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

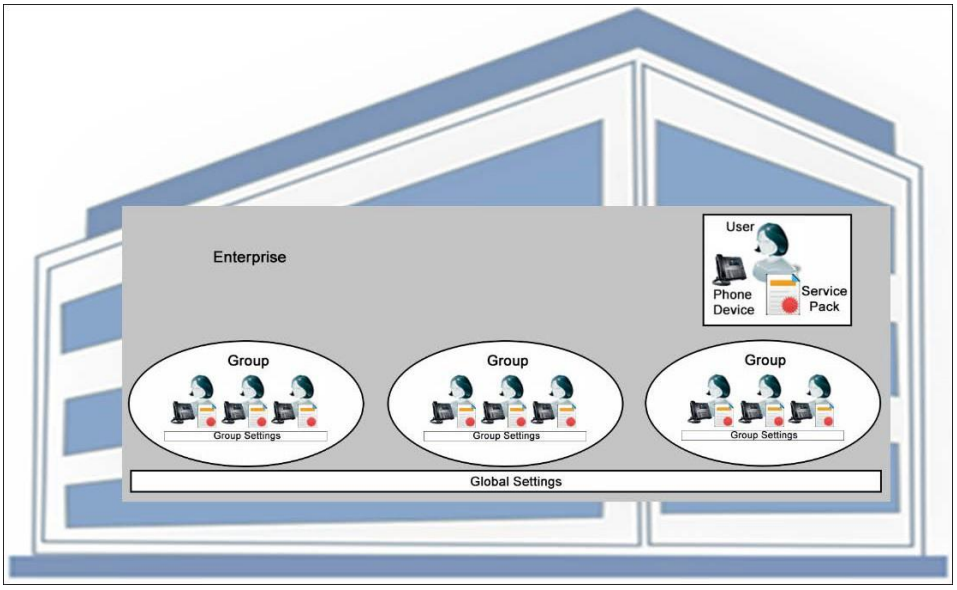


Figure 1 - Provisioning Hierarchy

Setting Up Users with Phones

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

1. Choose or create a phone Template Definition. Templates define a reusable set of features for a specific type of phone. They control the behavior of each button and softkey; the ring tones, how items are displayed on the screen, and so on. For more information, see the Phone Templates section.

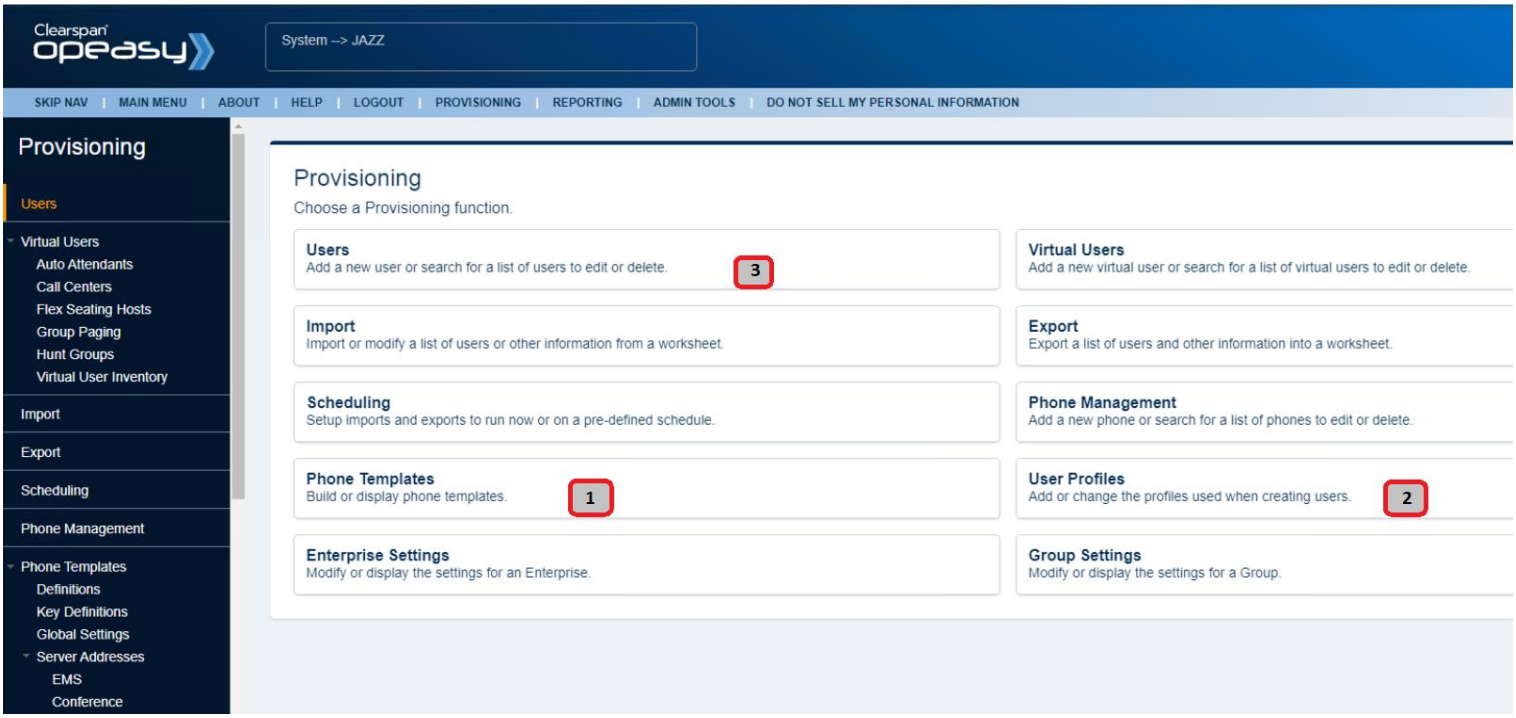


Figure 2: Provisioning Menu

2. Choose or create a User Profile. User Profiles are reusable sets of rules to be applied when new users are created. User Profiles contain information such as which phone template to use, which Service Packs to assign, what phone number to assign, the Voice Mail settings to use, and so on. For more information, see the User Profiles section.

3. Create a User in OpEasy for each person who will be using a phone. User information includes first name and last name, email, passwords, phone numbers, phone assignments, location, optional services configuration, and so on. Choosing a User Profile while creating a User simplifies the configuration requirements by automatically filling in many of the details. For more information, see the Users section.
   OpEasy allows you to create a primary Phone Device for a User as part of creating the User. Creating a Phone Device includes identifying information such as the brand and model of phone, associated Phone Template, number of lines/ports, MAC address, assigned phone number or extension, and so on.
   You can create one user at a time in the Users section of OpEasy, or you can create multiple users at once using the OpEasy Import feature. For more information, see the Import section.

4. After a User and an associated Phone Device are created, OpEasy sends setup instructions to

the user's Email. New User E-mail Notifications are configured in General Settings under Users.

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, see the Viewing or Editing Global Settings section.
6. Install the phone at the user's location. When a phone is connected to the network and started up, it prompts you for a Device ID or for device credentials depending on the device type, to apply the appropriate configuration file. For more information, refer to the Set Up a New Phone for a New User section.
7. The phone is ready to use.

Phone Templates

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

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

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

Notes:

- All the Aastra phone models are now referred to as Mitel phones.
- As new versions of OpEasy are released, new settings may be added to Templates and Global Settings. These new settings are typically presented to an administrator with the default value of “Unspecified.” The “Unspecified” value indicates that no value has ever been set. As such, any pre-existing Global Extra Settings that correspond to the new setting continue to be used. However, once a new setting has been changed from the “Unspecified” value, then OpEasy generates configuration file fields for the setting from then on. These values then override any Global Extra Settings for that setting. Finally, once a value is selected to replace the “Unspecified” value, the ‘Unspecified’ setting is no longer an option.

Viewing Phone Template Definitions

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

To view a phone template definition:

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

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

Figure 3 - Template Definition Selection

Choose the **Template Level** from the drop-down list.

3. Select the **Enterprise** and **Group** from the respective drop-down lists, if needed.

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

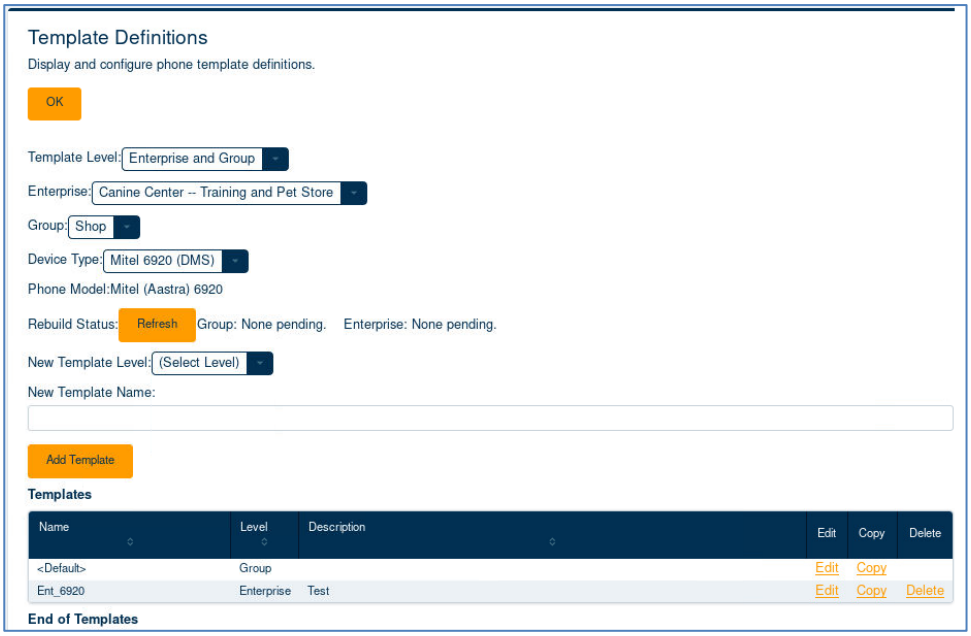


Figure 4 - Template Definitions - Device Type Selected

Viewing, Adding, or Editing Key Definitions

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

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

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

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

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

   The Template Keys selection determines the keys Administrators will be able to use while creating templates. The admins can configure the use of only System defined keys, only EnterpriseKeys or the System and Enterprise Defined Keys.
5. Select the **Phone Manufacturer**, if necessary. The available manufacturers depend on the device types configured for the Enterprise. The Key Definitions page opens, as shown in the following figure.

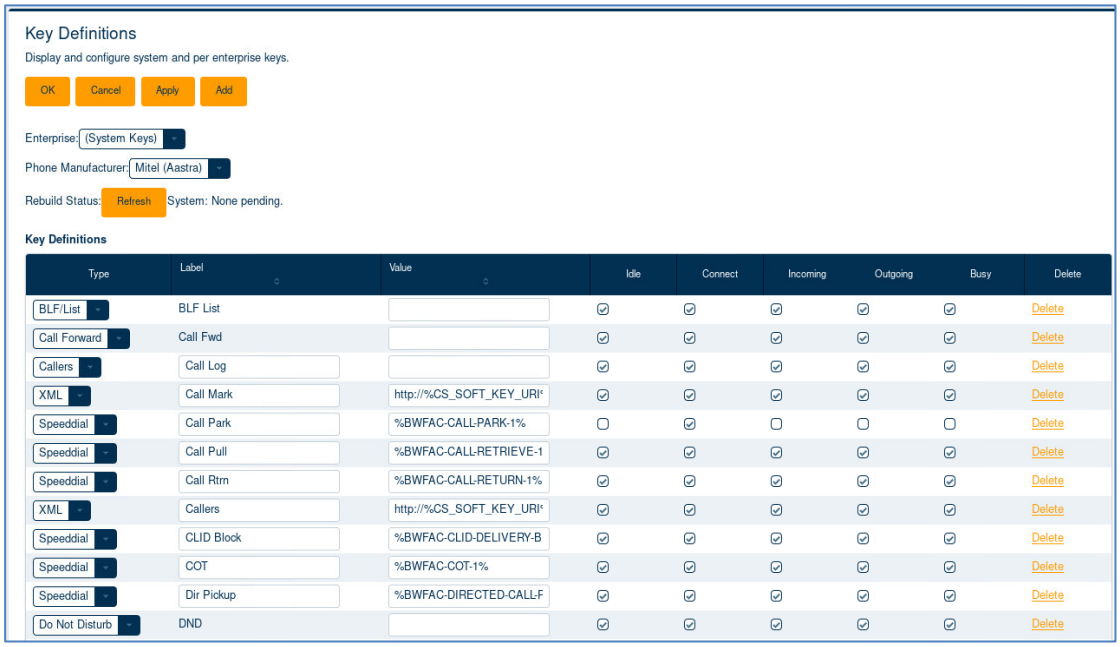


Figure 5 - Key Definitions Page - Keys

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

Figure 6 - Key Definition Row Added

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

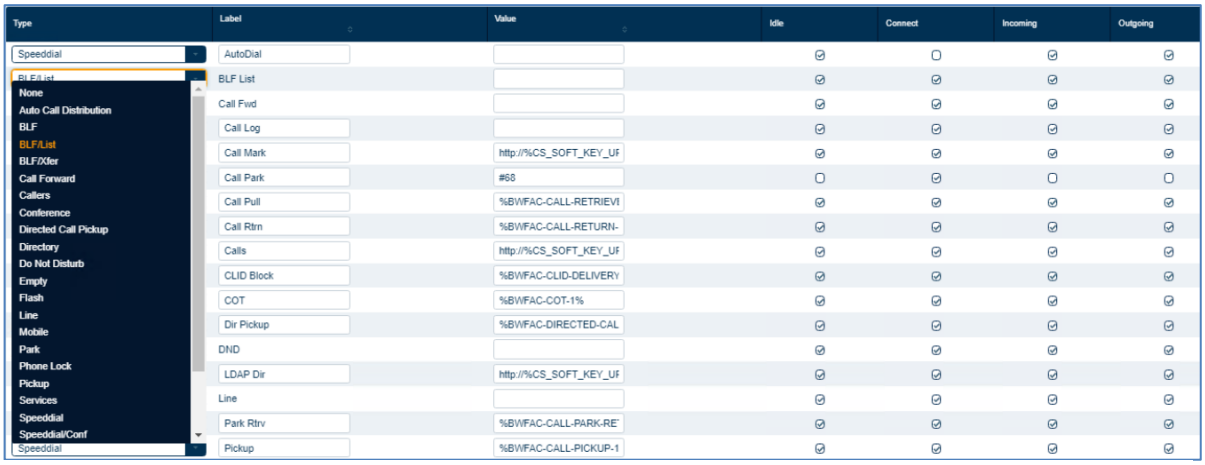


Figure 7: Key Definitions – Key Type Drop-Down List

8. Enter a **Label** for the key. Key labels can be a maximum of 12 characters in length.

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

Figure 8 - Softkey State Selection

11. Click **OK** or **Apply**.
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 opens.
3. Select an **Enterprise** to remove a key definition at the Enterprise level only or select **(System Keys)** to remove a key definition for the system.
4. Click **Delete** on the far-right side of the row of the key to delete the key definition.

Figure 9: Delete Key

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

Creating a Mitel Phone Template

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

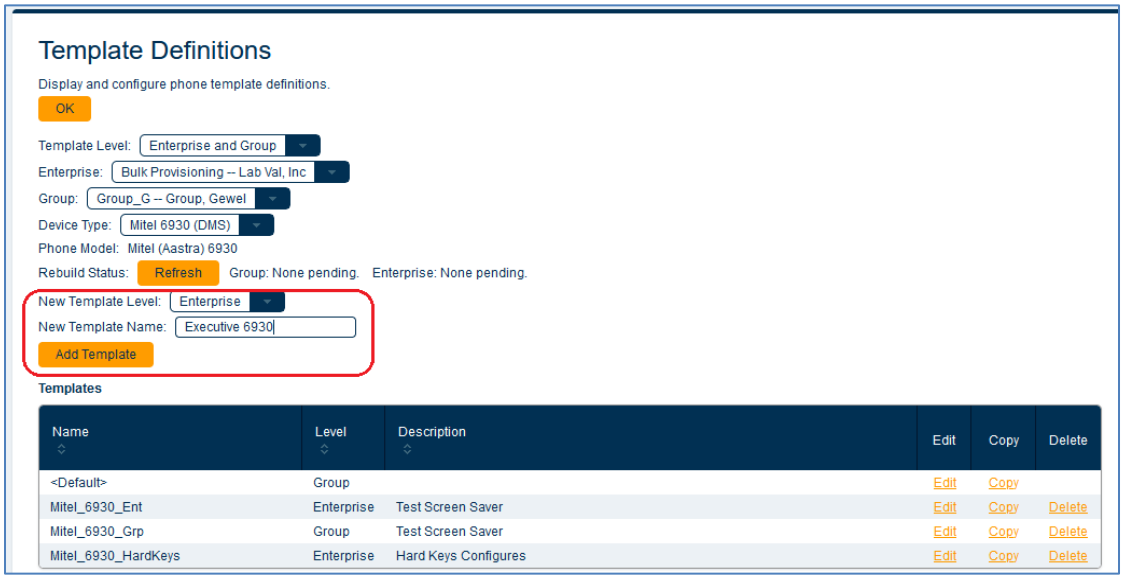


Figure 10: Enter New Template Name

9. Configure the general settings, lines, and keys for the new template as described in the following sections, and then click **OK**.

Configuring General Settings

On the Template Add page:

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

3. Select the **URI for Soft Keys** from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for certain key definitions.

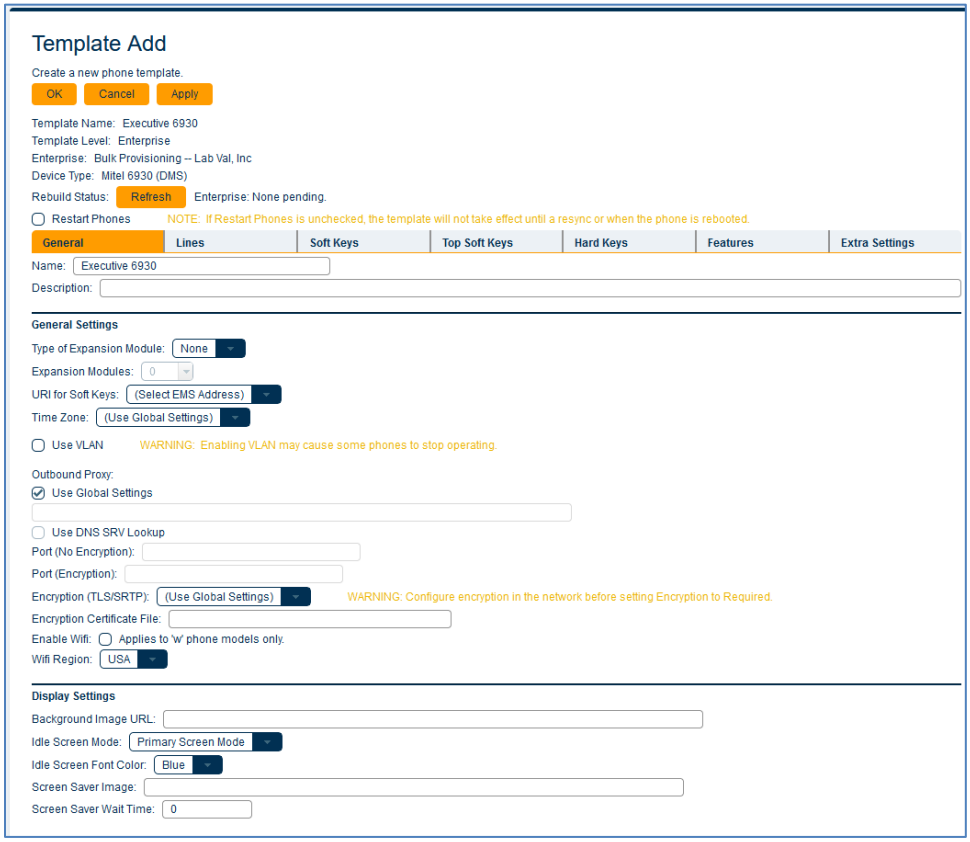


Figure 11: Template Add Page

4. Select the **Time Zone** from the drop-down list. **'Use Global Settings'** uses the time zone configured in Global Settings under Phone Templates. **User Time Zone** uses the time zone of the first primary user assigned to the phone. **Use DHCP** uses the time zone from the DHCP server. You can also select a specific time zone.
5. Select **Use VLAN** to add support for configuring phones to use their VLAN capability.

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

6. Use Global Settings for Outbound Proxy, Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) or uncheck **'Use Global Settings'** check box to enter the **Outbound Proxy Address, Outbound Proxy Port (No Encryption)** and **Outbound Proxy Port (Encryption)** used by this phone. These optional fields can contain text up to 256 characters, as well as tags.
7. Select the **Use DNS SRV Lookup** option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
8. Select the setting for Encryption (TLS/SRTP). For the Encryption Certificate File, enter the certificate filename for the device type. Enabling encryption affects both encryption of signaling using Transport Layer Security (TLS) and encryption of the media (voice) using Secure

Real-time Transport Protocol (SRTP). These settings are available for Mitel 6800 and 6900 phone models, AudioCodes MP-11X (DMS) and Media5 devices.

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

9. Use Global Settings for subscription time (as-feature-event) or uncheck the **'Use Global Settings'** check box and enter the subscription time in seconds.
10. Enter the location of the Image to be used as the background image on the idle screen of the phone in the **Background Image** field. The Background Image is a text file. The requirements for the file are as follows:
    - 320x240 pixels (Mitel 6867i, 6915, 6920)
    - 480x272 pixels (Mitel 6869i, 6930)
    - 800x480 pixels (Mitel 6873i, 6940)
    - 24 or 32-bit color depth
    - 1MB maximum file size
    - JPG and PNG formats are supported.
    - There should be no frame around the image.

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

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

Assigning Lines

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

1. On the Template Add page, select the **Lines** tab. The number of lines displayed depends on the number of lines that the phone supports.
2. Change the **BLF Line/User** if necessary. This value applies when the Busy Lamp Field (BLF) feature is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI.
3. Select the **Clearspan Line Position** that you want to assign.

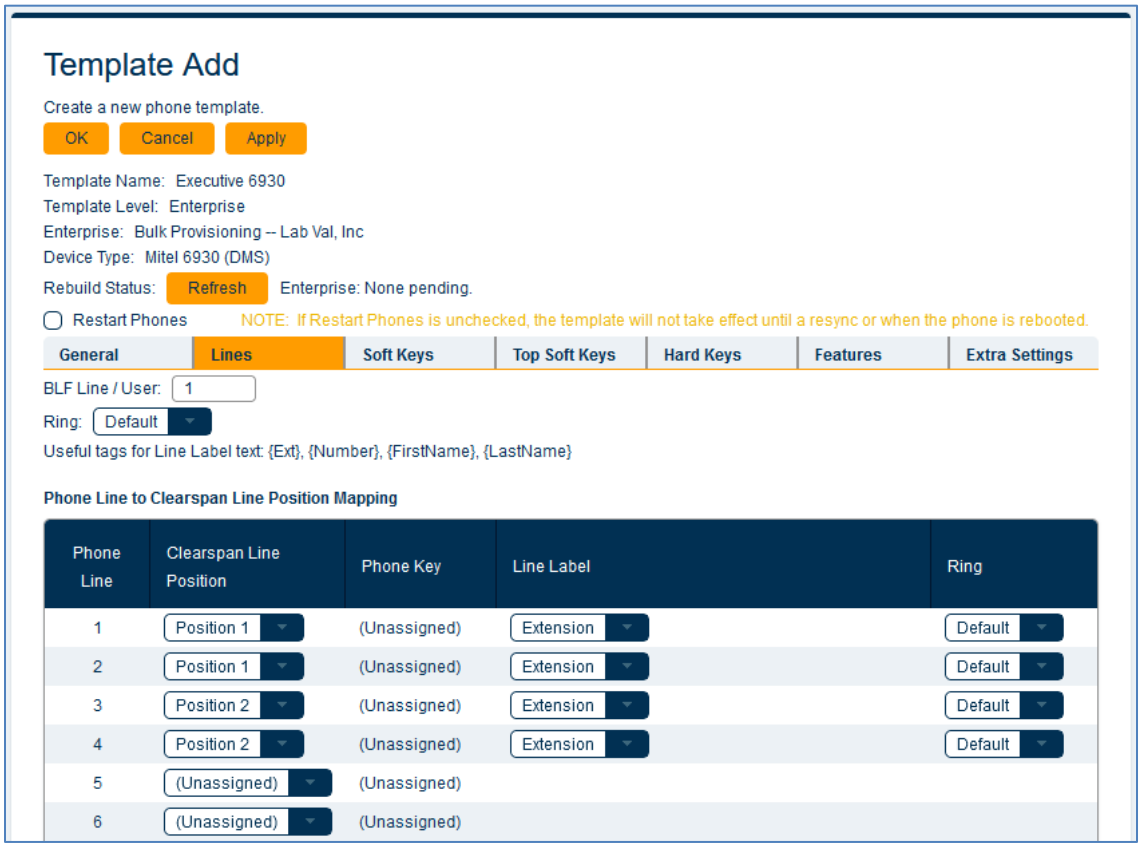


Figure 12: Phone Line to Clearspan Line Position Mapping

For the Mitel DECT 112 phones

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

3. Choose the **Line Label**, which determines the label shown on the phone display. Choosing **Text** allows you to enter up to 16 characters of text along with the Extension, represented by the tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to “{First Name} {Last Name}” or “{Last Name}, {First Name}”.

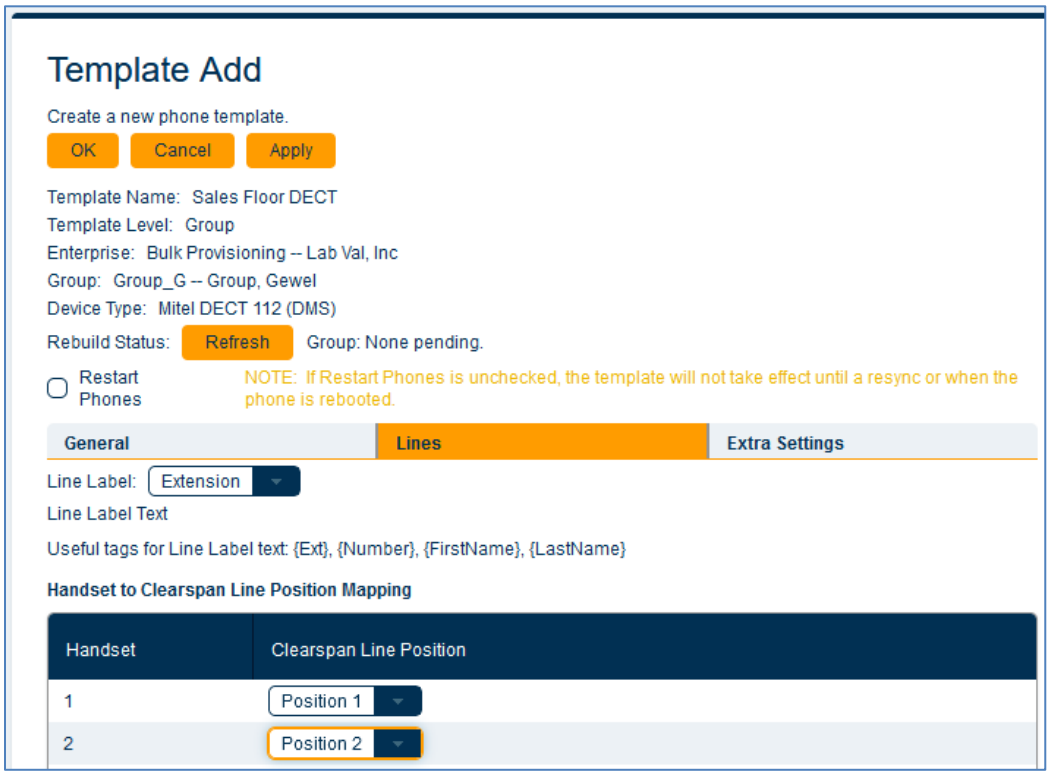


Figure 13: Handsets to Clearspan Line Position Mapping – Mitel DECT 112

4. Repeat these steps for every line on the phone that you want to assign.

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

Configuring Soft Keys

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

1. On the Template Add page, select the **Soft Keys**, **Top Soft Keys**, or **Programmable Keys** tab. A list of available keys is displayed. The tabs available, the number of lines, and the number of programmable keys depend on the phone.
2. Select a feature or line from the **Label** drop-down list for Key 1. This drop-down list of features is derived from the list of Key Definitions.

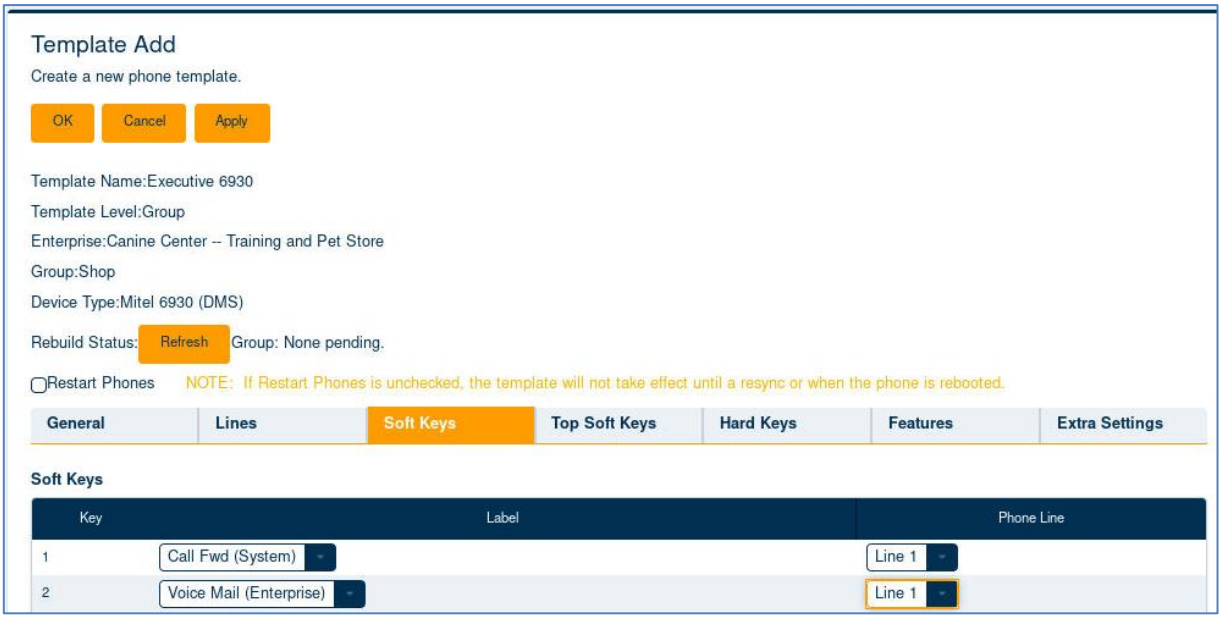


Figure 14: Template Add – Soft Keys Tab

3. Choose a **Phone Line** for the key if presented.
4. Continue configuring the keys until you have assigned all the features desired to the programmable keys in the template.

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

Configuring Hard Keys

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

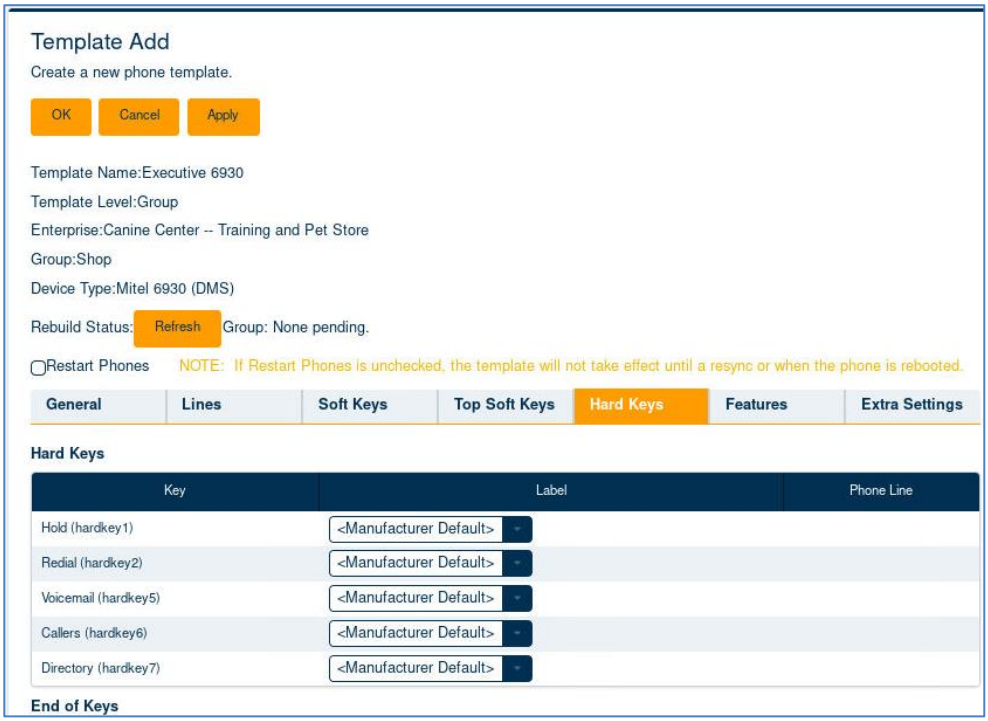


Figure 15: Template Add – Hard Keys Tab

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

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

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

Configuring Features

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

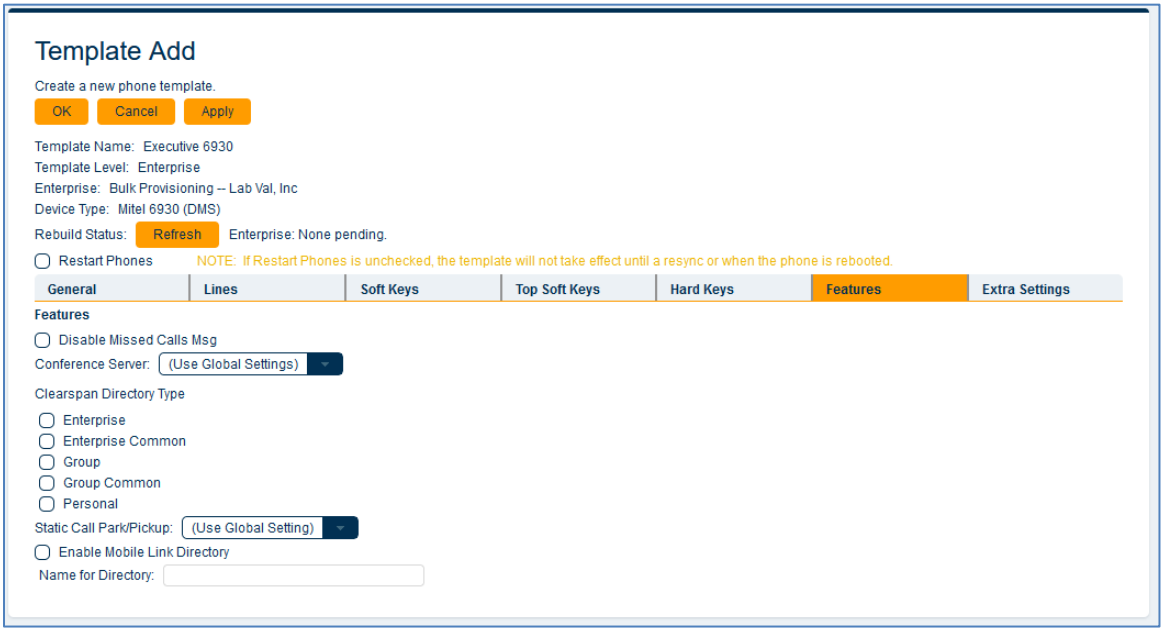


Figure 16 - Template Add - Features Tab

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

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

4. Enable **Static Call Park/Pickup** if you want Park and Pickup keys to appear on the phone automatically, without the need to specifically define a Park or Pickup key. If you enable this setting when those keys are also defined, then two Park/Pickup keys appear on the phone. This setting appears only for phone models that support display of these keys.
5. Select the **Enable Mobile Link Dir** check box to enable the mobile contacts to be synced to the phone and displayed as a directory on the desk phone.
6. Enter the desired name for the mobile directory on the desk phone in the **Name for Directory** field.

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

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

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

Configuring MiVoice Conference Phone Applications

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

Configuring Extra Settings

Template Add Extra Settings:

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

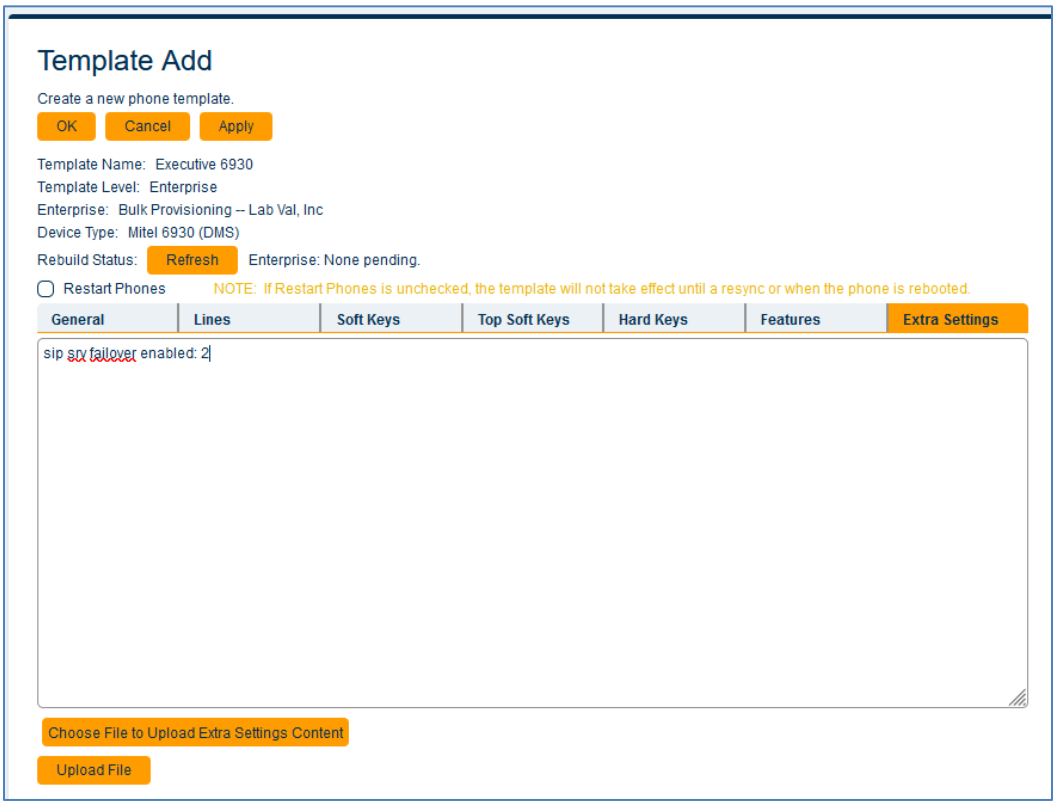


Figure 17: Template Extra Settings Tab

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

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

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

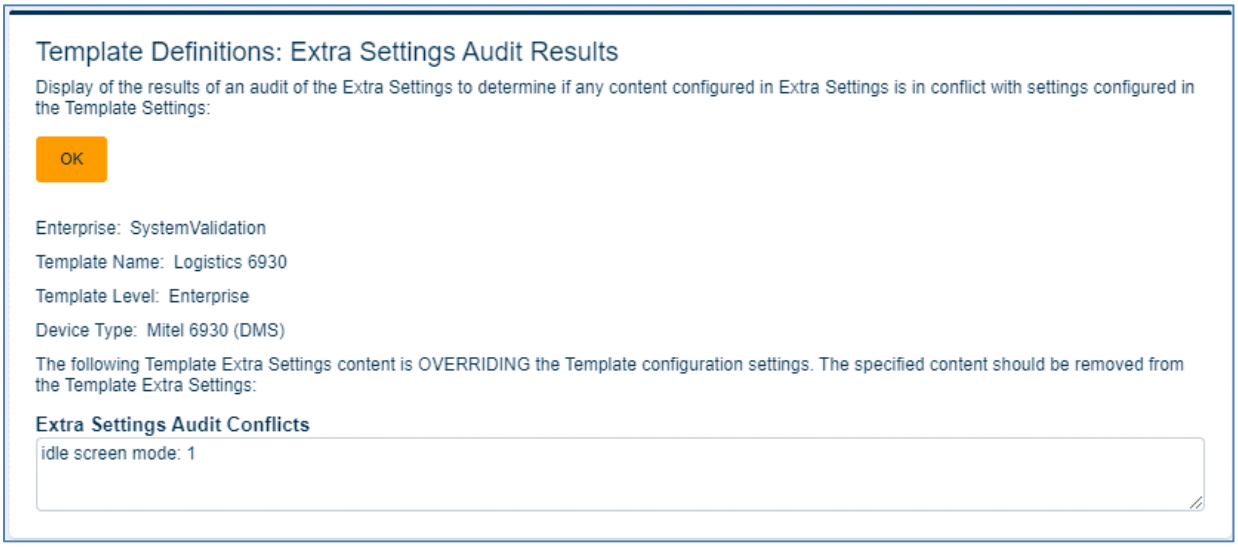


Figure 18: Template Definitions: Extra Settings Audit Results Page

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

Editing a Mitel Phone Template

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

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

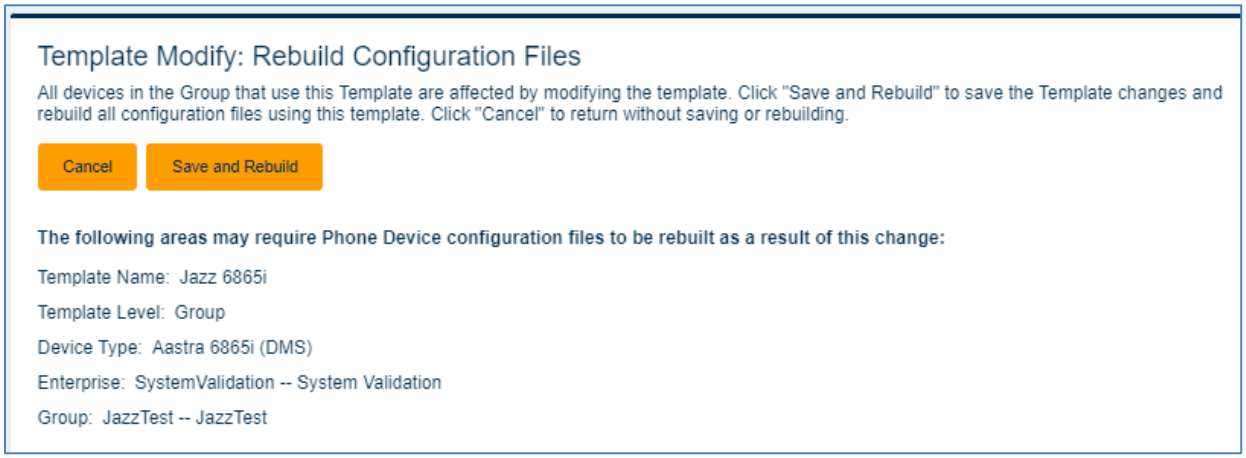


Figure 19: Template Modify: Rebuild Configuration Files Page

Searching for Template Users

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
3. Click the **Edit** link in the row or click anywhere on the template you want to modify. The Template Modify page opens.
4. Select the **Template Users** tab.
5. Select **Usage Displayed By** for a list of users or devices that use the template.

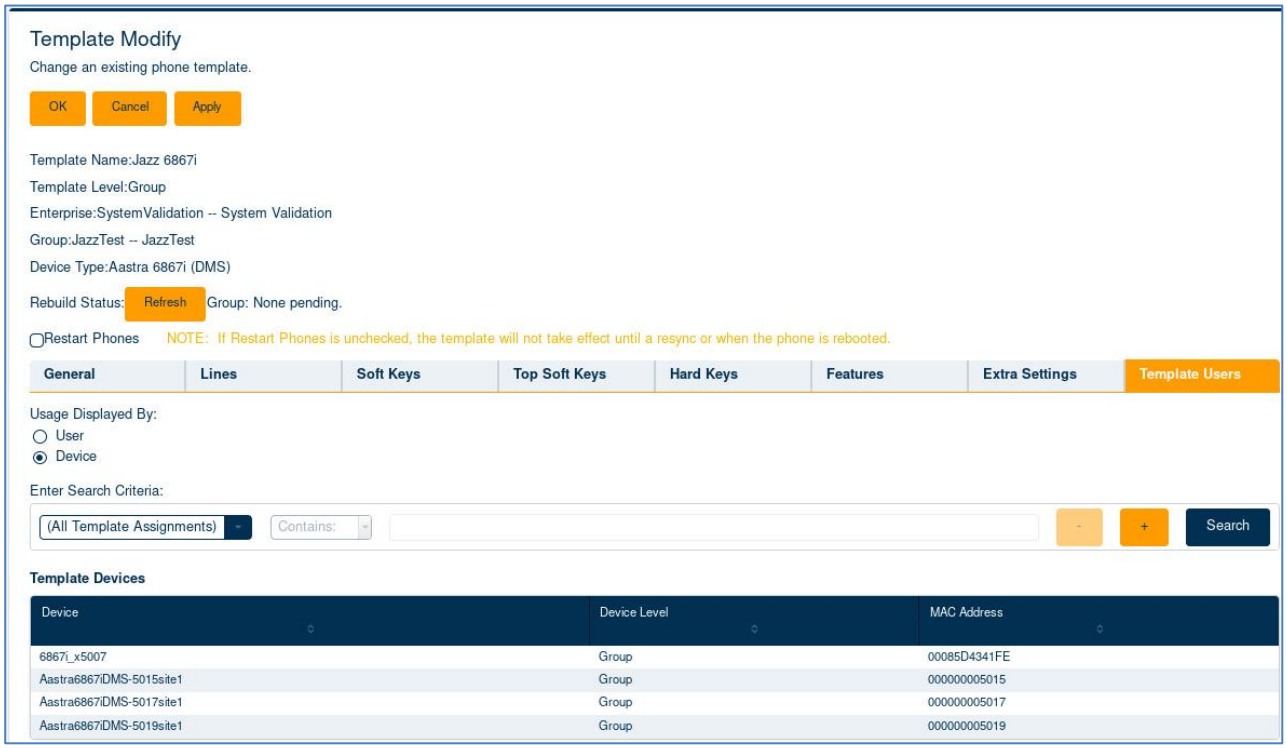


Figure 20: Searching for Template Users

6. Click **Search** or enter Search parameters to view all the Template Users.

Notes:

- If you select **All Template Assignments**, both the **Template Users** table and the **Template User Profiles** table are displayed.
- If you select **All User Profiles**, only the **Template User Profiles** table is displayed.
- If you select any other option, only the **Template Users** table is displayed.

For Clearspan Communicators:

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

Renaming a Phone Template

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

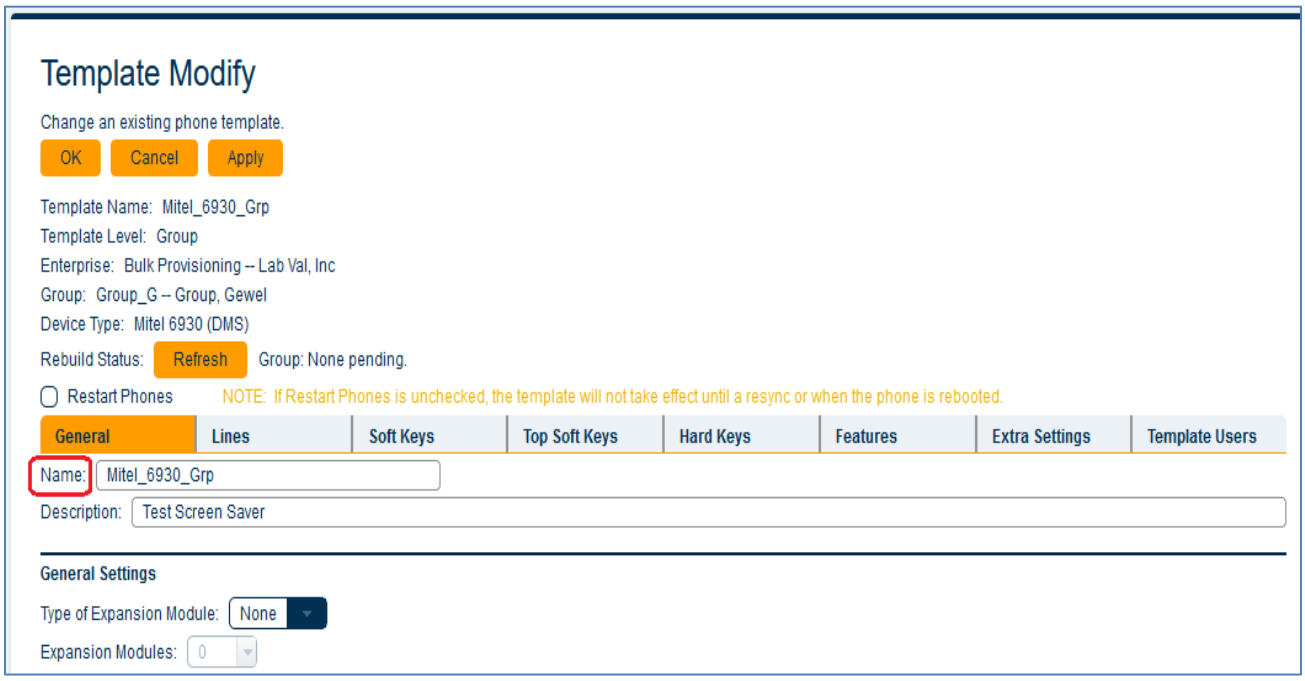


Figure 21: Renaming a Template

4. Change the **Name** on the Template Modify page.
5. Click **OK**. The template may appear in the list with "(Rename Pending)" next to the template nameto 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.

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

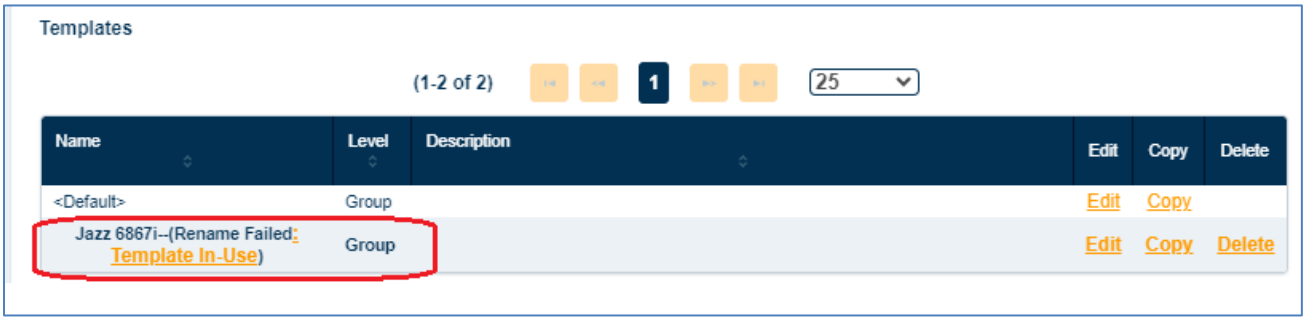


Figure 22: Template Rename Failed: Template in Use

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

Copying a Phone Template

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

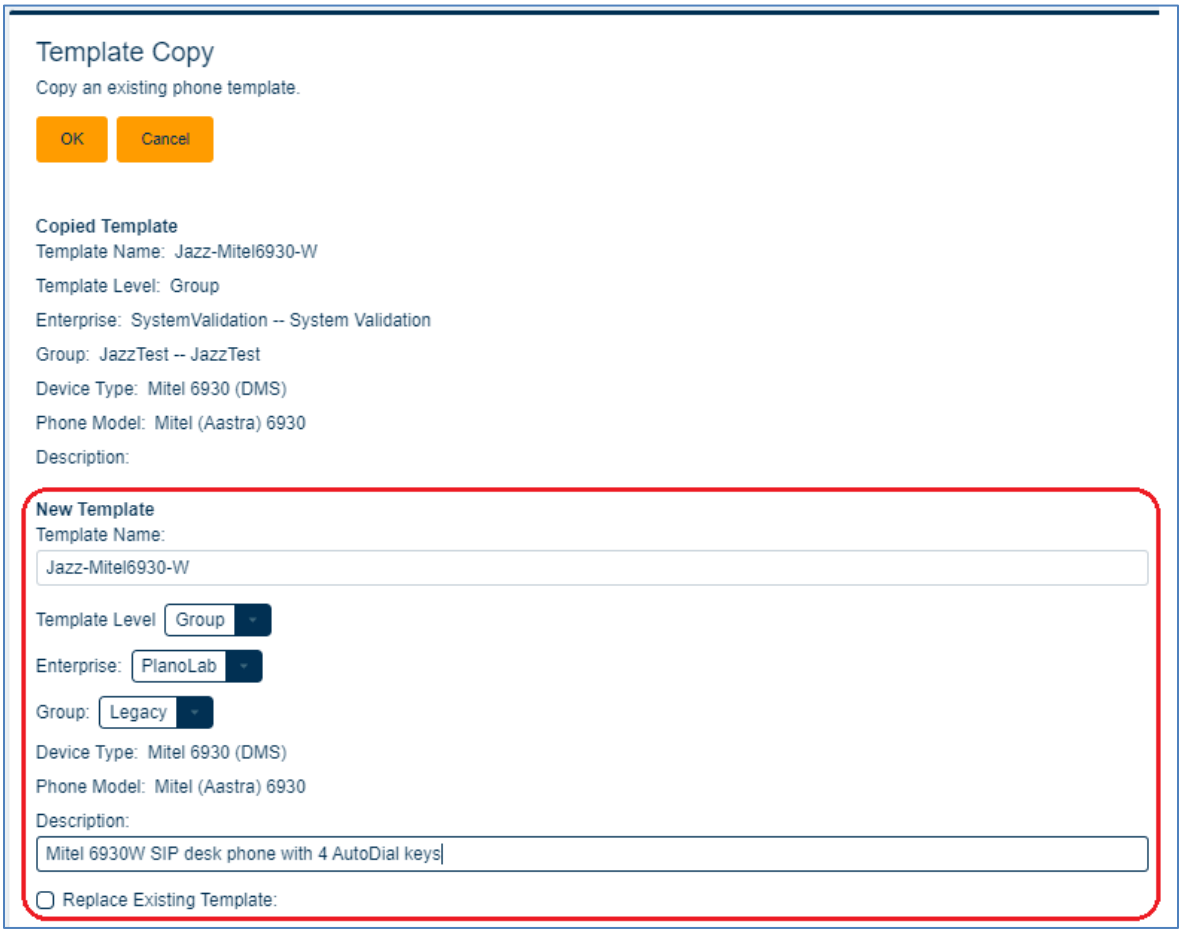


Figure 23: Template Copy Page – New Template Section

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

12. Click **OK** to save the changes. The Template Definitions page opens, and the copied template appears in the list.

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

Deleting a Phone Template

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

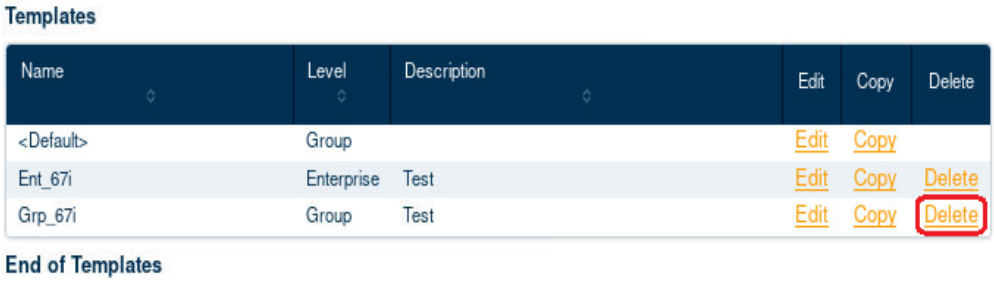


Figure 24: Template Selected to Delete

4. Click **Delete** on the Template Delete page. A confirmation dialog opens.
5. Click **Yes**. The template is marked for deletion with "(Delete Pending)" beside the template nameto 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. The search for template usage may take several minutes. Refresh the page to view the status updates.

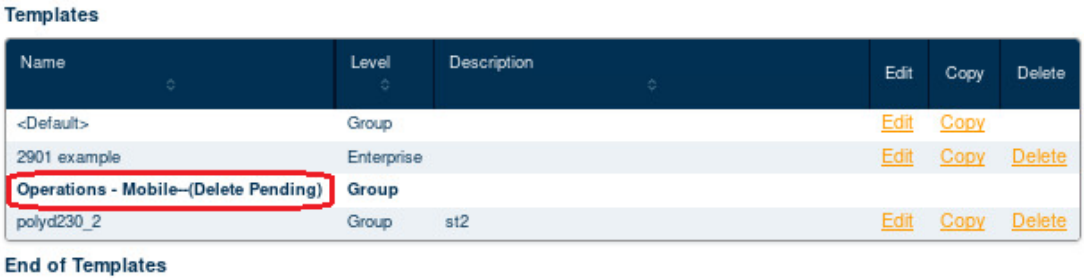


Figure 25 - Template - Delete Pending

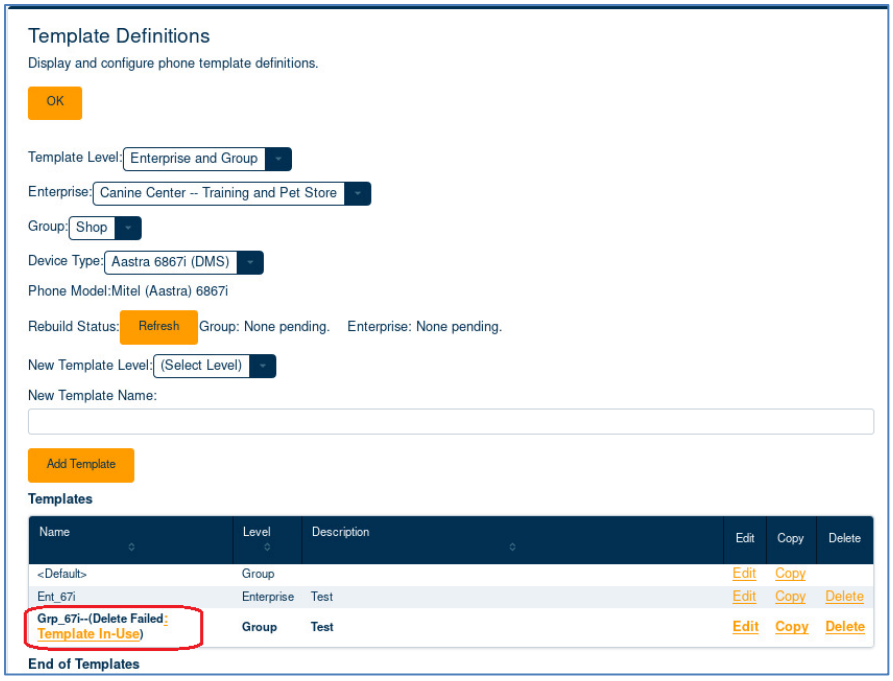


Figure 26: Template Delete Failed: Template in Use

6. If OpEasy confirms that the template is not in use, it is deleted. However, if any references are found, “(Delete Failed: Template In Use)” appears beside the template name, with a link to the Template Usage page.

7. 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).

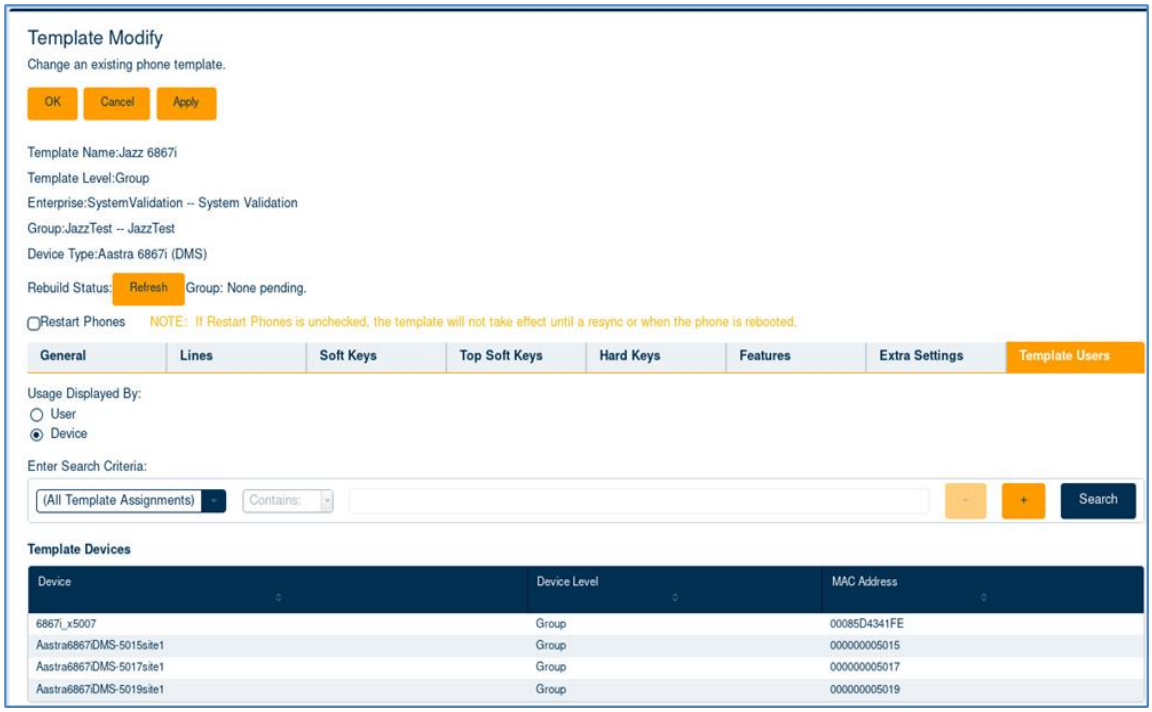


Figure 27: Template Usage Page

Creating or Editing an AudioCodes Template

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.

Figure 28: Template Add – General for AudioCodes

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

4. Select the **Enterprise** and **Group**, if necessary.
5. For the **Device Type**, choose an AudioCodes device.
6. Select a New Template Level.
7. Enter the name of the template in the **New Template Name** text box.
8. Enter the **New Template Name** and click **Add Template**. The Template Add page opens. On the General tab:
9. Enter the **Description** of the template.
10. Select the **Time Zone** from the drop-down list.
11. Select the Encryption Settings from the **Encryption (TLS/SRTP)** drop-down list.

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

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

DEVICE TYPE	NUMBER OF PORTS	MAXIMUM ENCRYPTION PORTS
AudioCodes MP 112	2	2
AudioCodes MP 114	4	3
AudioCodes MP 118	8	6
AudioCodes MP 124	24	18
AudioCodes MP 124E	24	16
AudioCodes MP 1288	288	288

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

External Backup Proxy 2, **External Backup Proxy 3**, and **External Backup Proxy 4** values. These optional fields can contain text up to 256 characters, as well as tags.

15. In the Ports tab, configure the **Group Number** for each port. The same group may be assigned to more than one port. When creating a template, the Groups tab should be filled out first so you can create the groups referenced on the Ports tab.

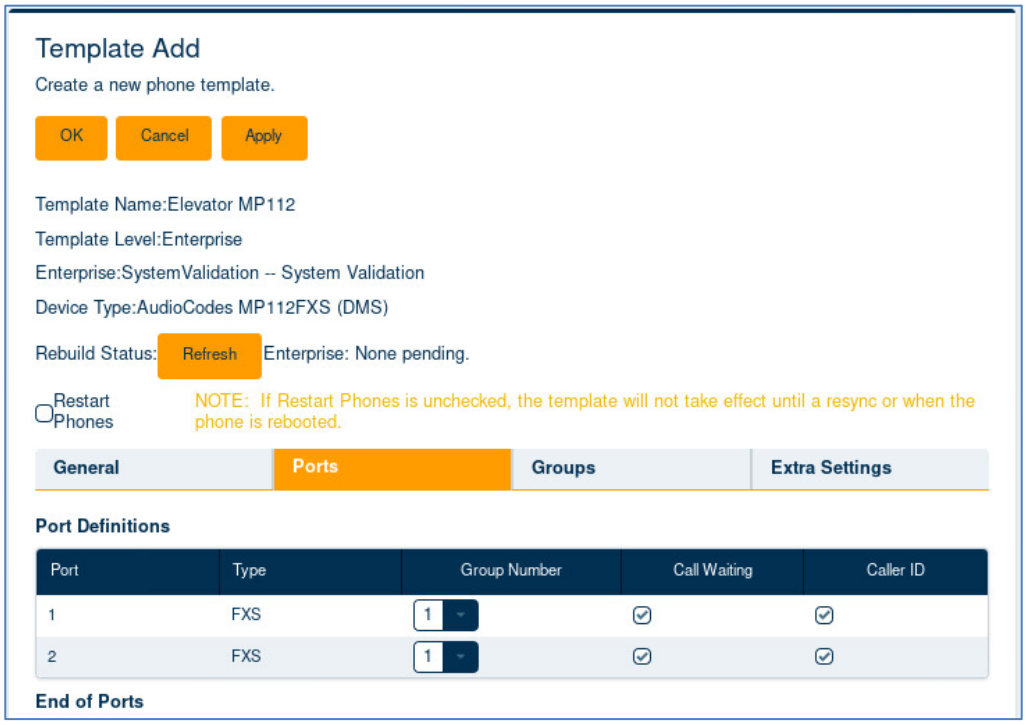


Figure 29: Template Add – Ports for AudioCodes

16. Call Waiting and Caller ID are enabled by default.
    - In the Groups tab, choose the **Channel Select Mode** for each group By Destination Phone Number - The channel is selected according to the called (destination) number. If the number

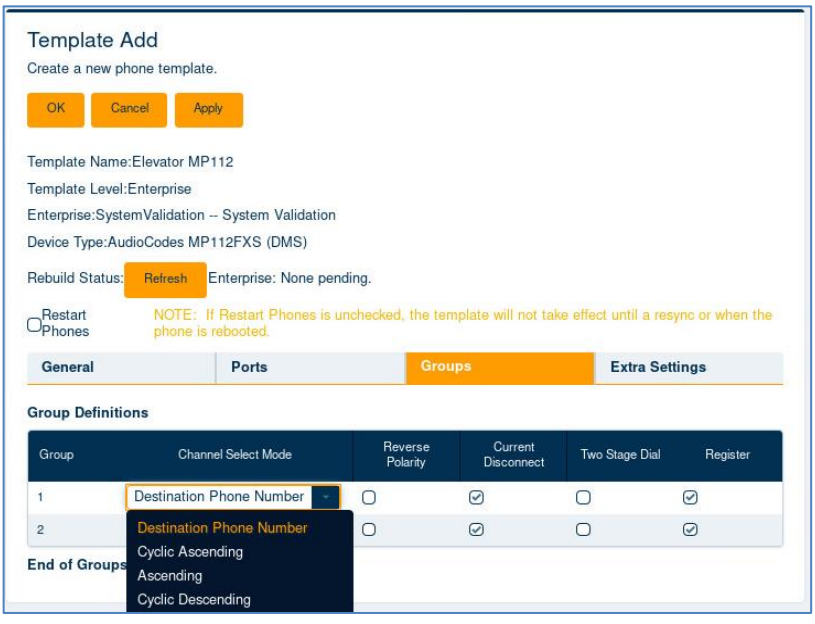


Figure 30: Template Add – Groups for AudioCodes

is not located, the call is released. If the channel is unavailable (busy),the call is put on call waiting (if call waiting is enabled and no other call is on call waiting);otherwise, the call is released.

- Cyclic Ascending - The next available channel in the Hunt Group, in ascending cyclic order, is selected. After the device reaches the highest channel number in the Hunt Group, it selects the lowest channel number in the Hunt Group, and then starts ascending again.
- Ascending - The lowest available channel in the Hunt Group is selected, and if unavailable, the next higher channel is selected.
- Cyclic Descending - The next available channel in descending cyclic order is selected. The next lower channel number in the Hunt Group is always selected. When the device reaches the lowest channel number in the Hunt Group, it selects the highest channel number in the Hunt Group, and then starts descending again.
- Descending - The highest available channel in the Hunt Group is selected, and if unavailable, the next lower channel is selected.
- Destination Number + Cyclic Ascending - The channel is selected according to the called number. If the called number isn't found, the next available channel in ascending cyclic order is selected.
- Source Phone Number - The channel is selected according to the calling number.
- Ring to Hunt Group - The device allocates IP-to-Tel calls to all the FXS ports (channels) in the Hunt Group. When a call is received for the Hunt Group, all telephones connected to the FXS ports belonging to the Hunt Group start ringing. The call is eventually received by whichever telephone first answers the call (after which the other phones stop ringing). This option is applicable only to FXS interfaces.
- Destination Number + Ascending - The device allocates a channel to incoming IP-to-Tel calls as follows:
    - The device attempts to route the call to the channel that is associated with the destination (called) number. If located, the call is sent to that channel.
    - If the number is not located or the channel is unavailable (busy), the device searches in ascending order for the next available channel in the Trunk Group. If located, the call is sent to that channel.
    - If all the channels are unavailable, the call is released.

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

is set to Enabled.

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

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

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

Creating or Editing an AudioCodes MP-5XX/M500Li Template

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

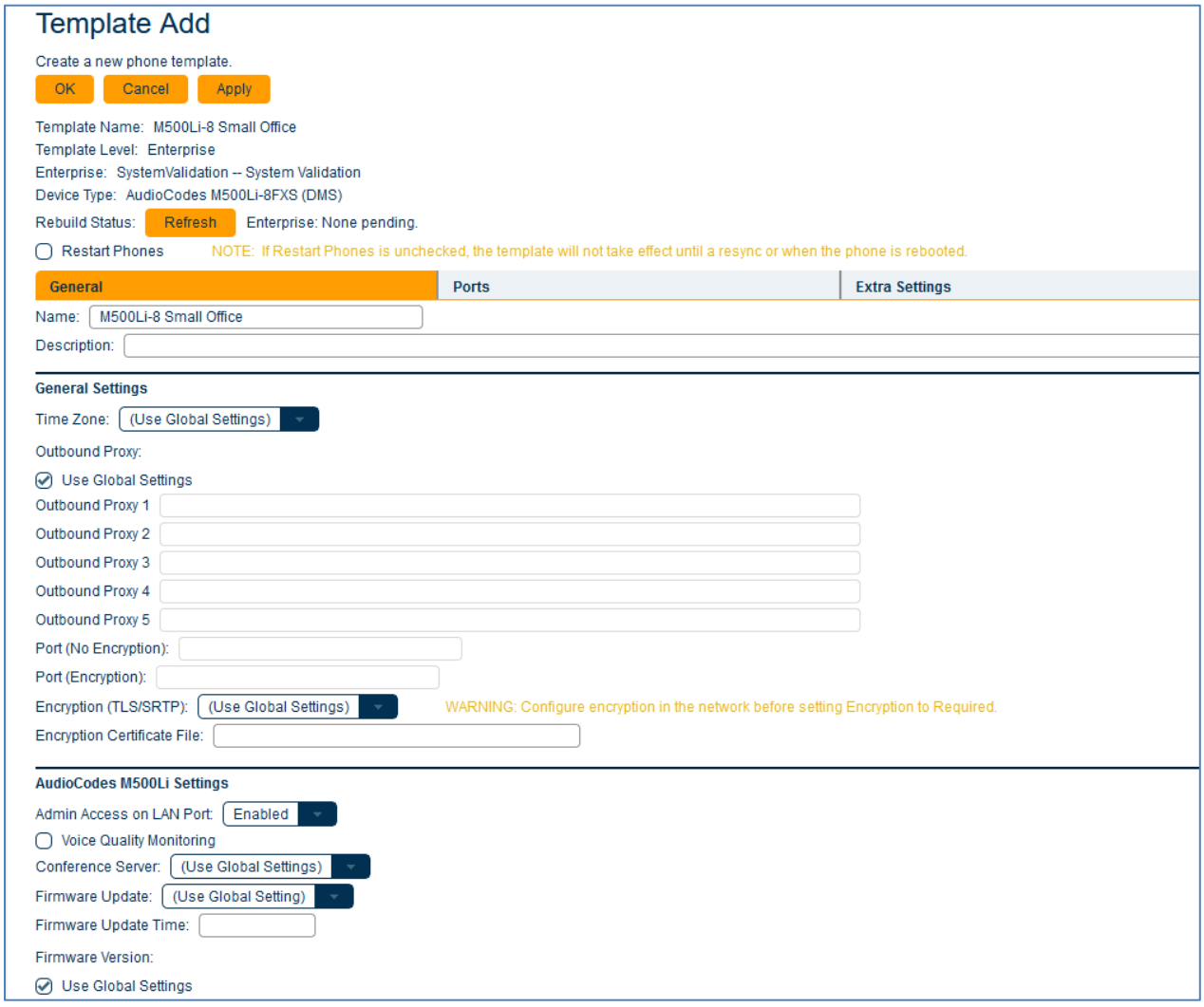


Figure 31 - Template Add - AudioCodes

On the General tab:

9. Enter the **Description** of the template.
10. Select the **Time Zone** from the drop-down list.

11. Select **'Use Global Settings'** to use the global settings for **Outbound** Proxy, or clear the check box, and enter the **Outbound Proxy1** address, and the **Outbound Proxy Port** with encryption or **Outbound Proxy Port** without encryption, and **Outbound Backup Proxy 2** address, **Outbound Proxy 3**, **Outbound Proxy 4,** and **Outbound Proxy 5** values. These optional fields can contain text up to 256 characters, as well as tags.
12. Select the Encryption Settings from the **Encryption (TLS/SRTP)** drop-down list.
13. Enter the certificate filename in the **Encryption Certificate File** for the device type. Contact your Supervisor for the Encryption Certificate File name.
14. Select the **AudioCodes MP-5XX/M500Li/M800C Settings** that you want to provision.
    - Conference Server: Select the Conference Server from the Conference Server drop-down list or choose 'Use Global Settings'.
    - Firmware Update: Enable or disable Firmware Update. Firmware Update can be enabled based on the selected Time or Interval and value entered.
    - Firmware Version: Enter a firmware version or check 'Use Global Settings'.
    - Tones File: Enter a Tones File name or check Use Global Settings.
    - Current Disconnect: Enables or disables the current disconnect on FXS ports for call release signaling.
    - Polarity Reversal: Enables or disables polarity reversal signaling for call release.
    - Set OOS (Out Of Service) on Reg(istration) Failure
    - Select Enable or Disable from the **Sys Log** drop-down list to enable/disable the log.
    - Enter the target server host name in the **Syslog Host** text box.
    - Select the sys log level from the **Syslog Level** drop-down list.
    - Select the debug log level from the **Debug Level** drop-down list.

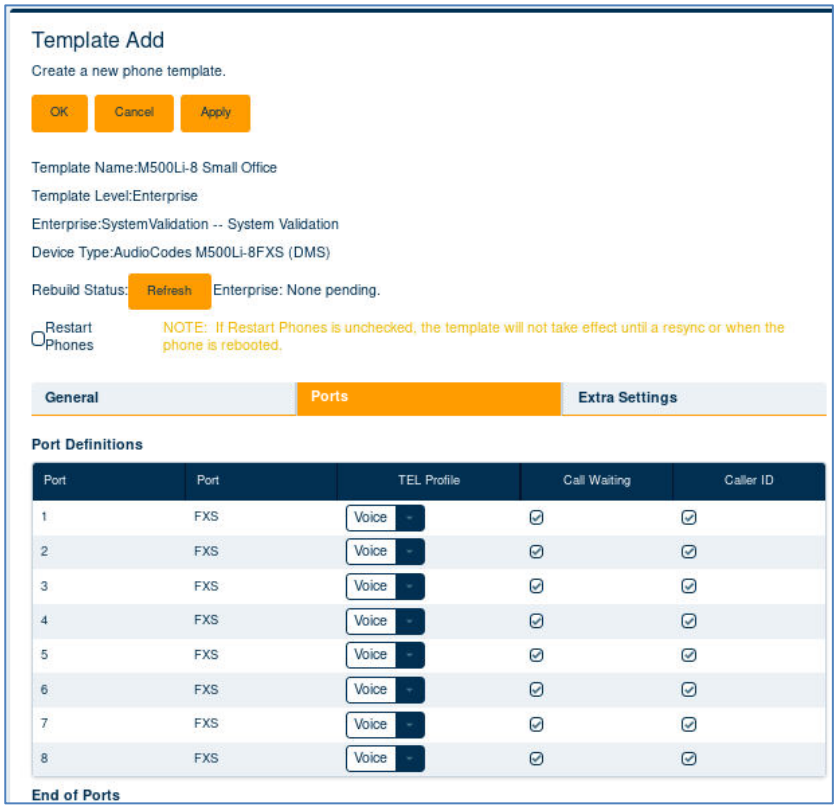


Figure 32 - AudioCodes M500L TEL Profile Assignment

15. In the Ports tab, configure the **TEL Profile** for each port.
16. Call Waiting and Caller ID are enabled by default.
17. On the **Extra Settings** tab, enter any custom configuration information for the template.

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

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

Creating or Editing an AudioCodes M800C-MSBR Template

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
3. Select a **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group**, if necessary.
5. For the **Device Type**, choose "M800C-MSBR-4FXS-1PRI-LTE."
6. Select a New Template Level.
7. Enter the name of the template in the **New Template Name** text box.
8. Enter the **New Template Name** and Click **Add Template**. The Template Add page opens.

   On the **General** tab:

9. Enter the **Description** of the template.
10. Select the **Time Zone** from the drop-down list.
11. Select **'Use Global Settings'** to use the global settings for Outbound Proxy, or clear the check box, and enter the **Outbound Proxy1** address, and the **Outbound Proxy Port** with encryption or **Outbound Proxy Port** without encryption, and **Outbound Backup Proxy 2** address, **Outbound Proxy 3**, **Outbound Proxy 4,** and **Outbound Proxy 5** values. These optional fields can contain text up to 256 characters, as well as tags.
12. Select the Encryption Settings from the **Encryption (TLS/SRTP)** drop-down list.
13. Enter the certificate filename in the **Encryption Certificate File** for the device type. Contact your Supervisor for the Encryption Certificate File name.
14. Select the **AudioCodes M800C Settings** that you want to provision.
    - Conference Server: Select the Conference Server from the Conference Server drop-down list or choose 'Use Global Settings'.
    - Firmware Update: Enable or disable Firmware Update. Firmware Update can be enabled based on the selected Time or Interval and value entered.
    - Firmware Version: Enter a firmware version or check 'Use Global Settings'.
    - Tones File: Enter a Tones File name or check Use Global Settings.
    - Set OOS (Out Of Service) on Reg(istration) Failure
    - Current Disconnect: Enables or disables the current disconnect on FXS ports for call release signaling.
    - Polarity Reversal: Enables or disables polarity reversal signaling for call release.
    - Select Enable or Disable from the **Sys Log** drop-down list to enable/disable the log.
    - Enter the target server host name in the **Syslog Host** text box.
    - Select the syslog detail level from the **Syslog Level** drop-down list.
    - Select the debug log detail level from the **Debug Level** drop-down list.

Figure 33 - M800C Template Add

On the **Ports** tab,

15. Configure the **TEL Profile** for each port.

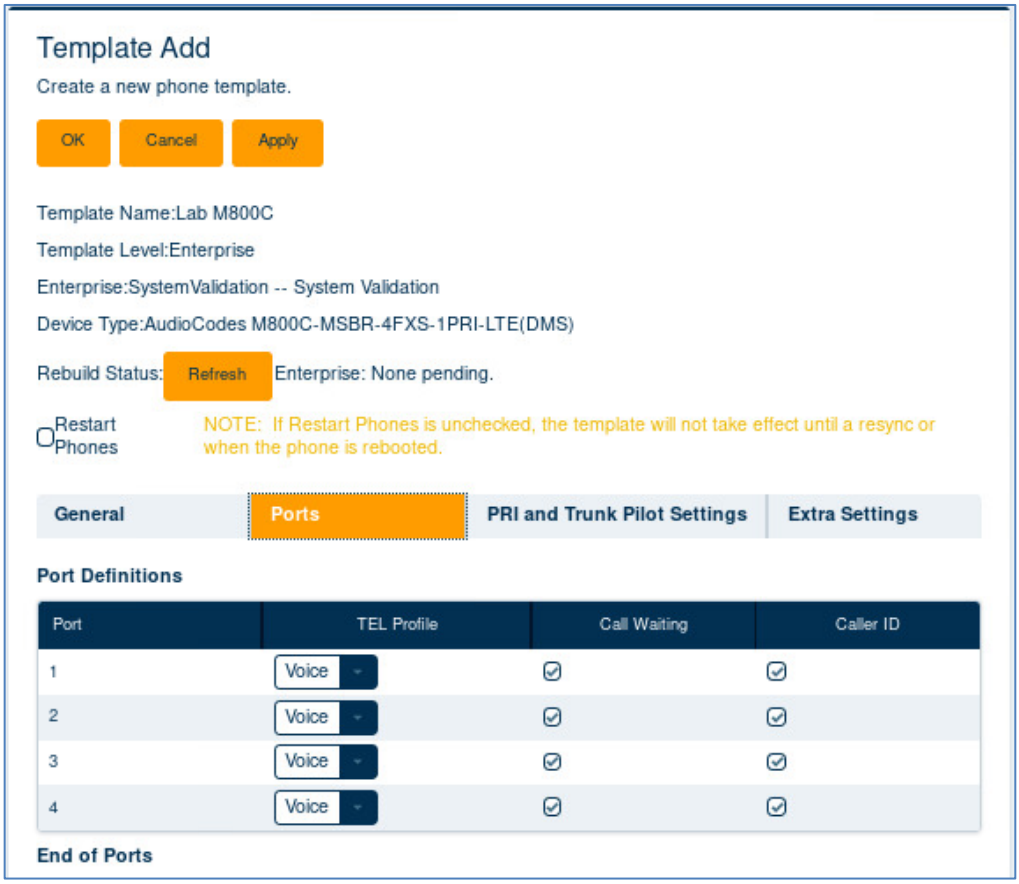


Figure 34 AudioCodes M800C TEL Profile Assignment

16. Call Waiting and Caller ID are enabled by default; modify as necessary.

17. On the **'PRI and Trunk Pilot Settings** tab, provision the **PRI Settings**
    - Select the **Channel Select Mode** for outbound calls on the PRI
        - **always-ascending**: The lowest numbered available channel in the Trunk Group is selected, and if unavailable, the next higher numbered channel is selected.
        - **always-descending:** The highest numbered available channel in the Trunk Group is selected, and if unavailable, the next lower numbered channel is selected.
        - **channel-cyclic ascending**: The next available channel in the Trunk Group, in ascending cyclic order is selected. After the device reaches the highest channel number in the Trunk Group, it selects the lowest channel number in the Trunk Group, and then starts ascending again.
        - **cyclic-descending:** The next available channel in descending cyclic order is selected. The next lower channel number in the Trunk Group is always selected. When the device reaches the lowest channel number in the Trunk Group, it selects the highest channel number in the Trunk Group, and then starts descending again.
        - **dst-number-ascending:** The device allocates channels 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 (e.g., 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 channels are unavailable, the call is released

- **dst-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. ***Note***: *If the called number is located, but the port associated with the number is busy, the call is released.*
- **dst-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 (e.g., 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.
- **not-configured:**
- **src-phone-number:** The channel is selected according to the calling number.
- **trunk-channel-cyclic-ascending:** The device implements the Trunk Cyclic Ascending and Cyclic Ascending methods to select the channel. This method selects the next physical trunk in the Trunk Group, and then selects the B-channel of this trunk according to the Cyclic Ascending method (i.e., selects the channel after the last allocated channel). For example, if the Trunk Group includes two physical trunks, 0 and 1:
  - For the first incoming call, the first channel of Trunk 0 is selected.
  - For the second incoming call, the first channel of Trunk 1 is selected.
  - For the third incoming call, the second channel of Trunk 0 is selected.
- **trunk-cyclic-ascending:** The channel from the first channel of the next trunk (adjacent to the trunk from which the previous channel was selected) is selected.

- Select the **First B-channel**, 1-24. This must match the configuration of the far end.
- Select the **Last B-channel**, 1-24. This must match the configuration of the far end.
- Select the **Framing Type**. This must match the configuration of the far end.
- Select the **Line Code**, **B8ZS** or **AMI**. This must match the configuration of the far end.
- Select the **NW User Side** setting, Network or User. This determines the signaling posture of the D-channel and **must be the opposite** of the far end.
- Select the **Protocol Type**. This must match the configuration of the far end.
- Select the **Clock Mode**, **recovered** if this M800C should treat the incoming PRI bit stream as its synchronization source (default), or **generated** if this M800C should expect the far end to slave its clock frequency to the bit stream generated by this device.
- Select the **Tel Profile**

- Select the **Clock Source**, **network** if this PRI should treat the incoming bit stream as its synchronization source (default), or **internal** if this PRI should expect the far end to slave its clock frequency to the bit stream generated by this device.

Figure 35-M800C PRI and Trunk Pilot Settings

18. Under Trunk Pilot Settings, configure the RFC 6140 GIN trunk authorization settings. Line/Port's User, SIP Auth ID, and SIP Auth Password must all match the credentials provided by the trunking service provider.

On the **Extra Settings** tab,

19. Enter any custom configuration information for the template.

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

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

Creating or Editing a Clearspan Communicator/Engage Template

1. From the main menu, select Provisioning, and then select Phone Templates.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
3. Select a **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group**, if necessary.
5. Select the **Device Type**:
   - Choose Business Communicator – PC: Clearspan Engage Desktop or Clearspan Communicator Desktop.
   - Choose Business Communicator – Mobile: Clearspan Communicator for iOS or Android clients,
   - Choose Business Communicator – Tablet: Clearspan Communicator for iOS tablets.
6. Select a New Template Level.
7. Enter the name of the template in the **New Template Name** text box.
8. Click **Add Template**. The Template Add page opens. The General tab is displayed by default.

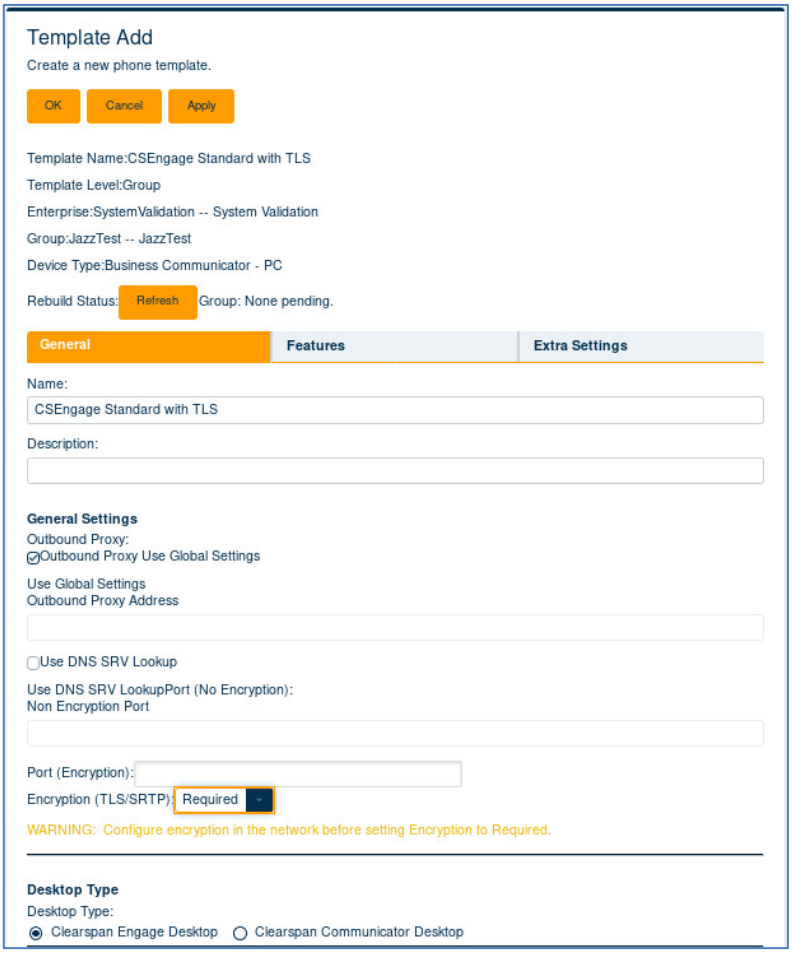


Figure 36: Template Add – General for CS Engage Desktop/CS Communicator Desktop

9. Configure General Settings on the General tab.
   Choose to **Use Global Settings**, or enter the Outbound Proxy, and Outbound Proxy Port in the **Outbound Proxy Port (No Encryption)** box when encryption is not allowed for the client,or in the **Outbound Proxy Port (Encryption)** box when encryption is required for the client. These optional fields can contain text up to 256 characters, as well as tags.
10. Select the **Encryption (TLS/SRTP)** setting: Required/Not Allowed/Use Global Settings
11. For Device Type, Business Communicator - PC, choose **Desktop Type:**
    - Select **Clearspan Engage Desktop**
      - Click **Apply**. This saves the template. Continue with the **Features** tab.
12. On the **Features** tab, check the corresponding box(es) to enable features for the client.

Note: The corresponding Clearspan service must also be assigned and enabled for the associated user. This menu merely drives the presentation of the feature for management on the soft client interface.

- Call Park
- Call Center
- Call Pickup
  - Call Pickup Blind
  - Call Pickup Directed
- Call Pull
- Call Recording
- Call Transfer
- Conference
  - Max Parties; 4 - 15
  - Show Participant List
- Message Waiting Indicator
- Voicemail
  - Visual Voicemail
- Unified Call History: Enabled/Disabled/Use Global Settings

Also, note the extended menu to allow 'Self Care Portal Access' for the user administration of the following features for which the underlying Clearspan service must also be assigned to the user in order to be presented on the softphone interface.

- Call Forward Always
- Call Forward Busy
- Call Forward No Answer
- Call Forward Not Reachable
- Clearspan Anywhere
- Do Not Disturb
- Anonymous Call Rejection
- Simultaneous Ring Personal

- Sequential Ring
- Automatic Callback
- Call Waiting
- Caller ID Delivery Blocking
- Personal Assistant
- Call Center
- Remote Office
- Voice Messaging

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

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

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. Click OK.

Creating or Editing a Connect Mobile/Tablet Template

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

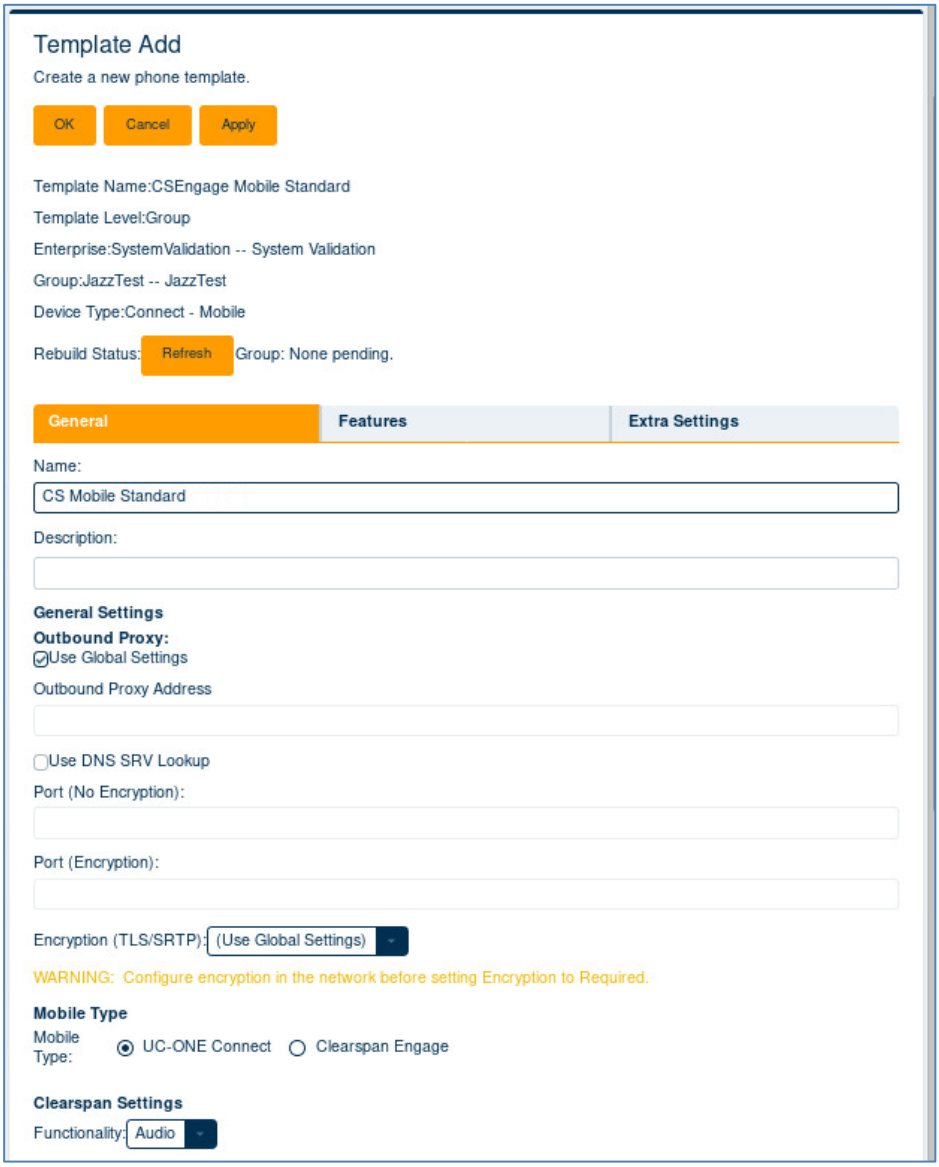


Figure 37: Template Add – General for Clearspan Mobile

9. Configure Connect Tablet/Mobile Settings on the General tab.
   Choose to **Use Global Settings**, or enter the Outbound Proxy, and Outbound Proxy Port in the **Outbound Proxy Port (No Encryption)** box when encryption is not being used by the client, or in the **Outbound Proxy Port (Encryption)** box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.
10. Select the Encryption (TLS/SRTP) setting.
11. Select the **Functionality** for the device.
12. The **VoIP Mode** is enabled by default in the **Default Dialing Method** section. Select the **Default Dialing** mode. Both Call Back and Native Call options are enabled by default, uncheck the box to disable either dialing method.
13. The Clearspan Directory is enabled in the Contact Search section. The Search Enterprise Directory is enabled by default. Check the box Search Enterprise Common Phone List, Search Group Common Phone List and Search Personal Phone List to enable the list.
14. The **IM&P** (Chat and Presence) settings are enabled by default. Uncheck the option to disable either setting.
15. On the **Features** tab, enable the features for the device. All features in the **Enabled Features** and **Side Menu** list are enabled by default.
16. On the **Extra Settings** tab, enter any custom configuration information for the template.

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

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

Creating or Editing a Grandstream WP820 Template

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
3. Select a **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group**, if necessary.
5. Select the **Device Type** Grandstream WP820 (DMS) from the drop-down list.
6. Select a New Template Level.
7. Enter the name of the template in the **New Template Name** text box.
8. Click **Add Template**. The **Template Add** page opens. The **General tab** is displayed by default.

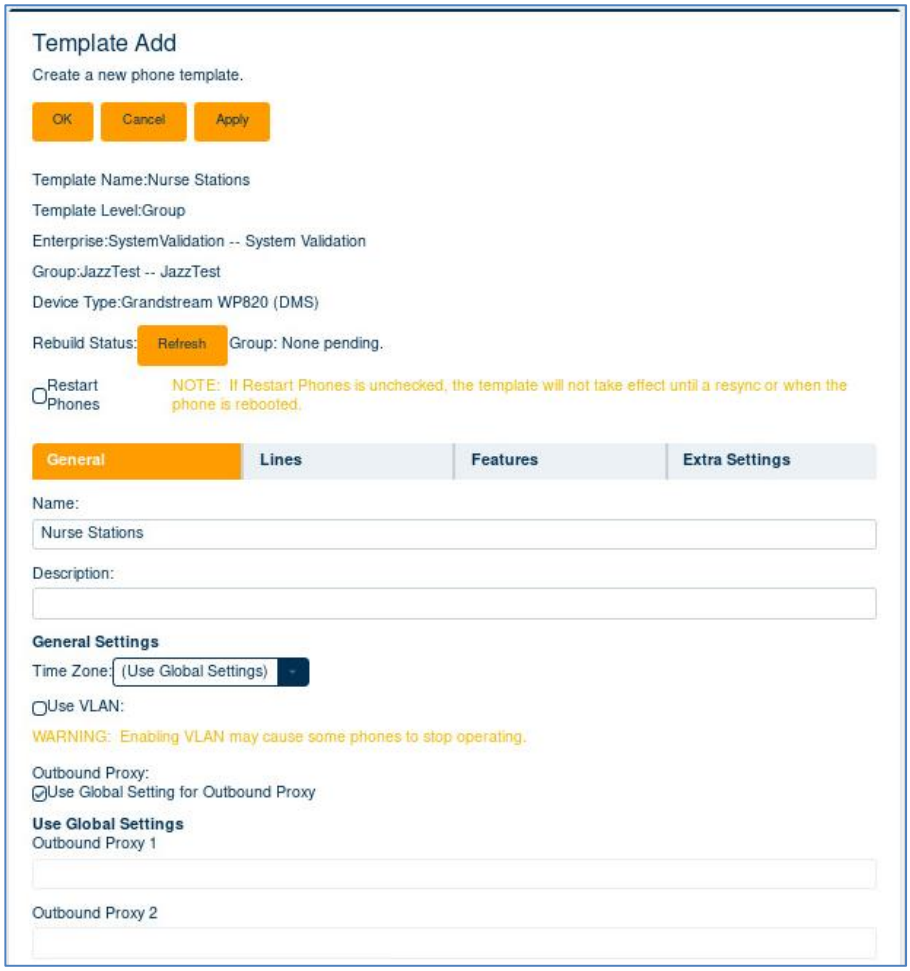


Figure 38: General Tab for Grandstream

9. Enter the **Description** of the template.
10. Configure General Settings on the General tab
    - Select the **Time Zone** from the drop-down list.
    - Chose to **Use VLAN** check box.

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

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

11. Configure Grandstream Settings on the General tab:
    - Select any mode from the **Keypad Access Mode**.
    - Select **Enabled** or **Disabled** from the **Sys/Debug Log** drop-down list.
    - Enter the host for the **Sys/Debug Log Host** drop-down list.
12. On the **Features** tab, select the features to enable the **Clearspan Directory Type**:
    - Enterprise
    - Enterprise Common
    - Group
    - Group Common
    - Personal
13. On the **Extra Settings** tab, choose the file to Upload the custom configuration information for the template.

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

14. On the Template Users tab,
    - Select **Usage Displayed by** User or Device from the drop-down list.
    - Click **Search** or enter Search parameters to view the full list.
15. If you are modifying an existing template, select the Template listed in the **Template Definition** page. Click **Edit** to do the required changes and Click **OK** to save the changes.

Creating or Editing a Media5 Template

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
3. Select a **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group**, if necessary.
5. Select the **Device Type**:
   - Media5 4102
   - Media5 C710
   - Media5 C711
   - Media5 C775
   - Media5 S724
   - Mitel TA7102
   - Mitel TA7104
   - Mitel TA7108
   - Mitel GXGateway24FXS
6. Select a New Template Level.
7. Enter the name of the template in the **New Template Name** text box.
8. Click **Add Template**. The **Template Add** page opens. The **General tab** is displayed by default.

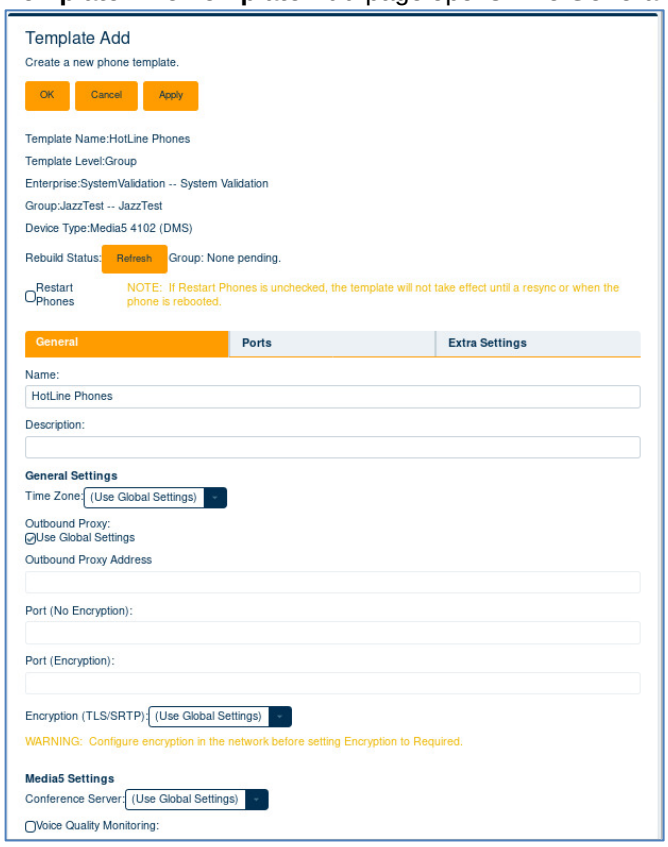


Figure 39 – Media5 Template Add

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

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

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

14. Click **OK**.

Creating or Editing a Mitel DECT 112 Template

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

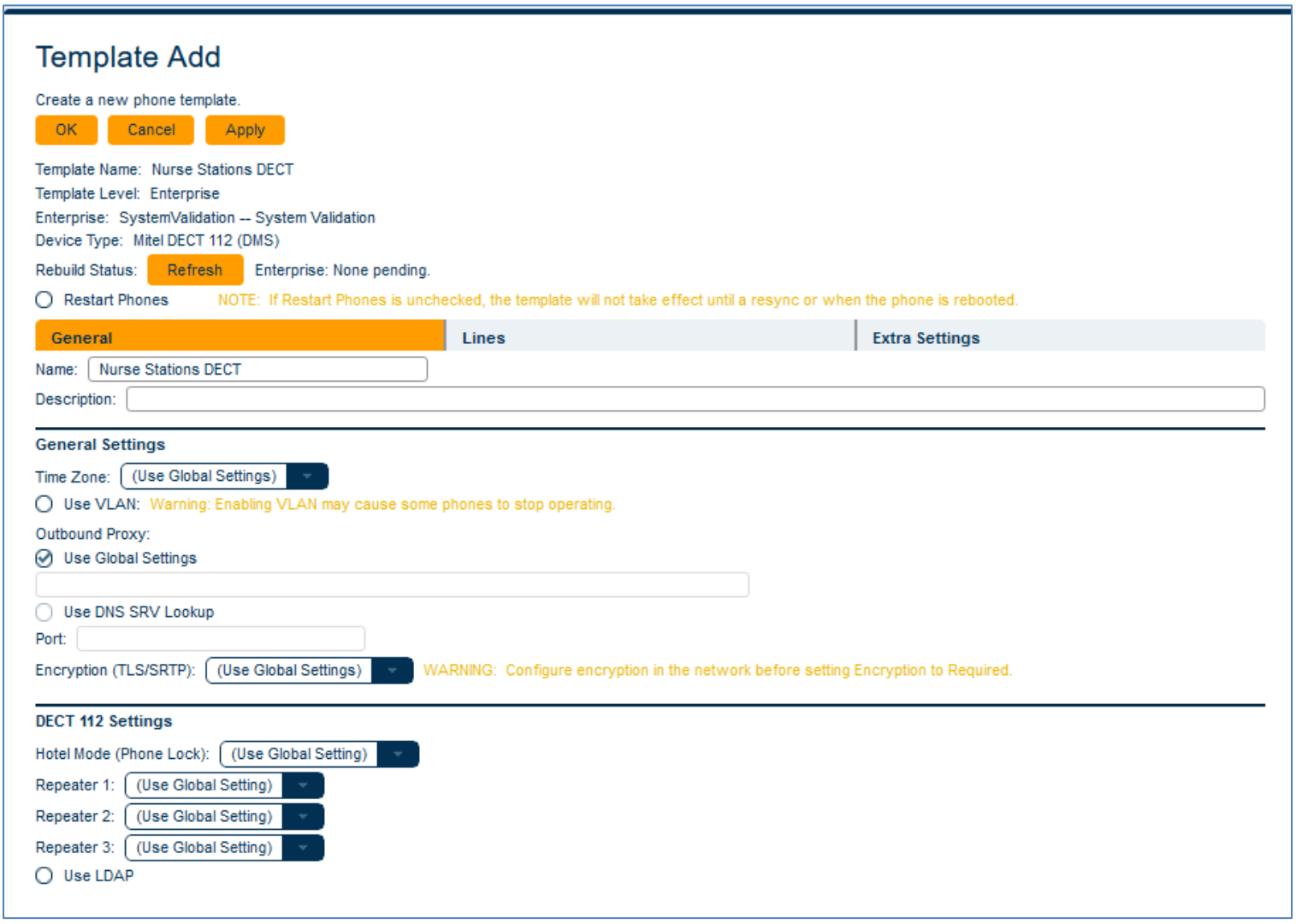


Figure 40 - Template Add - General Tab

9. Enter the description in the **Description** text box.
10. Configure General Settings on the General tab.
    - Select the **Time Zone** from the drop-down list.

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

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

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

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

- Use Global Settings for subscription time (as-feature-event) or uncheck the **'Use Global Settings'** check box and enter the subscription time in seconds.

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

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

Creating or Editing a Polycom Phone Template

The Polycom SoundPoint IP, VVX, and Poly Edge E phone families share most global and template settings and are described below.

- Global Settings – System, Enterprise, and Group level settings must be configured for Polycom phones.
- Definitions – One or more templates must be created for each type of Polycom phone.

Notes:

- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Un- specified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.
- The Polycom VVX 230 DECT phone has a unique set of Global Settings separate from those of the Poly Edge E, the legacy Polycom VVX, and the SoundPoint IP phones.

- User General Settings: – The E-mail message sent to new Polycom phone users will be different than the message sent to Mitel phone users.

Key Definitions for Polycom Phones

Key Definitions – In addition to the Polycom standard soft keys, some OpEasy-configured soft keys may be assigned to Polycom phones.

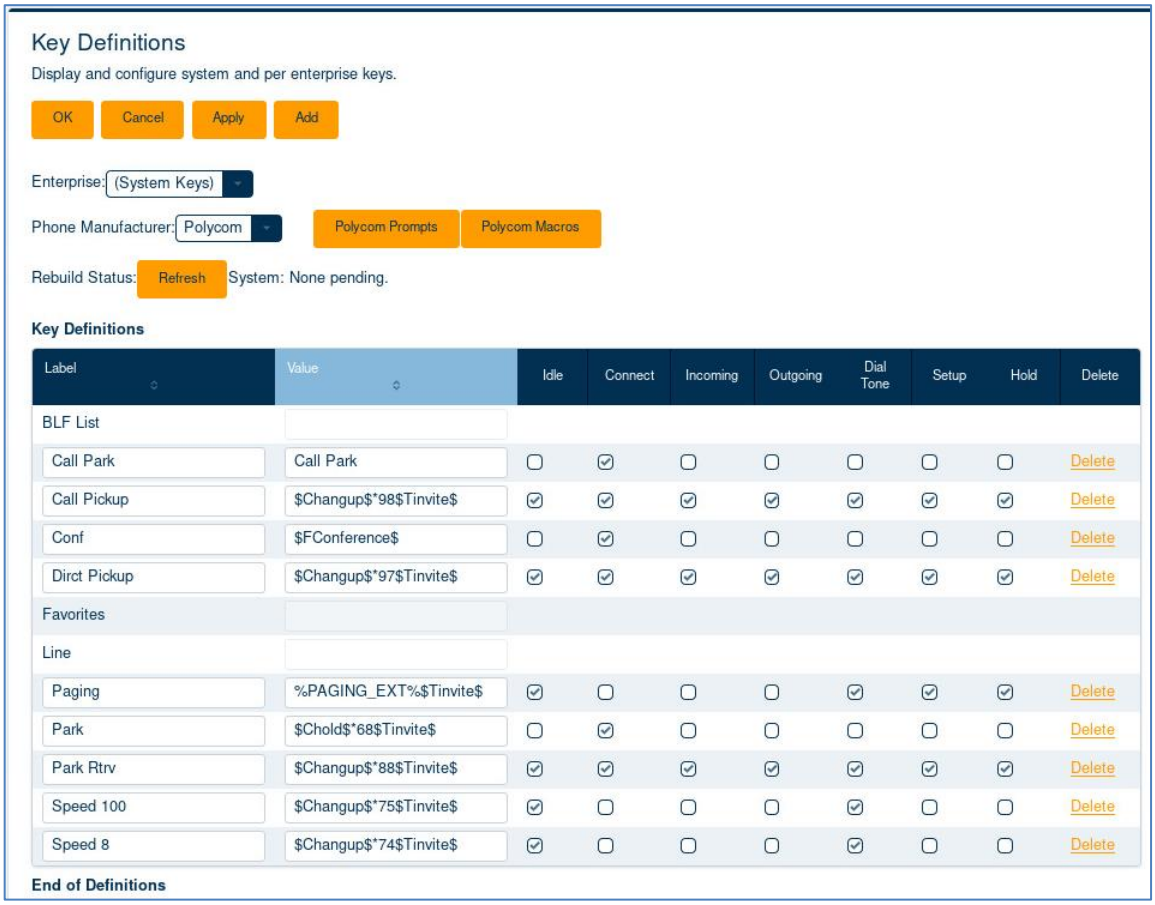


Figure 41 - Key Definitions for Polycom Phones

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. 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. Select the phone states in which this soft key should appear: Idle / Active / Alerting / Proceeding / Dial Tone / Setup / Hold

The 'Value' 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.

Polycom Prompts

From the Key Definitions page for Polycom Phones, click Polycom Prompts to view user input prompts for Polycom key actions. The prompts can be included in a key definition by using syntax “$P(PromptName)Nn$”, where “PromptName” is the Prompt Name on the Polycom Prompt Definitions page, and “n” is the number of characters to collect.

Prompt Text is the text that appears on the phone’s display, Input Type specifies whether the expected response is Numeric or Text, and the Visible check box indicates whether the response is visible on the phone’s display or is shown as asterisks.

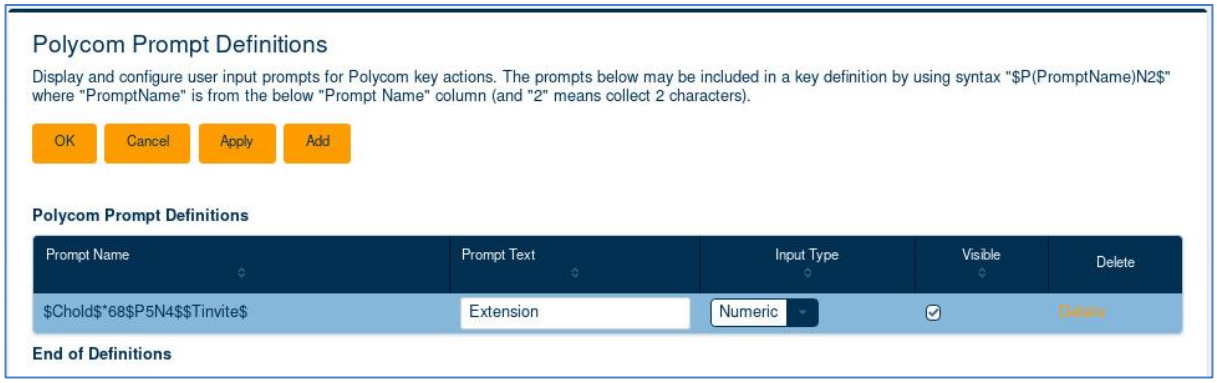


Figure 42

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*.

Phone Templates: Definitions for Polycom Phones

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

Note: The Soft Keys, Incoming Calls and Outgoing Calls tabs are not available while provisioning Polycom Trio 8800, Polycom Trio 8500, Trio 8300 and Polycom Trio C60 phones, as the Polycom Trio 8800, Polycom Trio 8500, Trio 8300 and Polycom Trio C60 are single line conference phones with no soft keys.

Tab / Section	Field	Setting
General		
	Name	Template name.
	Description	Description of the template.
General Settings		
	Type of Expansion Module	If a Polycom expansion module is attached to the phone, select the type of that module. The expansion module choices depend on the Polycom phone device type.
	Expansion Modules	Select the number of Polycom expansion modules attached to the phone, from 0 to 3.
	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. The 'Use Global Settings' selection 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 provided from the DHCP server. You can also select a specific time zone.
	Use VLAN	Select the "Use VLAN" check box if the phone must be assigned to and use a VLAN.
	Outbound Proxy	This is the IP address or FQDN to which all SIP signaling should be sent. Typically, this will be the address of an on-premise SBC or the Clearspan core SBCs. Select '**Use Global Settings**' to defer to the value entered in the OpEasy Global Settings table for this manufacturer.
	Use DNS SRV Lookup	Selecting 'Use DNS SRV Lookup' forces the phones to select an Outbound Proxy based on a service lookup from an internal reference on the phone (if present) or on a DNS lookup from the external DNS server address. The benefit of an SRV lookup is that multiple targets can be returned so the phone has failover options in the event that a proxy cannot be reached.
	Keep-alive	(Edge B series only) Select this check box to enable periodic messaging designed to keep a firewall pinhole open.
	Port (No Encryption)	TCP or UDP port to target when sending unencrypted SIP signaling messages to the Outbound Proxy IP address or FQDN.
	Port (Encryption)	TCP port to target when send encrypted (TLS) SIP signaling messages to the Outbound Proxy IP address or FQDN.
	Encryption (TLS/SRTP)	Select "Required" to force encrypted signaling. Select "Not Allowed" to force unencrypted signaling. Select "Use Global Settings" to defer the setting to the value entered in the OpEasy Global Settings table for this manufacturer.

Tab / Section	Field	Setting
	Subscription Time:	Select “Use Global Settings” to defer the setting to the value entered in the OpEasy Global Settings table for this manufacturer or clear the checkbox and set the refresh time in seconds for SIP Subscriptions. SIP Subscriptions provide the phone with status updates for system features like Shared Call Appearance, Do Not Disturb, Call Forwarding, Busy Lamp Field and ACD Sign-On/Sign-Off.
Poly/Polycom Settings		
	Voice Quality Monitoring	Select this checkbox to enable generation of Voice Quality reports for every call.
	Conference Server	Use the pulldown menu to select a specific N-way conference server setting or defer to the value entered in the OpEasy Global Settings table for this manufacturer.
	Handset Voice Volume Persistent	(VVX and Edge E series only) Select this checkbox to preserve the handset volume setting for the next call and to preserve the setting after a phone restart.
	Headset Voice Volume Persistent	(VVX and Edge E series only) Select this checkbox to preserve the headset volume setting for the next call and to preserve the setting after a phone restart.
	Stuttered Dial Tone for Unread Voice Mail Messages	(VVX and Edge E series only) Select this checkbox to provide the user with a ‘stuttered dial tone’ when a voice message is available.
	RTCP Extended Reports Enabled	Select this checkbox to enable generation of Voice Quality reports for every call.
	Sticky Auto Line Seize Enabled	(VVX and Edge E series only) Select this checkbox to enable the phone to automatically select the ringing line when the handset is taken off-hook.
	Background Image URL	(VVX only) Enter the address and/or name of the image used for the background display on a VVX phone. Supported Image Formats: PNG, JPEG and BMP (Progressive and multi scan JPEG images are not supported). Maximum supported image size – 600 KB. The following is a list of optimal background image size in pixels based on phone models: VVX 250 – 320x24 VVX 300, VVX310 – 208 x 104 VVX 350 – 320x240 VVX 400, VVX 410 – 320 x 240 VVX 450 – 480x272 VVX 500 – 320 x 240 VVX 600 – 480 x 272
	Incoming Rejection Enabled for all SCA Lines	(Edge E series only) Select this checkbox to enable a ‘Reject’ softkey presentation during incoming calls to SCA lines.
	Syslog Host	Enter an IP address or FQDN as a target for Syslog status messages or defer to the value entered in the OpEasy Global Settings table for this manufacturer.

Tab / Section	Field	Setting
	Idle Display Image URL	Enter the address and/or name of the image used for the idle display on a SoundPoint or SoundStation phone. Supported Image Formats: PNG and JPEG The following is a list of optimal background image size in pixels based on phone models: SoundPoint IP 32x/33x – 87 x 11 SoundPoint IP 430 – 94 x 23 SoundPoint IP 450 – 170 x 73 SoundPoint IP 550/560/650 – 213 x 111 SoundStation IP 5000 – 240 x 32 SoundStation IP 6000 – 240 x 32 SoundStation IP 7000 – 255 x 75
	Idle Display Image URL	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) service is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI. **Note**: This option is not available when provisioning Trio Conference phone models.
	Ring (BLF Line)	Select the ring option to alert the user when a call to a BLF line is presented.
	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 150 = 8 VVX 250 = 24
	Max Calls Per Line	This is the number of simultaneous calls per phone number to which the phone will respond before returning a ‘Busy’ response to Clearspan. The count consists of connected, held, and waiting calls. **Note**: This option is not available while provisioning Trio 8800, Trio 8500, Trio 8300 and Trio C60 phones.

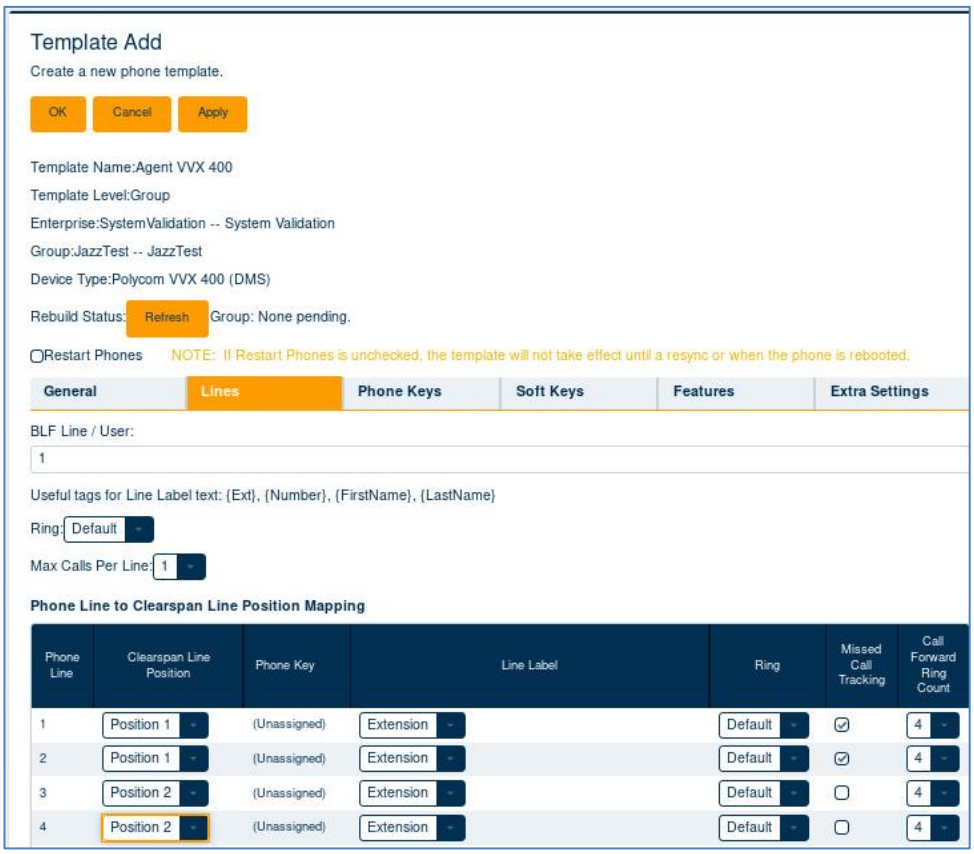


Figure 43 - Template Add – Lines for Polycom Phones

Tab / Section	Field	Setting
	Clearspan Line Position	Select the **Clearspan Line Position** that you want to assign. This is the Clearspan line to use for the **Phone Line**. A single **Clearspan LinePosition** 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.

Figure 44 - Poly Template Add - Phone Keys

Tab / Section	Field	Setting
Paging Group (Edge E only)		
	Enable Paging Groups	Select the check box to enable multi-cast paging capability.
	Off-Hook Paging	(Edge E only) Select the check box to allow paging messages when the phone is in an active call.
	Multicast IP Address	Enter the multicast IP address for sending and receiving paging calls.
	Multicast Port	Enter the UDP port number on which the phone should listen for paging calls.
	Emergency Paging Group	Select the Paging Group designated for 'Emergency' use. Emergency pages will be delivered over the handset, headset, or speaker regardless of the 'Off-Hook Paging' setting.
	Paging Group Enable	Select the 'Enable' check box for each Paging Group to which the phone is to belong
	Paging Group Label	Enter a descriptive label to uniquely identify the Paging Group for the user.
Soft Keys (SoundPoint and VVX Only)		
	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.
	End Call	When checked, an **End Call** soft key appears on the phone.
	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.
	Join	When checked, a **Join** soft key appears on the phone, allowing a held call and an active call to be joined into a three-way conference.
	Callers	The Callers soft key appears on the phone so the user can see the list of received calls.
	Directories	The Directories soft key appears on the phone so the user can select destination numbers from pre-programmed directories.
	Forward	When checked, the Forward soft key appears on the phone, allowing the user to control the different types of forwarding for received calls.

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	The Key Definitions for Polycom phones. Only the keys available to Polycom phones are selectable in the Label drop-down list.
Insert	**Insert** a new Soft Key within the list of Soft Keys, before the key where Insert was clicked. The key where Insert was clicked, and all following keys shift down in the fixed list of Soft Keys to make room for the new keys. You will then need to properly set both the Soft Key Position and Label for the inserted key.
Delete	**Delete** an existing Soft Key within the list of Soft Keys. The key where Delete was clicked is removed and all following keys shifted up in the fixed list of Soft Keys, with a new empty key placed as the last key in the list.

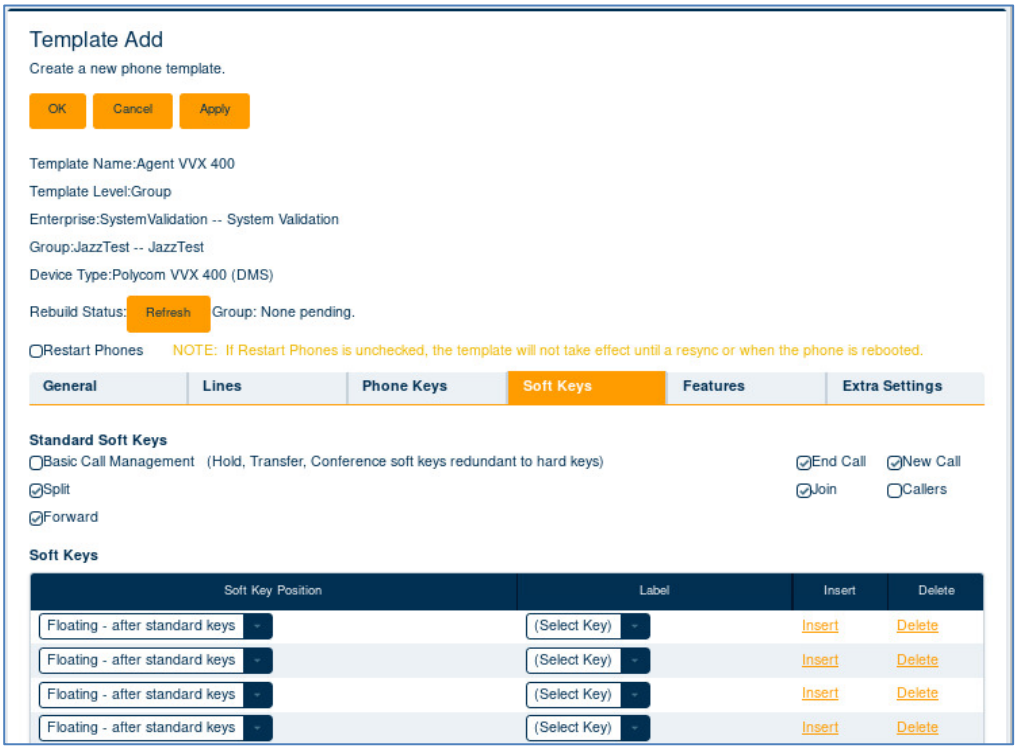


Figure 45 - Poly Template Add - Soft Keys

Tab / Section	Field	Setting
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. Assignment of a Clearspan Call Center service to the user is also required. Available on SoundPoint® IP, VVX, and Edge E models.
	ACD Line	Select the line on the phone to be associated with the ACD feature keys.
	Feature Sync ACD	Enables Polycom's premium ACD feature. If not enabled, then only the basic capabilities of sign in, sign out, available, and unavailable (without reason codes) can be used. If enabled, then Agent Unavailable with reason codes, Queue Status Notification (for some phone models), View Incoming Call Center Information, Transfer Call Information to a Supervisor (Dispensation Code, Trace, Emergency Escalate) can be used. Assignment of a Clearspan Call Center service to the user is also required. Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 250, VVX 300, VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411, VVX 450, VVX 500, VVX 501, VVX600, VVX 601 phones.
	ACD Agent Unavailable with Reason Code	ACD Agent Unavailable with Reason Codes allows the agent to enter a reason code when becoming Unavailable. The set of reason codes allows the agent to enter 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 250, VVX 300, VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600, VVX 601 phones. Also available on Poly Edge E, but at the time of this writing the feature is labeled "ACD Premium Unavailability"
	Audio/Video Toggles	On the VVX 500, VVX501 and VVX 600, VVX 601 phones with a camera only, this feature enables the switching of the call between audio and video using a soft key.
	Bluetooth	On the VVX 600/601, Trio 8800, Trio 8500, Trio 8300 and Trio C60 phone only, enables Bluetooth operation.
	Call List	On Poly and Polycom phones except the SoundPoint IP 321 and 331, 'Call List' enables the display of lists of received, placed, and missed calls using the Call List soft key.
	Call Recording	The Call Recording feature enables soft key presentation for Clearspan centralized call recording. Available on VVX phones. The Clearspan Call Recording service must also be assigned to user account(s) assigned to the phone. (The Call Recording feature can also be enabled on Edge E phones by adding the rule: voIpProt.SIP.serverFeatureControl.callRecording="1" in the 'Extra Settings' tab)

Tab / Section	Field	Setting
	Corporate (LDAP) Directory	Allows an LDAP directory key to be programmed on Polycom phones.
	Local Directory	Enables the display and entry of directory entries into a directory local to the phone using the Directory soft key.
	Enterprise Directory	Enables the Enterprise Directory feature. Available on VVX 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
	Group Directory	Enables the Group Directory feature. Available on VVX 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
	Personal Directory	Enables the Personal Directory feature. Available on VVX 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
	Executive Assistant	(Edge E only) Enables soft keys and Clearspan Xsi connectivity associated with the Clearspan Executive-Assistant service (which also must be assigned to users of the phone).
	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. Available on SoundPoint and VVX phone models.
	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 own profile on the host phone. Using Hoteling in conjunction with the Call Center Agent feature enables the agent to use any available host phone by logging in with agent credentials. After logging in, an agent has access to their own profile and Call Center settings on the host phone. You must select a Hoteling Line.
	Last Call Return	Enables a soft key for initiating an outbound call to the phone number of the most recent inbound caller.
	Ring Download	Enables download of custom ringtones when the phone restarts.
	Conference Management	Enables the conferencing of multiple calls (not just a 3-way conference). To use Clearspan conferencing, select a Conference Server Address. Conference Server Addresses are configured by your administrator.
	Use Clearspan Conference Server	Select a Conference Server address or default to Global Settings
	Non-volatile Ringer Volume	Enables retaining the ringer volume through restarts of the phone.

Tab / Section	Field	Setting
	Picture Frame	On the VVX 250, VVX 350, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600, VVX 601, Trio 8300, Trio 8500, Trio 8800 and Trio C60 phones only, enables the display of images on the phone when idle. The images are contained in files from a device connected to the phone via a USB connection.
	Queue Status Notification	Enables Clearspan Call Center agents to view the queue status for a call center. To use this feature, the Clearspan Premium Call Center service must be assigned to user accounts assigned to the phone. Available on SoundPoint® IP 450, 550, 560, 650, and Trio 8800 desktop phones.
	URL Dialing	Enables dialing of calls using a URL, in addition to dialing just using digits.
	Video	On the VVX 500/501, VVX 600/601, Trio 8300, Trio 8500, Trio 8800 and Trio C60 phones with a camera only, enables video calls.

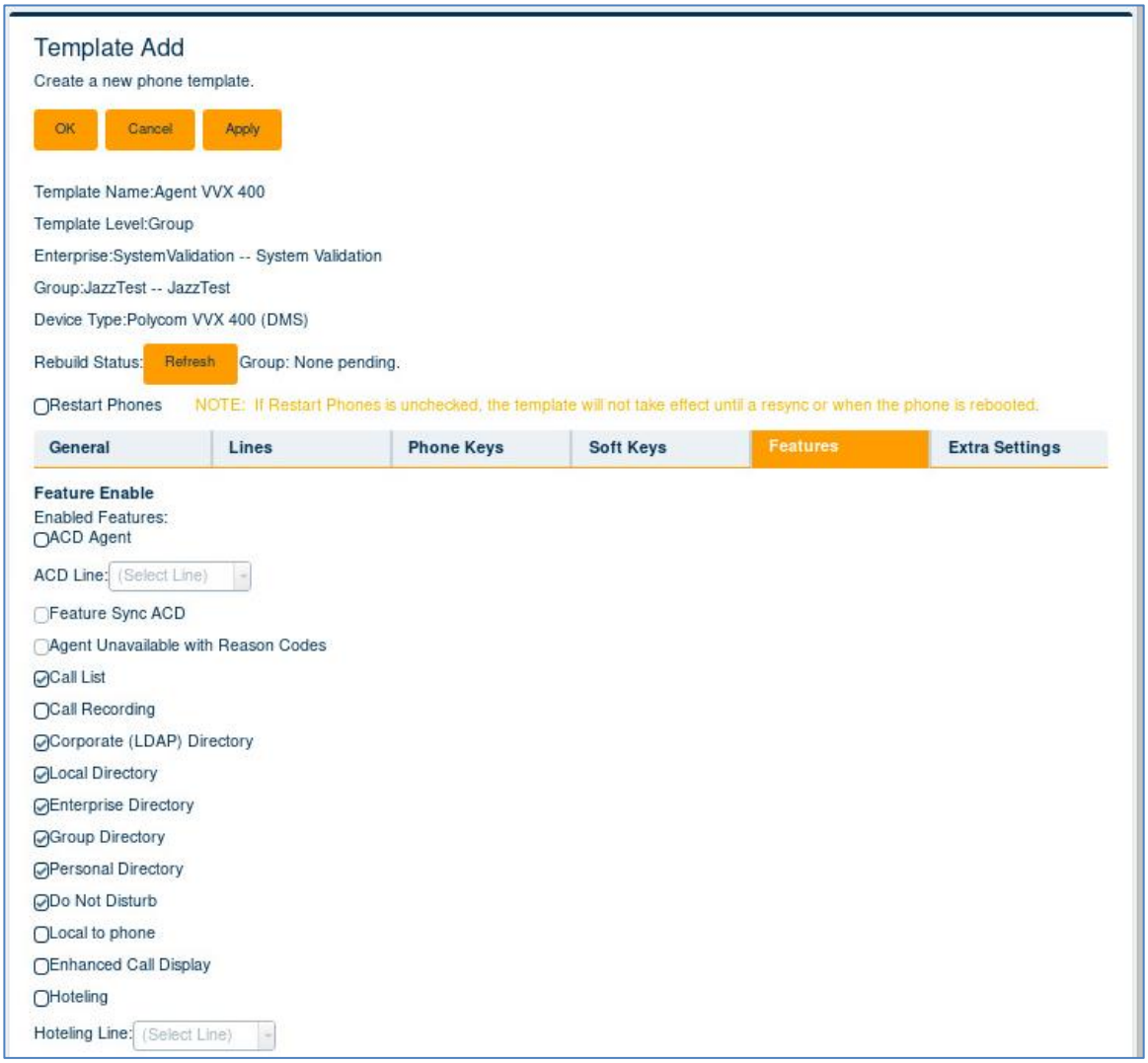


Figure 46 - Template - Features for Polycom Phones

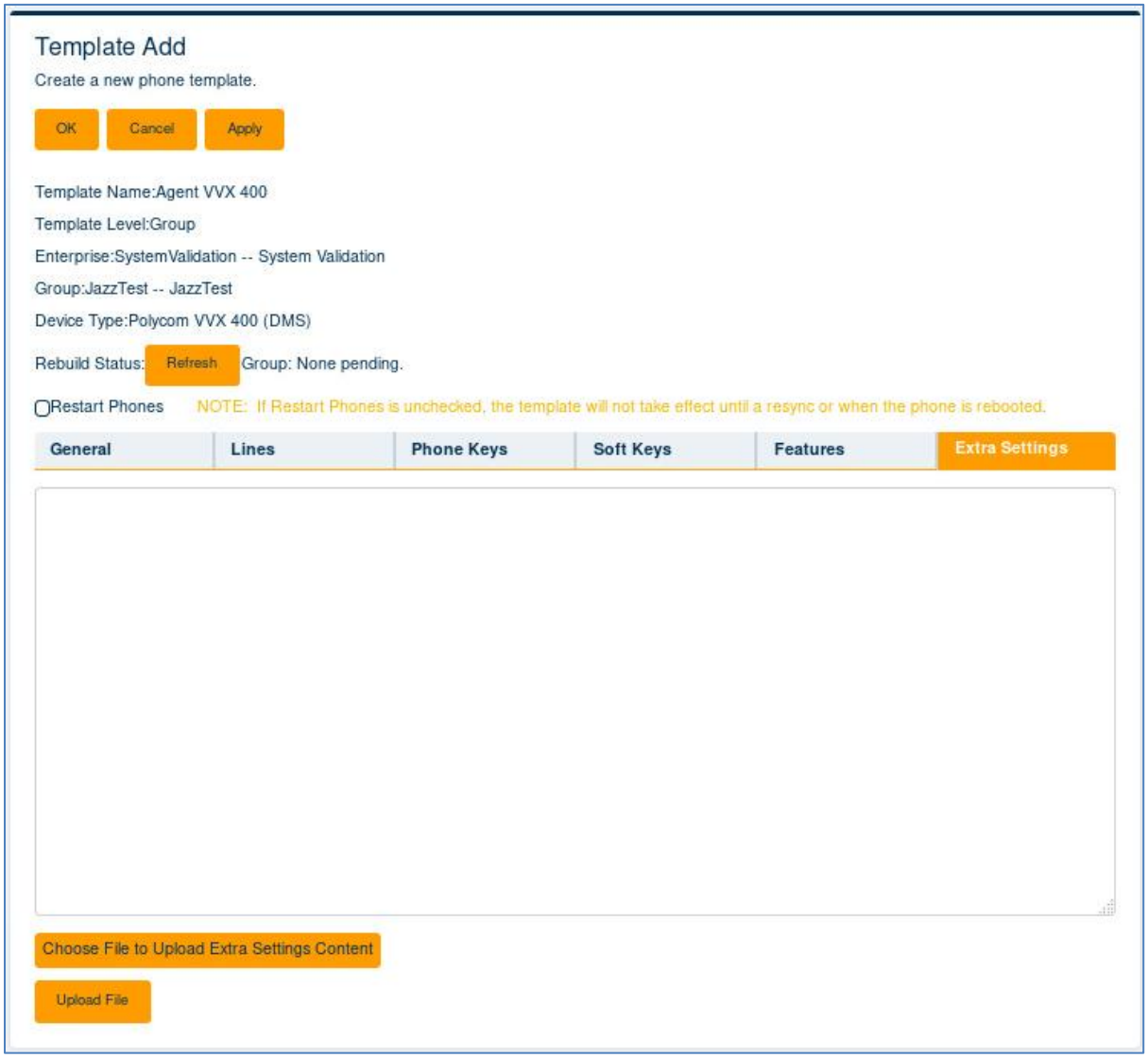


Figure 47 - Template – Extra Settings for Polycom Phones

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

Creating or Editing a Poly Edge-B Phone Template

The Poly Edge-B phone family has global and template settings that are unique to its design and function. These disparate provisioning items are described below. Create templates for Poly Edge-B phones as described in the Phone Templates section, with the differences described in the following table and shown in the following figures.

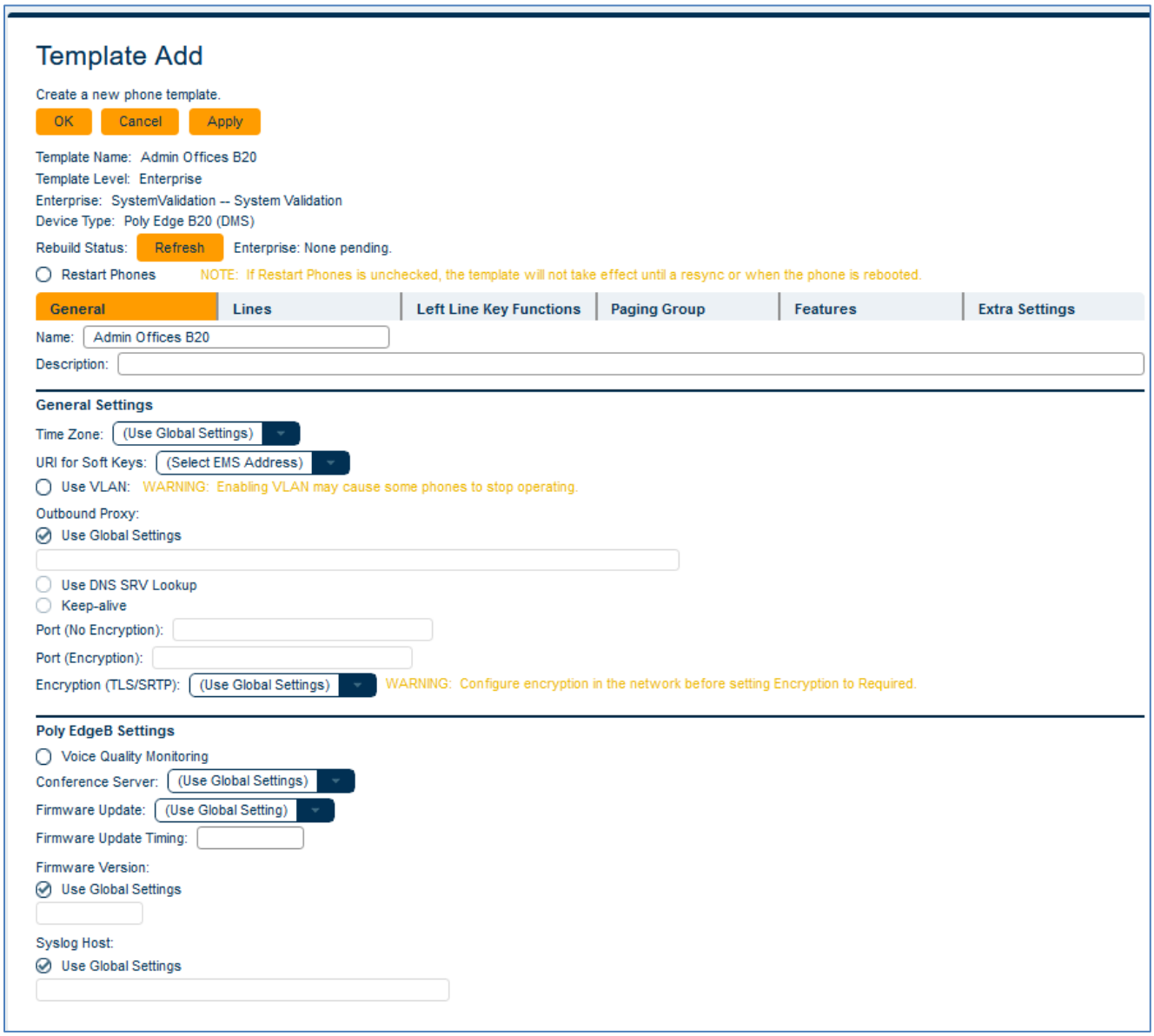


Figure 48 - Template Add for Poly Edge B Phone

TAB / SECTION	FIELD	SETTING
General		
	Name	Template Name
	Description	Verbose description of the Template
General Settings		
	Time Zone	Select the correct **Time Zone** for the phone's physical location 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.
	Use VLAN	Select the "Use VLAN" check box if the phone must be assigned to and use a VLAN.
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Polycom phones.
	Use DNS SRV Lookup	Check this box to direct the phones to submit an SRV type query when resolving the Outbound Proxy domain address.
	Keep-alive	Check this box to enable 'keep-alive' signaling designed to maintain communication with the outbound proxy when the phone is behind a firewall.
	Proxy Port (No Encryption)	Enter the port number on the outbound proxy where SIP messages are to be sent by the phones when establishing an unencrypted connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Proxy Port (Encryption)	Enter the port number on the outbound proxy where SIP messages are to be sent by the phones when establishing an encrypted (TLS) connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Encryption (TLS/SRTP)	Select the desired setting for signaling and media encryption.
Poly EdgeB Settings		
	Voice Quality Monitoring	Check this box to enable generation of Voice Quality metrics for all phone calls.
	Conference Server	Select a specific conference server or default to the Global Settings.

Firmware Update	Choose the desired firmware update methodology. Disabled Do not update Periodically Check for update at the provisioned frequency System Start Check for update upon reboot Time of Day Check for update at the provisioned time of day
Firmware Version	Enter the desired firmware version.
Syslog Host	Enter the IP address of a target syslog server. The phone will send real time operational messages for troubleshooting purposes.

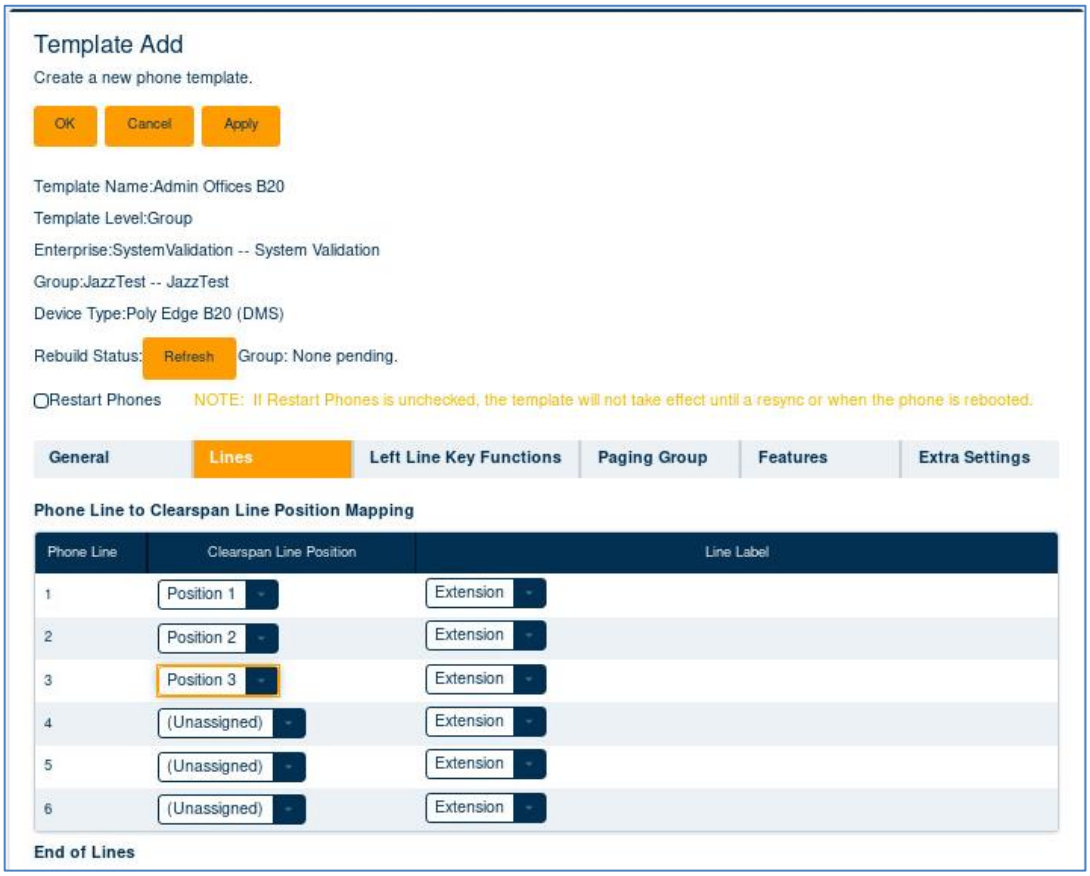


Figure 49 - Template Modify Lines – Poly Edge B

TAB / SECTION	FIELD	SETTING
Lines		
	Clearspan Line Position	Select the Clearspan Line Position to assign. “Position 1” corresponds to the first phone number/user associated with a phone, “Position 2” corresponds to the second phone number associated with a phone, and so on.
	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}”
Left Line Key Functions		
	Function	Choose the desired function for the Left Line Keys (1 – 8) Auto Answer Intercom ACD Sign On/Off Action URL Add to Conference Blind Transfer Blind Transfer 2 Block Anonymous Call Block Caller ID Busy Lamp Field Call Appearance Call Forward Call Park Monitor Call Waiting Conference Disposition Code Do Not Disturb Do Not Ring Executive Filter On/Off Executive/Assistant Hold Hoteling Line Monitor Next Tab Message Status Page Group 1 Page Group 2 Page Group 3 Page Group 4 Page Group 5 Page Group 6 Page Group 7 Page Group 8 Page Group 9 Page Group 10 Presence Monitor Speed Dial Transfer

	Max Calls	Select the maximum number of answered and ringing calls for this call appearance before a busy response is sent.
	Associated Number/ID	Enter the user part of the BLF URI if the selected function is 'Busy Lamp Field, otherwise leave blank.
	Service	Enter the associated SIP Line (SP1 – SP6) for the selected function.
Paging Group		
	Join	Check the corresponding box to participate in the multicast paging group.
	Multicast Address	Enter the multicast IP address for the paging group.
	Multicast Port	Enter the multicast port number for the paging group.
Features		
	Feature Enable	Check the corresponding box to enable access to the **management** of Clearspan features from the phone. Note that this page does **not** assign corresponding Clearspan features to the user account. Service assignment is accomplished by assigning one or more Service Packs to a user account.
Extra Settings		Enter extra settings that are to be applied to all phones using this template. The extra settings for the Poly phones must be entered in XML format.

Creating or Editing a Poly VVX D230 Phone Template

The Poly VVX D230 DECT phone has global and template settings that are unique to its design and function. These disparate provisioning items are described below. Create templates for D230 DECT phones as described in the Phone Templates section, with the differences described in the following table and shown in the following figures.

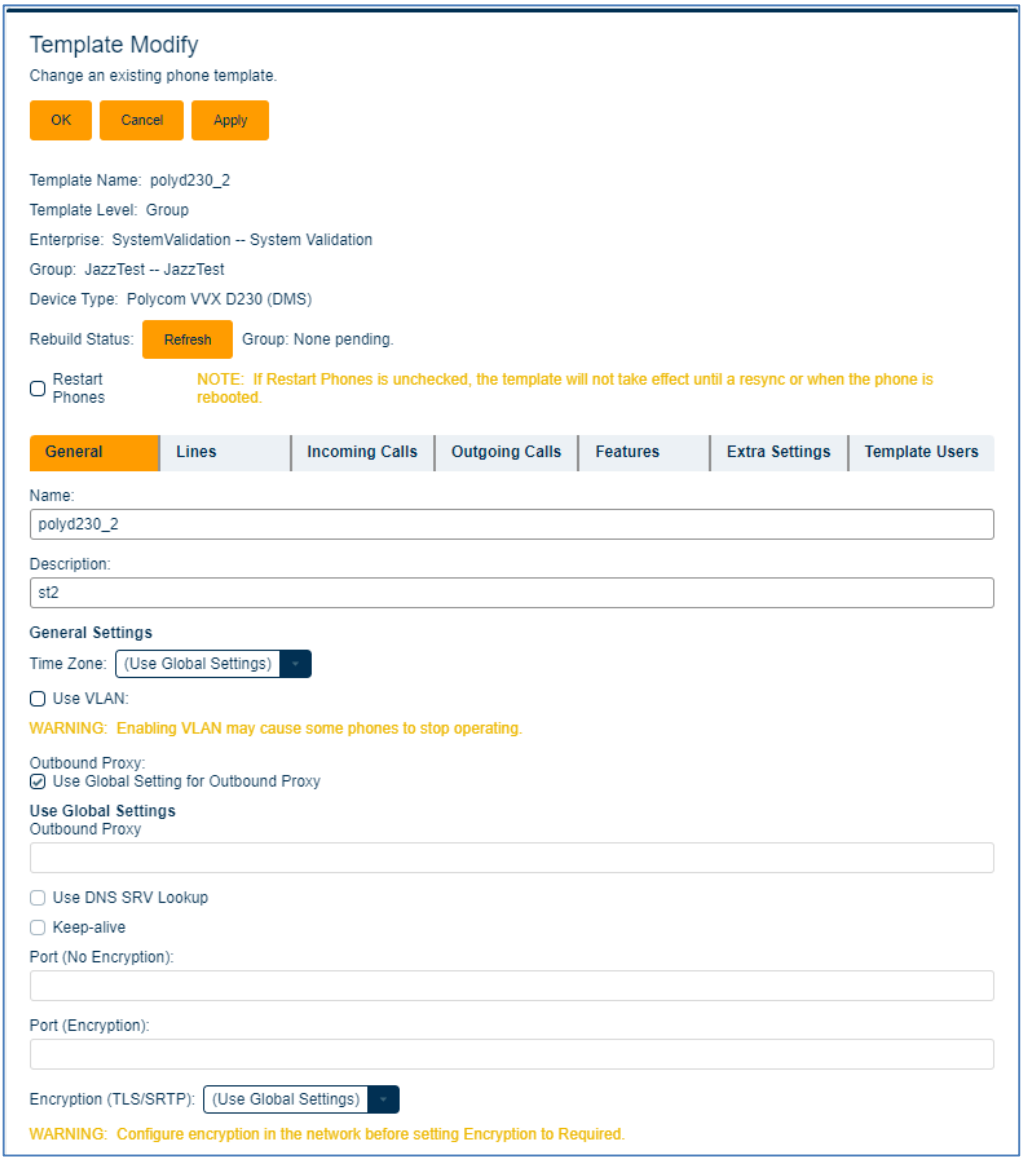


Figure 50 - Template Modify - Poly D230

TAB / SECTION	FIELD	SETTING
General		
	Name	Template Name
	Description	Verbose description of the Template
General Settings		
	Time Zone	Select “Use Global Settings” to defer the setting to the value entered in the OpEasy Global Settings table or select the correct **Time Zone** for the phone’s physical location from the drop-down list. **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 selecta specific time zone.
	Use VLAN	Select the “Use VLAN” check box if the phone must be assigned to and use a VLAN.
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Polycom phones.
	Use DNS SRV Lookup	Check this box to direct the phones to submit an SRV type query when resolving the Outbound Proxy domain address.
	Keep-alive	Check this box to enable ‘keep-alive’ signaling designed to maintain communication with the outbound proxy when the phone is behind a firewall.
	Proxy Port (No Encryption)	Enter the port number on the outbound proxy where SIP messages are to be sent by the phones when establishing an unencrypted connection. *This field is not applicable when the ‘Use DNS SRV Lookup’ box is checked.*
	Proxy Port (Encryption)	Enter the port number on the outbound proxy where SIP messages are to be sent by the phones when establishing an encrypted (TLS) connection. *This field is not applicable when the ‘Use DNS SRV Lookup’ box is checked.*
	Encryption (TLS/SRTP)	Select “Use Global Settings” to defer the setting to the value entered in the OpEasy Global Settings table or select the desired setting for signaling and media encryption.
	Subscription Time	Select “Use Global Settings” to defer the setting to the value entered in the OpEasy Global Settings table for this manufacturer or clear the checkbox and set the refresh time in seconds for SIP Subscriptions. SIP Subscriptions provide the phone with status updates for system features like Shared Call Appearance, Do Not Disturb, and Call Forwarding,
Polycom D230 Settings		
	Conference Server	Select a specific conference server or default to the Global Settings.

Sys/Debug Log Host	Enter the IP address or FQDN of the target server to which syslogs and/or debug logs should be sent.
Hand Set Display Names	Select ‘Extension,’ Phone Number,’ or a custom ‘Text’ entry as a unique identifier for each handset.

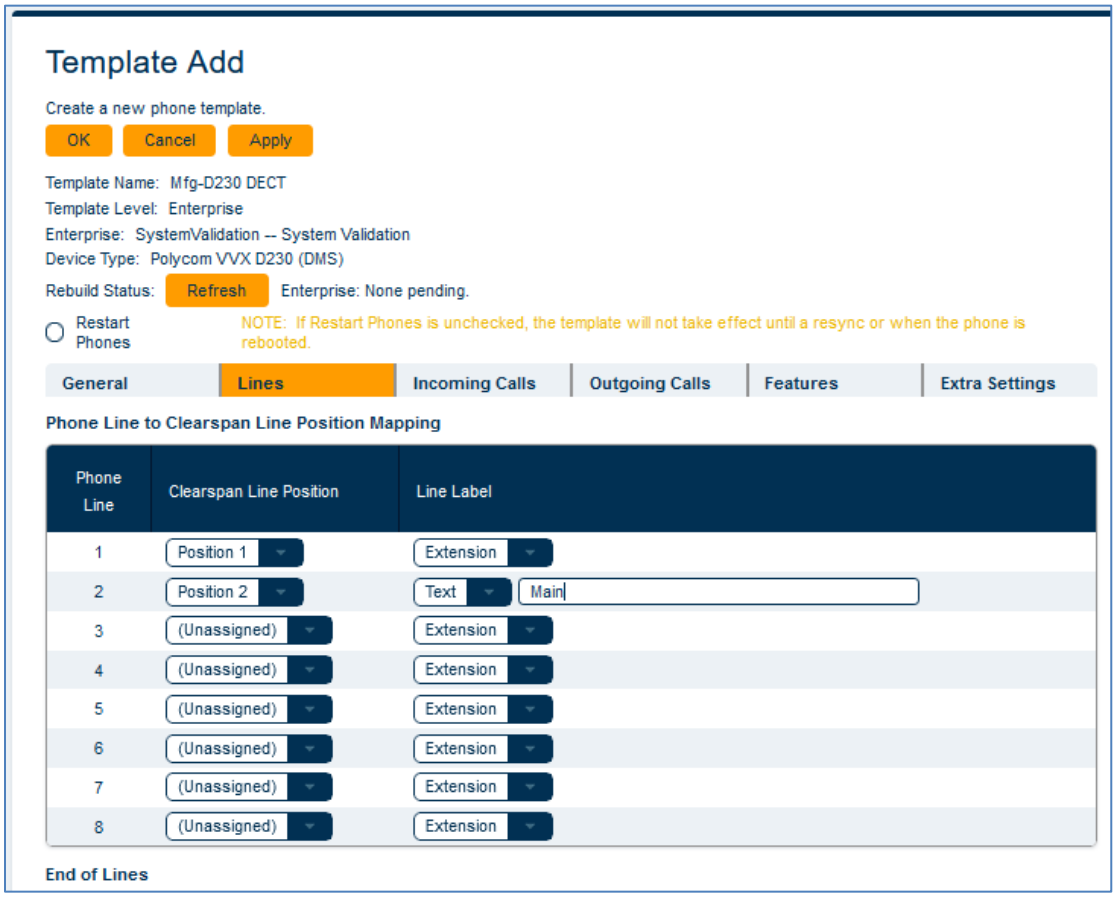


Figure 51 - VVX D230 - Lines Tab

TAB / SECTION	FIELD	SETTING
Lines		
	Clearspan Line Position	Select the Clearspan Line Position to assign. “Position 1” corresponds to the first phone number/user associated with a phone, “Position 2” corresponds to the second phone number associated with a phone, and so on.
	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}”

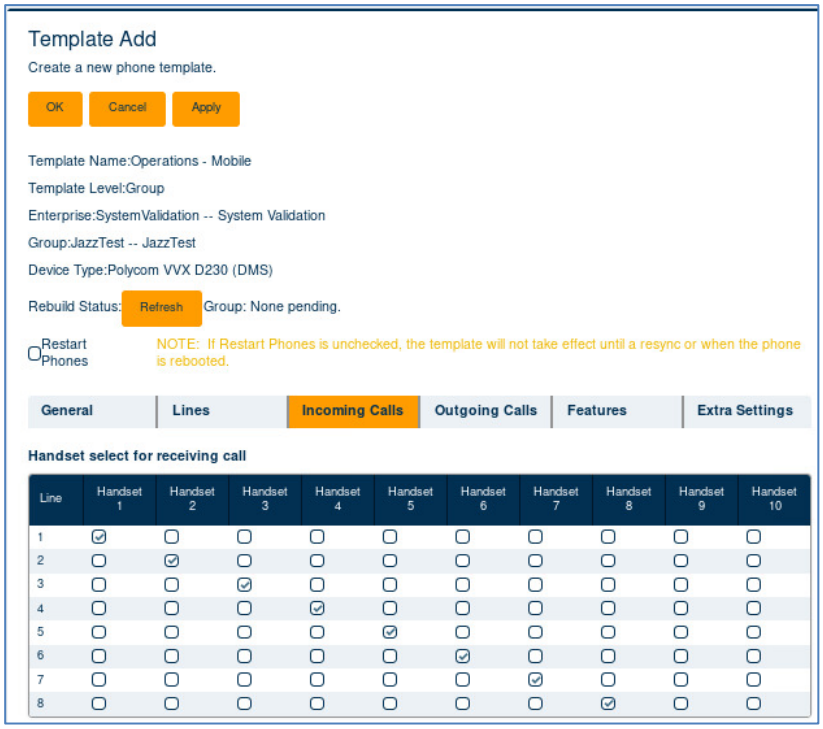


Figure 52 - VVX D230 Incoming Calls Tab

TAB / SECTION	FIELD	SETTING
Incoming Calls		
	Handset 1-10	There can be up to eight phone numbers assigned to the D230 base station. Select the handsets where incoming calls for each of the assigned lines should ring.
Outgoing Calls		
	Line 1 – 8	Select the handsets for each of the eight possible lines which are allowed to make outgoing calls.
	Default Outgoing Line	Select from the set of up to eight lines assigned to the base station that each handset will use by default when originating an outbound call.

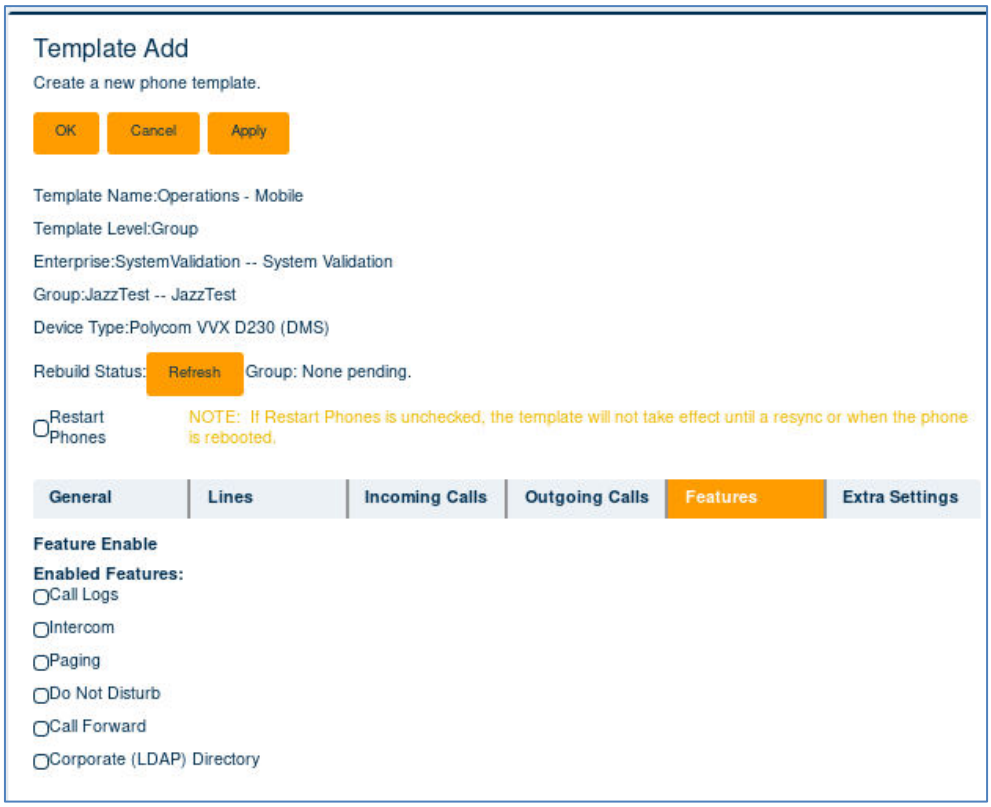


Figure 53 - VVX D230 - Features Tab

TAB / SECTION	FIELD	SETTING
Features		
	Call Logs	Select the check box to enable logging of recent calls.
	Intercom	Select the check box to enable the VVX D230 Intercom feature
	Paging	Select the check box to enable the Paging feature
	Do Not Disturb	Select the check box to allow the Do Not Disturb feature to be enabled/disabled by the handsets
	Call Forward	Select the check box to allow Call Forwarding enable/disable and administration from the handsets.
	Corporate (LDAP) Directory	Select the check box to enable LDAP directory lookups. Use of this feature also requires custom setup in Extra Settings.
Extra Settings		
		Enter extra settings that are to be applied to all phones using this template. The extra settings for the Poly phones must be entered in XML format.

Creating or Editing a UC ONE/CS Engage Mobile Template

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

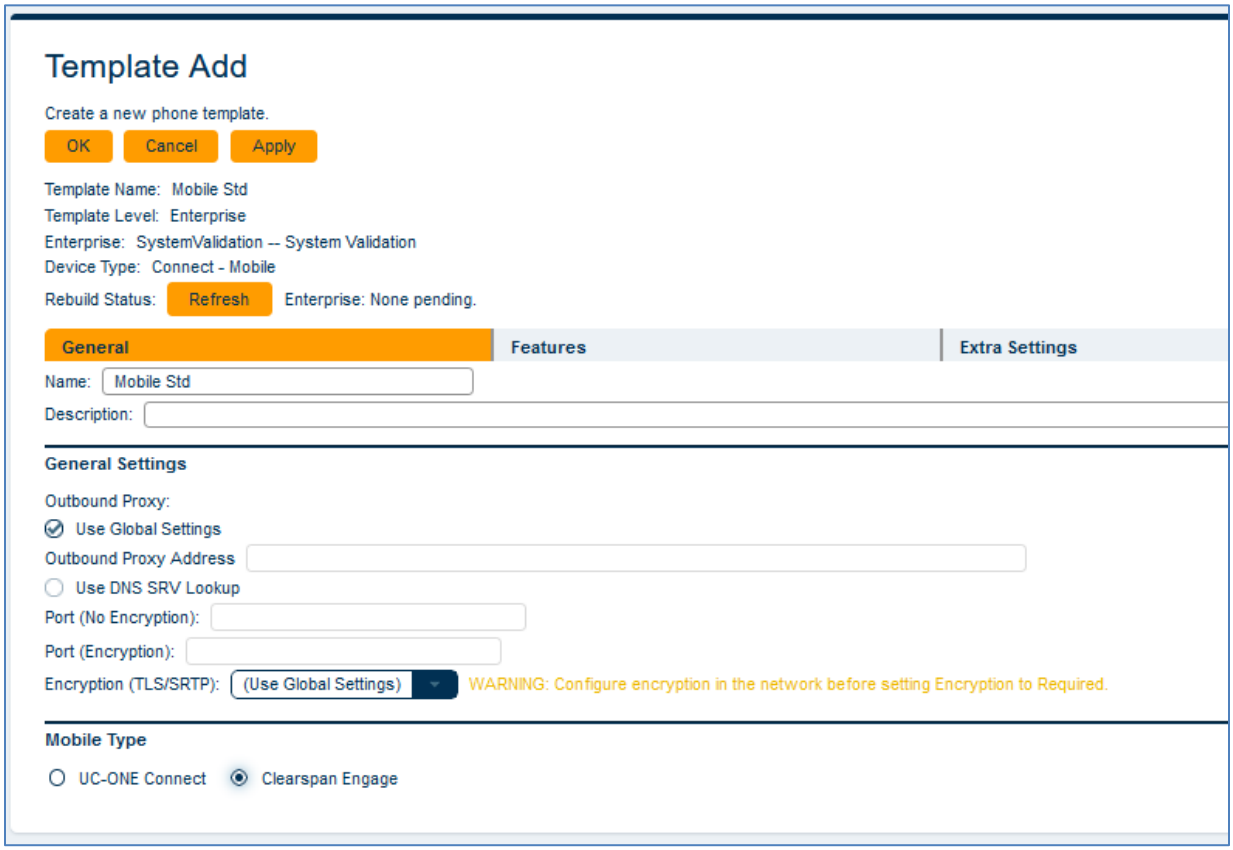


Figure 54 - Template Add – General for UC ONE/CS Engage Mobile/Tablet

9. Configure General Settings on the General tab.
   Choose to **Use Global Settings**, or enter the Outbound Proxy, and Outbound Proxy Port in the **Outbound Proxy Port (No Encryption)** box when encryption is not being used by the client, or in the **Outbound Proxy Port (Encryption)** box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.
10. Select the **Encryption (TLS/SRTP)** setting.
11. Configure **Mobile/Tablet Type** on the General Tab. Choose UC-ONE Connect or Clearspan

Engage.

12. On the **Features** tab, select the features to enable for the client:

Note: The corresponding Clearspan service must also be assigned and enabled for the associated user. This menu merely drives the presentation of the feature on the soft client interface.

- Call Back
- Call Center
- Call Park
- Call Pull
- Call Recording
- Call Transfer
- Conference
    - Max Parties; 4 - 15
    - Show Participant List
- Message Waiting Indicator
- Voicemail
    - Visual Voicemail
- Unified Call History: Enabled/Disabled/Use Global Settings

Also, note the extended menu to allow 'Self Care Portal Access' for the user administration of the following features for which the underlying Clearspan service must also be assigned to the user in order to be presented on the softphone interface.

- Call Forward Always
- Call Forward Busy
- Call Forward No Answer
- Call Forward Not Reachable
- Clearspan Anywhere
- Do Not Disturb
- Anonymous Call Rejection
- Simultaneous Ring
- Sequential Ring
- Automatic Callback
- Call Waiting
- Caller ID Delivery Blocking
- Personal Assistant
- Call Center
- Remote Office

- Voice Messaging

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

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

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. Click OK.

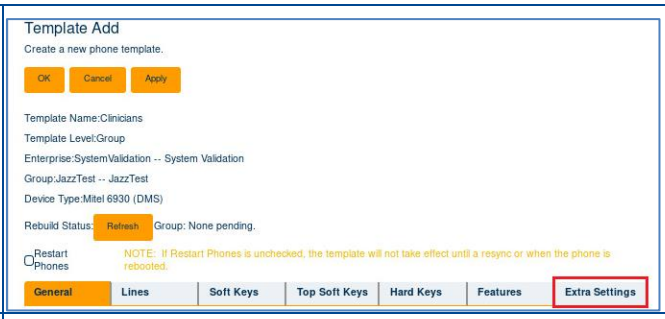
Viewing or Editing Global Settings

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.

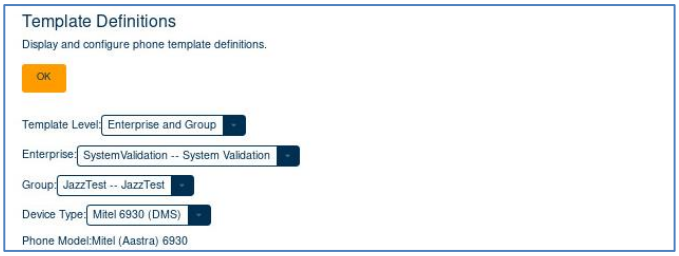
This feature should not be used without a thorough understanding of the device configuration files. All settings on the Global Configuration File Settings pages are optional, and some of them override others. For duplicated and conflicting configuration information, the following hierarchy is applied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

Highest Priority

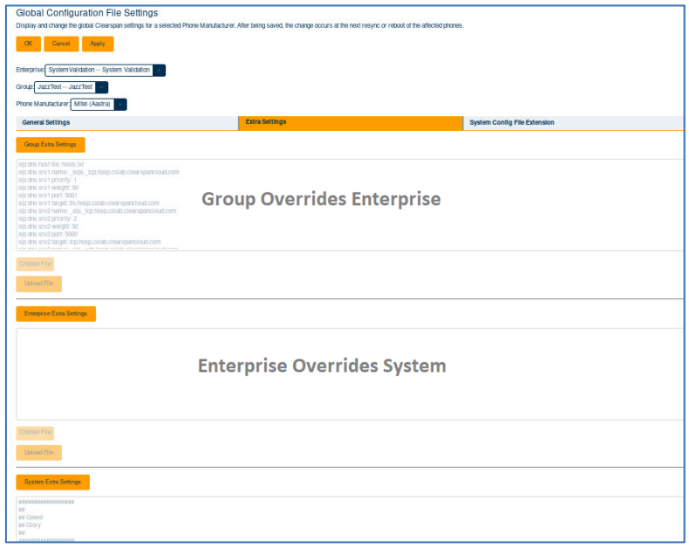
Template Extra Settings



OpEasy - Generated Settings

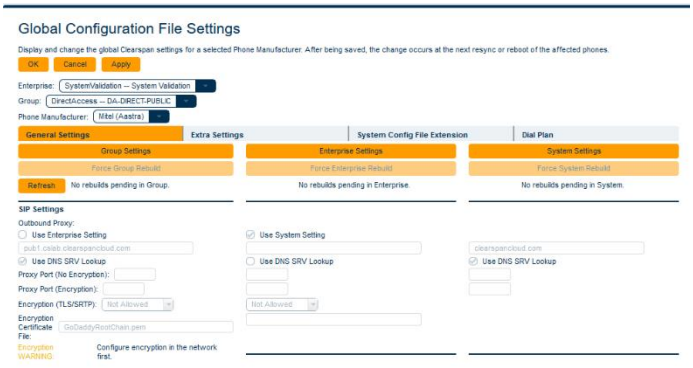


Template Definition Settings



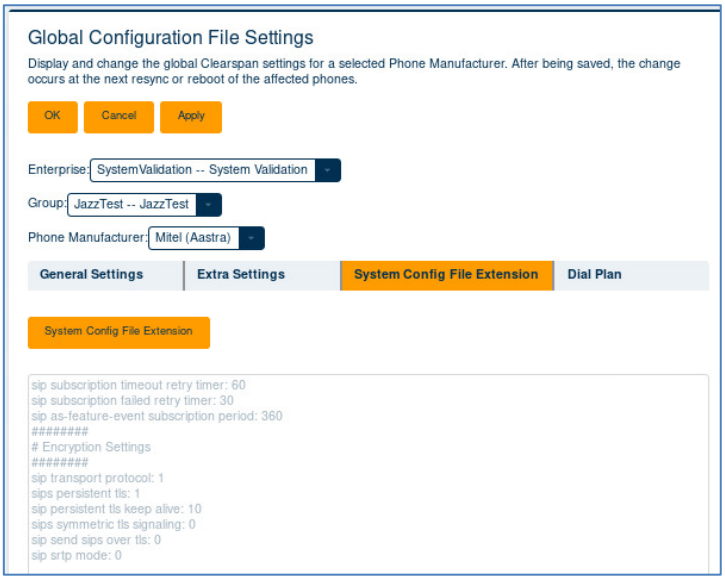
Global Extra Settings

Global Extra Settings



Global Group-Enterprise-System Settings

LowestPriority

System configuration File Extension Settings	 **Figure 55 - Global Configuration File Hierarchy**

To view or edit global settings, General tab:

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

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

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

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

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

Editing System, Enterprise, and Group Extra Settings

Figure 56 - Global Configuration File Settings: Rebuild Configuration Files Page

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

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

Note:

- The Admin must have the permission to edit Extra Settings.
- Only Group Administrators and above can modify Group Extra Settings
- Only Enterprise Administrators and above can modify Enterprise Extra Settings
- Only System Administrators and above can modify System Extra Settings

7. Click the Extra Settings tab. The Extra Settings page is displayed.
8. Click the **Group, Enterprise or System Extra Settings** button. A confirmation box is displayed, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”.
9. Click **Yes** to edit the Group**,** Enterprise or System Extra Settings. The Group, Enterprise or System Extra Settings are enabled.

10. Enter the extra settings in the Group, Enterprise or System Extra Settings box.
11. Click **Apply or OK**. If the Group or Enterprise Extra Settings were changed, then the Global Configuration File Settings: Rebuild Configuration Files page is displayed.
12. Click the **Save** and **Rebuild** button.
13. If the Extra Settings are overriding any parameter in the General Settings or Dial Plan setting, the **Global Configuration File Settings: Extra Settings Audit Results** page is displayed.

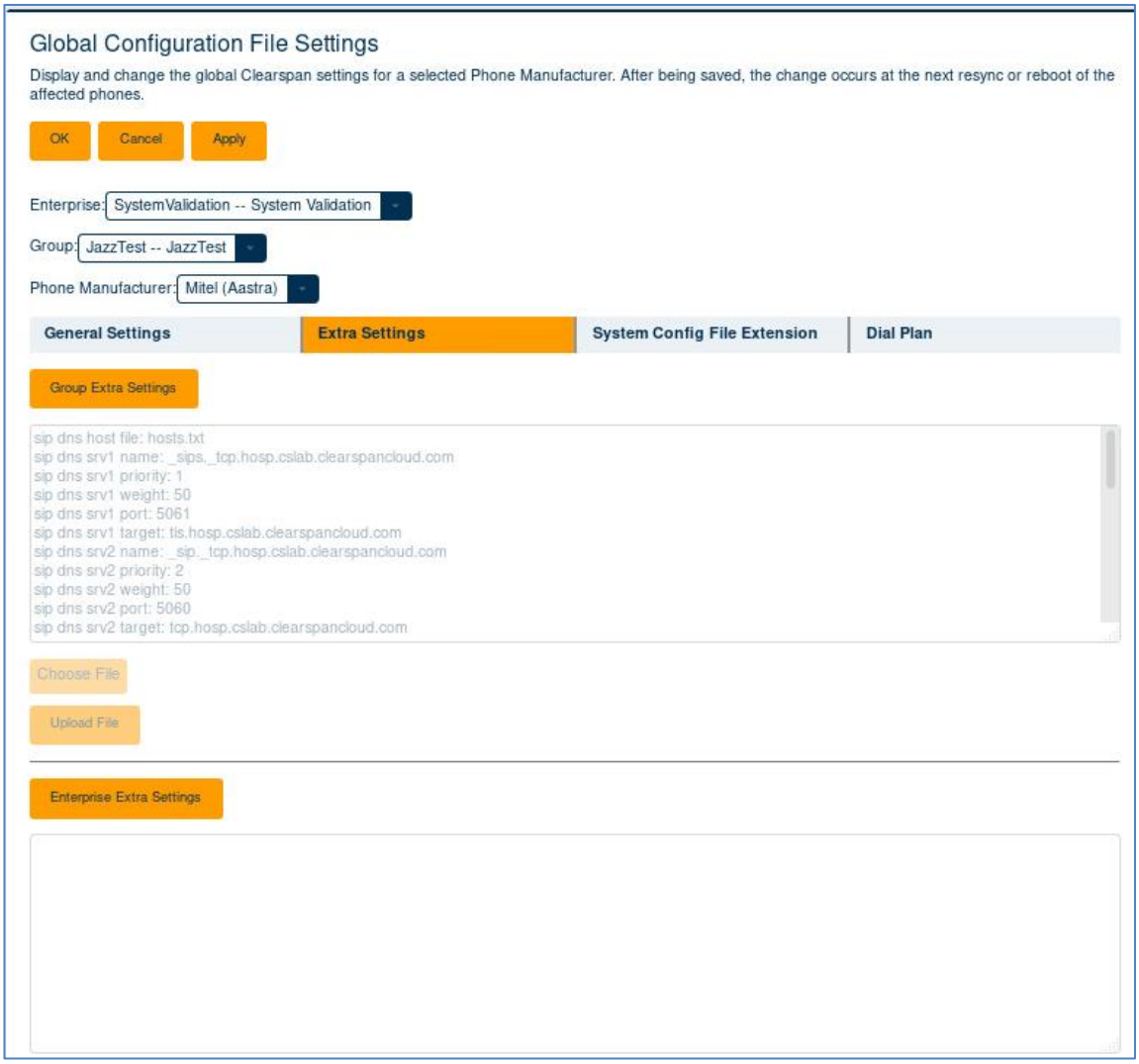


Figure 57 - Global Extra Settings for Mitel Phones

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

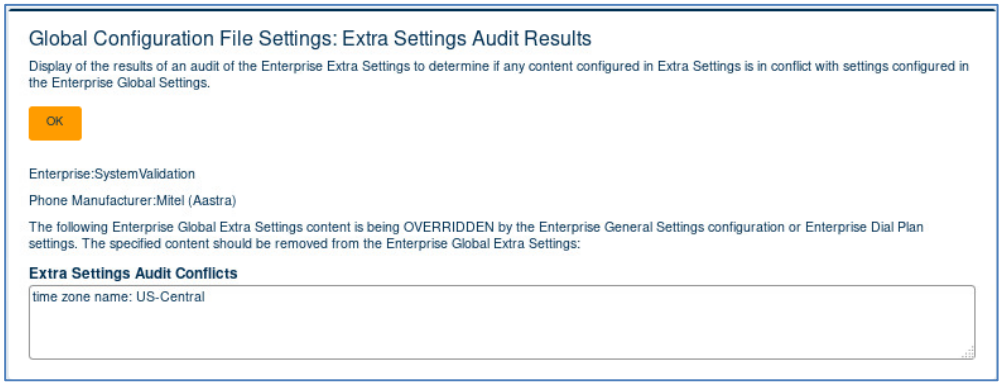


Figure 58 - Global Configuration File Settings: Extra Settings Audit results page

System Configuration File Extension

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

This tab only appears for the following devices:

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

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

System, Enterprise, and Group Mitel Phone Global Settings

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

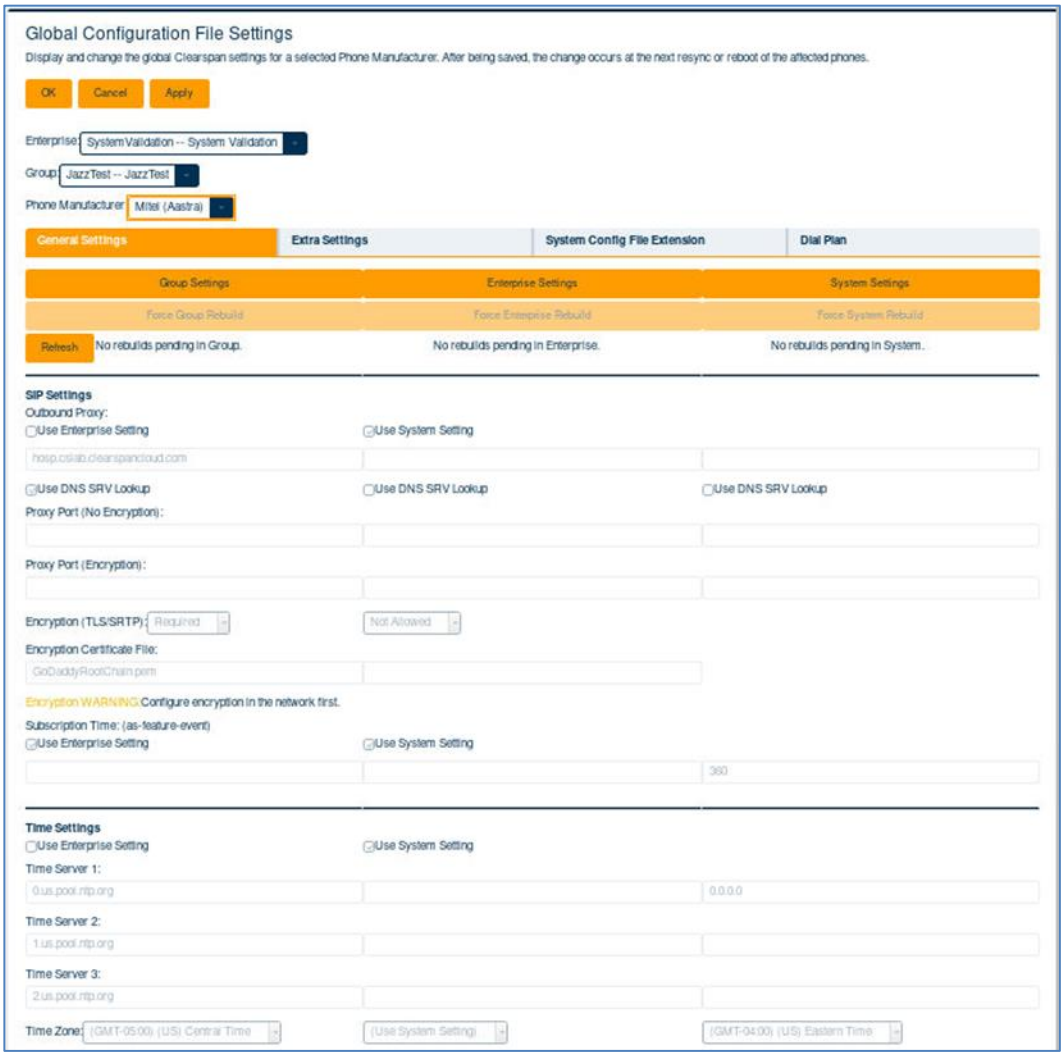


Figure 59 - Global Configuration File Settings Page – Mitel Phones

- SIP Settings
  - Outbound Proxy
  - Use DNS SRV Lookup
  - Proxy Port (No Encryption) and Proxy Port (Encryption)
  - Encryption settings
  - Encryption Certificate File (Name for certificate file. Must be entered if Encryption is set to Required)
  - Subscription Time (as-feature-event).
- Time Settings
  - Time Server 1 are text fields that contain the FQDN/IP address of the Time Server.
  - Time Server 2 are text fields that contain the FQDN/IP address of the Time Server.
  - Time Server 3 are text fields that contain the FQDN/IP address of the Time Server.

  - Time Zone
- Device Settings
  - LAN Port Mode
  - Admin Password. Valid password characters are a-z, A-Z, 0-9, or special characters – (dash), _ (underscore), (period), or @ (at symbol).
  - Confirm Admin Password
  - User Password. Valid password characters are a-z, A-Z, 0-9, or special characters – (dash), _ (underscore), (period), or @ (at symbol).
  - Confirm User Password
  - Web Interface enables/disables the web interface for the phone
  - Phone Lock enables/disables the ability to lock the phone
- Voice Codecs
  - Voice Codec #1 (highest priority)
  - Voice Codec #2
  - Voice Codec #3
  - Voice Codec #4 (lowest priority).
- Quality Monitoring
  - Quality Monitoring
  - Collector Server Address. The Collector Server Address is the fully qualified domain name
  - Collector Server Port
- General Settings
  - If Static Call Park/Pickup is enabled, Park and Pickup keys appear on the phone automatically without the need to specifically define a Park or Pickup key. If you enable this setting when those keys are also defined, then two Park/Pickup keys appear on the phone.
  - Conference Server is the conference server to be used for conference calls. The drop-down-list shows all configured conference servers.
  - Firmware Server is a text field that contains the location of the firmware to be loaded.
  - Image Server is a text field that contains the URI of the image server where pictures are stored for the display on the phone during incoming and outgoing calls, in the Directory, Received Callers list, and Outgoing Redial List entries. This applies to 6867i, 6869i, 6873i series phones and 6900 series phones. The requirements for the file are as follows:
    - Pictures must be PNG format
    - 150x150 pixels
    - 24 or 32-bit color
    - Filenames must be stored using the phone number as the filename (for example, 9995551234.png)
  - Upload System Info on Crash
- Upload System Info Server contains the location where the phone sends the system and crash files (server.cfg, local.cfg, and crash.gz) if Upload System Info On Crash is enabled.
- Directory Settings
  - Resync Start Time (00:00 - 23:59)
  - Resync Frequency (1 - 364 days)
  - Resync Window length (120 - 1439 mins)

- 6800/6900 HELD Settings
    - Enter the Location Information System server URL in the **LIS Server URL** field
    - Enter/paste the public certificate for the LIS server in the **LIS Public Cert** field
    - Enter/paste the private key for the LIS server in the **LIS Private Key** field

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

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

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

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

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

- SIP Settings
  - Outbound Proxy (enter the Outbound Proxy server address)
  - Use DNS SRV Lookup
  - Proxy Port
  - Encryption Settings
  - Subscription Time
- Time Settings
  - Time Server
  - Time Zone
- Device Settings
  - Admin Password (Valid password may contain text with a maximum of 15 characters)
  - Confirm Admin Password
  - Handset Registration Code - If not configured, the Handset Registration Code will be populated.
  - Hotel Mode (Phone Lock)
  - Repeater 1 with enable and disable options
  - Repeater 2 with enable and disable options
  - Repeater 3 with enable and disable options
- General Settings
  - Firmware Server Settings
  - Firmware file server location
  - Base Station/Handset Firmware Version
  - Base Station/Handset Firmware Branch
  - Repeater Firmware Version
  - Repeater Firmware Branch are entered when the Firmware Server Settings is not selected to use the higher-level setting

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

System, Enterprise, and Group AudioCodes Global Settings

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

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

    - Voice Codec #4 (lowest priority)
- SNMP Settings
    - SNMP Traps
    - SNMP Server 1
    - SNMP Server 2
    - SNMP Server 3
    - SNMP Server 4
    - SNMP Server 5
- Quality Monitoring
    - Quality Monitoring (Session Only or Session and Periodic)
- General Settings
    - Conference Server is the conference server to be used for conference calls. The drop-downlist shows all configured conference servers.

System, Enterprise, and Group AudioCodes MP5XX/M500Li/M800C Global Settings

The Global Configuration File Settings page contains the following settings for AudioCodes MP-5XX, M500L and M800C devices:

- SIP Settings
  - Outbound Proxy
  - Proxy Port (No Encryption)
  - Proxy Port (Encryption)
  - Outbound Proxy 1
  - Outbound Proxy 2
  - Outbound Proxy 3
  - Outbound Proxy 4
  - Outbound Proxy 5
  - Proxy Port (No Encryption)
  - Proxy Port (Encryption)
  - Encryption (TLS/SRTP) settings for Group and Enterprise Settings
  - Encryption Certificate File (Name for certificate file. Must be entered if Encryption is set to Required)
- Time Settings
  - Time Server Settings
  - Time Server
  - Backup Time Server
  - Time Zone
- Device Settings
  - Admin Password
  - User Password
- Voice Codecs
  - Voice Codec Settings
  - Voice Codec #1 (highest priority)
  - Voice Codec #2
  - Voice Codec #3
  - Voice Codec #4 (lowest priority)
- SNMP Settings
  - SNMP Traps
  - SNMPV3 User
  - SNMPV3 Auth Protocol
  - SNMPV3 Private Protocol
  - SNMPV3 Auth Key
  - SNMPV3 Private Key
  - SNMP Server 1

- SNMP User 1
- SNMP Server 2
- SNMP User 2
- SNMP Server 3
- SNMP User 3
- SNMP Server 4
- SNMP User 4
- SNMP Server 5

- General Settings
  - Conference Server is the conference server to be used for conference calls. The drop-down list shows all configured conference servers.
  - Firmware Update
  - Firmware Version
  - Tones File
  - License File
  - Set OOS on Reg Failure
  - Current Disconnect
  - Polarity Reversal
  - Syslog
  - Syslog Host
  - Syslog Level
  - Debug Level

System, Enterprise, and Group Media5 Global Settings

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

- SIP Settings
  - Outbound Proxy server address
  - Proxy Port (No Encryption)
  - Proxy Port (Encryption)
  - Encryption (TLS/SRTP)
- DNS Servers
  - DNS Server Settings
  - DNS Server 1
  - DNS Server 2
  - DNS Server 3
  - DNS Server 4
- Time Settings
  - Time Server 1
  - Time Server 2
  - Time Server 3
  - Time Server 4
  - Time Zone
- Device Settings
  - Admin Password
  - Confirm Admin Password
  - Public Password
  - Confirm Public Password
- Voice Codecs
  - Voice Codec Settings
  - Voice Codec #1
  - Voice Codec #2
- SNMP Settings
  - SNMP Traps
  - SNMP Server 1
  - SNMP Server 2
  - SNMP Server 3
  - SNMP Server 4
  - SNMP Server5
- Quality Monitoring
  - Quality Monitoring
  - Collector Server Address
- General Settings

- Conference server
- Firmware version for all types of Mitel Media5/Media5 devices
  - TA7102 / 4102
  - TA7104 / C710/ C775
  - TA7108 / C711
  - GX Gateway 24FXS / S724

System, Enterprise, and Group Clearspan Communicator Global Settings

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

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

System, Enterprise, and Group UC ONE/CS Engage Global Settings

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

- SIP Settings
  - Outbound Proxy: Set the target DNS or IP address for outbound SIP message
  - Use DNS SRV Lookup: Enable/Disable
  - Proxy Port (No Encryption): Set the target IP port for outbound unencrypted SIP messages
  - Proxy Port (Encryption): Set the target IP port for outbound encrypted SIP messages
  - Encryption (TLS/SRTP): ‘Required’ or ‘Not Allowed’
- Codecs
  - Voice Codec Setting
  - Voice Codec #1 (highest priority),
  - Voice Codec #2
  - Voice Codec #3
  - Voice Codec #4
- General Settings
  - Unified Call History: Enable to allow synchronization of call activity across Engage devices.
  - Voice Codec #5 (lowest priority)

System, Enterprise, and Group Clearspan Mobile/Tablet Global Settings

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

- SIP Settings
  - Outbound Proxy
  - Use DNS SRV Lookup
  - Proxy Port (No Encryption)
  - Proxy Port (Encryption)
  - Encryption (TLS/SRTP)
  - Subscription Time
- Codecs
  - Voice Codecs Setting
  - Voice Codec #1 (highest priority)
  - Voice Codec #2
  - Voice Codec #3
  - Voice Codec #4
  - Voice Codec #5 (lowest priority)
- Quality Monitoring
  - Quality Monitoring
  - Collector Server Address. The Collector Server Address is the fully qualified domain name
  - Collector Server Port
- General Settings
  - Unified Call History: Enable to allow synchronization of call activity across Engage devices.

System, Enterprise, and Group Grandstream Global Settings

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

- SIP Settings
  - Outbound Proxy
  - Outbound Proxy 1
  - Outbound Proxy 2
  - Proxy Port (No Encryption)
  - Proxy Port (Encryption)
  - Encryption (TLS/SRTP)
- Time Settings
  - Time Server Settings
  - Time Server
  - Time Zone
- Device Settings
  - Keypad Access Mode
  - Admin Password
  - Confirm Admin Password
  - User Password
  - Confirm User Password
- Video Codec Settings
  - Voice Codec Setting
  - Voice Codec #1 (highest priority)
  - Voice Codec #2
  - Voice Codec #3 (lowest priority)
- General Settings
  - Firmware Version

System, Enterprise, and Group Poly/Polycom Global Settings

To configure global Polycom phone settings, choose Phone Templates from the Provisioning menu, and then select Global Settings and select Polycom as the Phone Manufacturer. The common global settings for Polycom phones are shown on the General Settings tab and described in the following table.

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

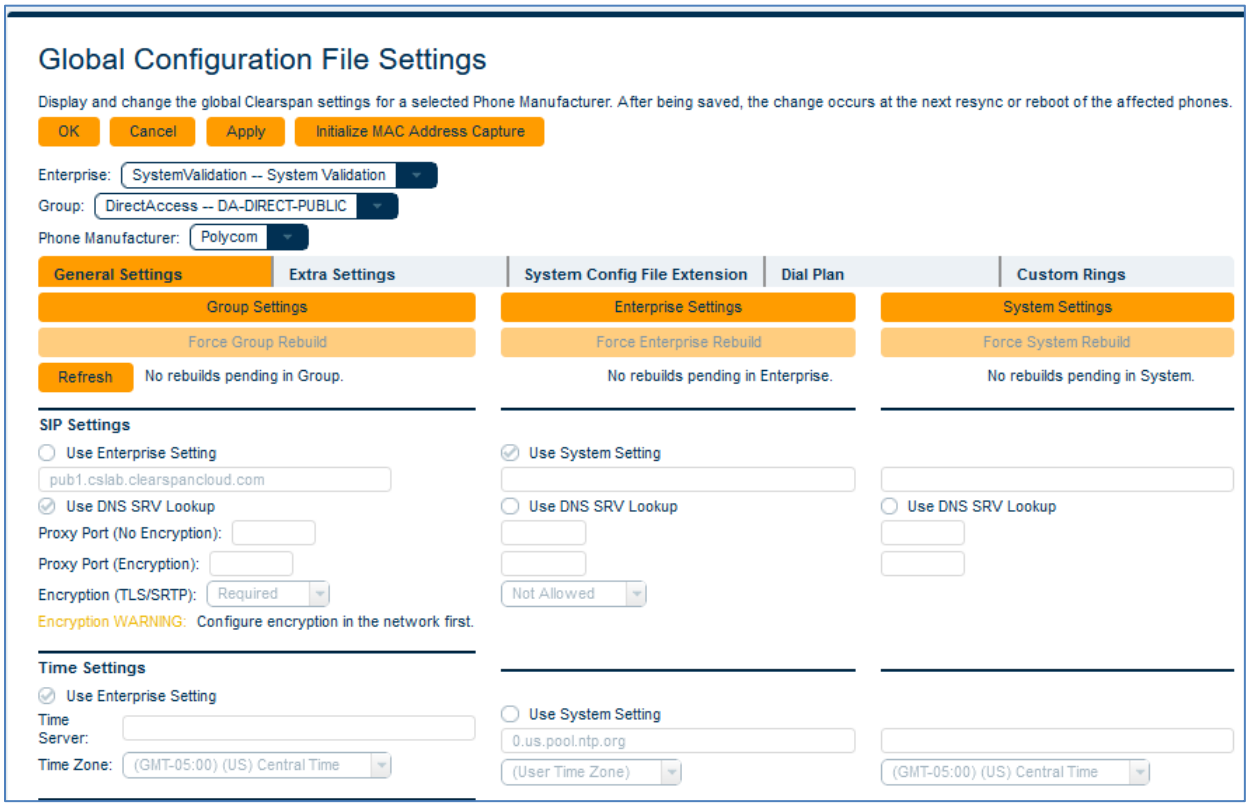


Figure 60 - Global Configuration File Settings - Polycom

Tab / Section	Field	Setting
SIP Settings		
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used bythe Polycom phones.
	Use DNS SRV Lookup	True or False
	Outbound Proxy Port (No Encryption)	Enter the target port of the outbound proxy (1 – 65535) when the phone is not configured for encrypted operation.

	Outbound Proxy Port (Encryption)	Enter the target port of the outbound proxy (1 – 65535) when the phone is configured for encrypted operation.
	Subscription Time	Enable/Disable or Use Enterprise Setting. Enter the Subscription refresh duration in seconds.
	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 in which the phones are physically installed.
Device Settings		
	Network Discovery	Select the CDP Enabled field if CDP is supported by the network. (This is the usual setting.)
	LAN Port Mode	Select the LAN speed, normally Auto. The other options include 10 MbpsHalf-Duplex, 10 Mbps Full-Duplex, 100 Mbps Half-Duplex, 100 Mbps Full-Duplex, 1000 Mbps Full-Duplex.
	Admin Password	Enter a password that is required to access the advanced settings withinthe phone.
	User Password/Reset User Password	Enter a password that is required to access the user settings within the phone. The Reset User Password field will be displayed if the User Password is already set.
Voice Codecs		
	Voice Codec #1 to #4	Identify the voice codecs that the Polycom phone is to use when placingor receiving calls. The codecs are in priority order, with Codec #1 as thehighest 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 to be sent by the phone.
	Collector Server Port	Enter the target port of the collector server. The default port number is 5060.
	Outbound Proxy	Enter the Quality Monitoring outbound proxy FQDN / IP Address. When configured, this parameter directs SIP messages related to voice quality monitoring to a separate proxy.
	Outbound Proxy Port	Enter the target port for 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.
VVX HELD Settings		
	LIS Server URL	Enter the URL of the LIS service for VVX phones
	LIS Public Cert	Paste or enter the public certificate used to access the LIS service here
	LIS Private Key	Paste or enter the private key used to access the LIS service here
General Settings		
	Conference Server	Select the conference server for centralized conference calls.
	Firmware Server	Text field that contains the URL of the firmware to be loaded.

System, Enterprise, and Group Extra Settings for Polycom Phones

To enter extra settings that are to be applied to all Polycom phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Group Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Enterprise Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

System, Enterprise, and Group System Configuration File Extension Settings for Polycom Phones

The Device Type for each Polycom phone model includes a **sys.cfg** file that contains system-wide configuration settings used in the configuration files for all Polycom phones of that phone model. These settings can be extended by choosing **Phone Template** from the **Provisioning** menu, selecting **Global Settings,** and selecting **Polycom** as the Phone Manufacturer, clicking on the **System Config File Extension** tab, and entering the additional settings on that tab. The additional settings must be in an XML format as are all Polycom configuration settings.

Note that the sys.cfg file and the settings on the System Config File Extension tab have lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings. However,

the System Config File Extension tab settings have higher-priority than the settings in the sys.cfg file being extended.

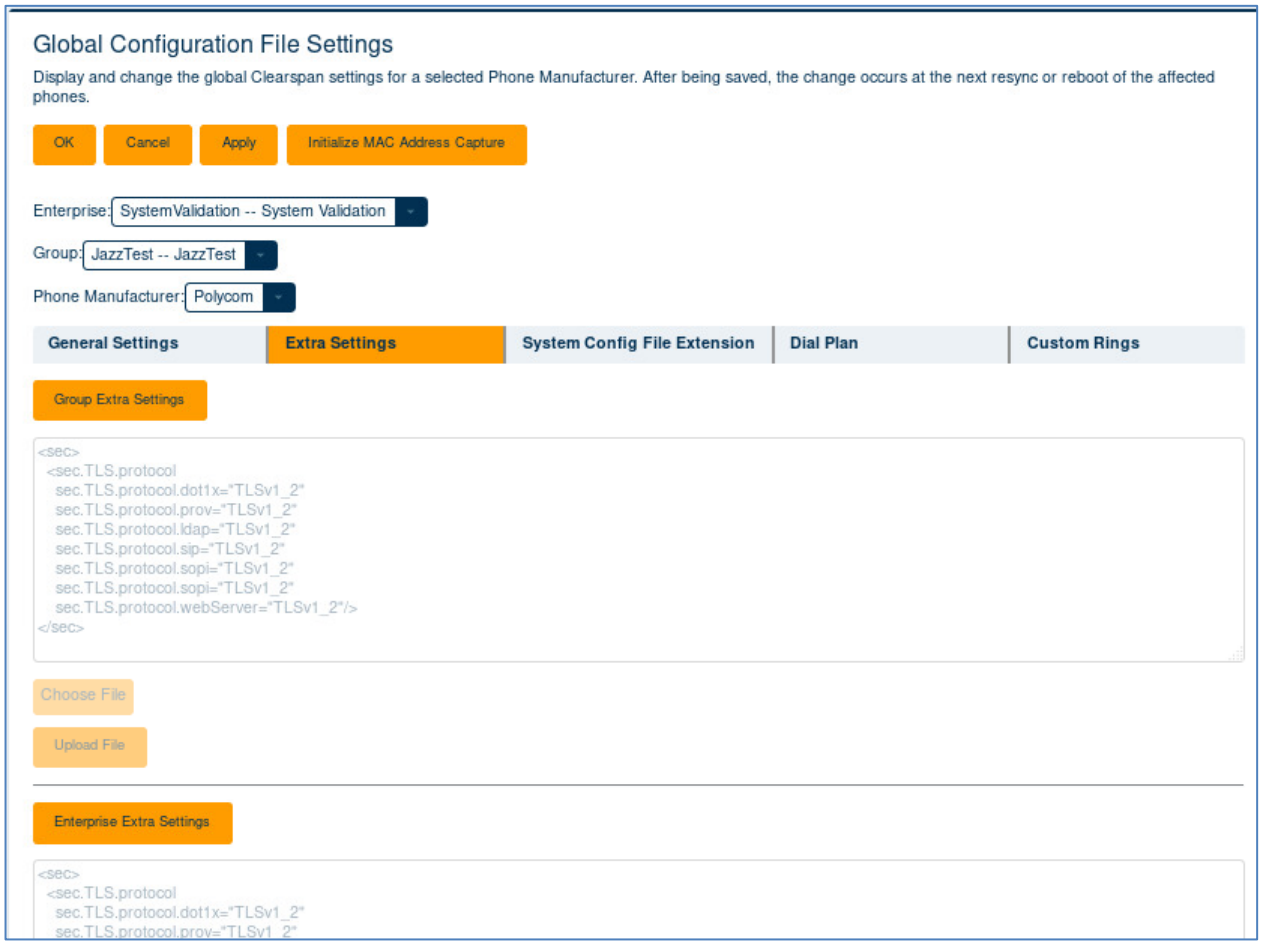


Figure 61 - Global Extra Settings for Polycom Phones

Only Super Users and System Administrators can access the **System Config File Extension** Settings.

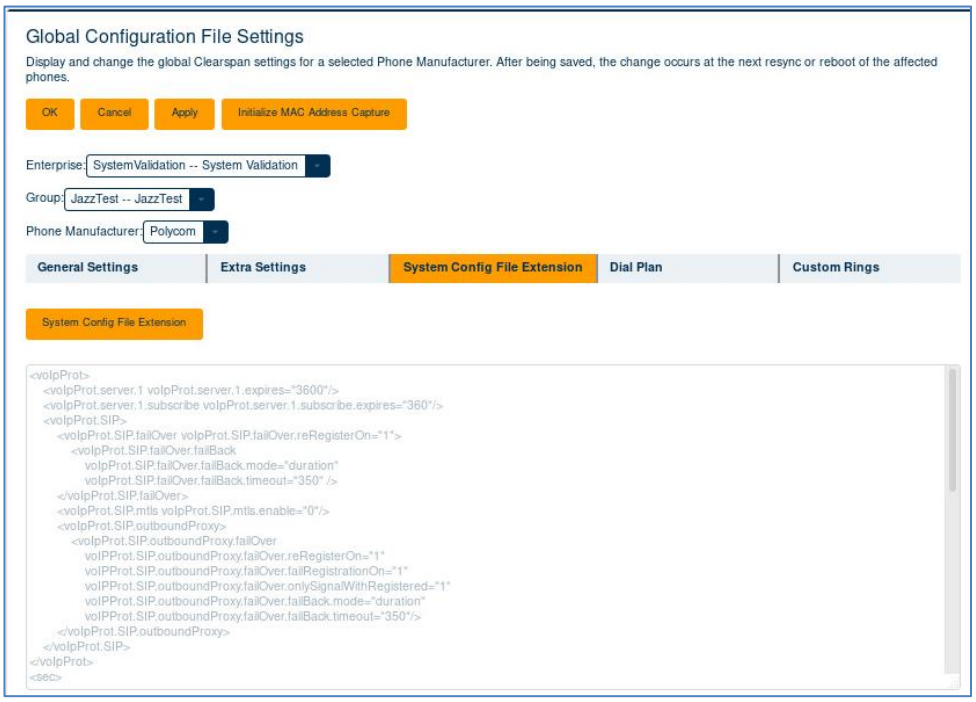


Figure 62 - System Config File Extension Settings for Polycom Phones

System and Enterprise Custom Rings for Polycom Phones

System-level custom rings are ONLY used for system-level Polycom phone templates that need to use a custom ring. Enterprise-level custom rings are used for both the enterprise-level and group-level Polycom phone templates.

To configure custom rings, choose Phone Templates from the Provisioning menu, and then select Global Settings. Choose Polycom as the Phone Manufacturer, and click the Custom Rings tab. The Polycom Custom Rings tab opens.

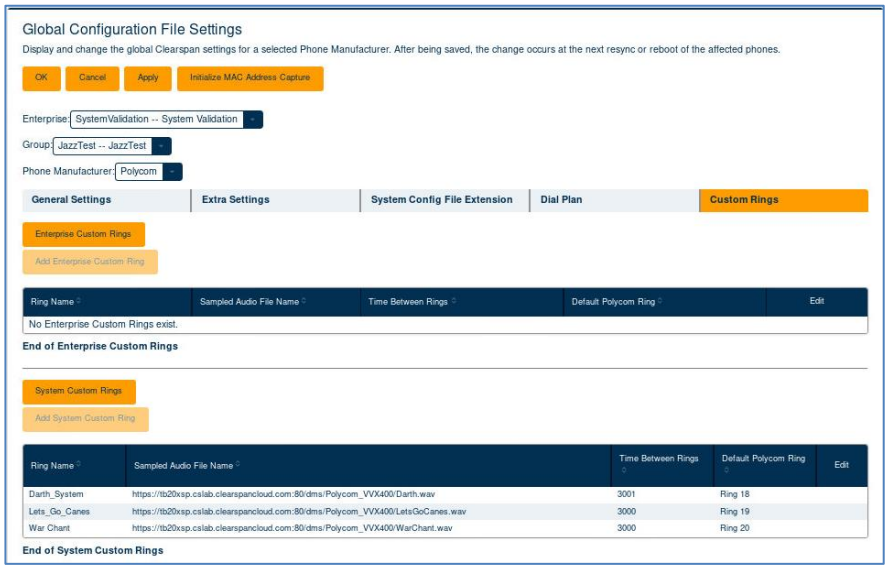


Figure 63 - Custom Rings for Polycom Phones

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 createa new custom ring.

Enter or change the following fields for the custom ring:

Field	Setting
Ring Name	Unique name to give the custom ring. This name is referenced to select the custom ring when creating the template.
Audio File Name	Complete URL of a wave file containing the audio to be played as the ring.
Time Between Rings	Enter the number of milliseconds to wait between the played audio rings. Example: 3000 for 3 seconds.
Default Polycom Ring	Optionally select a Polycom ring (Ring 15 to Ring 24) where this custom ring is to be defined. It is used when creating a new phone template for a Polycom phone. If a Default Polycom Ring is not selected, the custom ring can still be manually assigned to a Polycom ring in the phone template. Selecting the Polycom ring here simplifies the process of creating the phone template for commonly used custom rings.

Initialize MAC Address Capture for Polycom Phones

To configure MAC Address Capture tags, choose Phone Templates from the Provisioning menu, and then select Global Settings. Select Polycom as the Phone Manufacturer and click on Initialize MAC Address Capture. This is typically a one-time task used to add a MAC address tag to each Polycom device in the system. You must have System Administrator privileges to access this function.

Figure 64 - Initialize MAC Address

System, Enterprise, and Group Global Settings for Poly Edge-B Phones

To configure global settings for the Poly Edge B phone family, choose Phone Templates from the Provisioning menu, and then select Global Settings and select "**Poly Edge B**" as the Phone Manufacturer. The common global settings for Poly Edge B phones are shown on the General Settings tab and described in the following table.

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

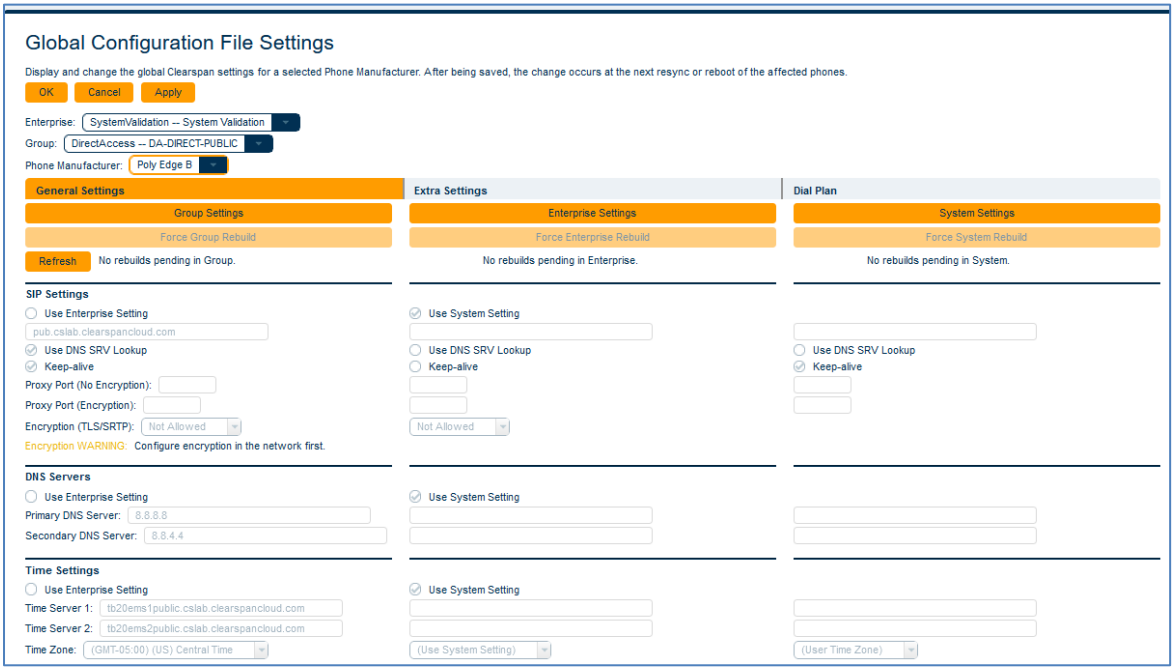


Figure 65 - Global Configuration File Settings – Poly Edge B

Tab/Section	Field	Setting
SIP Settings		
	Outbound Proxy	Enter the hostname or IP address of the outbound prox server used bythe phones
	Use DNS SRV Lookup	Check this box to direct the phones to submit an SRV type query when resolving the Outbound Proxy domain address
	Keep-alive	Check this box to enable 'keep-alive' signaling designed to maintain communication with the outbound proxy when the phone is behind a firewall.
	Proxy Port (No Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an unencrypted connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Proxy Port (Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an encrypted (TLS) connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Encryption (TLS/SRTP)	Select the setting for signaling and media encryption
	Subscription Time	Enter the subscription refresh duration in seconds.
DNS Servers		
	Primary DNS Server	Enter the IP address of the primary Domain Name Service server
	Secondary DNS Server	Enter the IP address of the secondary Domain Name Service server
Time Settings		
	Time Server1	Enter the IP address or FQDN of a Network Time Protocol (NTP) server to be used as a synchronization source.
	Time Server2	Enter the IP address or FQDN of a Network Time Protocol (NTP) server to be used as a synchronization source.
	Time Zone	Select the correct time zone for the phone's physical location.
Device Settings		
	Admin Password	Enter a password that is required to access the advanced settings withinthe phone.
	User Password	Enter a password that is required to access the user settings within thephone. The Reset User Password field will be displayed if the User Password is already set.
Voice Codecs		
	Voice Codec #1 to #4	Identify the voice codecs that the Polycom phone is to use when placingor 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	Select the desired mode for reporting RTCP-XR call quality metrics via SIP PUBLISH. **Off**: Do not send call quality report **Session**: Send a report at the end of each call. **Periodic**: Send a report every n millisecond as defined by the 'Periodic Monitor Period' and at the end of each call.
	Periodic Monitor Period	Enter the monitor period in milliseconds
HELD Settings		
	LIS Server URL	Enter the URL of the LIS service.
	LIS Public Cert URL	Enter the URL for the LIS service public certificate
General Settings		
	Conference Server	Select the conference server for centralized N-way conference calls.
	Config & Firmware Update	Select the methodology for configuration and firmware updates. Disabled - Do not update Periodically - Check for update at the provisioned frequency System Start - Check for update upon reboot Time of Day - Check for update at the provisioned time of day
	Firmware Version	Text field that contains the desired version of firmware. Upon restart the phone will attempt upgrade/downgrade to this version if different from the actively executing version
	Syslog Host	Enter the IP address of a target syslog server. The phone will send real time operational messages for troubleshooting purposes.

System, Enterprise, and Group Global Settings for Poly VVX D230 DECT Phones

To configure global settings for the D230, choose Phone Templates from the Provisioning menu,and then select Global Settings and select "**Polycom D230**" as the Phone Manufacturer. The common globalsettings for Poly VVX D230 phones are shown on the General Settings tab and described in the following table.

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

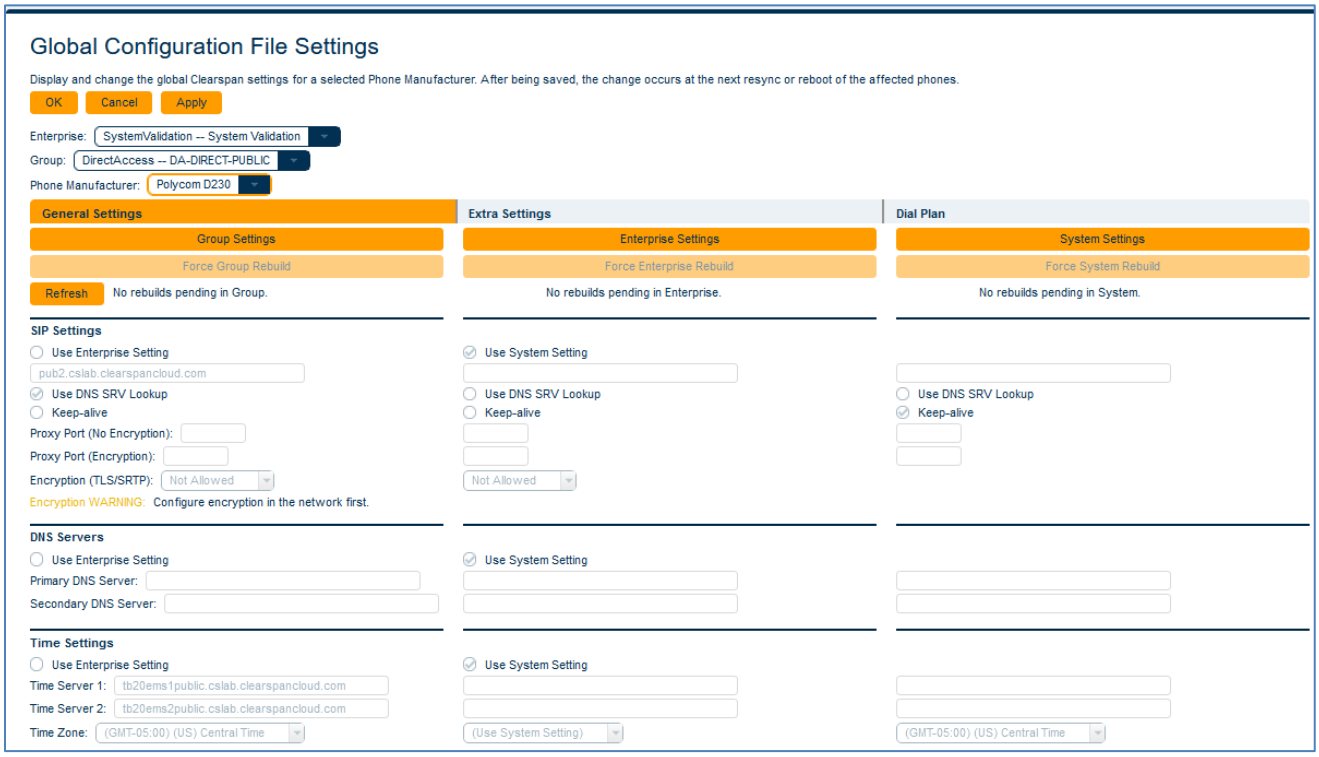


Figure 66 - VVX D230 Global Configuration File Settings

Tab/Section	Field	Setting
SIP Settings		
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used bythe Polycom phones
	Use DNS SRV Lookup	Check this box to direct the phones to submit an SRV type query when resolving the Outbound Proxy domain address
	Keep-alive	Check this box to enable 'keep-alive' signaling designed to maintain communication with the outbound proxy when the phone is behind a firewall.
	Proxy Port (No Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an unencrypted connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Proxy Port (Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an encrypted (TLS) connection. *This field is not applicable when the 'Use DNS SRV Lookup' box is checked.*
	Encryption (TLS/SRTP)	Select the setting for signaling and media encryption
DNS Servers		
	Primary DNS Server	Enter the IP address of the primary Domain Name Service server
	Secondary DNS Server	Enter the IP address of the secondary Domain Name Service server.
Time Settings		
	Time Server1	Enter the IP address or FQDN of a Network Time Protocol (NTP) server to be used as a synchronization source.
	Time Server2	Enter the IP address or FQDN of a Network Time Protocol (NTP) server to be used as a synchronization source.
	Time Zone	Select the correct time zone for the phone's physical location.
Device Settings		
	Admin Password	Enter a password that is required to access the advanced settings withinthe phone.
	User Password	Enter a password that is required to access the user settings within thephone. The Reset User Password field will be displayed if the User Password is already set.
Voice Codecs		
	Voice Codec #1 to #4	Identify the voice codecs that the Polycom phone is to use when placingor 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	Select the desired mode for reporting RTCP-XR call quality metrics via SIP PUBLISH. **Off**: Do not send call quality report **Session**: Send a report at the end of each call. **Periodic**: Send a report every n millisecond as defined by the 'Periodic Monitor Period' and at the end of each call.
	Periodic Monitor Period	Enter the monitor period in milliseconds
General Settings		
	Conference Server	Select the conference server for centralized N-way conference calls.
	Firmware Version	Text field that contains the desired version of firmware. Upon restart the phone will attempt upgrade/downgrade to this version if different from the actively executing version

System, Enterprise, and Group Extra Settings for Poly VVX D230

System, Enterprise and Group Extra Settings for the Poly VVX D230 phones are not shared with the other Polycom phone types but follow the same rules of precedence: Group overrides Enterprise, Enterprise overrides System. See System, Enterprise, and Group Extra Settings for Polycom Phones for additional detail.

Dial Plans

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

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

AudioCodes

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Select Media5 from the **Phone Manufacturer.** The available manufacturers depend on the device types configured for the Enterprise.
5. Click the **Dial Plan** tab. The Dial Plan page is displayed.
6. Click the **Group Dial Plan, Enterprise Dial Plan** or the **System Dial Plan** to modify the dial plans.

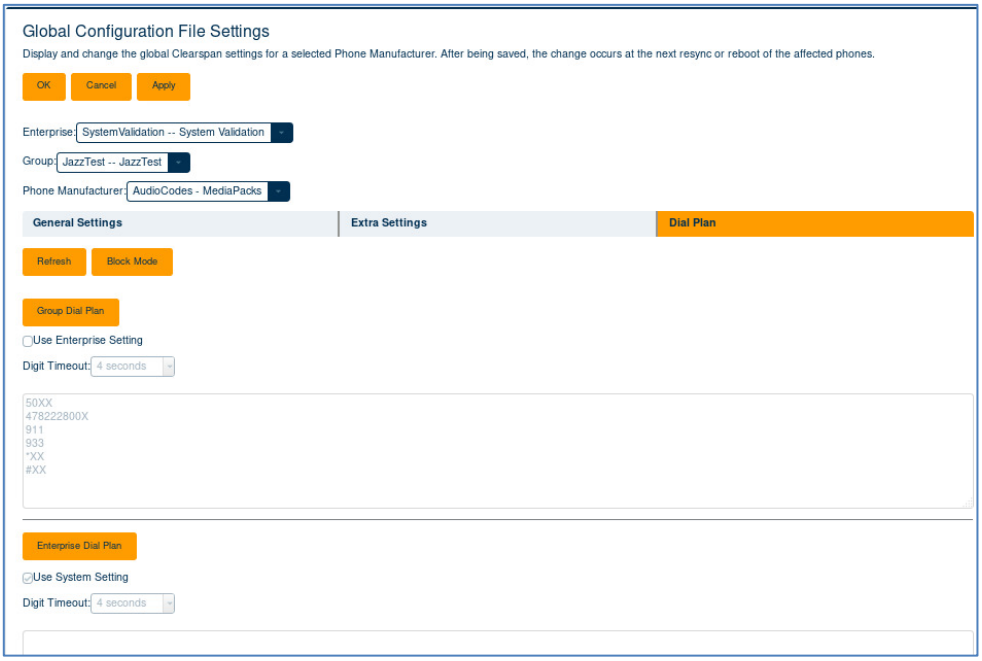


Figure 67 - Global Configuration File Settings: Dial Plans Tab for AudioCodes

- Use the **Clear** button to delete a dial plan.
- Use the **Copy** and **Paste** buttons to copy an existing dial plan to another field.
- Use the **Line Mode** and **Block Mode** buttons to toggle between the two format views.
- Enter or change the **Digit Timeout** values as required. The Digit Timeout is the time that

the phone waits between key presses before timing out and returning to the idle state.

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

7. Dial Plan changes might also require changes to the configuration settings in the EMS-based *Call Logs* and *Directory* applications. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

AudioCodes MP-5XX/M500Li/M800C

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Select AudioCodes – MP-5XX / M500Li / M800C from the **Phone Manufacturer** drop down list. The available manufacturers depend on thedevice types configured for the Enterprise.
5. Click the **Dial Plan** tab. The Dial Plan page is displayed.

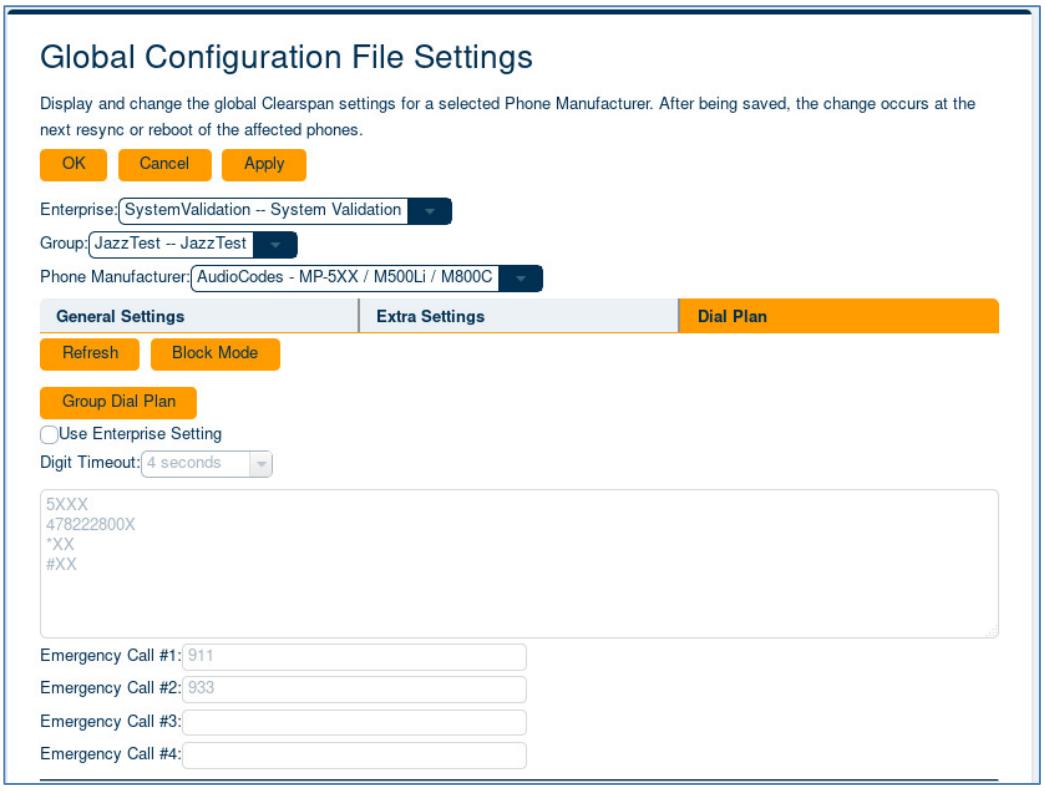


Figure 68 - Global Configuration File Settings: Dial Plans Tab for AudioCodes M500L

6. Click the **Group Dial Plan, Enterprise Dial Plan** or the **System Dial Plan** to modify the dial plans.
   - Use the **Clear** button to delete a dial plan.

- Use the **Copy** and **Paste** buttons to copy an existing dial plan to another field.
- Use the **Line Mode** and **Block Mode** buttons to toggle between the two format views.
- Enter or change the **Digit Timeout** values as required. The Digit Timeout is the time that the phone waits between key presses before timing out and returning to the idle state.
- Enter or change the following Emergency Call fields as required to set the emergency dial patterns.
  - Emergency Call #1
  - Emergency Call #2
  - Emergency Call #3
  - Emergency Call #4

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

7. Dial Plan changes might also require changes to the configuration settings in the EMS-based *Call Logs* and *Directory* applications. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

Grandstream Phones

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

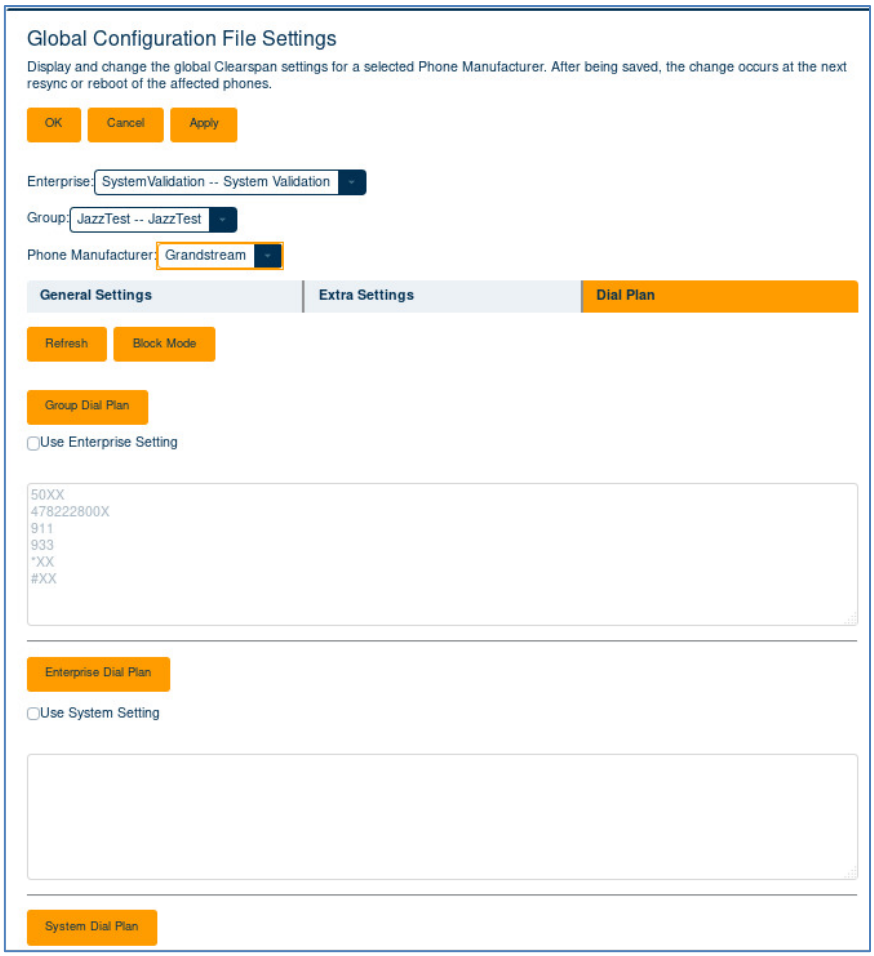


Figure 69 - Global Configuration File Settings: Dial Plans Tab for Grandstream

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

Media5

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

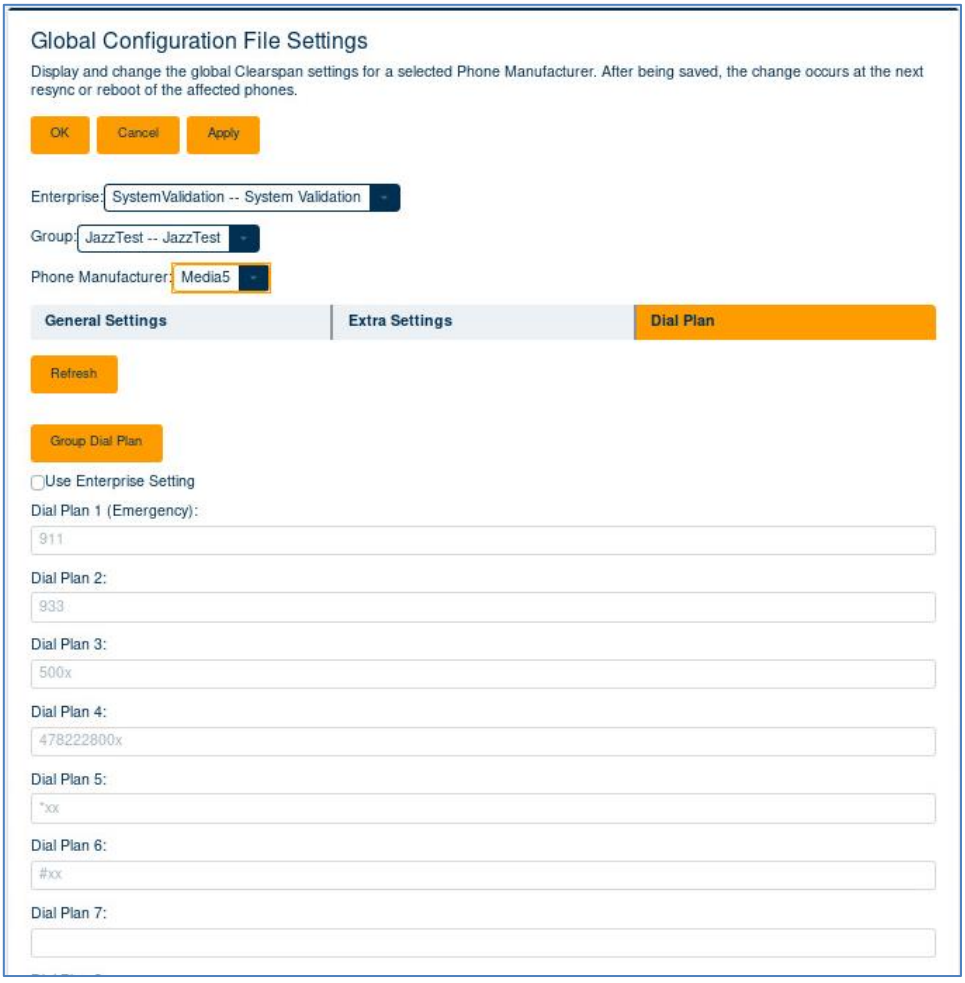


Figure 70 - Global Configuration File Settings: Dial Plans Tab for Media5

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

Mitel Phones

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

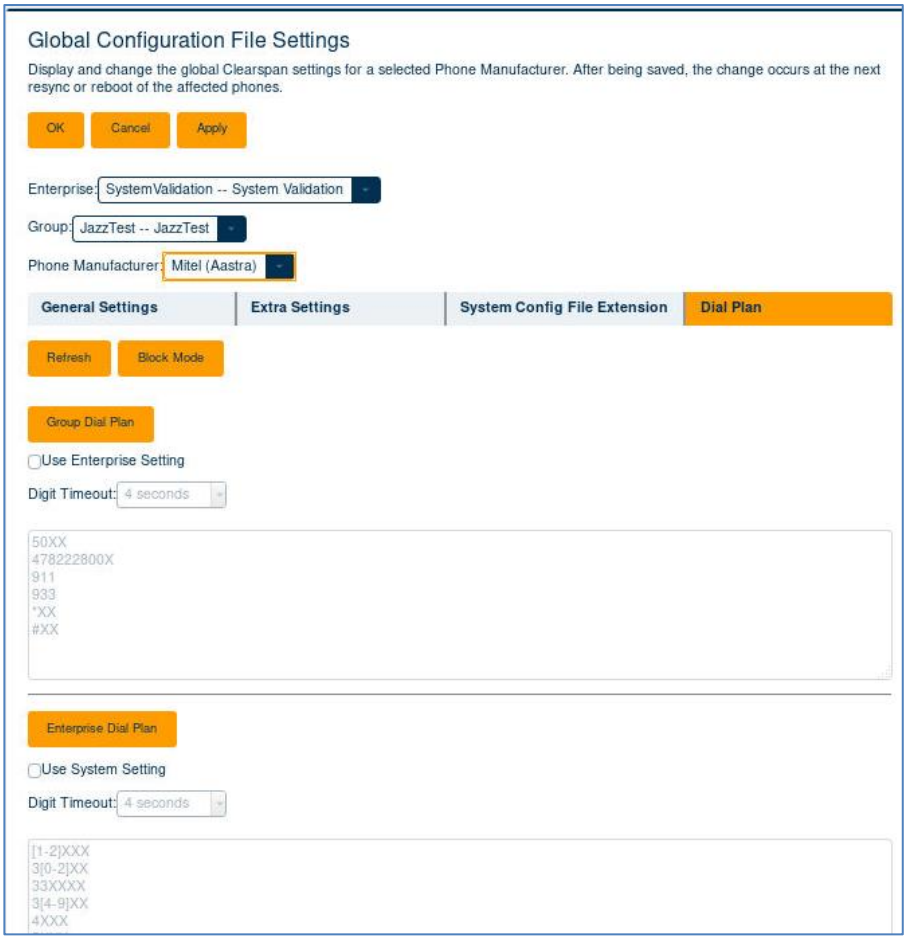


Figure 71 - Global Configuration File Settings: Dial Plans Tab for Mitel Phones

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

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

7. Dial Plan changes might also require changes to the require changes to the configuration settings in the EMS-based *Call Logs* and *Directory* applications. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

Mitel MiVoice

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

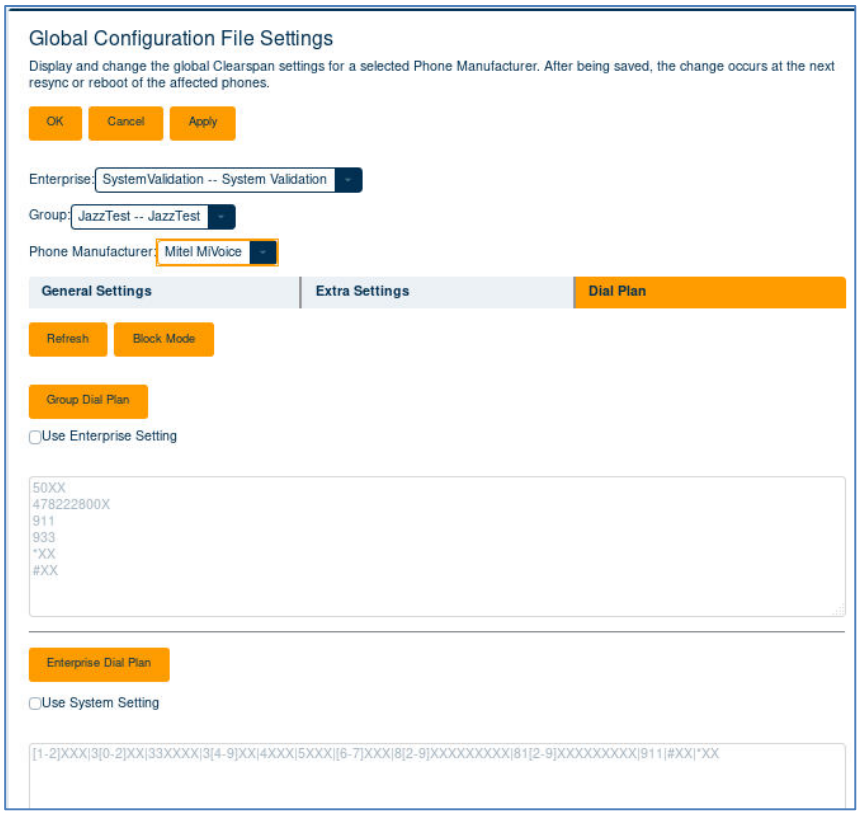


Figure 72 - Global Configuration File Settings: Dial Plans Tab for Mitel MiVoice

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

   If values are entered in multiple fields, Enterprise settings take precedence over System settings,

Group settings take precedence over System and Enterprise settings, and phone template Extra Settings take precedence over all others.

7. Dial Plan changes might also require changes to the require changes to the configuration settings in the EMS-based *Call Logs* and *Directory* applications. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

Poly/Polycom

Click the Dial Plan tab on the Global Configuration File Settings page to enter dial plan information for System, Enterprise, or Group levels, or click **Use Enterprise Setting** to use enterprise settings, or click **Use System Setting** to use system settings. The dial plan information entered must be in Polycom format and can include any Polycom-specific setting.

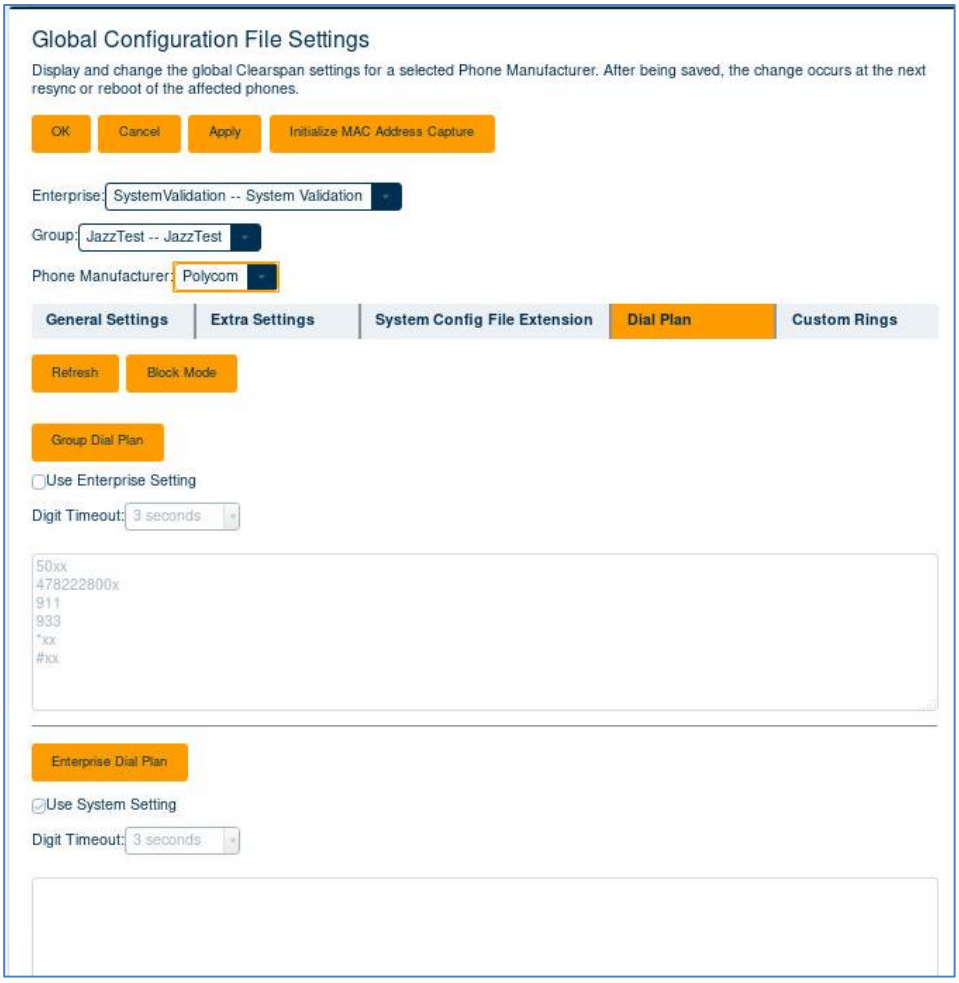


Figure 73 - Global Configuration File Settings: Dial Plans Tab for Polycom

Server Addresses

Viewing EMS Addresses

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

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
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 opens. The current EMS servers are displayed in the list.

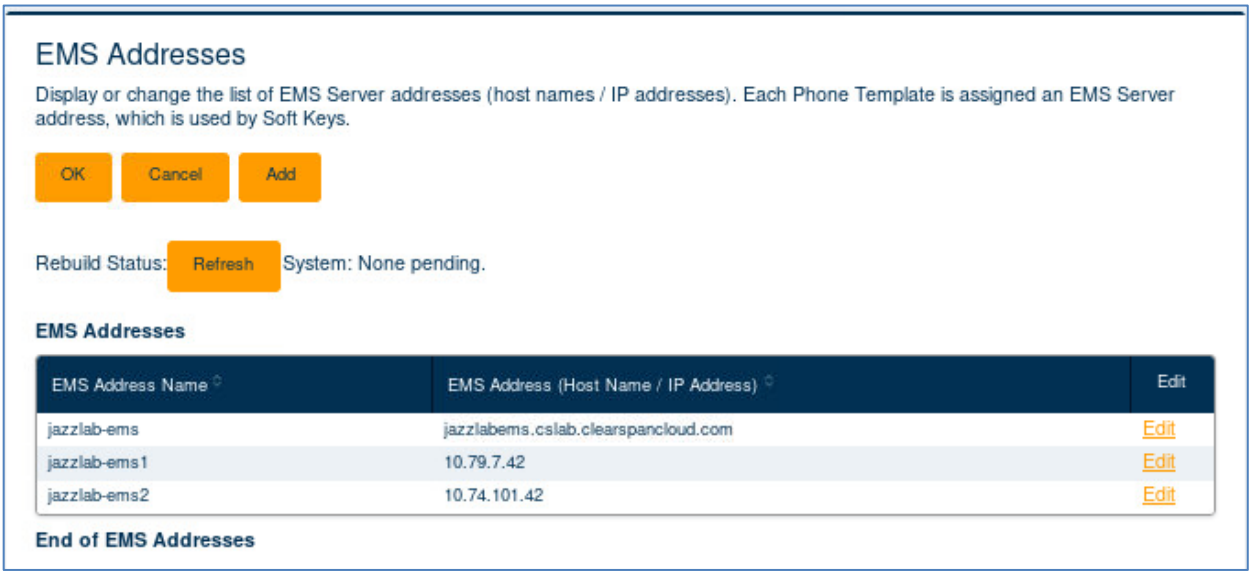


Figure 74 - Phone Templates Page - EMS Addresses

3. Click **OK.**

Viewing Conference Server Addresses

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

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
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 opens. The current Conference Servers are displayed in the list.
3. Click **OK**.

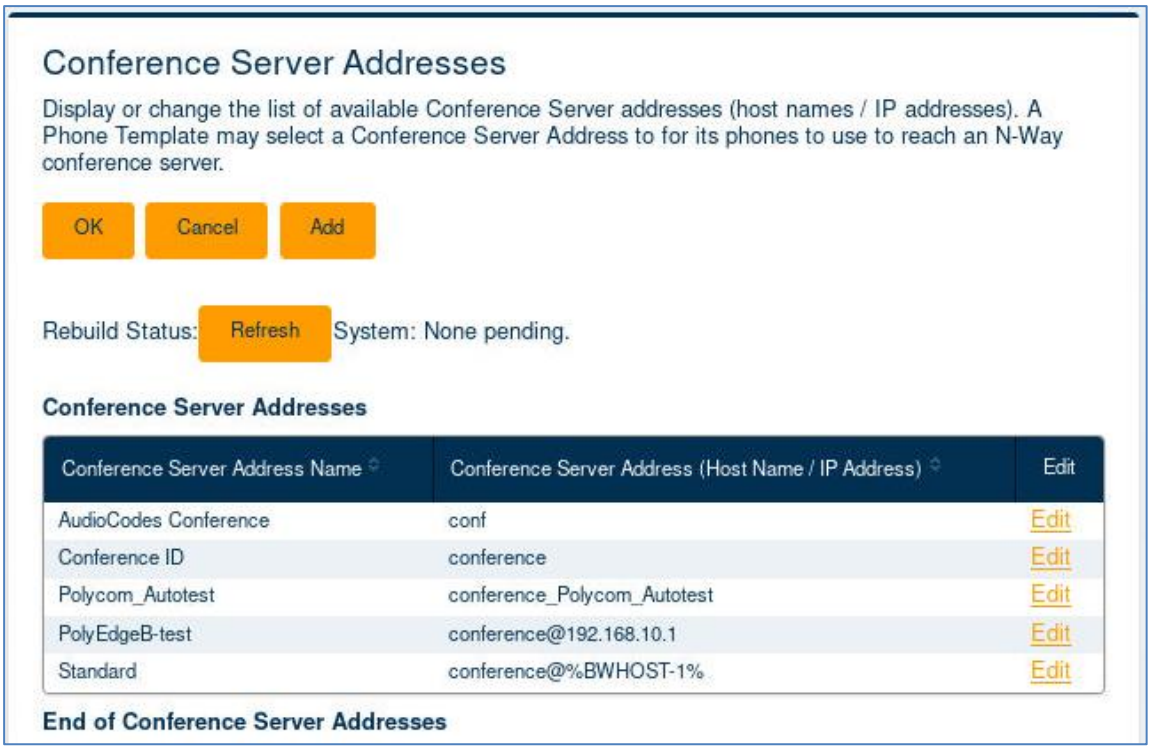


Figure 75 - Phone Templates Page – Conference Server Addresses

Phone Management

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

Viewing Phone Device Templates

To view existing Phone Templates:

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

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

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

Notes:

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

Phone Management: Phone Template

View the details of the phone template that is assigned to a phone device.

OK

Enterprise: SystemValidation -- System Validation

Group: JazzTest -- JazzTest

Phone Device Type: Mitel 6930 (DMS)

Template Name: Jazz-Mitel6930-W

Template Level: Group

Description:

Telephone Line	Phone Number	Line Label	Ring
No lines are defined.			

Top Soft Keys	Function	Options
TSK1	1st Phone Number	Label: Extension, Ring: Default
TSK2	1st Phone Number	Label: Extension, Ring: Default
TSK3	Call Park	
TSK4	Park Rtrv	
TSK5	Voice Mail	
TSK6	Call Fwd	

Top Soft Keys	Function	Options
TSK7	DND	
TSK8		
TSK9		
TSK10		
TSK11		
TSK12		

Figure 76 - Phone Template Details

Changing the Phone Template on a Device

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

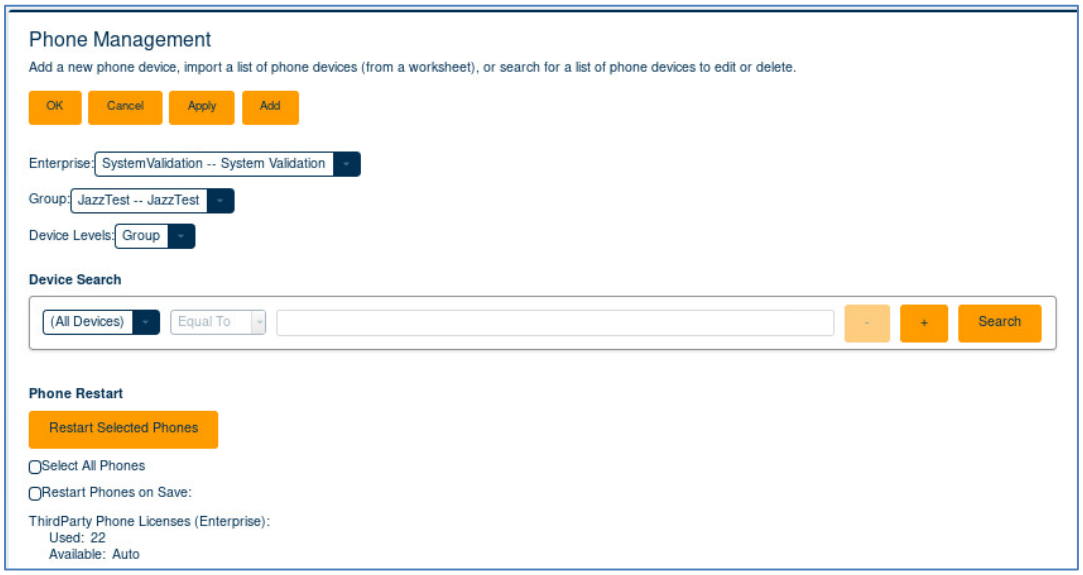


Figure 77 - Phone Management Page

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

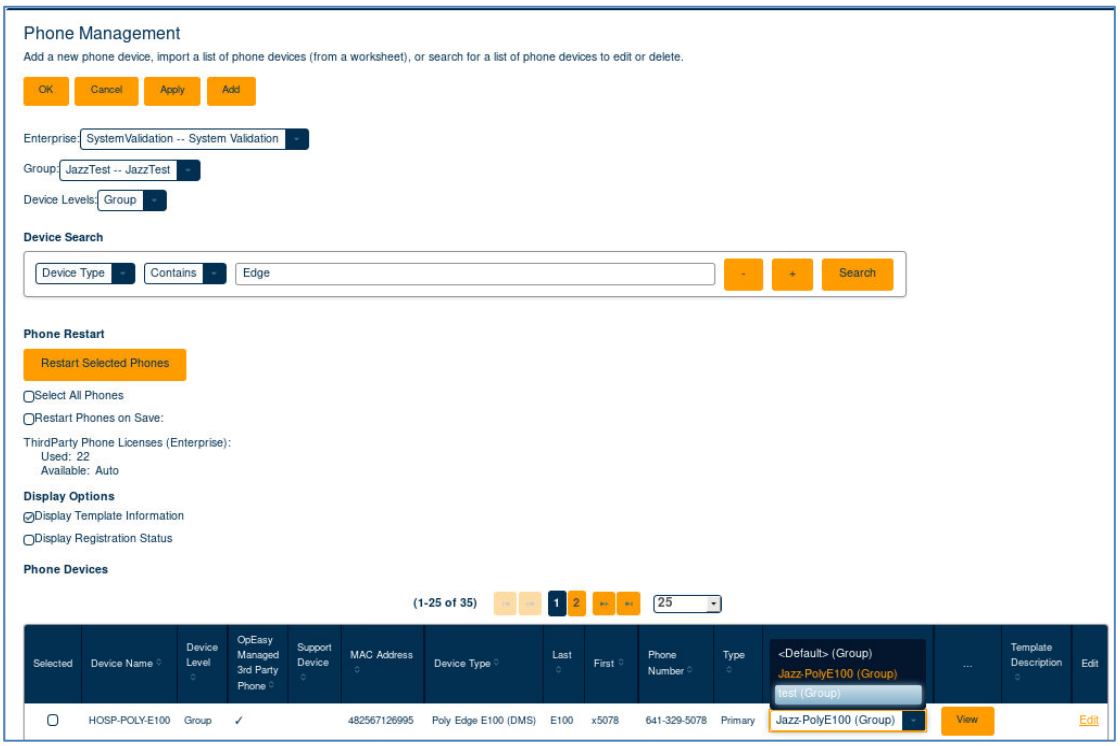


Figure 78 - Changing Template for a Phone Device

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

Phone Devices Table:

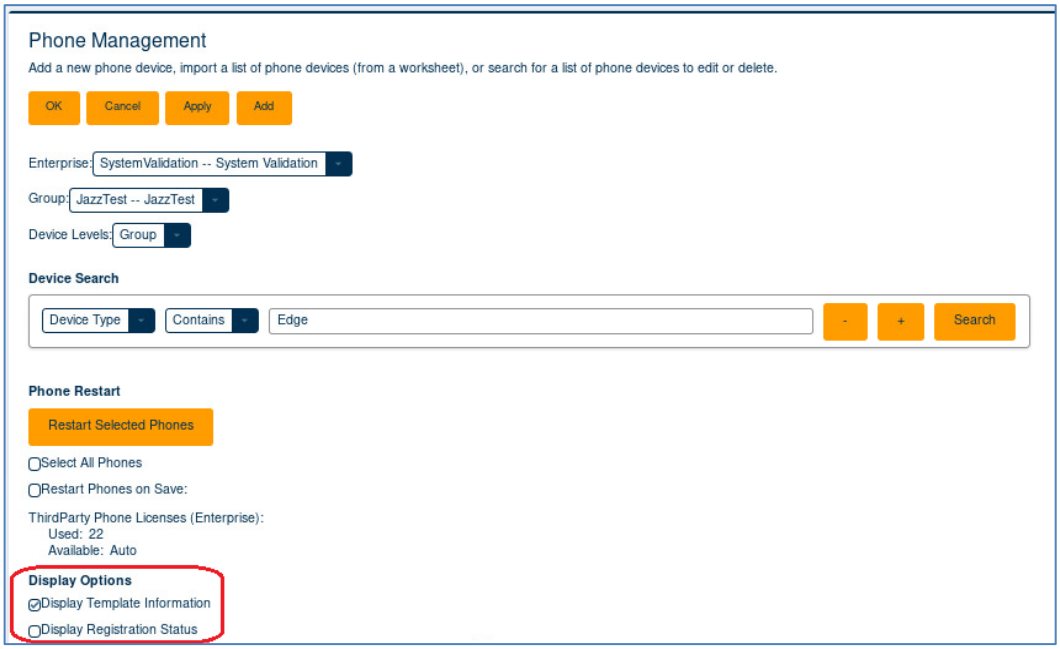


Figure 79 - Display Selection

The Phone Devices Table in the Phone Management page by default displays Phone Information,

Assigned User and Phone Number. The Template Name and Description are also listed.

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

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

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

Restarting Phone Devices

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

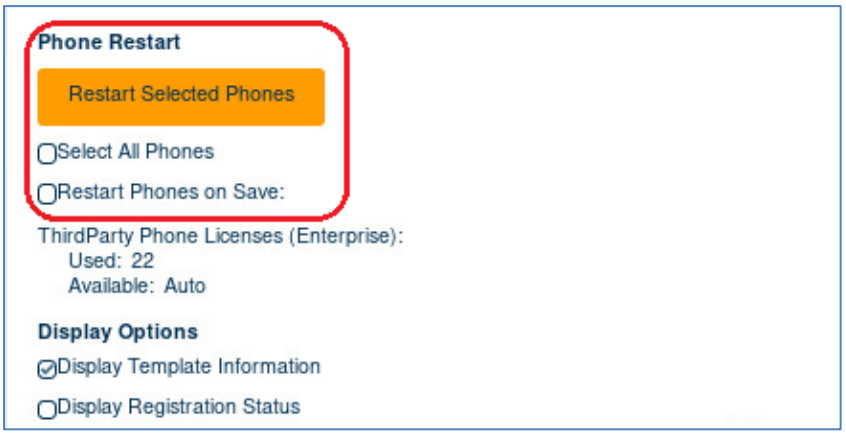


Figure 80 - Phone Restart and Display Selection Sections

Adding a Phone Device

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

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

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

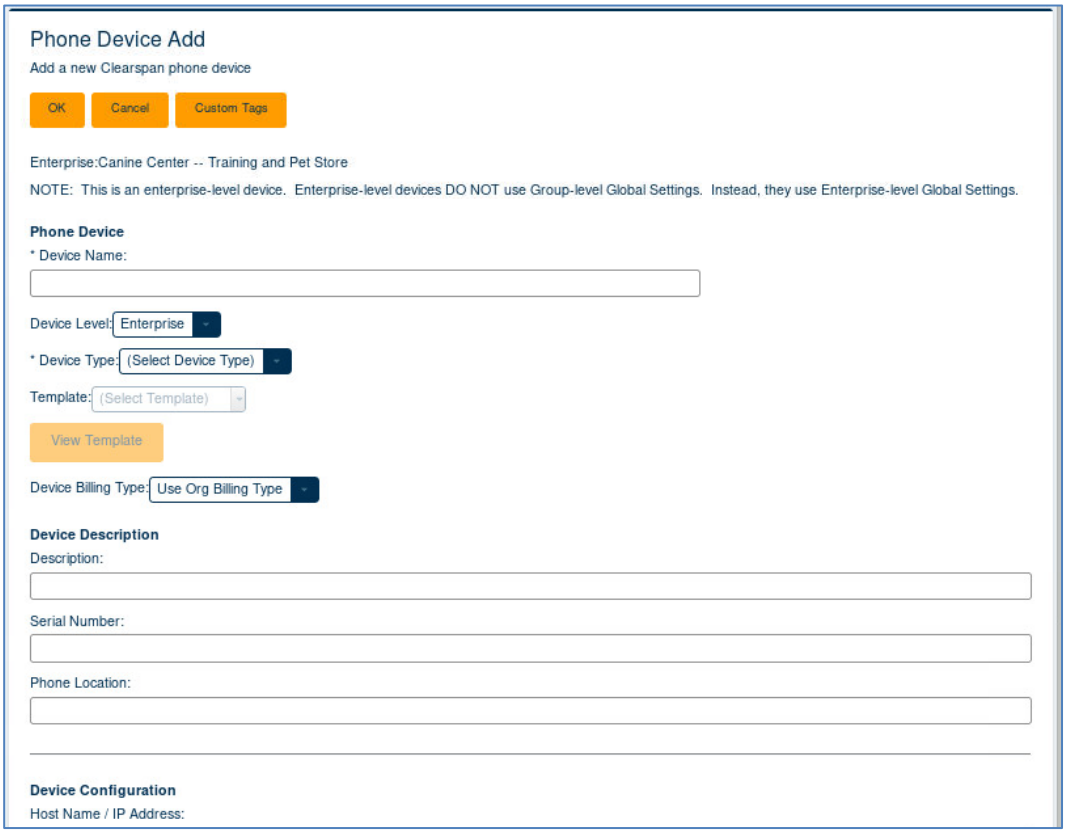


Figure 81 - Phone Device Add Page

3. Enter the **Device Name**.
4. Select the **Device Level** and **Device Type** from the drop-down lists.
5. Select the **Template** from the drop-down list. To view the template you selected, use the **View Template** button. Do not set Mitel, Polycom, Panasonic or Cisco phone templates to <None>. If an OpEasy template has not been created for those phone devices, set the value to <Default>.
6. In the Device Description section, enter a **Description** and **Serial Number** of the phone, both optional.
7. Enter the physical **Phone Location**. Valid characters are a-z, A-Z, 0-9, and any of the following special characters: !.%*_+-`'~

8. The Device Configuration section includes the following:
   - Host Name/IP Address
   - Outbound Proxy
   - Stun Server
   - MAC Address

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

9. The **Transport Protocol** is "Unspecified" by default.
10. Enter the **ERL Record Name**.

    If an Emergency Routing Service (ERS) is assigned to the selected enterprise, then a drop-down list is used to select an Emergency Response Location for the phone device.

    If greater than 250 Emergency Response Locations have been provisioned for the Enterprise, the drop-down list is replaced with a search input selector.

11. Enter the **VLAN ID**.

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

12. The Encryption (TLS/SRTP) field displays the encryption status of the device, "None" appears in the field for devices that do not support encryption.
    Encryption Override can be used to override Encryption, Encryption Disabled or Encryption Disabled (Timed) or to turn the Override Off, Select None.

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

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

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

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

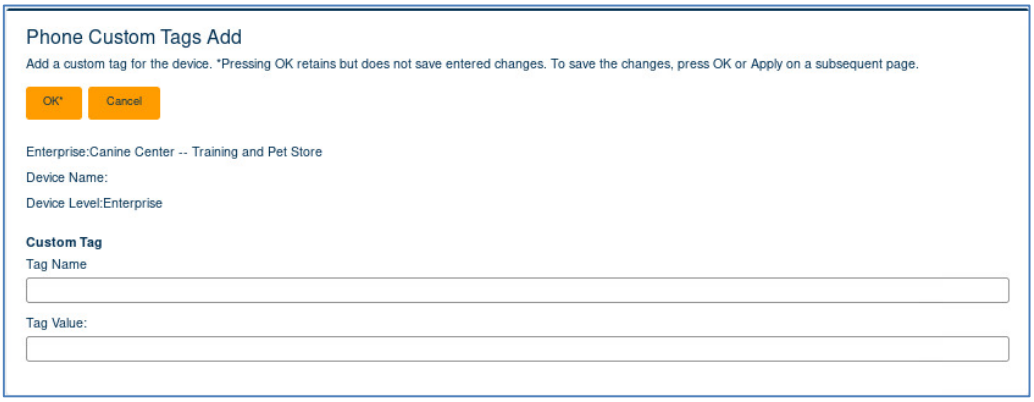


Figure 82 - Phone Custom Tags Add Page

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

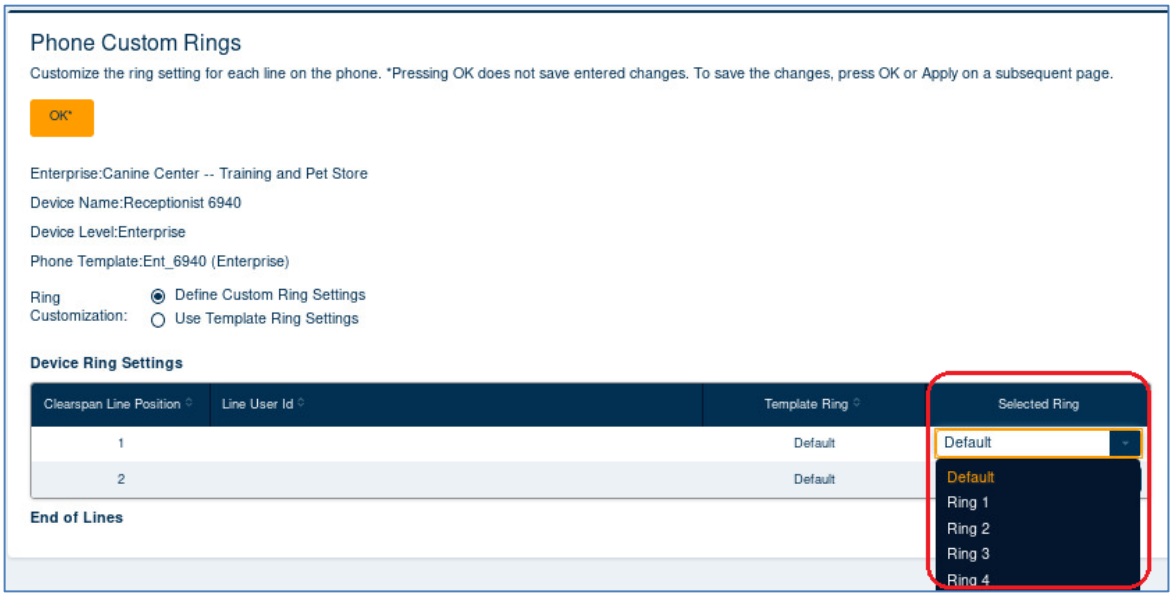


Figure 83 - Phone Custom Rings Page

17. Click **OK***.

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

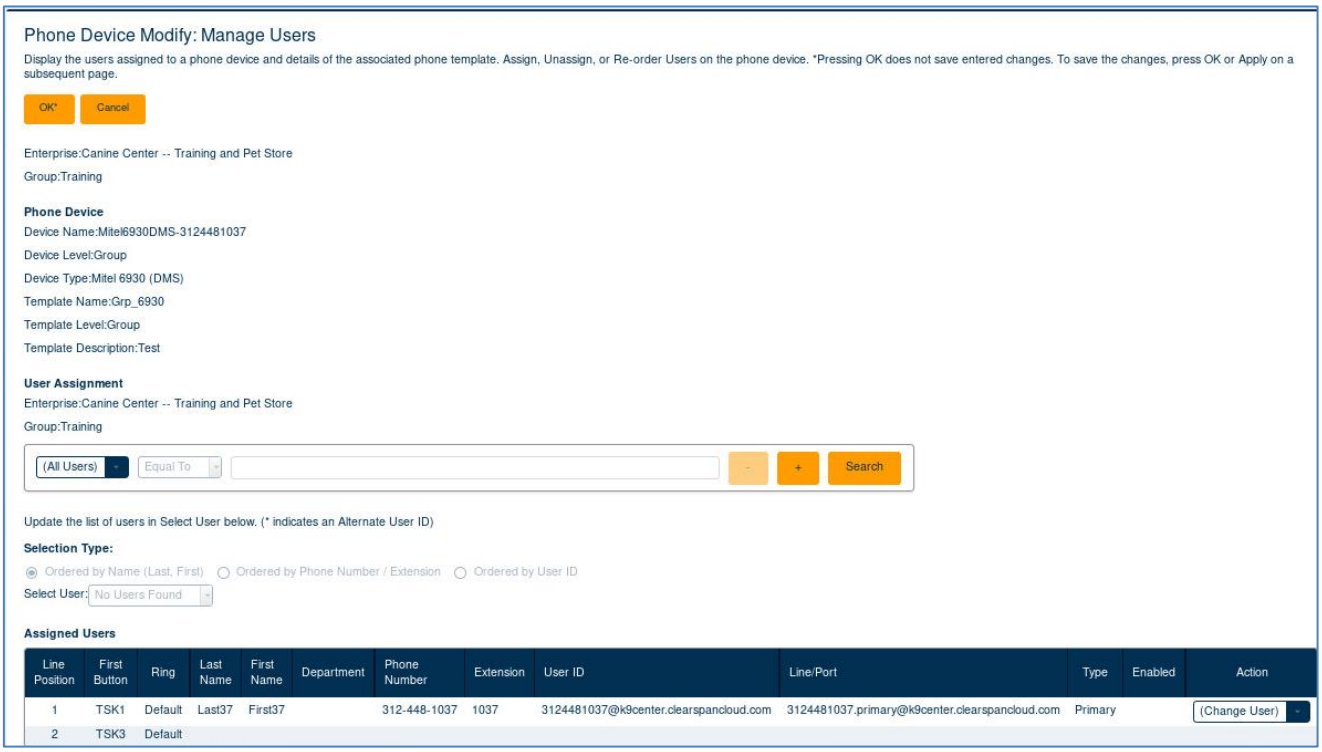


Figure 84 - Phone Management: Manage Users

19. Click **OK***.

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

Modifying a Phone Device

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

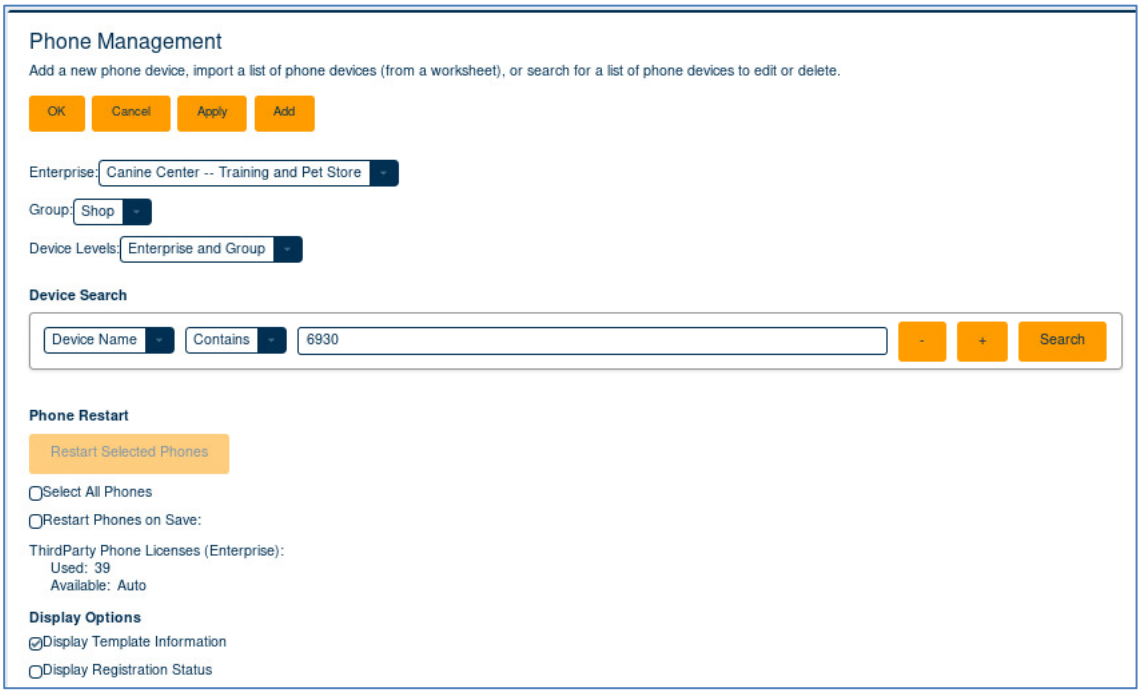


Figure 85 - Phone Device Search Example

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

Note:
- Group-level devices use Group-level Global Settings.
- Enterprise-level devices use Enterprise-level Global Settings.

6. Click the **Edit** link in the row or click anywhere in the row of the phone device you want to edit. The **Phone Device Modify** page appears.
7. Click **OK** to confirm the changes made.
8. Click **OK** or **Apply**.

Deleting a Phone Device

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

1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is displayed.
2. Select the **Enterprise** and **Group** from the drop-down lists, if necessary.
3. Select the Device Levels.
4. Click **Search** to view all the Devices or enter Search parameters to filter the Search.
5. Select a device without a User assigned and click the **Edit** link in the row or click anywhere in the row of the phone device you want to delete. The **Phone Device Modify** page is displayed with a Delete button.

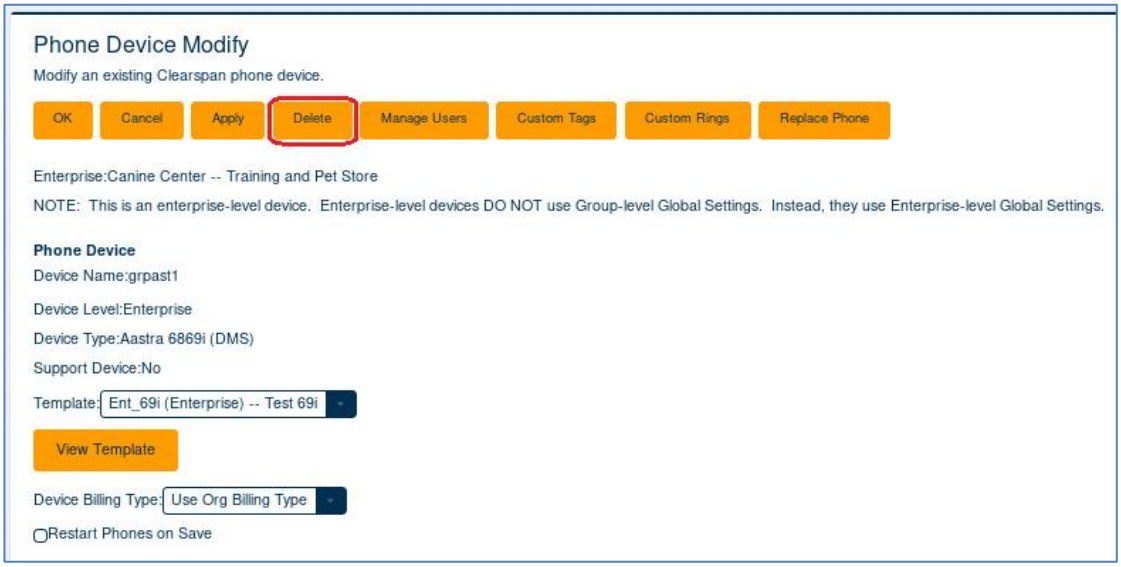


Figure 86 - Deleting a Phone Device

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

Replacing a Phone Device

1. From the main menu, select **Provisioning** and then select **Phone Management.** The Phone Management page is displayed.
2. Select the **Enterprise** and **Group** from the drop-down lists, if necessary.
3. Select the Device Levels.
4. Click **Search** to view all the Devices or enter Search parameters to filter the Search.
5. Click the **Edit** link in the row or click anywhere in the row of the phone device you want to edit or delete. The **Phone Device Modify** page appears.

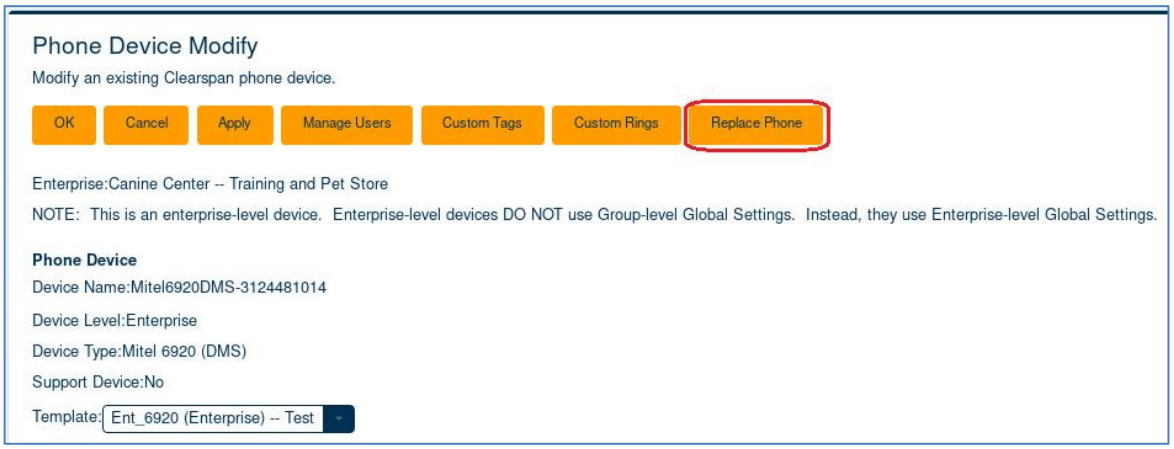


Figure 87 - Replace Phone

6. Click **Replace Phone** to replace an existing phone with a new phone with the same model and functionality. The Replace Phone button takes you to the Replace Phone page.
7. Enter the MAC Address of the device or enter the Auto Install ID of the device.
8. For Polycom Phones, enter the Device Access User Name, Password and Confirm Password.
9. Click **OK***
10. Click **OK** or **Apply** to save the changes.

Assigning, Removing, or Reordering Users on a Phone Device

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

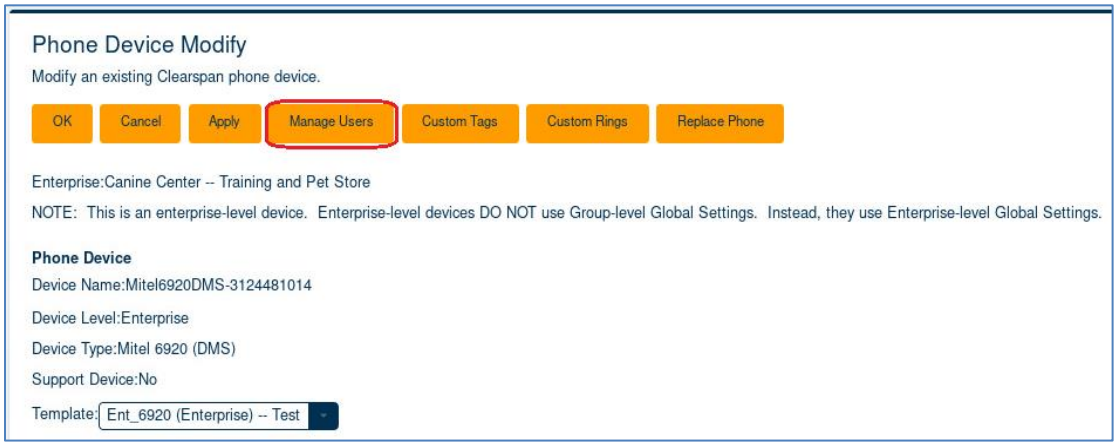


Figure 88 - Phone Device Modify: Manage Users Button

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

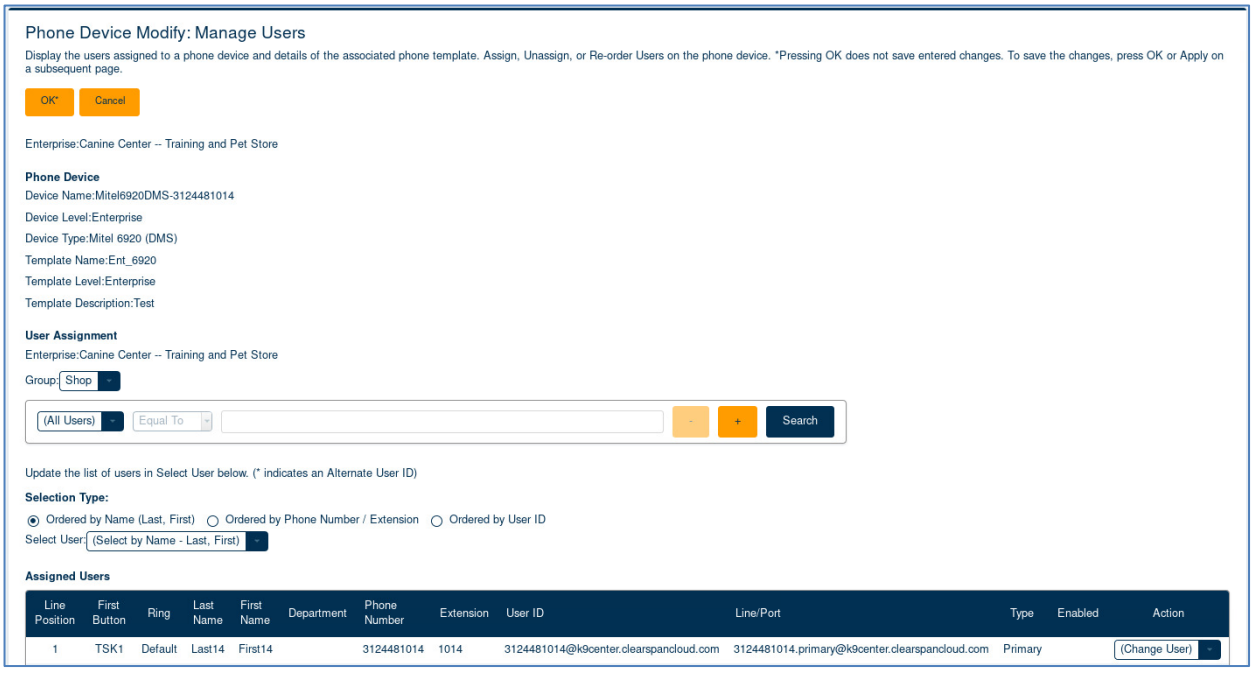


Figure 89 - Phone Device Modify: Manage Users Page

Assigning New Users to a Phone Device

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

1. On the Manage Users page, Click **Search for Users** to view all the Available Users or enter Search parameters to filter the list of users in the drop-down.
2. Select the desired user from the **Select User** drop-down menu. You can choose to list users **Ordered by Name**, **Ordered by Phone Number/Extension**, or **Ordered by User ID**.

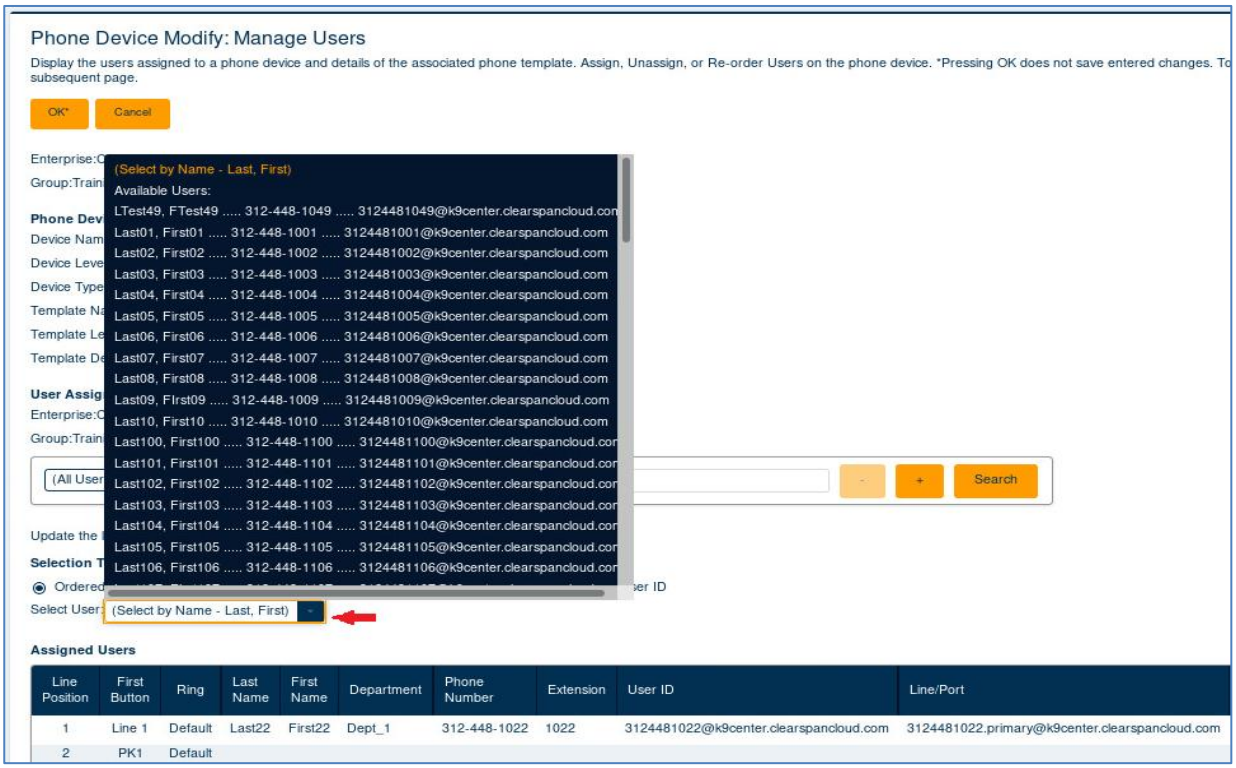


Figure 90 - Manage Users: Select User

3. Configure the settings for the assignment:
   - Select SCA Device from the Endpoint Type drop-down list. If the Endpoint Type selectionis grayed out, then it cannot be changed.
   - The Line/Port is filled.
     Note: the line/port domain will be pre-selected for MS Teams devices using the Clearspan Native Teams Int Device Type
   - Enable or Disable the Shared Call Appearance, the SCA are enabled by default.
   - Select Allow Calls to Originated and Allow Calls to this Destination check boxes, both are checked by default.
   - Click the Show SCA Options button to change any of the following options for this SCA:
     - Alert All Shared Appearances for Click-to-Dial calls
     - Allow Call Retrieve from another location
     - Allow Multiple Concurrent Calls on the same shared line
     - Allow Bridging of Users on the same shared line
     - Bridge Warning Tone for Barge-in

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

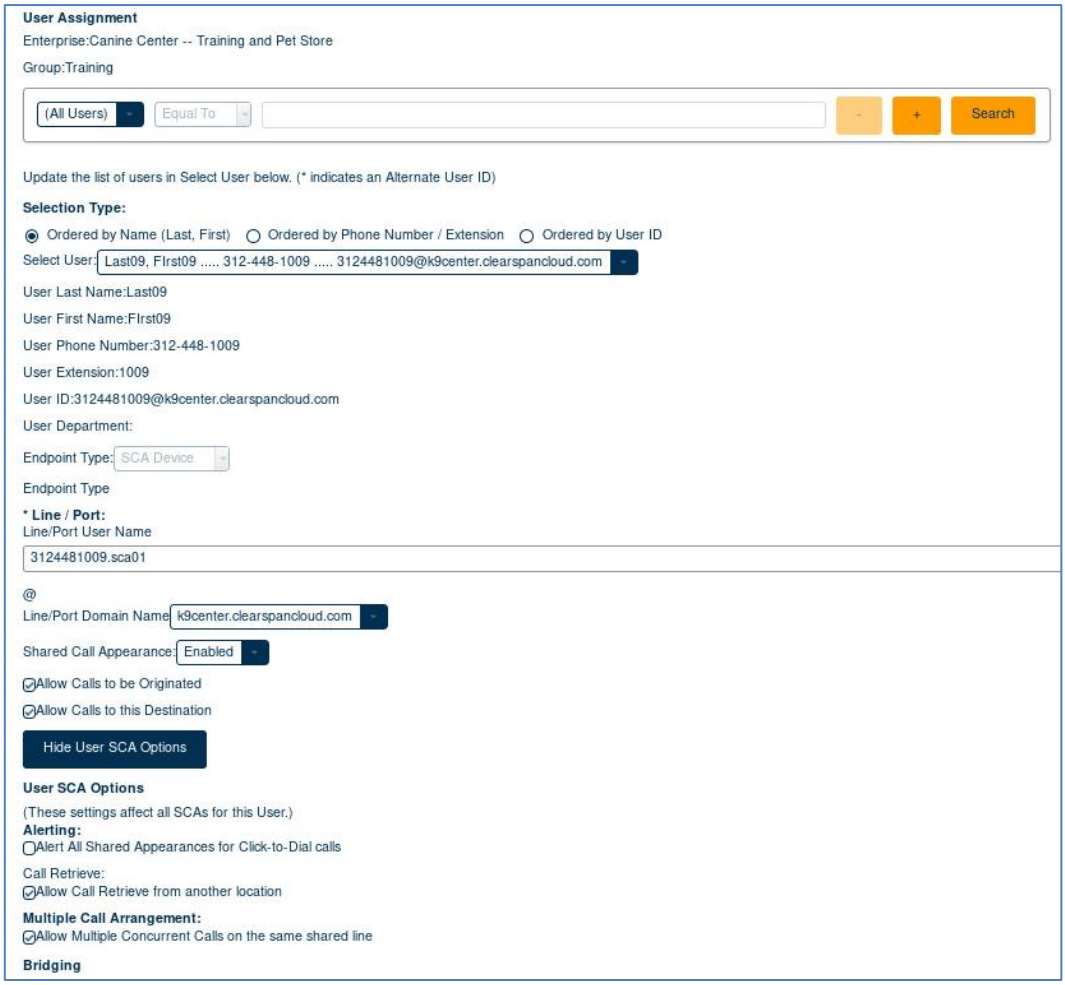


Figure 91 - Manage Users: New User Assignment

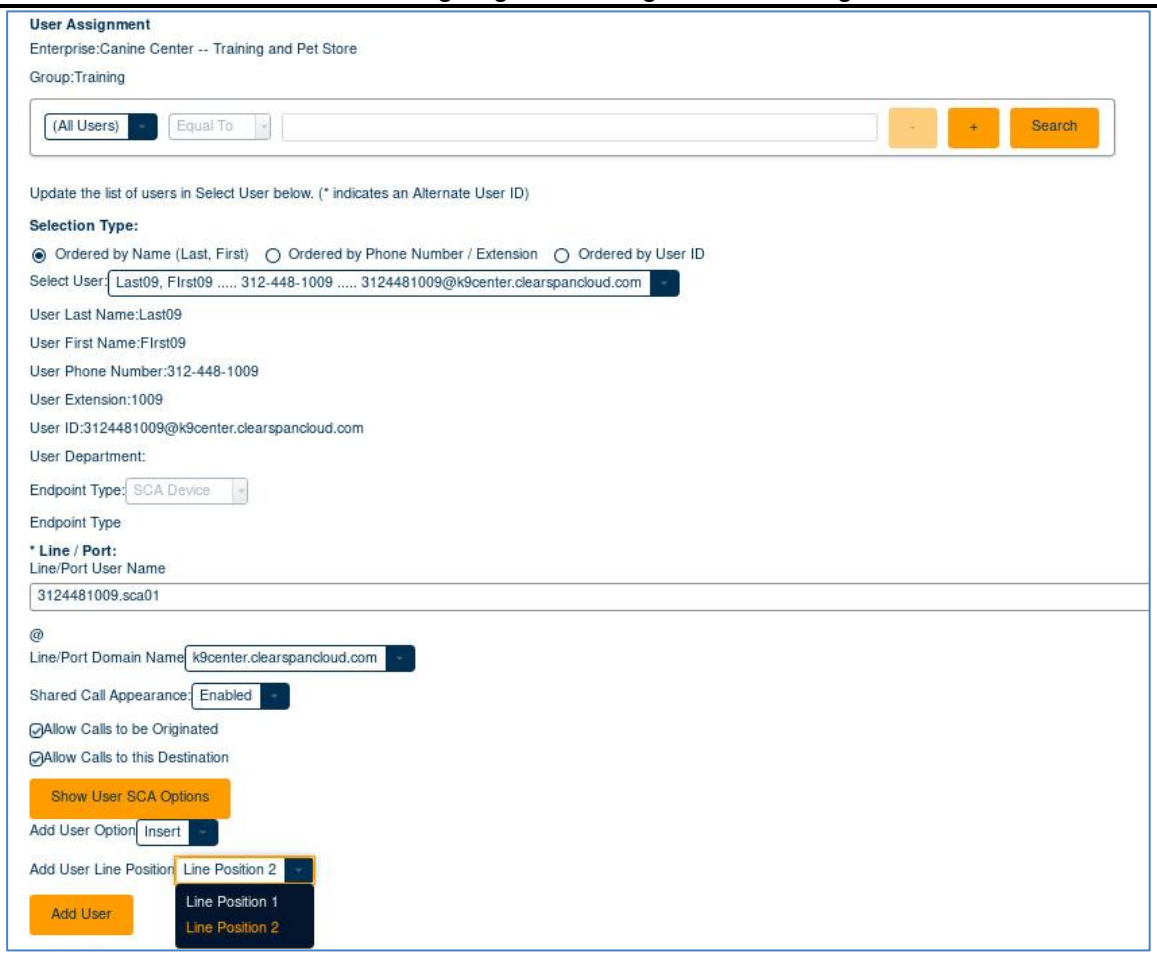


Figure 92 - Manage Users: Line Position

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

- **For Primary Device**:

  - Select Primary Device from the Endpoint Type drop-down list. If the Endpoint Type selection is grayed out, then it cannot be changed.
  - The Line/Port is filled.
    Note: the line/port domain will be pre-selected for MS devices using the Clearspan Native Teams Int Device Type
  - Choose to Insert the user or replace another user with this one.
  - Choose the Line Position for the new user.
  - Click Add User. The Assigned Users table is updated, and the display shows the assignments.

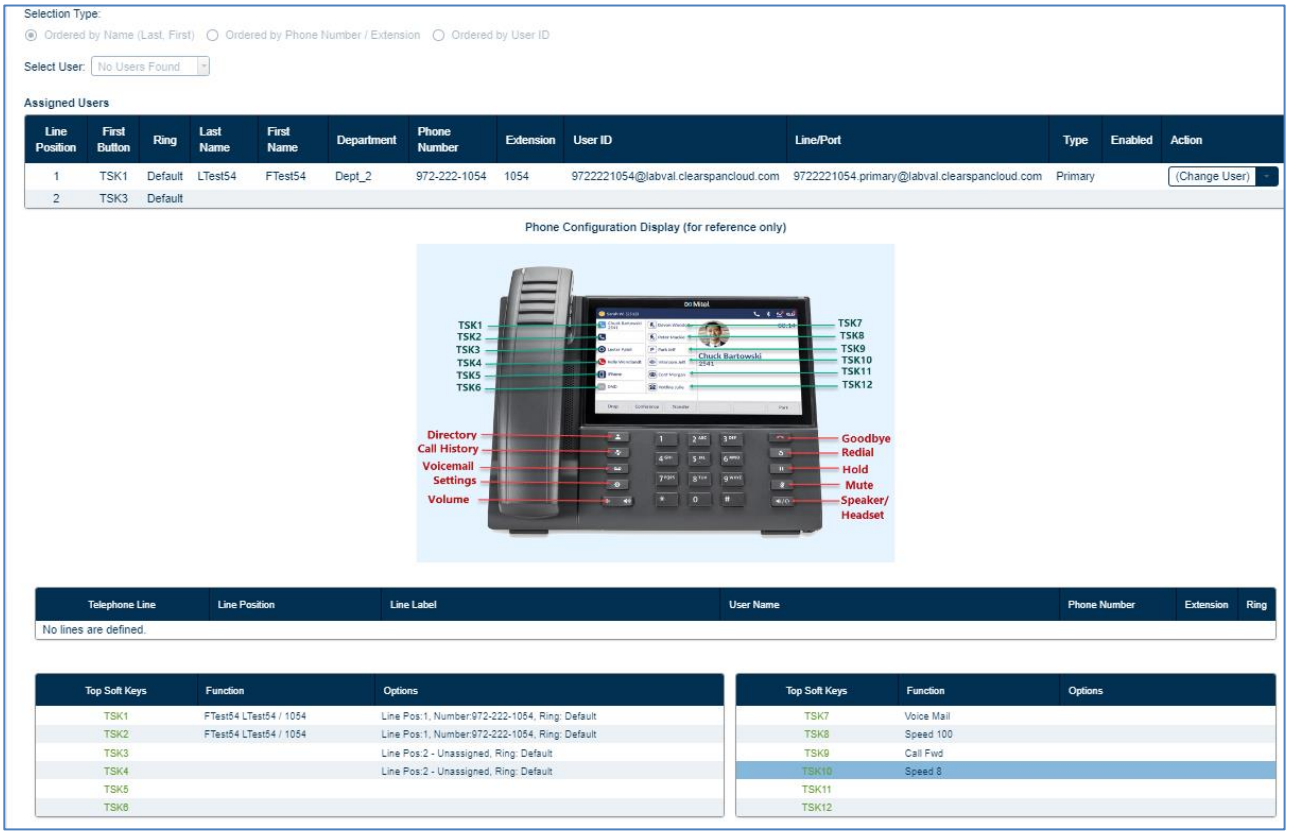


Figure 93 - Manage Users: Assigned User

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

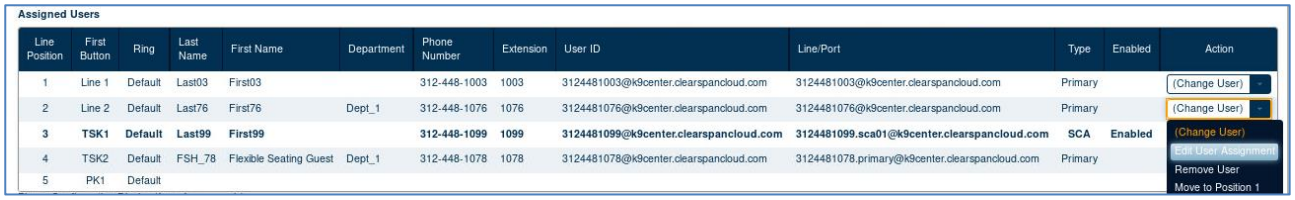


Figure 94 - Assigned User - Edit User Assignment

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

Figure 95 - Assigned User - Save Edit

6. Click **OK***. Click **OK** again.

Removing or Reordering Users on a Phone Device

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

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

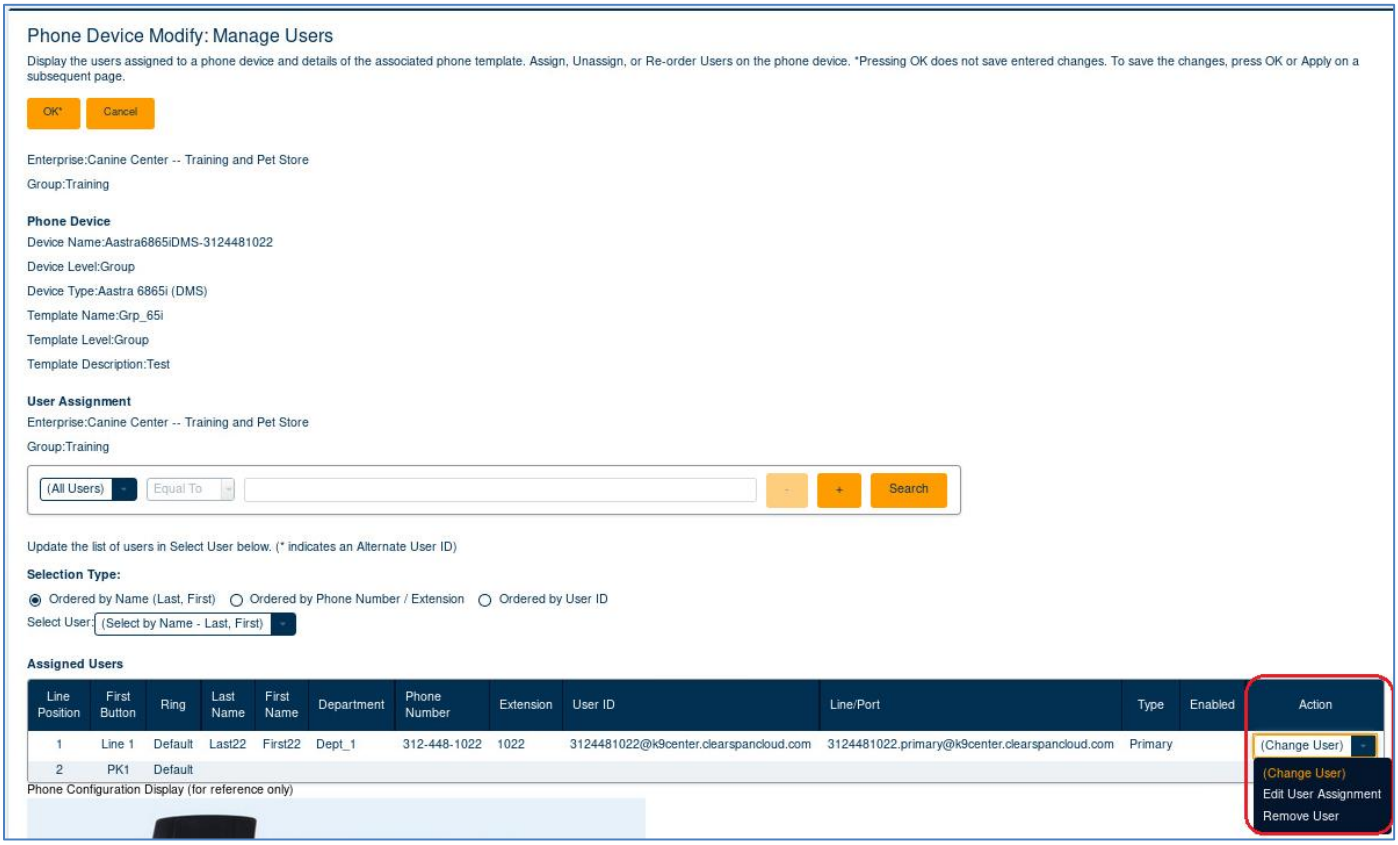


Figure 96 - Manage Users

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

User Profiles

The User Profile is a set of rules applied at the time of user creation. For example, a user profile could define the type of phone or phones that a set of users share in common along with Service Packs and Voicemail settings. Having this set of rules can greatly simplify the user creation process when many new users are being added because it allows certain user fields to be derived based on the rules. UserProfiles should be created before adding Users. User Profiles can be exported and imported using Group Import and Group Export.

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** and then Click **User Profiles** or click **User Profiles** from the Provisioning page menu. The User Profile page opens.
2. Select the **Enterprise** and **Group** from the drop-down lists.
3. Click **Add**. The **User Profile Add** page opens, as shown in the following example.

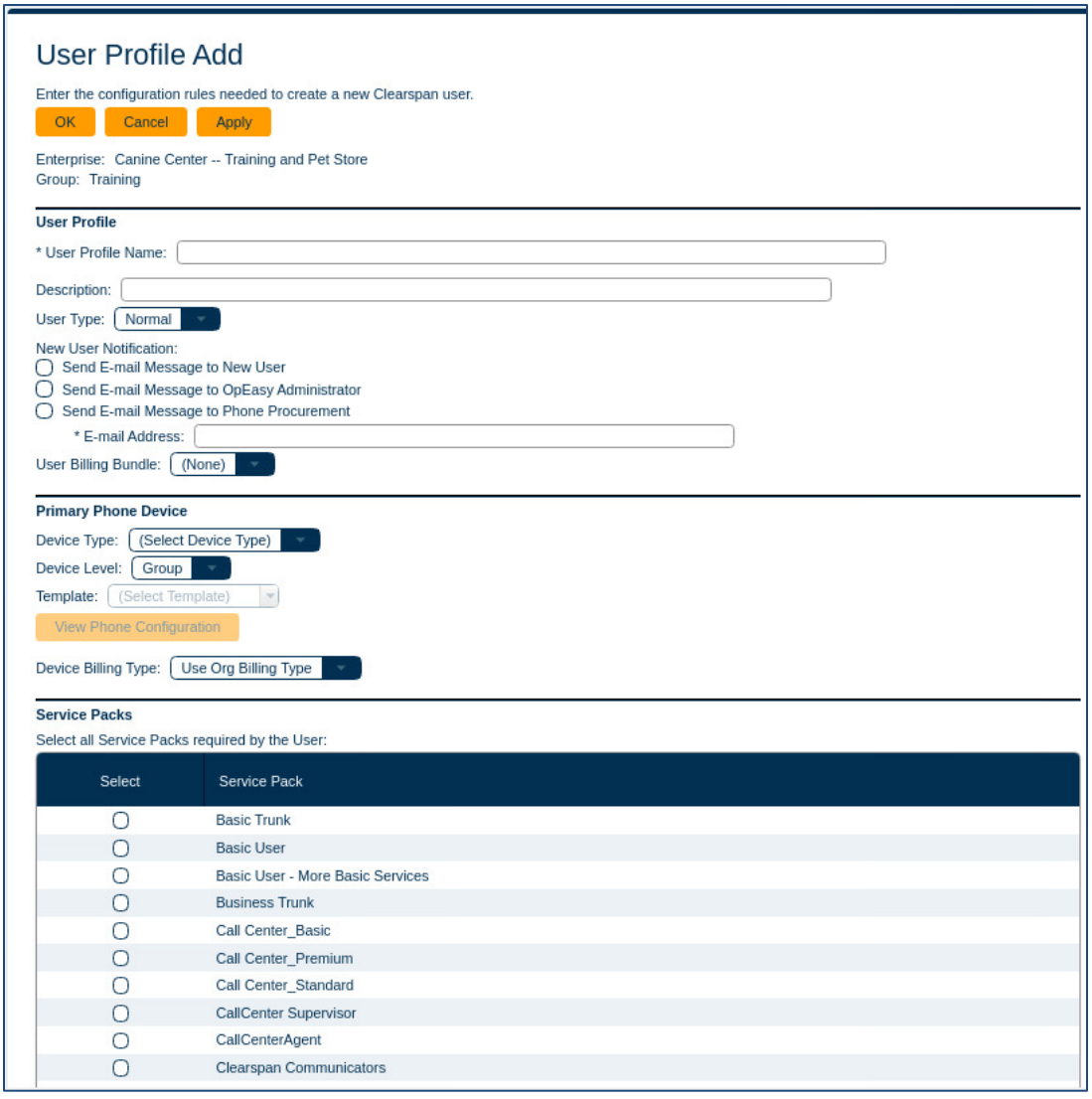


Figure 97 - User Profile Add

4. Enter the User Profile Name.
5. Enter a Description for the user profile.
6. Select the **User Type**. The options are Normal and Voice Mail Only.
7. Choose the E-mail notifications that you want sent when a new user is created that uses this profile.
8. If applicable, choose a **User Billing Bundle** from the drop-down menu.
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.
    - Note that if the ClearspanBridge Device Type is selected, the Device Level field is forced to "Enterprise." Each Enterprise can only interoperate with one Clearspan Bridge device.
10. Select the **Device Level** and **Template** from the drop-down list. The available Templates depend on the Device Level.
11. Click **View Phone Configuration** button to confirm this device and template are correct.
    - The User Profile: Phone Template page is displayed.
    - Click OK to return to the User Profile Add page.
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. In this section, all Service Packs available to this Enterprise and Group will be listed. You should know the content of the Service Pack before assigning it to the profile.
13. **User Defined Fields** – These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the **Use Default** check box and enter the value of the User Defined Field in the **Value** box.
14. Select the **User Domain** from the drop-down list in the **User Information** section. The drop-down list contains all domains assigned to this Group.
15. Select the **User Billing Type**. The **User Billing Type** drop-down box appears only if the Billing User Types are defined in the System Settings.
16. Check the box for **Clearspan ACD Add-on** to enable the use of the Clearspan Call Center selector window in Microsoft® Teams.
17. Check the box for **Initialize Ping User Password to random password** if a pre-determined password is not desired, and/or Ping client users are expected to use Single Sign On (SSO) credentials to login. Leave the box un-checked if the intention is to provide new Ping client users with a known password; in which case the password must be entered explicitly on the 'Users' Add/Modify GUI page or via an Import workbook.
18. For MS Teams users, check the **Use MS Teams Voicemail** box to enable MS Teams voicemail if MS Teams voicemail is preferred over Clearspan voicemail.
19. For very large MS Teams deployments, select the appropriate **Voice Route** and **PBX Location** from the drop-down menus. These options affect geographic load balancing of the TeamMates integration with Clearspan.
20. 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.

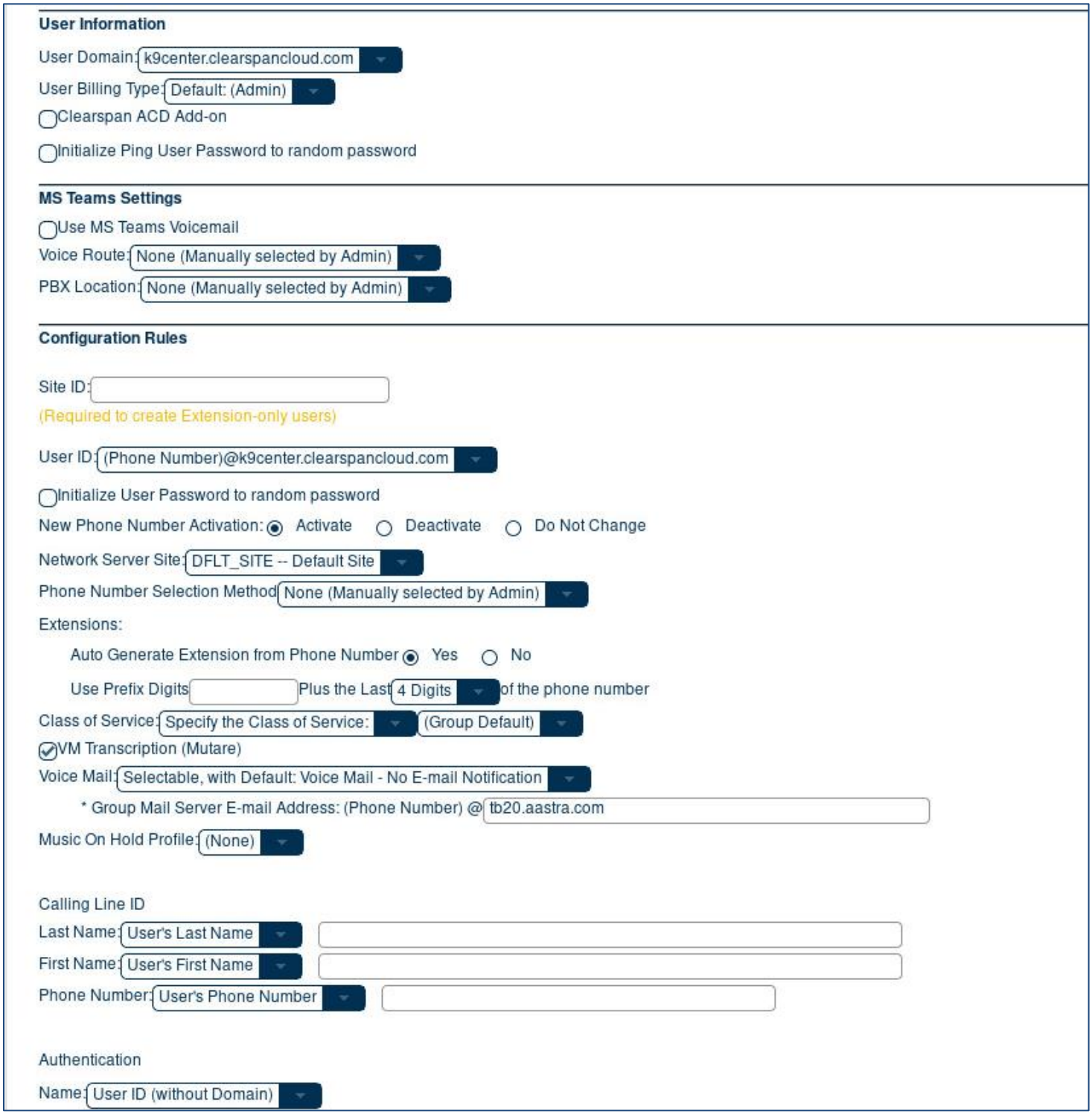


Figure 98 - User Profile Add Page – User Info

21. Select the format for the **User ID** from the drop-down list. The options include, FirstNameLastName, PhoneNumber, or the User's E-mail Address.
22. Check the **Initialize User Password** check box to initialize the password to a randomly generated value; leaving the box unchecked requires the administrator to enter a password.

23. Click one of the following for **New Phone Number Activation**:
    - **Activate (Recommended):** If the phones will place and receive calls from outside the system
    - **Deactivate:** If the calls will be internal only
    - **Do Not Change:** If no change is required
24. 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.
25. Choose a **Phone Number Selection Method**. None (Manually selected by Admin), Extension Only, or PreselectPhone 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 NumberRanges.
26. 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.
27. 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.
28. Check or Uncheck the **VM Transcription (Mutare)** check box to enable or disable Mutare for the User.
29. Select a **Voice Mail** from the drop-down list:
    - 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

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.

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

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

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

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

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

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

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

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

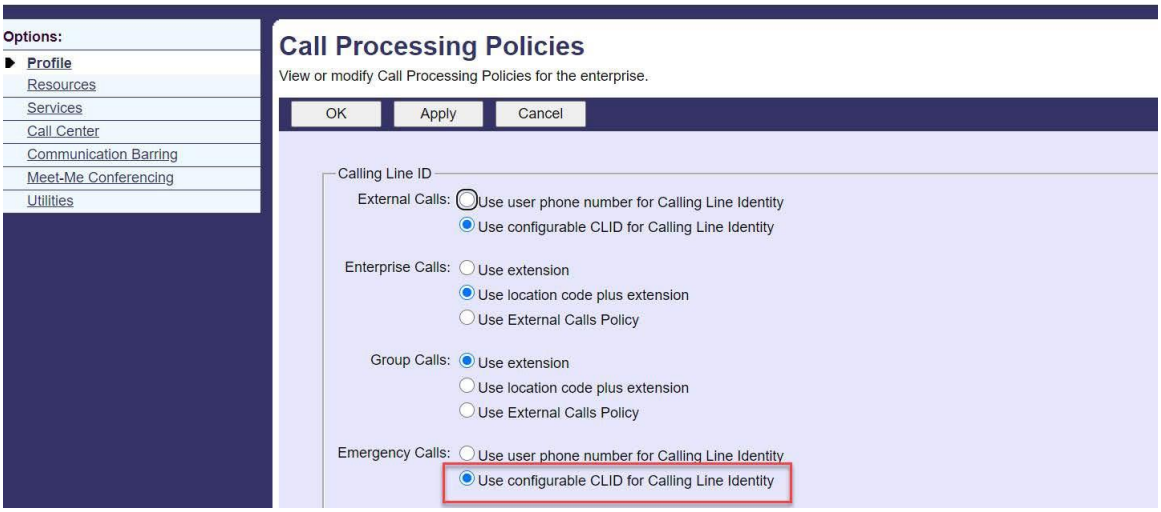


Figure 99 -Clearspan Call Processing Policies Page

33. Choose the rules for creation of the **Authentication Name.**
34. Enter the **Password** and **Confirm Password** if you choose **Specify the Authentication Password**. The Name can be the User ID or a unique ID generated by OpEasy. The Password can be generated randomly by OpEasy if the **Generate Random Password** is chosen, or it can be specified in the text box to the right. Valid Authentication Password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @.
35. Select the domain to use for a user's **Phone Line/Port** from the drop-down list.
    Note: this domain will be pre-selected for MS Teams devices using the Clearspan Native Teams Int Device Type.
36. Choose the method to create the **MAC Address** for Mitel, Cisco and DECT112 phones. The 4 options are the 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 2-Digit SCA number is only added on SCA devices.

    When configuring a device, the MAC Address can be the device's MAC Address, or the Auto Install Device ID created by the MAC Address rules. After the Auto Install process is complete, the MAC Address field displays the actual MAC address.
37. For **Device Access**, choose the method for determining **User Name.**
38. Enter **Password** and **Confirm Password** if you choose **Specify the Device Access Password**. This field is only used by Polycom and Panasonic phones.
39. If a User also requires a Desktop, Mobile or a Tablet device, check one or more of the check boxes in the **Desktop/Mobile/Tablet** section.
    - Select the device type required for each device option. ClearspanBridge or CS Engage are recommended, the others are available for backward compatibility. Selecting ClearspanBridge for the Desktop enables Clearspan's PING client desktop and mobile applications; a second selection for Mobile or Tablet devices is not required.
        - For Desktop, select:
            - CS Engage
            - ClearspanBridge

        - MS Teams Client
        - Communicator Desktop
        - Skype for Business (S4B)
    - For Mobile, select:
        - UC-One Connect Mobile
        - CS Engage Mobile
        - Clearspan Mobile
        - Communicator Mobile
    - For Tablet, select:
        - UC-One Connect Tablet
        - CS Engage Tablet
        - Clearspan Tablet
        - Communicator Tablet
- If MS Teams Client is selected, the assignment of a user to a Desktop, Mobile, or Tablet is controlled by the MS Teams service. OpEasy integrates a Clearspan user with a Teams user for the purpose of phone service.
- Set the **Line/Port** domain and device **Template** to be used for each device type.
  Note: the line/port domain will be pre-selected for MS Teams devices using the Clearspan Native Teams Int Device Type

40. 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. All the User Profiles are displayed.
4. Click the **Edit** link in the row or click anywhere in the row of the profile to modify. The User Profile Modify page opens. You can modify the profile using the procedures in section *Adding a User Profile*. The only field that you cannot change is the User Profile Name field.
5. 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. All the User Profiles are displayed.
4. Click the **Copy** link on the end of the row of the profile to copy. The User Profile Copy page

opens, as shown in the following example.

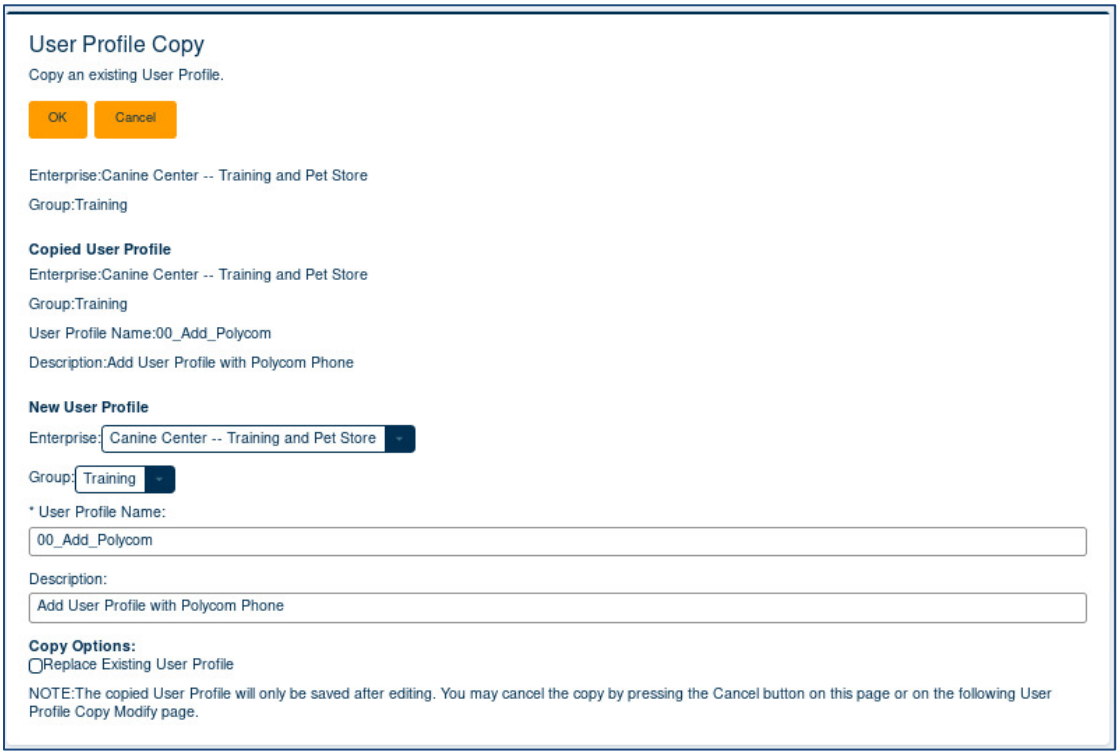


Figure 100 - User Profile Copy Page

5. 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.
6. Enter the name for the new profile in the **User Profile Name** text box.
7. Enter a **Description** in the Description text box.
8. Select **Replace Existing User Profile** if you want to overwrite an existing User Profile of the same name.
9. If you chose a different group to copy this user profile to, you can configure the following:
   - Check Copy Template to copy the template that is associated with the original group to the new group.
   - Enter the Template Name and Description of the template.
10. Click **OK.** After you have copied a user profile, the User Profile Copy Modify page opens, enabling you to modify the new User Profile.
11. Modify any of the settings in the new profile. You can modify the profile using the procedures in section Adding a User Profile.
12. Click **OK**. The User Profiles page opens, with the new profile appearing in the list.

Creating a Trunk User Profile

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

1. From the main menu, select **Provisioning**.
2. Click **User Profiles** from the menu tree or click **User Profiles** from the Provisioning page menu.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Add**.
5. Under the Primary Phone Device section, select **Trunk User** as the **Device Type**. When the Trunk User is selected the Phone Configuration button and the Template drop-down list are removed.

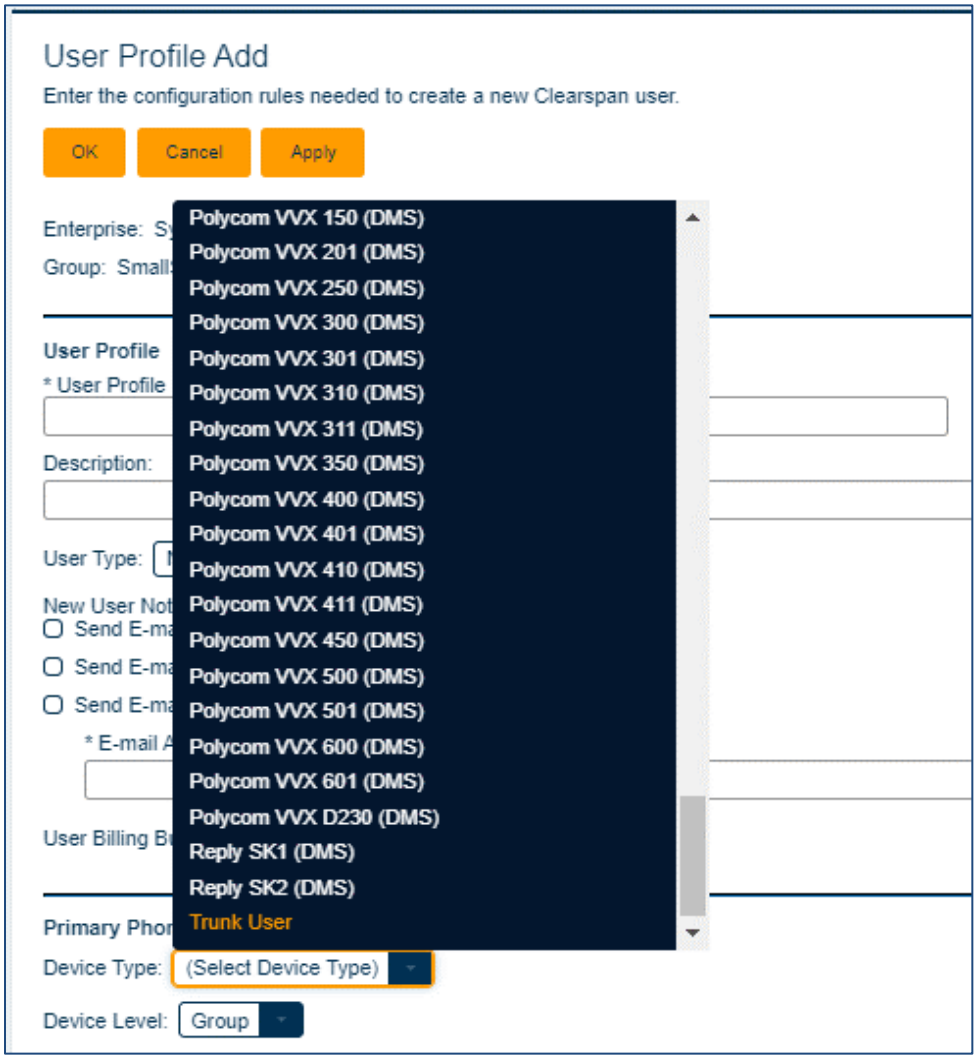


Figure 101 - User Profile Add - Select Trunk User

6. Select a **Trunk Group** for this user. Or, if this user will belong to multiple Trunk Groups, choose the appropriate **Enterprise Trunk**.
7. Click **OK**.

Users

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

User Licenses

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

Adding or Editing a User

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

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

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

Figure 102 - Users Page

4. Click **Edit** in the search results for the user you want to modify, or click **Add** to add a new user, then the **Advanced: User Add** page opens. The **Advanced: User Modify** page opens if you click edit, as shown in the following figure. If no license is available, an error appears.

Note:

- Support Users are created by the support administrator team for testing and troubleshooting only.
- If the Add button does not appear, then you are not authorized to add or delete users.

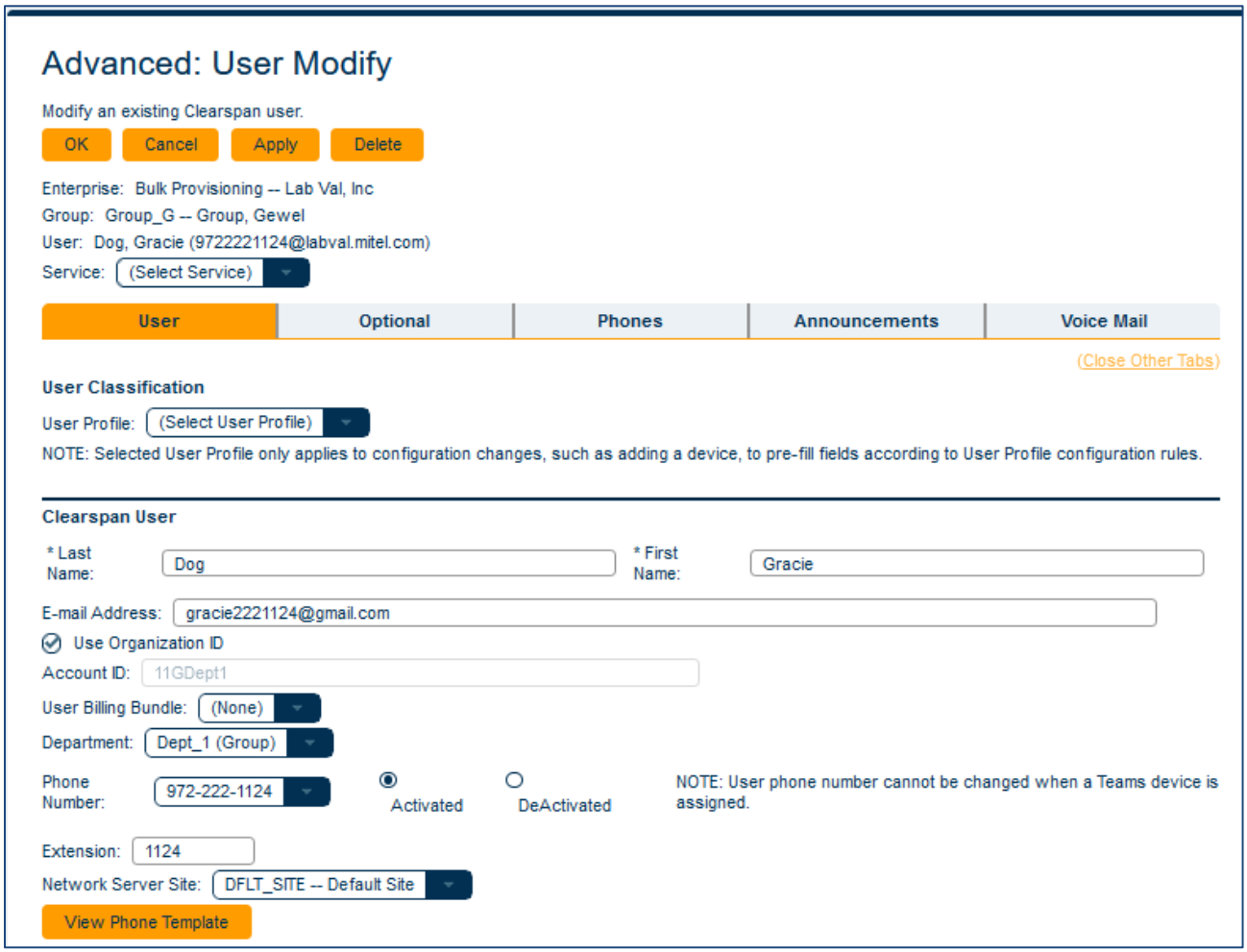


Figure 103 - Advanced: User Modify

Note: If the Admin is not authorized to add or delete then the New Phone Device selection does not appear.

Users Tab

1. From the Advanced: User Add or Advanced: User Modify page, select a **User Profile** from the User Profile drop down list in the User Classification section. Choosing a User Profile pre-populates certain fields.
2. Enter the user's **Last Name** and **First Name** under the Clearspan User section.
3. Enter the **E-mail Address** for the user.
4. Check **Use Organization ID** check box of the User or uncheck the **Use Organization ID** check box and enter the **Account ID** of the User. This option is enabled only for Enterprise Administrators, System Administrators and Solution Resellers.
5. Select the **User Billing Type**. The **User Billing Type** drop-down box appears only if the User Billing Types are defined in the System Settings.
6. Select the **User Billing Bundle** (if they are defined for the Enterprise). The default is None.
7. Select the **Department** from the drop-down list.
8. Select the **Phone Number** from the drop-down list. The **Extension** field fills in automatically if a User Profile has been selected.
9. **Activated** or **Deactivated** indicates the current status of the phone number selected. Change this setting if necessary. Select **Activated** (Recommended) if the phone will place and receive calls from outside the system or **Deactivated** if the calls will be internal only.
10. Change the **Network Server Site** if you want to use a site other than the one shown. This setting applies when a user is assigned a phone number.
11. You can click **View Phone Template** to view the template for the primary phone.
12. Enter the **Phone Location** (Optional data for E911 Emergency services). The Phone Location text box is displayed when using a User Profile.
13. If the user is associated with an AudioCodes MediaPack or Media5 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 or Media5 device is assigned to the user in the Emergency Gateway.

    If the Emergency Routing Service (ERS) is assigned to the selected enterprise, then a drop-down list is used to select an ERL for the phone device.
14. Check or Uncheck the **VM Transcription (Mutare)** check box to enable or disable Mutare for the User.
15. Select the **Voice Mail** type from the drop-down list. 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.
16. Enter the **Voice Portal Passcode and Confirm Portal Passcode**. It is typically 4-8 digits in length, to be determined by the administrator. Valid characters are 0-9.
17. Enter the **User Password** and **Confirm User Password**. It can include any characters and is typically at least 6 characters in length, to be determined by the administrator.
    - You can click **Initialize User Password to random password** to auto generate a password.

A password is required but as stated the auto generated password is lengthy and complicated. This 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 recommended.

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.

18. 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, Cisco, Dect112 and Polycom phones only
    - Site ID–required if an extension-only user
    - Clearspan User ID–required
    - Support User–checked if this user is for Support Administrator and is excluded from billing
    - Calling Line ID information–last name and first name are required
    - Service Packs selection–click on the Service Pack(s) on the left and click **Add**
    - **User Defined Fields** – These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the **Use Default** check box and enter the value of the User Defined Field in the **Value** box.
    - Authentication Name, Password and Confirm Password–required if this user is assigned a device that uses authentication, the password is to be determined by the administrator. You can click **Initialize Authentication Password to random password** to auto generate a password. This randomly generated password is lengthy and complicated, which protects the user from unauthorized access in cases where the password will not be used.

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

Optional Tab

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

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

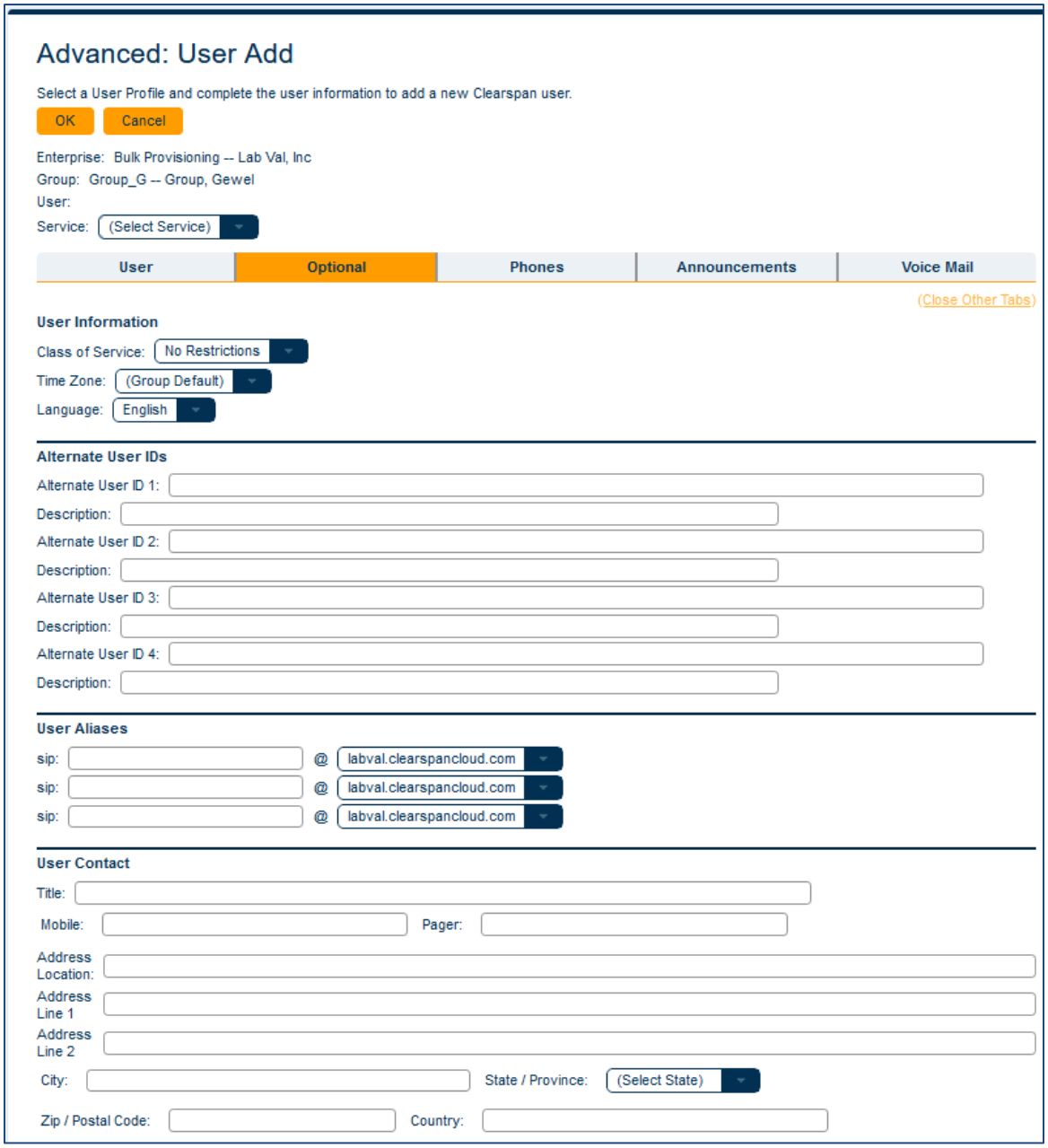


Figure 104 - Advanced: User Add Page – Optional Tab

Phones Tab

Click the Phones tab of the User Add page to view or change the Phone Configuration and Shared Call Appearances, and view the primary phone template, as shown in the following figure.

- Edit – Takes you to the User: Primary Phone Device Edit Phone 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.

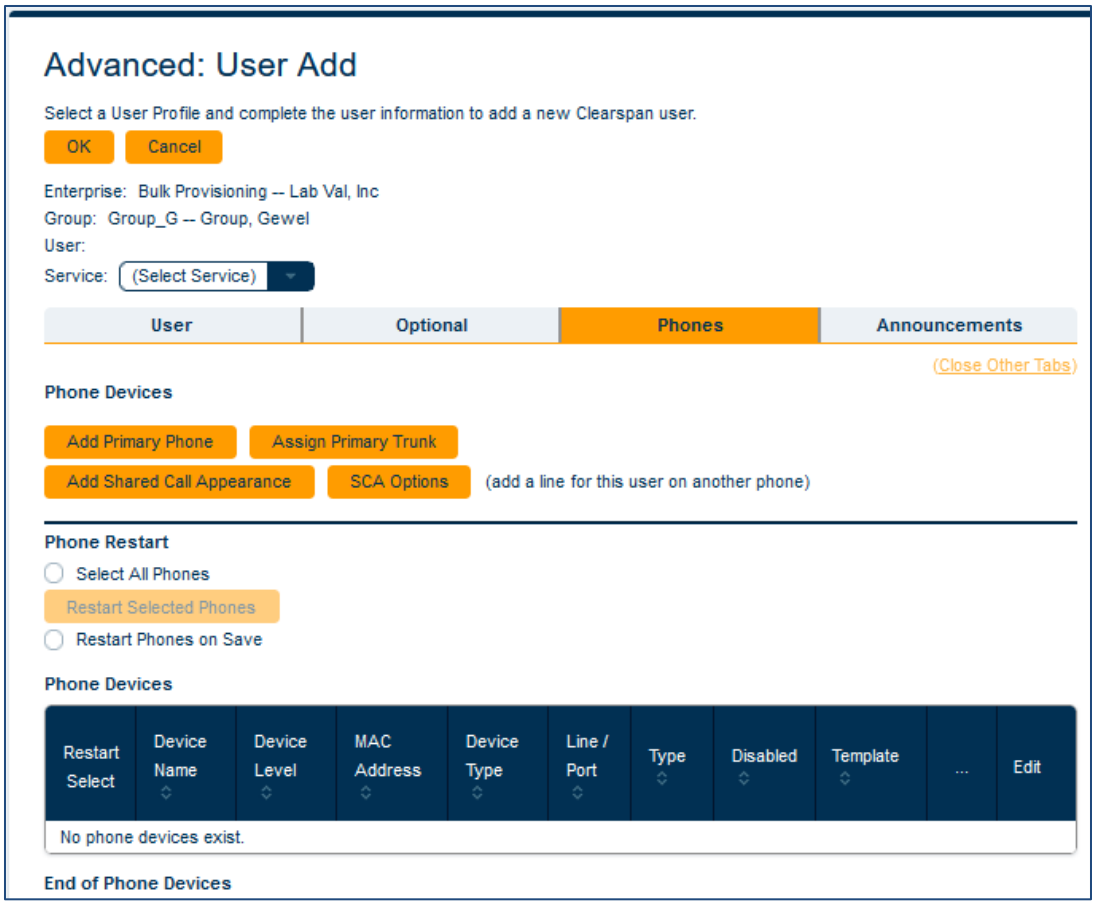


Figure 105 - Advanced: User Add - Phones Tab

- **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.

Adding the Primary Phone Device for a User

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search Parameters to filter the Search.
4. Click **Add** button. The Advanced: User Add page is displayed.
5. Click the **Phones** tab on the Advanced: User Add page.
6. Click **Add Primary Phone** button. The User: Primary Phone Device Add page is displayed.

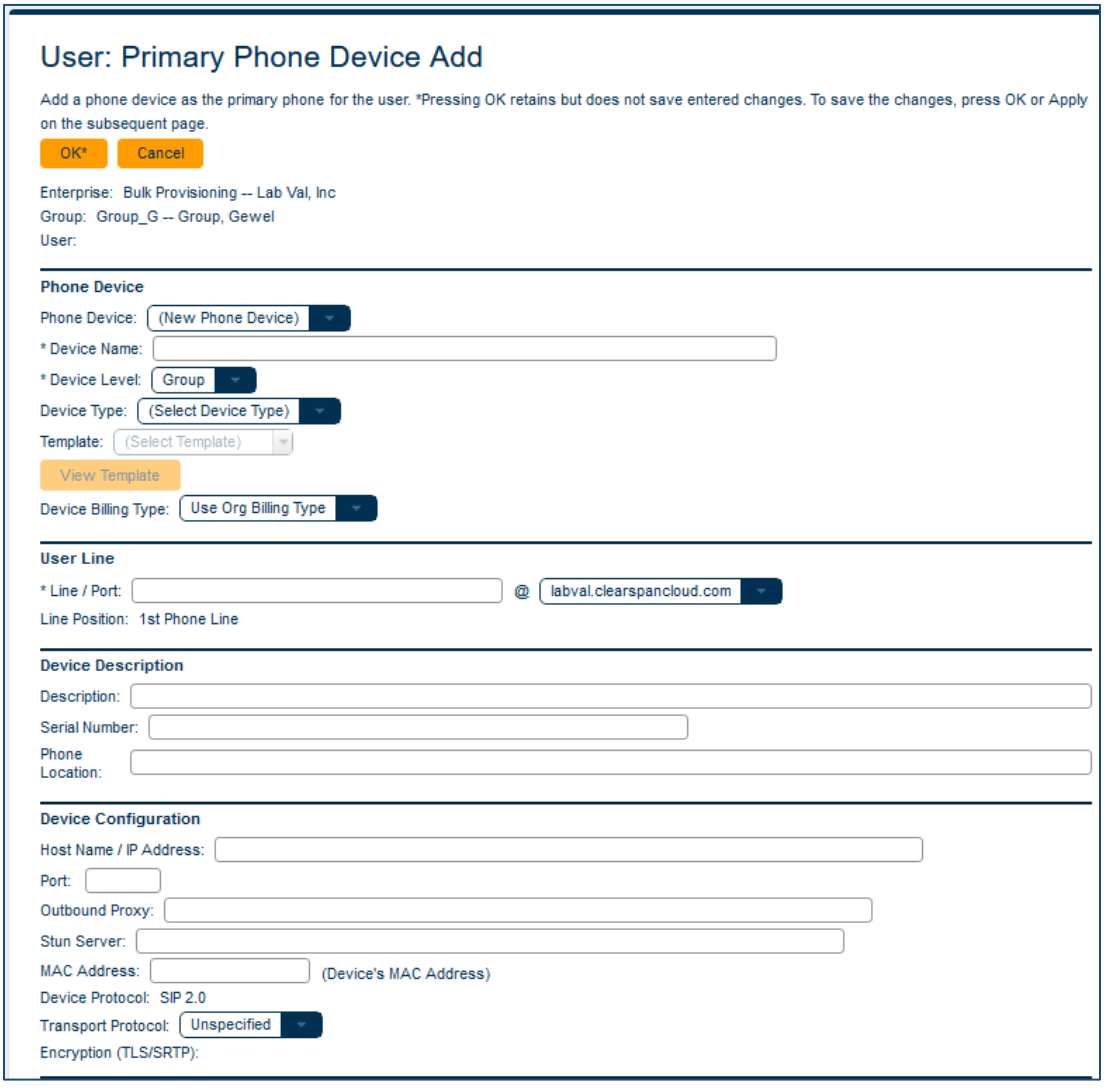


Figure 106 - User: Primary Phone Device Add Page

7. You may add a new device or select **Search Phone Devices** to search and select a specific device or set of devices. After you click **Search**, the **Phone Device List** shows a list of devices that match the search criteria.

8. If the device being added is the Clearspan Bridge, then the **Ping Client** section will be displayed.

- The **Ping Client Username** field will be preset using the user part of the Clearspan User's email address and the appropriate domain set via Enterprise Settings.
- Enter a password to be used for Ping client login.
    - If the preset Ping Client Username matches an existing Ping account, the admin will be presented with two options.
        - Use the existing Ping account
        - Choose a new Ping account
    - If the option for a 'new Ping account' is chosen, the Ping Client Username field will be automatically updated with a non-existent Ping account name and will also become available for manual entry.

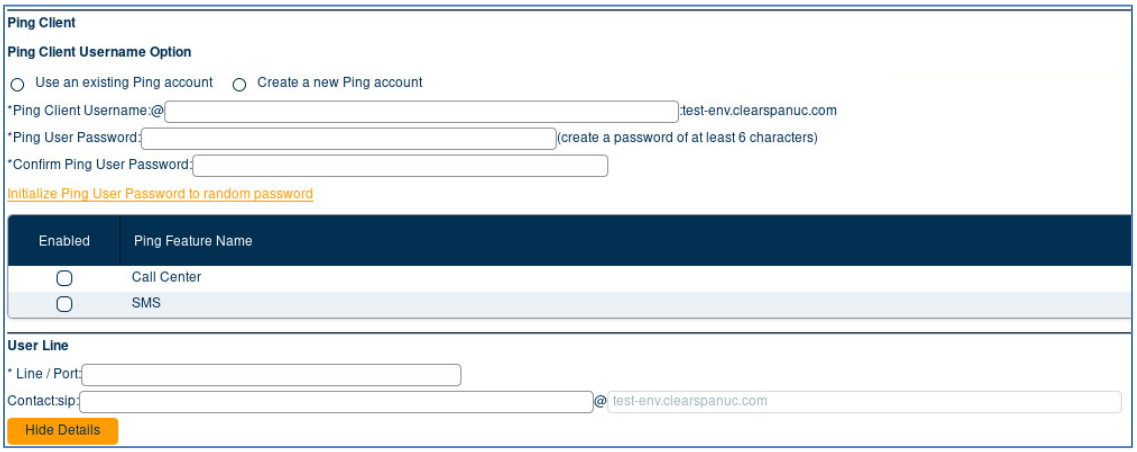


Figure 107 - Ping Client account information

- If Ping client add-in features have been enabled for the Enterprise, the 'Ping Feature Name' selection box will appear. Check the appropriate box in the 'Enabled' column to enable the feature; additional monthly service charges may apply.

9. 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/Site ID>@<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

Note: the line/port domain will be pre-selected for MS Teams devices using the Clearspan Native Teams Int Device Type

10. For MS Teams devices:
    - The **Use MS Teams Voicemail** option will be displayed. When this option is selected, OpEasy provisions the user in the TeamMate portal to use the MS Teams Voicemail as opposed to using the Clearspan Voicemail system.
    - The **Voice Route** and **PBX Location** drop-down menus will also be displayed for Enterprise Administrators whose access privileges include the 'Enterprise Settings' privilege. These settings will normally remain at their default values unless the user is participating in a very large-scale integrated MS Teams deployment.
    - The **Enable Clearspan ACD Add-on** option will be displayed. If checked, this enables the use of the Clearspan Call Center Selector functionality within the MS Teams client.
11. Select a **Line Position** if more than one user is assigned to this device.
12. If the user is associated with an AudioCodes MediaPack or Media5 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 or Media5device is assigned to the user in the Emergency Gateway.
    If the Emergency Routing Service (ERS) is assigned to the selected enterprise, then a drop-down list is used to select an ERL for the phone device.
13. The **Encryption (TLS/SRTP)** field displays the encryption status of the device, **None** appears in the field for devices that do not support encryption.

    Encryption (TLS/SRTP) setting of the phone is specified by the template or global settings. **Encryption Override** can be enabled or disabled.
14. Enter the MAC Address (Device's MAC Address or Auto Install Device ID). This field is required to identify the device.
15. Select the protocol from the **Transport Protocol** drop-down list.
16. Select the record name from the **ERL Record Name** drop-down list. If greater than 250 Emergency Response Locations have been provisioned for the Enterprise, the drop-down list is replaced with a search input selector.
17. Click **OK***. This adds the Primary Phone Device.

Adding a Shared Call Appearance (SCA)

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link at the end of the user's row or click anywhere in the row of the phone device you want to edit.
5. Click the **Phones** tab on the Advanced: User Modify page.
6. Click the **Add Shared Call Appearance** button. The User: Shared Call Appearance (SCA) Add page opens.
7. You may create a new device or select the desired device from the **Phone Device** drop down list. Select criteria for a specificdevice or set of devices. Click **Search**, the **Phone Device List** displays the list of devices.

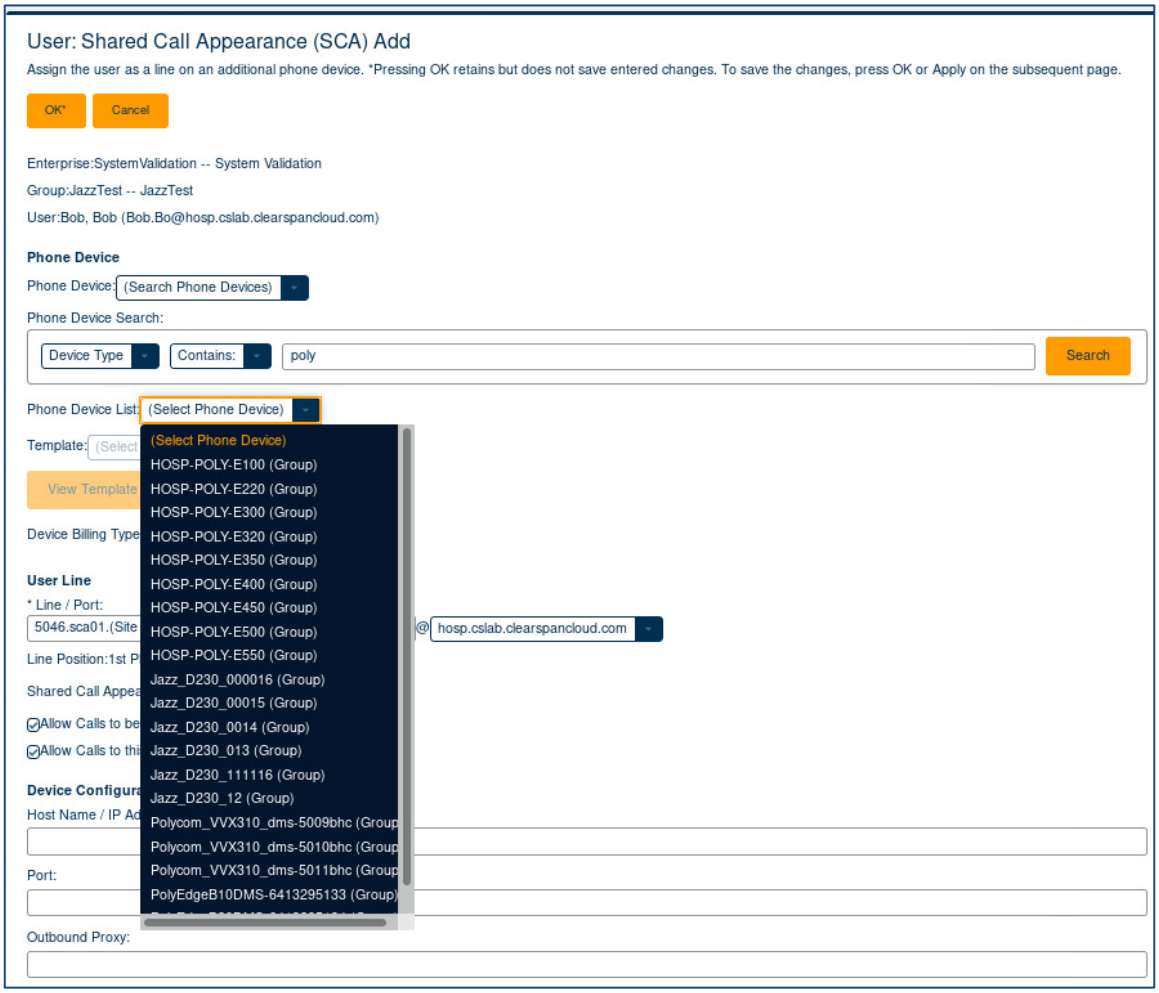


Figure 108 - User: Shared Call Appearance (SCA) Add Page

8. If the device being added is the Clearspan Bridge, then the Ping Client section will be

displayed.

Figure 109 - Ping client account information

- Choose to 'Use an existing Ping account' or 'Create a new Ping account.'
- The **Ping Client Username** field may be preset using the user part of the Clearspan User's email address and the preset Enterprise domain.
- Enter and confirm a password to be used for Ping client login.
    - If Ping client add-in features have been enabled for the Enterprise, the 'Ping Feature Name' selection box will appear. Check the appropriate box in the 'Enabled' column to enable the feature; additional monthly service charges may apply.

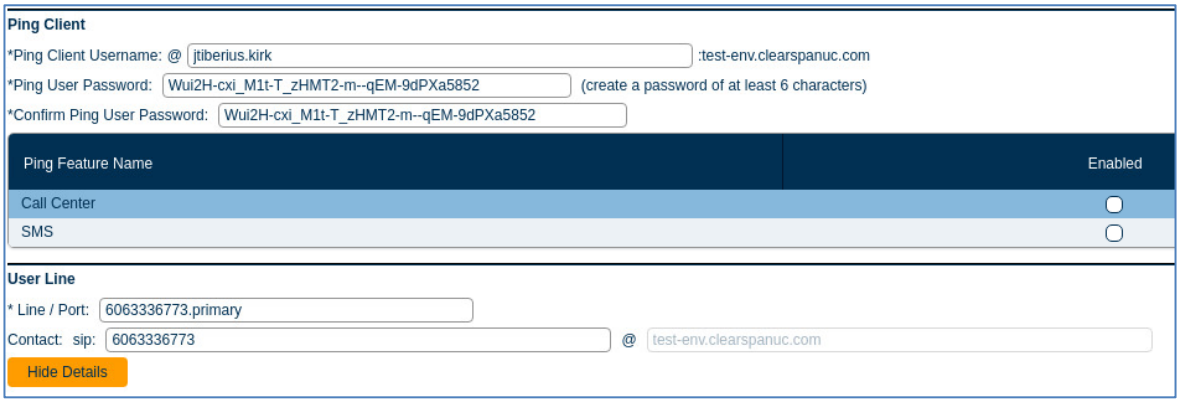


Figure 110 - Ping Client add-in Feature Selection

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

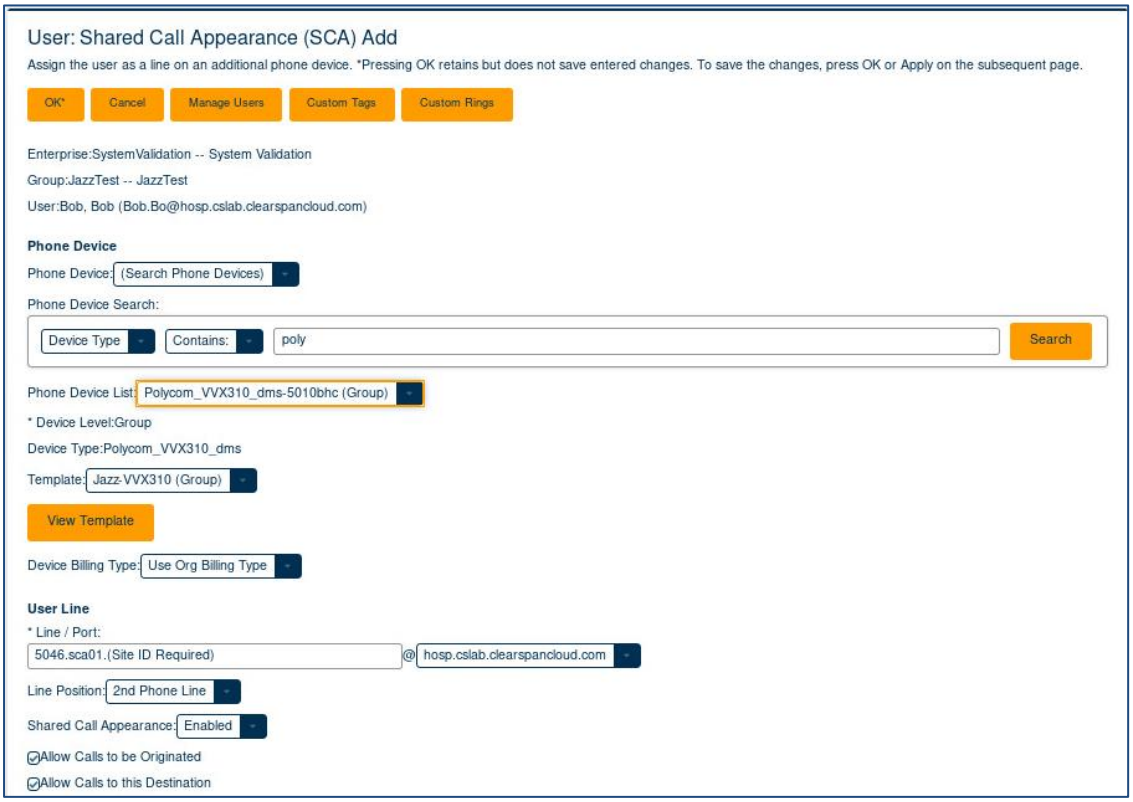


Figure 111 - User: Shared Call Appearance (SCA) Add Page

10. Click the **View Template** button to display the template for this phone device. The User: Phone Template page opens.
11. To change user assignments on this phone device, click **Manage Users** and make changes as described in Assigning, Removing, or Reordering Users on a Phone Device.
12. Check Restart Phones on Save.
13. The **Line/Port** number is entered automatically. 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”.
    Note: the line/port domain will be pre-selected for MS Teams devices using the Clearspan Native Teams Int Device Type
14. For MS Teams devices:
    - The **Use MS Teams Voicemail** option will be displayed. When this option is selected, OpEasy provisions the user in the TeamMate portal to use the MS Teams Voicemail as opposed to using the Clearspan Voicemail system.
    - The **Voice Route** and **PBX Location** drop-down menus will also be displayed for Enterprise Administrators whose access privileges include the ‘Enterprise Settings’ privilege. These settings will normally remain at their default values unless the user is participating in a very large-scale integrated MS Teams deployment.
    - The **Enable Clearspan ACD Add-on** option will be displayed. If

checked, this enables the use of the Clearspan Call Center Selector functionality within the MS Teams client.

•

15. Choose **Line Position** from the drop-down list to indicate the position of this Shared Call Appearance on the device selected.
16. The **Allow Calls to be Originated** and the **Allow Calls to this Destination** fields are checked by default. Make adjustments if you do not want calls to originate from or terminate on this SCA line.
17. If the Enterprise subscribes to the Intrado ERS service, enter the appropriate emergency response location in the **ERL Record Name** field.
18. Click **OK***. The entry is not yet saved.
19. Click the **SCA Options** button on the Phones tab if you want to change any of the following options that apply to all SCAs. The SCA Options tab opens.

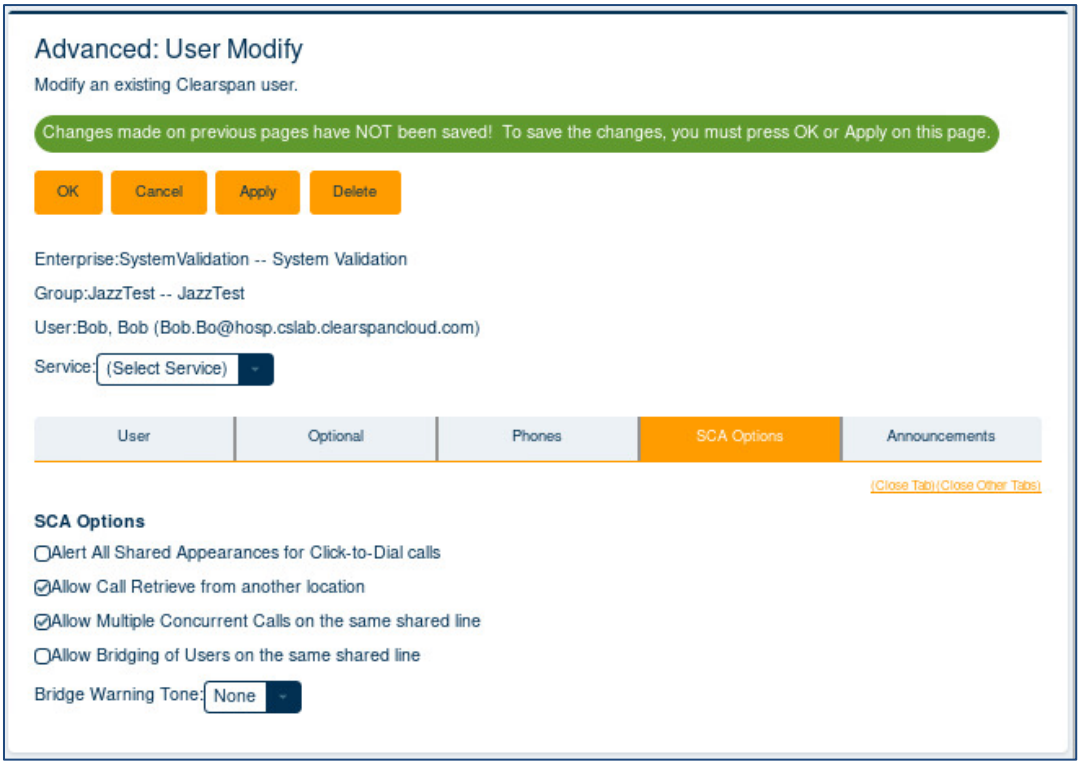


Figure 112 - Advanced: User Modify Page – SCA Options Tab

- 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

20. Select **Allow Bridging of Users on the same shared line**, if required.
21. 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.

22. Click **OK** or **Apply**.

Removing a Shared Call Appearance

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

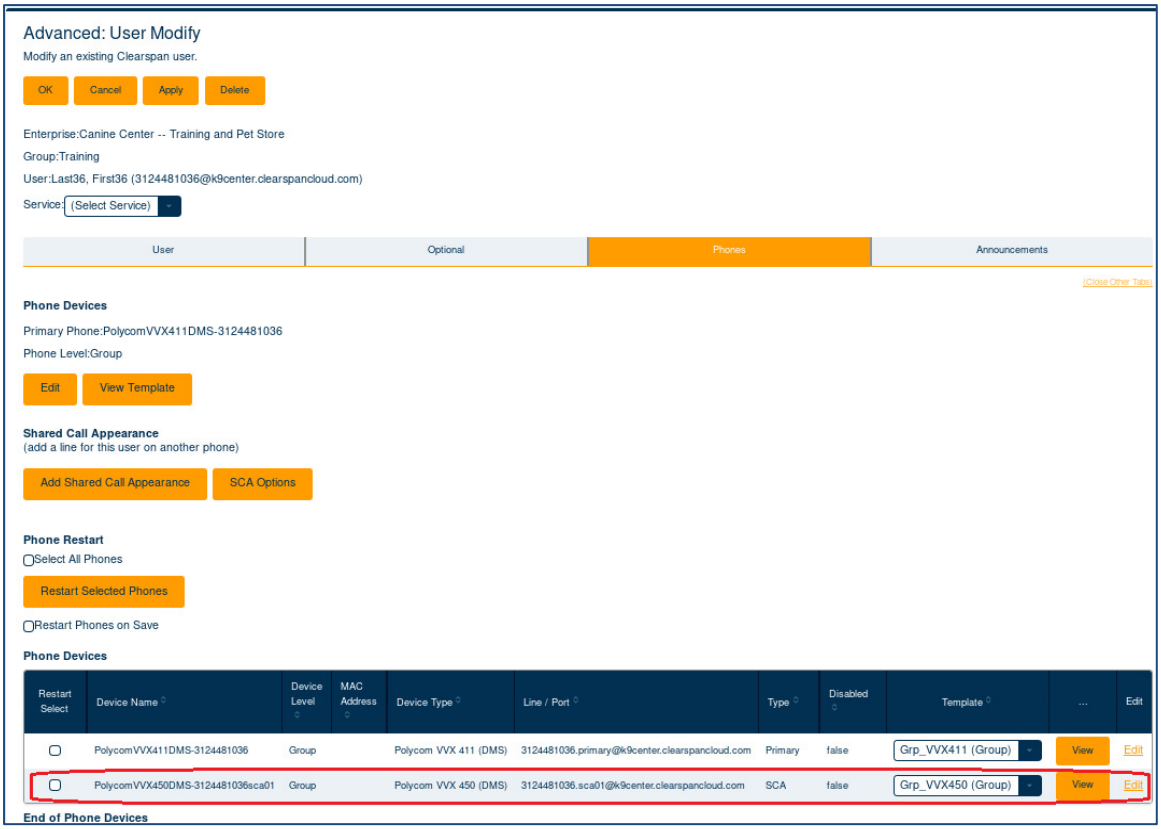


Figure 113 - Advanced: User Modify Page – SCA to Remove

6. Click the **Edit** link at the end of the user's row or click anywhere in the row of the SCA to remove, in the Phone Devices table. The User: Shared Call Appearance (SCA) Modify page is displayed.

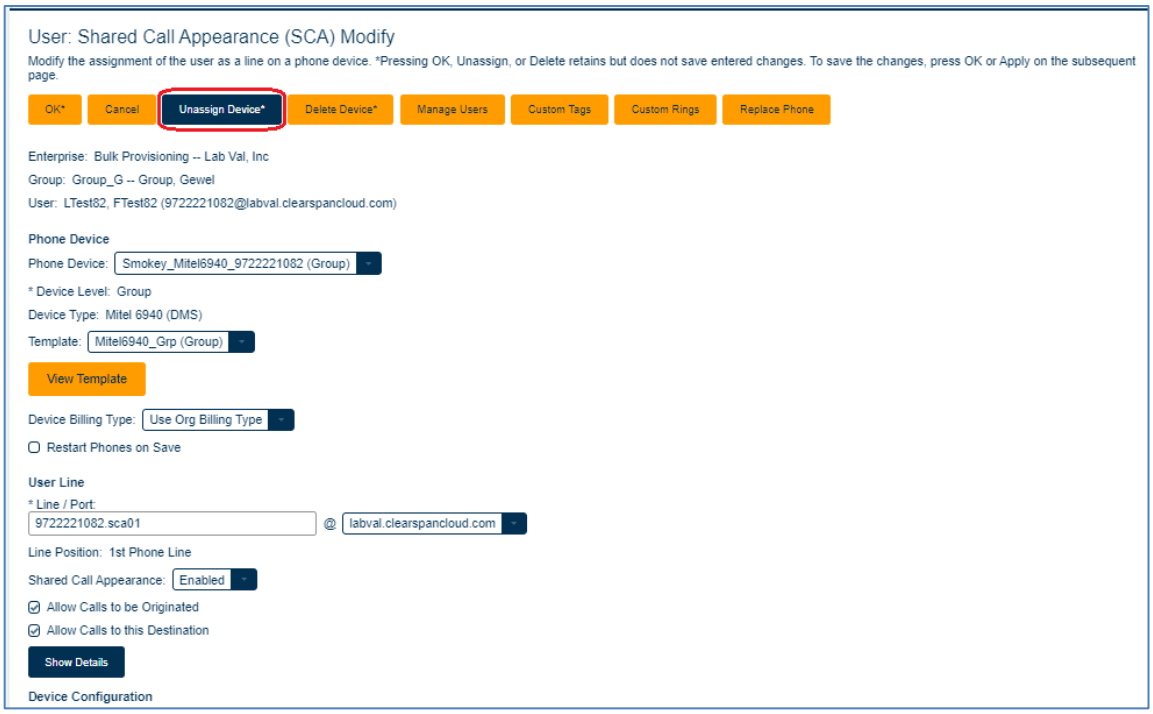


Figure 114 - Unassign a Shared Call Appearance from a Phone Device

Click the **Unassign Device** button.

7. Click **Yes** in the Unassign confirmation dialog box. The Shared Call Appearance is removed.
8. Click **OK** or **Apply**.

Creating a Trunk User

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

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

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. Click the **Assign Primary Trunk** button for the Primary Phone. The User: Primary Trunk Assign page opens.

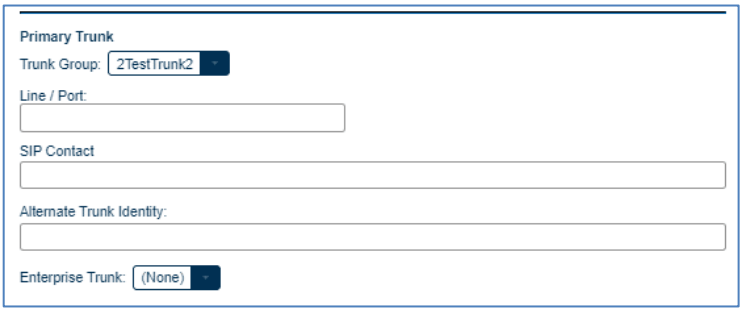


Figure 115 - Users: Modify - Assign Trunk Group Page

6. Select a Trunk Group from the **Trunk Group** drop down list.
7. Enter the **Line/Port**.
8. Enter the contact in the **Contact sip** text box.
9. Enter an **Alternate Trunk Identity**, if required. This field is used to present alternative routing information to the destination. For example, if the user is behind an existing PBX, this field may be used to properly route the trunk to the current PBX destination.
10. Choose an **Enterprise Trunk** when the Trunk User will use more than one Trunk Group.
11. Click **OK*** and then Click OK. The Users page opens.
12. Click **OK** again. The Provisioning menu is opened.

Announcements Tab

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

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

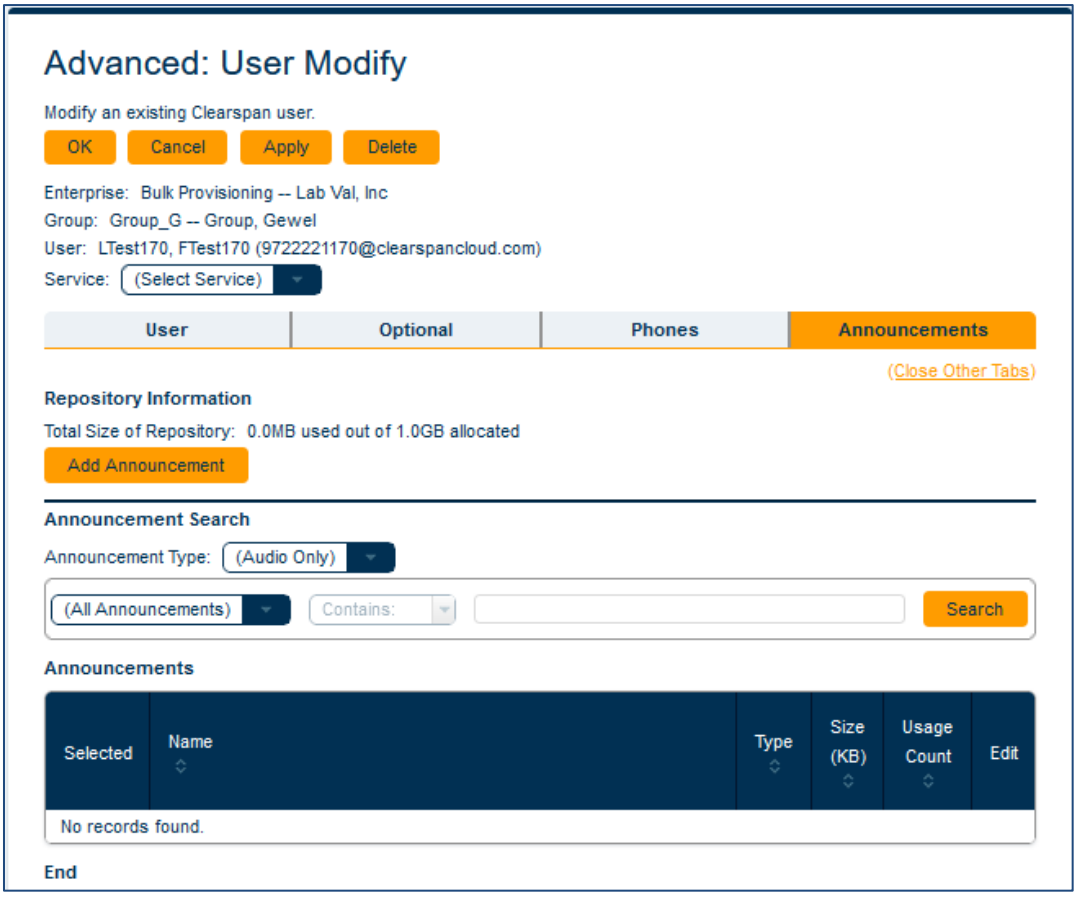


Figure 116 - Advanced: User Modify Page – Announcements Tab

6. To upload a new file, click **Add Announcement**. The User: Announcement Add page opens. Enter an Announcement Name and click Browse to choose the audio or video file to upload. Supported file types include WAV, WMA, MOV, or 3GP. Click OK*. The new announcement

appears in the Announcements list.

7. To rename or replace an announcement, search for the announcement. Search results appear in the list at the bottom of the page. Click Edit on the row of the announcement you want to modify. Make any desired changes on the Announcement Modify page, and then click OK*.
8. To delete an announcement, select the announcement to be deleted from the search results list and click Delete Selected Announcements, or click Delete on the Announcement Modify page. You cannot delete announcements that are in use.
9. Click **OK** or **Apply**. You *must* click **OK** or **Apply** again to save your changes.

Failure Error Messages

When you click OK to finish creating or modifying a user, any errors that prevent the user from being created or changed will be reported at the top of the page as in the following figure.

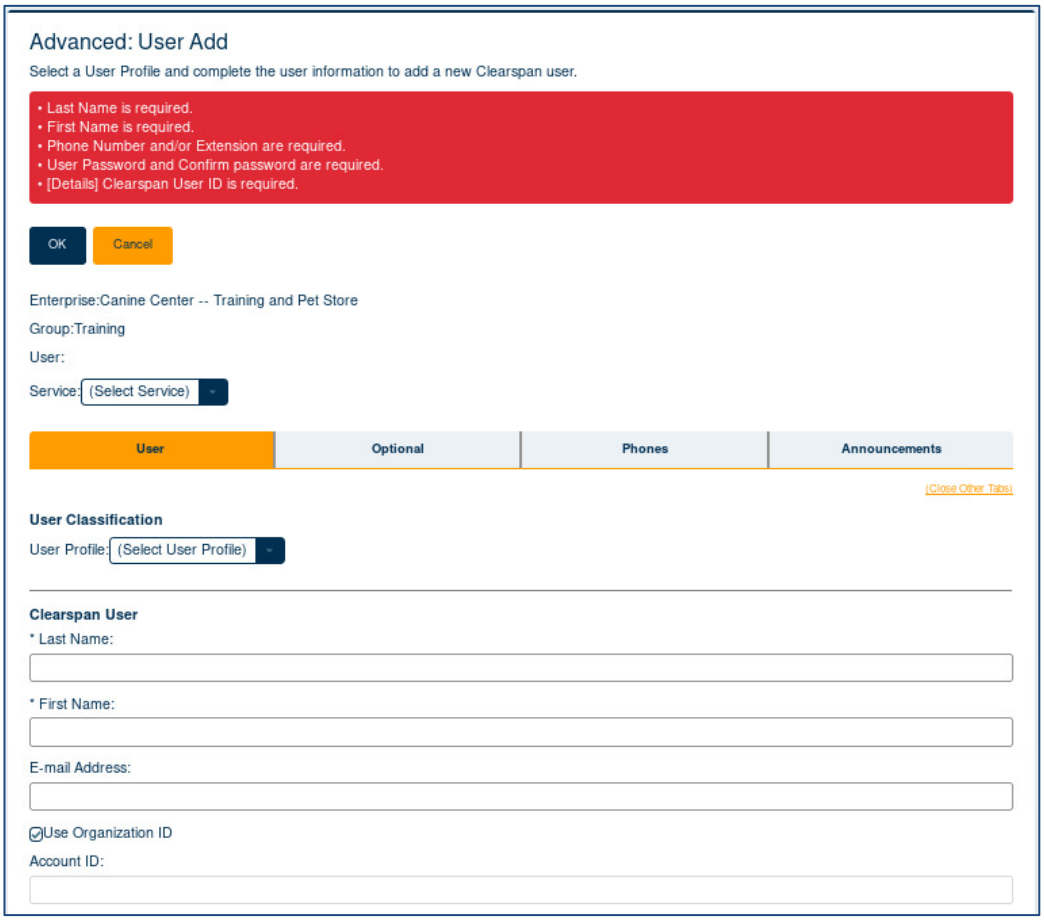


Figure 117 - User Add Error Messages

Failures may also be reported on the User Add Messages page as shown below.

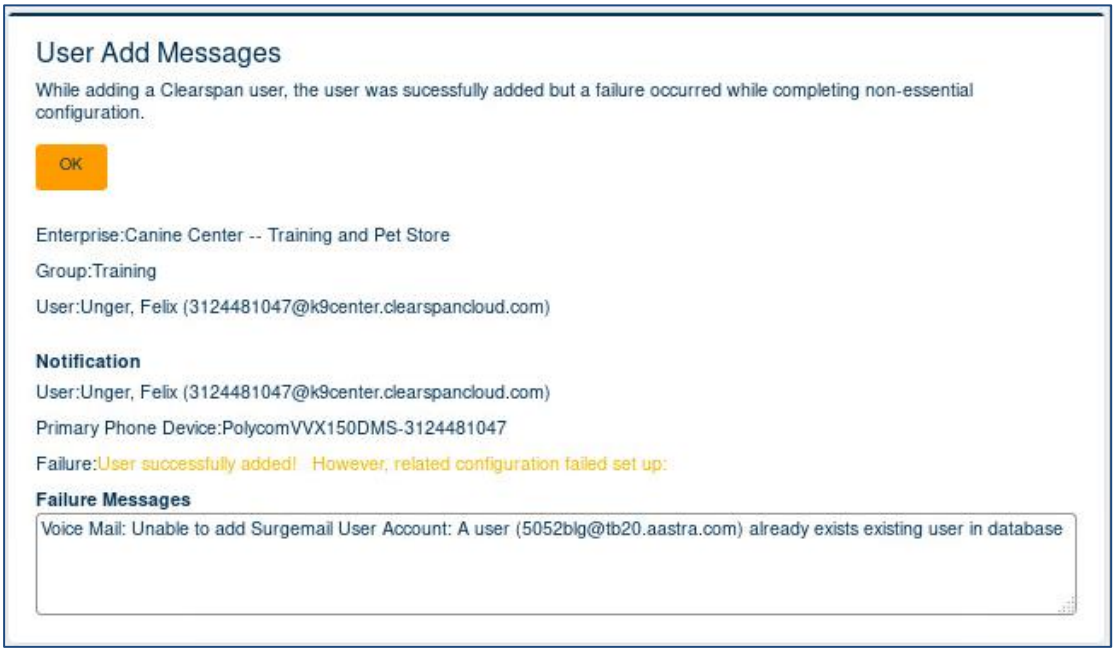


Figure 118 - User Add Failure Page

Configuring Advanced User Features

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

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

Alternate Numbers

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

Note: ' Alternate Numbers' is a service that must be assigned to the user on Clearspan.

pattern for each number, if your phone supports it.

1. From the main menu, select **Provisioning** and then **Users**. The **Users** page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row for which you want to set up alternate numbers. The **Advanced: User Modify** page opens.
5. Select **Alternate Numbers** from the **Service** Drop-down list. The **Alternate Numbers** tab opens as in the following example:

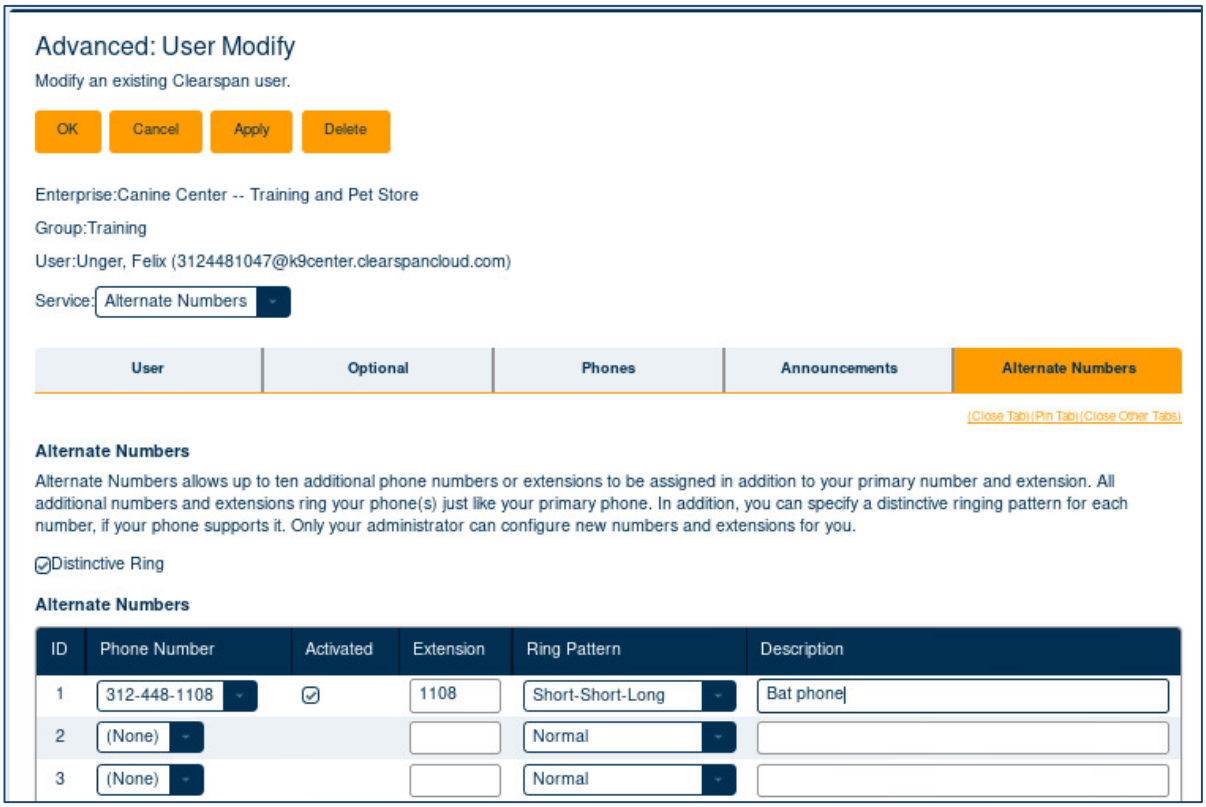


Figure 119 - Advanced: User Modify Page

6. To add an alternate number, select a **Phone Number**, enter an **Extension**, select the **Ring-Pattern** from the drop-down list and enter the Description. The Ring Pattern is available in the following formats:
   - Long-Long
   - Short-Short-Long
   - Short-Long-Short formats.
7. Click the **Activated** check box to activate the alternate number.
8. Click **OK** or **Apply**.

Authorization Codes

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

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

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

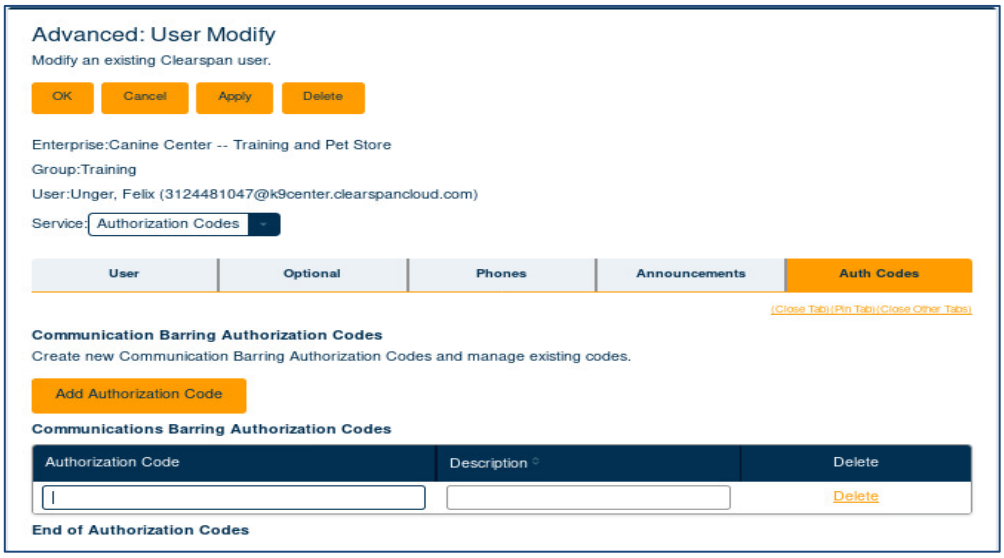


Figure 120 - Advanced: User Modify Page – Auth Codes Tab

6. Click Add Authorization Code.
7. Enter an **Authorization Code** and **Description**.
8. Click **Delete** to delete an existing code.
9. Click **OK** or **Apply**.

Busy Lamp Field (BLF)

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

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Select **Busy Lamp Field (BLF)** from the **Service** drop-down list. The BLF tab opens as shown in the following example.

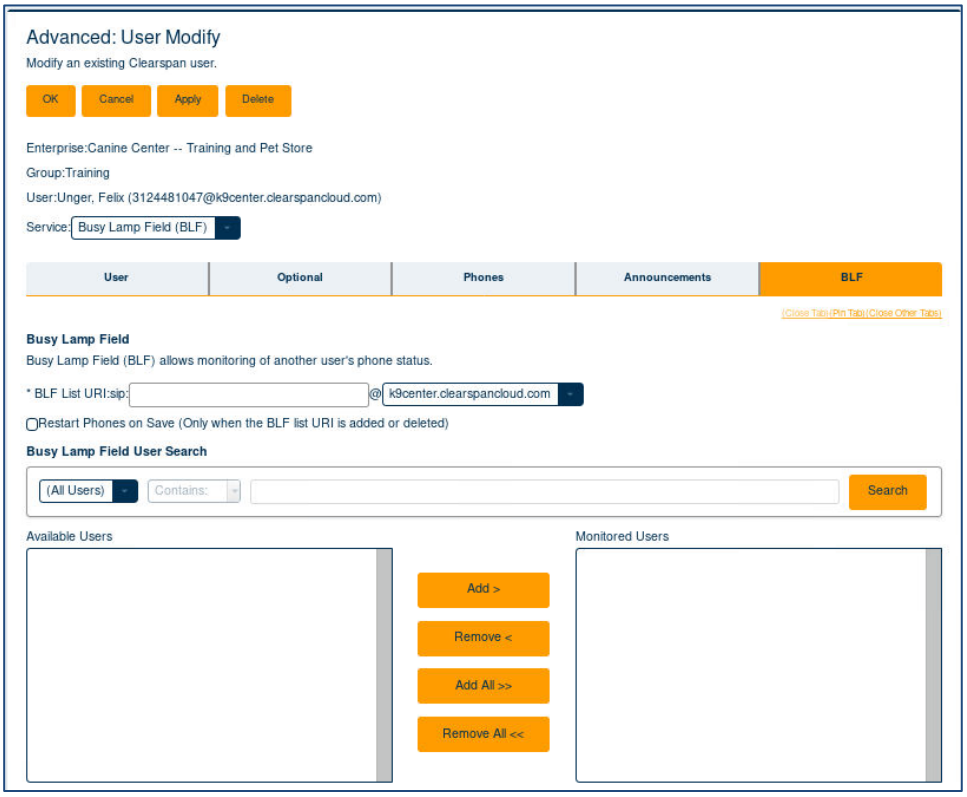


Figure 121 - Advanced: User Modify Page - BLF Tab

5. Enter the BLF List URI, for example, 9785551003BLF@moorehouse.com. The BLF List URI must be unique. You can choose any name, but it cannot be duplicated elsewhere in the system.

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

6. Click Search to view all the Users available for assignment; or enter Search parameters to filter the Search.
7. Select the users that you want to be in the BLF **Monitored Users** list.
8. Click the following options required:
   - 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.
   - Click **Remove** or **Remove All** to remove users from the list.

- Click **Move Up** or **Move Down** to reorder the list. The ordering dictates the order in which it is displayed on the user's phone.

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

Call Center Agent

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

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Select **Call Center Agent** from the **Service** drop-down list. The Call Center Agent tab opens as shown in the following example:

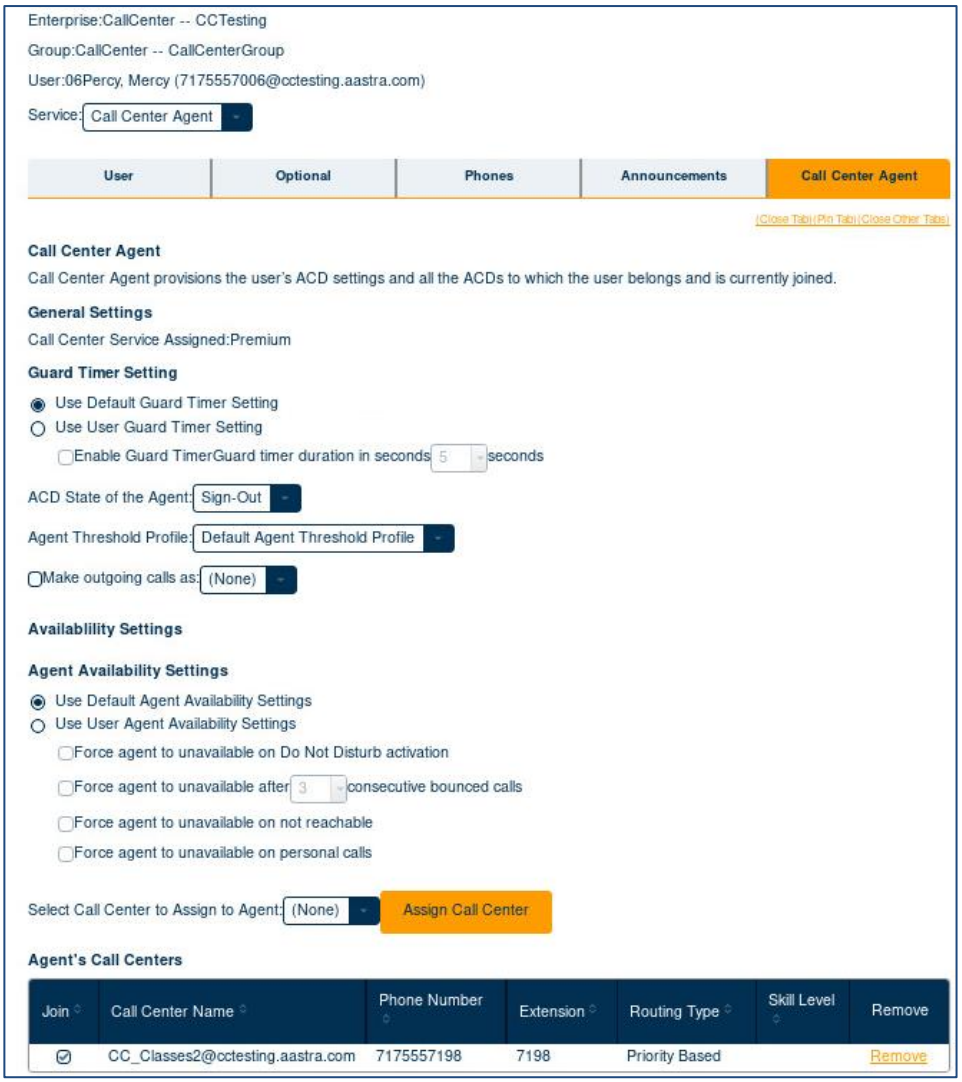


Figure 122 - Advanced: User Modify Page – Call Center Agent Tab

5. 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 2-5 seconds.
6. 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.
7. Select the **Agent Threshold Profile** which should be applied to this agent. An Agent Threshold Profile is an optional set of warning thresholds configured for an agent to track metrics.
8. Enable **Make outgoing calls as** to configure the agent's outgoing calls setting. This setting might not be available for some call centers.
9. Select the **Agent Availability Settings** from the following settings to manage the availability to receive inbound calls from the call centers.
   - **Use Default Agent Availability Settings** - User overrides the default setting for the user.
     - Force agent to unavailable on Do Not Disturb activation
     - Force agent to unavailable after some consecutive bounded calls
     - Force agent to unavailable on not reachable
     - Force agent to unavailable on personal calls
10. Select the Call Center from the drop-down list and the click the **Assign Call Center** button.
11. The **Join** check box is checked by default.
12. Select a **Skill Level** from the drop-down menu in the **Agent's Call Centers** list.
13. Clear **Join** to remove the user from that callcenter. Select the **Remove** link to remove the call center from the list.
14. Click **OK** or **Apply**.

Call Center Supervisor

The Call Center Supervisor tab allows you to assign the Supervisor to Call Center(s).

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

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

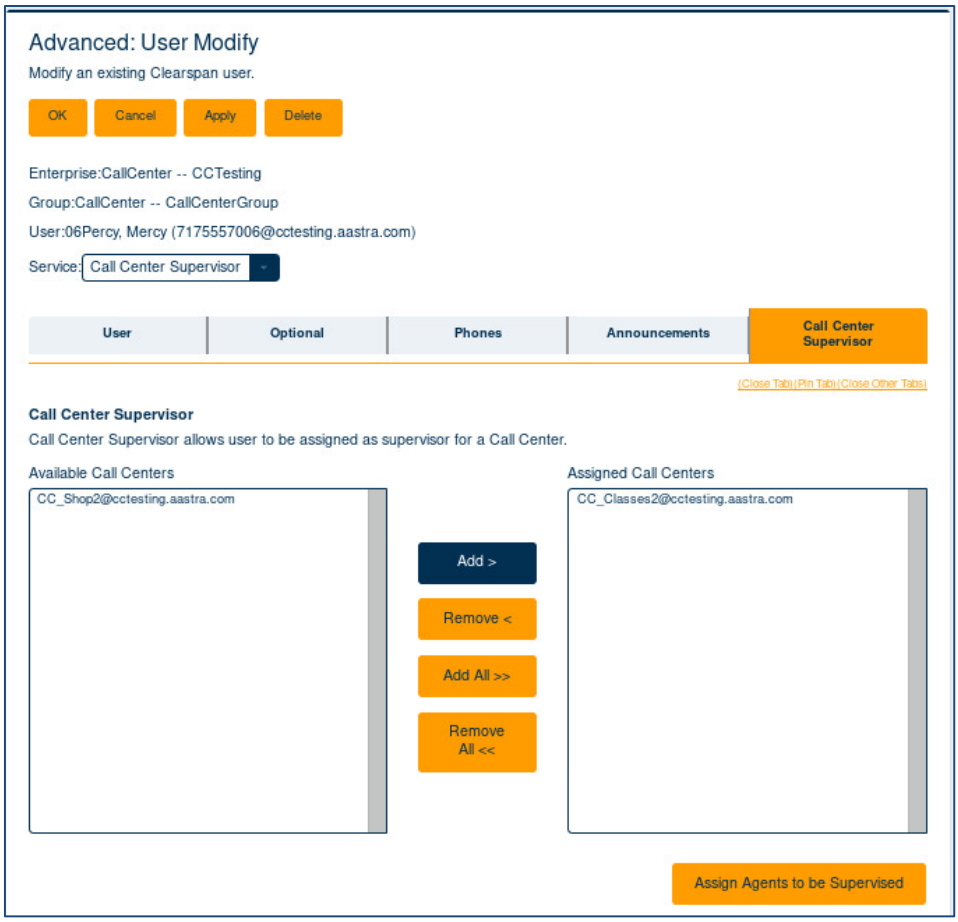


Figure 123 - Advanced: User Modify Page – Call Center Supervisor Tab

6. User **Add** and **Remove** to assign Call Centers to the User. The User will be a Supervisor in the selected call center.
7. Select a Call Center from the **Call Center** drop down list, if required. Search to display all Agents available for assignment; or enter the parameters to narrow the search.
8. Use **Add** and **Remove** to assign available agents to be Supervised.
9. Click **Assign Agents to be Supervised**.
10. 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 opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user you want to set up call forwarding. The Advanced: User Modify page opens.

5. Select Call Forward from the Service Drop-down list. The Call Forward tab opens, as shown in the following example.

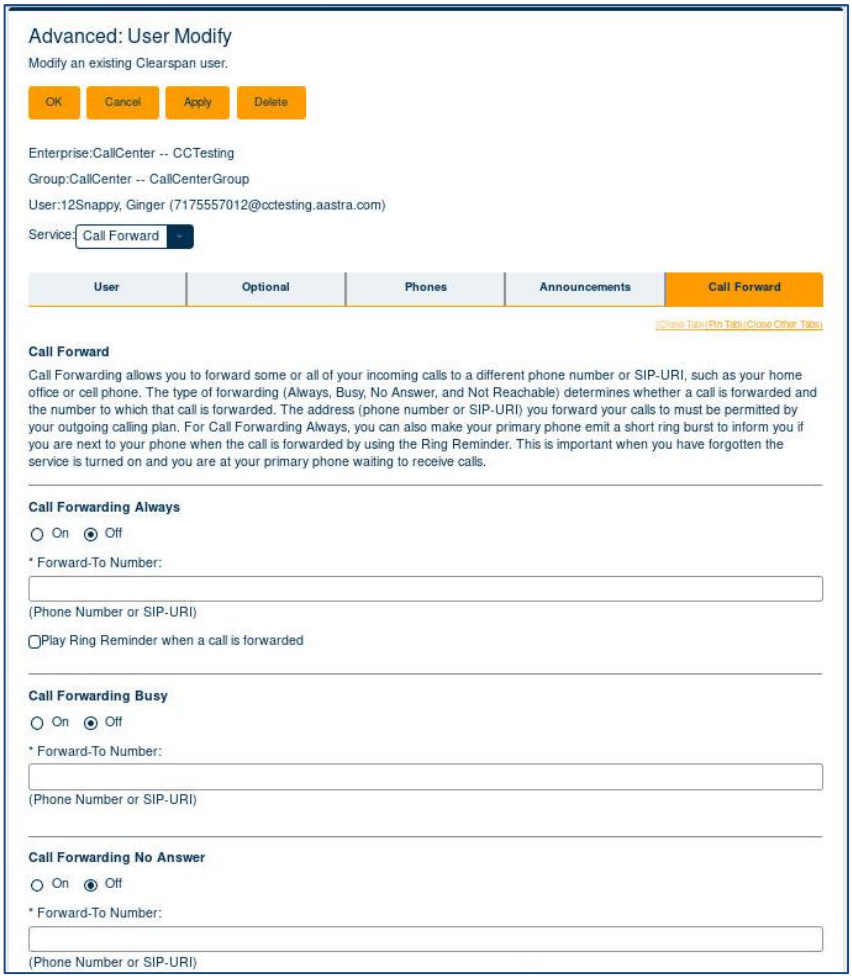


Figure 124 - Advanced: User Modify Page – Call Forward Tab

Select **On** or **Off** for **Call Forwarding Always** to have calls always forwarded. Enter a number or SIP-URI for the **Forward-To Number** destination. Check the **Ring Reminder** check 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.

6. Select **On** or **Off** button for **Call Forwarding Busy** to have calls forwarded when the primary phone is busy. Enter a number or SIP-URI for the **Forward-To Number** destination.

7. Select **On** or **Off** button for **Call Forwarding No Answer** to have calls forwarded when the primary phone is not answered. 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.

8. Select **On** or **Off** button for **Call Forwarding Not Reachable** to have calls forwarded when this number is not reachable. 'Not Reachable' means that a SIP INVITE was sent to an endpoint with a valid registration, but a signaling timeout occurred or a SIP signaling error was returned. Enter a number or SIP-URI for the **Forward-To Number** destination.

9. 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 opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user you want to set up call forwarding. The Advanced: User Modify page opens.
5. Select **Call Forward Selective** from the **Service** Drop-down list.

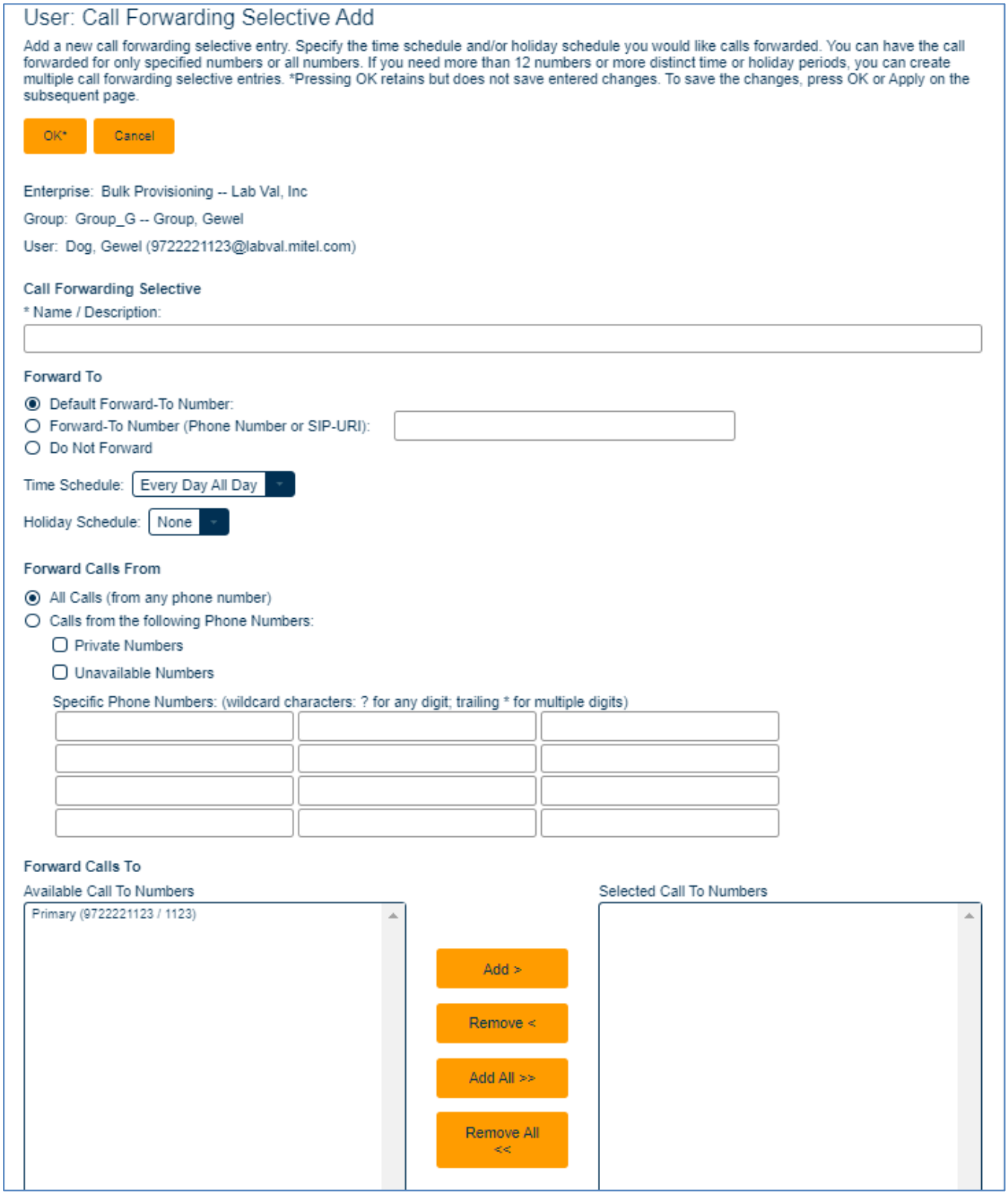


Figure 125 - Call Forward Selective Add Page

6. Select **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 set of call forwarding criteria or click **Edit** in the **Forwarding Criteria** table to modify or delete existing criteria. The User: Call Forwarding Selective Add/Modify page opens.
8. Enter a **Name/Description** for the call forwarding selective entry.
9. Select to forward calls to the default number or another number, or Do Not Forward.
10. Specify the **Time Schedule** and/or **Holiday Schedule** for which to forward calls.
11. The received calls that use a Selective Criteria are based on the **Calls From** settings. Select or enter one or more of the following options to use the selective criteria:
    - Select All Calls (from any phone number)
    - Select Calls from any or all the following:
        - Private Numbers
        - Unavailable Numbers
    - Enter Specific Phone Numbers (up to 12 numbers). The Phone numbers digit strings can include digits
        - from 0 through 9
        - the following wildcard characters:
        - * (star) – This wild card can only be used as the last character of the digit strings and matches any number of trailing digits. For example, 60833374*
        - − ? (Question mark) – This wild card can be used anywhere in the string and matchesany single digit. For example: 608????114 or 6?833?7?23 or 60?33374*
12. Choose the numbers from the **Available Call To Numbers** list in the **Calls To** section, and click **Add** to use the number for the Calls To criteria.
13. Click **OK***.
14. Click **OK or Apply**.

The **Forwarding Criteria** table displays the **Calls From** and **Calls To** columns. The **Calls To** criteria controls forwarding based on the destination that was dialed.
The User: Call Forwarding Selective page opens.

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: The Call Pickup group can be created in Clearspan or OpEasy, Provisioning | Group Settings | Call Pickup Groups. Call Pickup is a service that must be assigned to a user on Clearspan.

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user you want to set up call pickup. The Advanced: User Modify page opens.

5. Select **Call Pickup** from the **Service** Drop-down list.

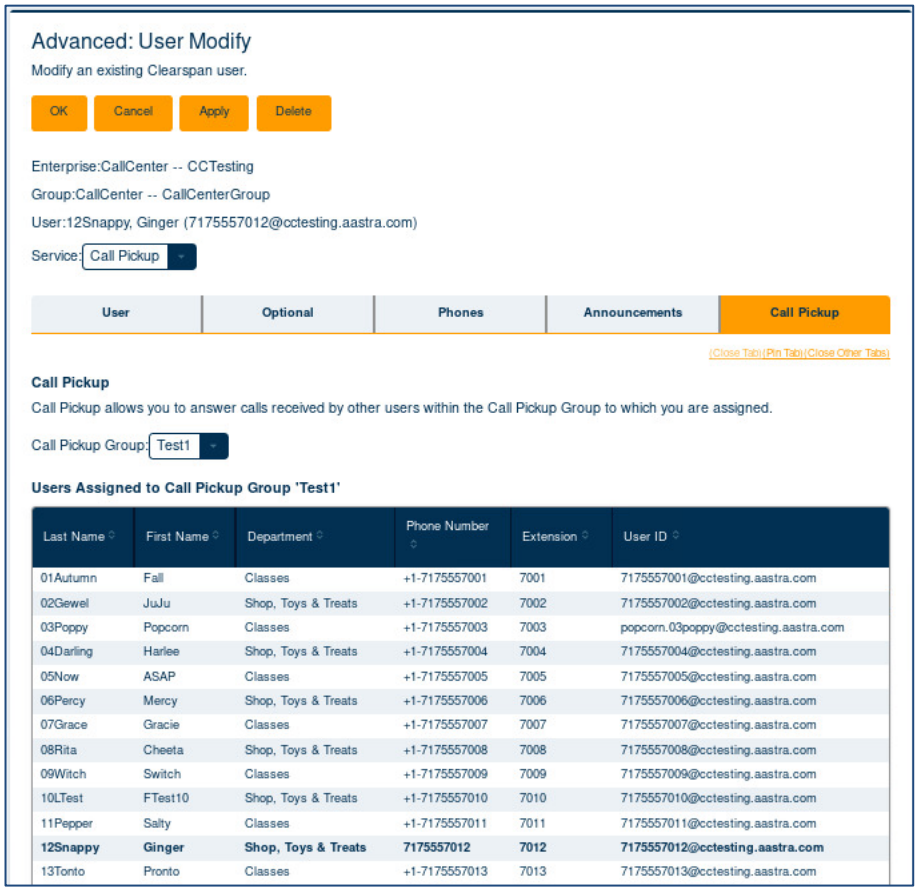


Figure 126 - Advanced: User Modify Page – Call Pickup Tab

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**.

Call Recording

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

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

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

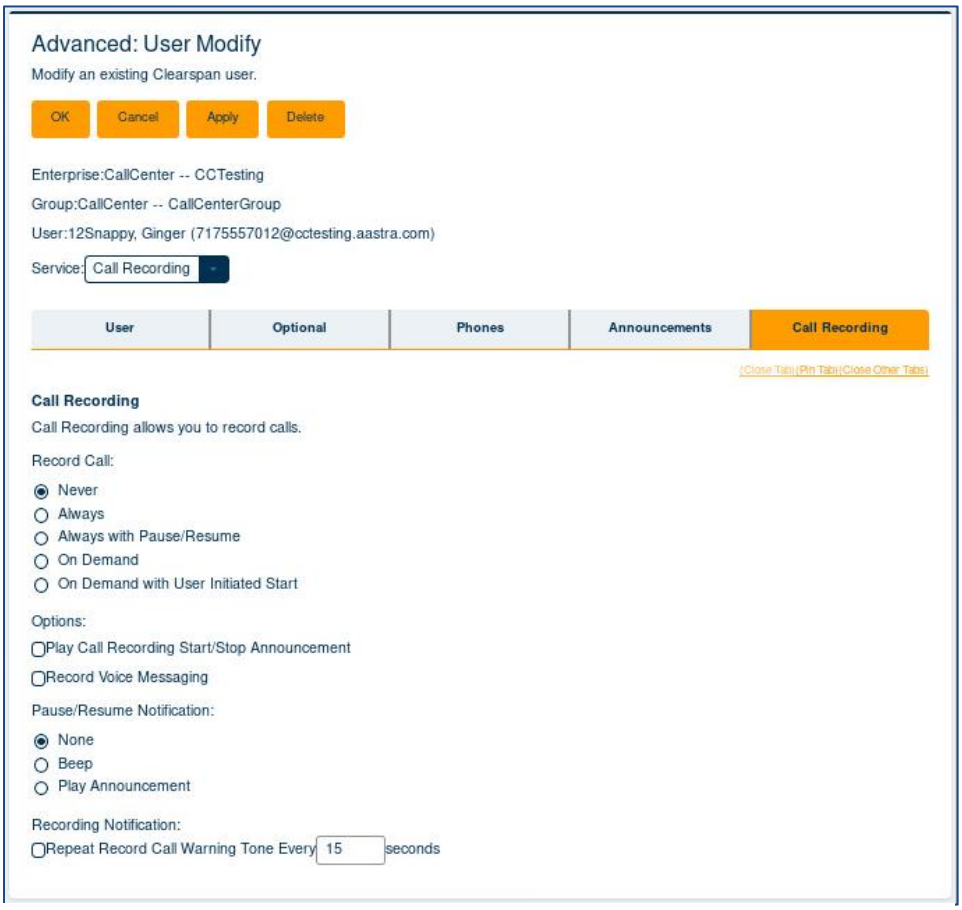


Figure 127 - Advanced: User Modify Page – Call Recording Tab

6. The **Record Call** setting determines when and how the user's calls are recorded.
7. Enable the **Play Call Recording Start/Stop Announcement** option to play an announcement when starting or stopping the recording of a call.
8. Enable the **Record Voice Messaging** option to record calls that go to Voice Mail.
9. The **Pause/Resume Notification** setting determines whether to play a beep or announcement notification when pausing or resuming the recording.
10. 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. Click OK or **Apply**.

Clearspan Anywhere

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

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

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

3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user you want to configure the Clearspan Anywhere feature. The **Advanced: User Modify** page opens.
5. Select **Clearspan Anywhere** from the **Service** Drop-down list. The **Clearspan Anywhere** tab appears.

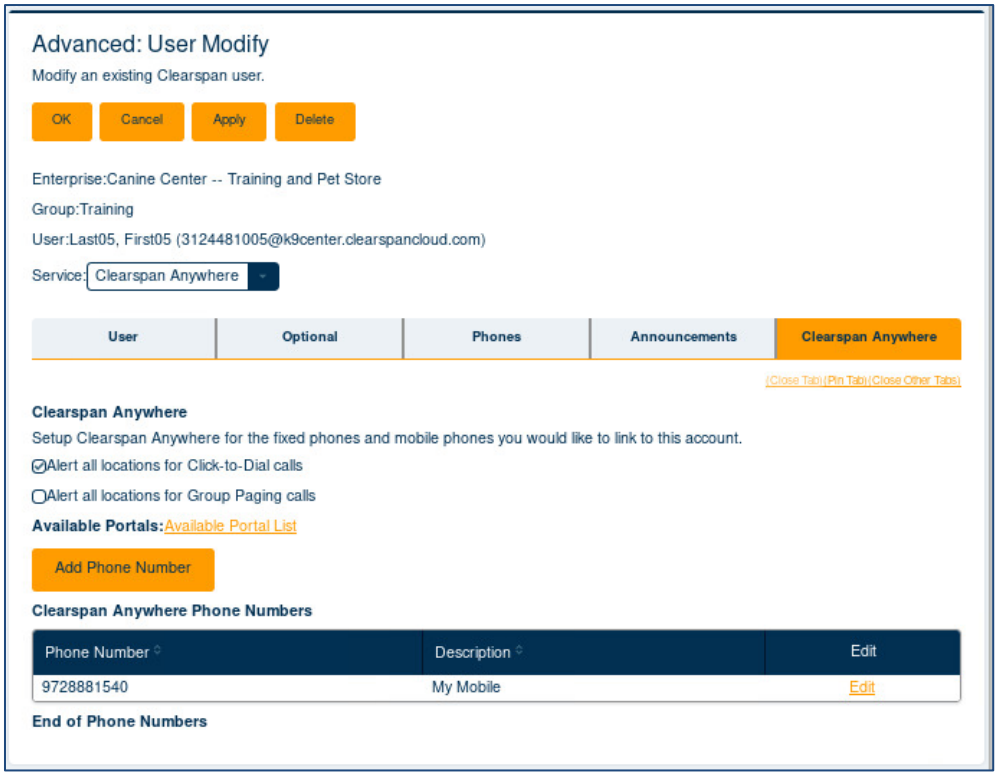


Figure 128 - Advanced: User Modify Page – Clearspan Anywhere

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

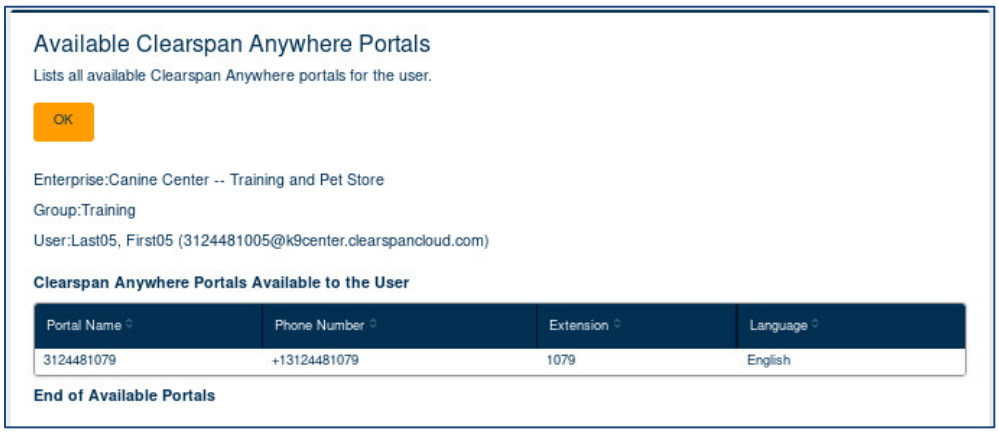


Figure 129 - Available Clearspan Anywhere Portals page

8. Click **Add Phone Number**. The **User: Clearspan Anywhere Phone Number Add** page appears,
9. Click **Edit** in the row of **Clearspan Anywhere Phone Numbers** table. The **User: Clearspan Anywhere Phone Number Modify** page appears.

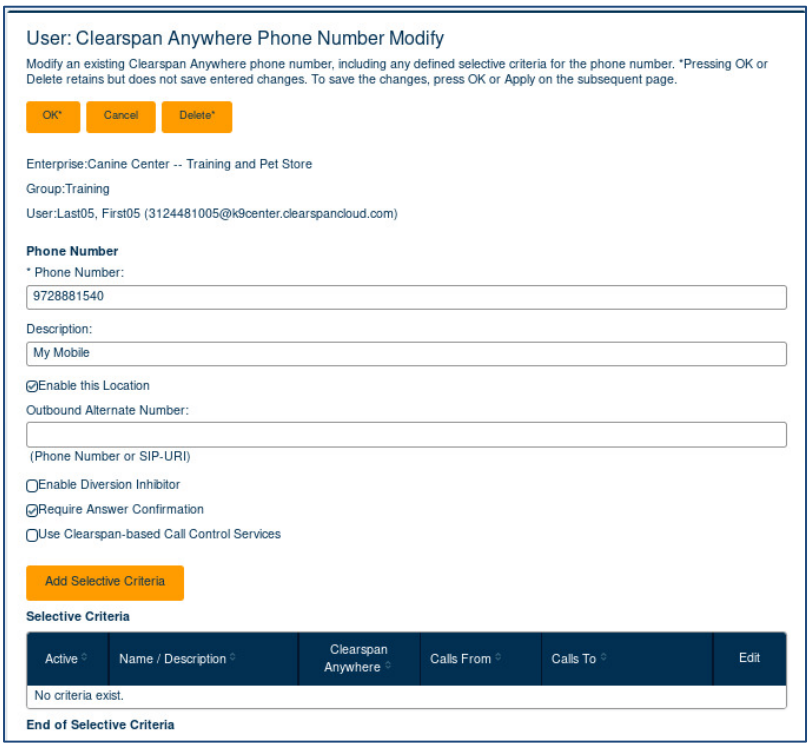


Figure 130 - Available Clearspan Anywhere Portals page

10. Enter or modify the Clearspan Anywhere phone number and description. Check the **Enable** check box to enable access to the configured Clearspan Anywhere location.
11. Enter or modify the **Outbound Alternate Number**. The **Outbound Alternate Number** allows you to add an outbound number or SIP URI to use when an alternate number must be dialed to reach this Clearspan Anywhere location.
12. Select the options:
    - **Enable Diversion Inhibitor:** This option specifies whether calls to this Clearspan Anywhere location may be redirected. If this setting is enabled and the destination is internal to Clearspan, calls will not be redirected/forwarded.
    - **Require Answer Confirmation:** This option specifies whether calls to this Clearspan Anywhere location require a confirmation touch-tone digit be entered by the answering party. Enabling this setting ensures that calls either connect to a live party or roll over to your Clearspan voice mailbox (or other designated forwarding destination)
    - **Use Clearspan-based Call Control Services:** This option inserts a Clearspan Media Server port into each call so that the answering endpoint can execute a transfer if desired.
13. Click **Add Selective Criteria** to Add a Selective Criteria, or Click **Edit** in the **Selective Criteria**

table to modify the Selective Criteria.

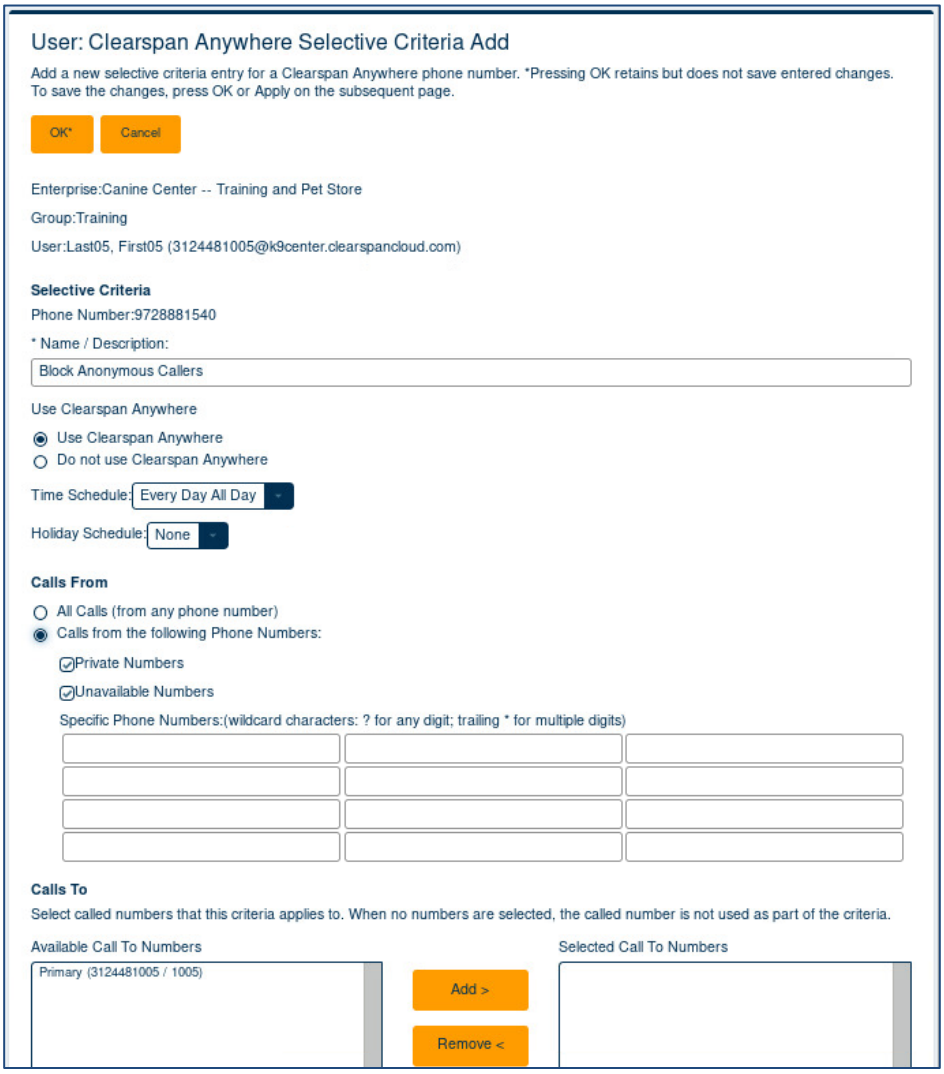


Figure 131 - Clearspan Selective Criteria Modify Page

14. Enter the Name or Description of the Selective Criteria, select a Time Schedule and/or Holiday Schedule to determine when the criteria apply.
15. The received calls that use a Selective Criteria are based on the **Calls From** settings. Select or enter one or more of the following options to use the selective criteria:
    - Select All Calls (from any phone number)
    - Select Calls from any or all the following:
        - Private Numbers
        - Unavailable Numbers
        - Specific Phone Numbers or wildcard matches
    - Enter Specific Phone Numbers (up to 12 numbers). The Phone number digit strings can include:
        - digits from 0 through 9
        - the following wildcard characters:

- * (star) – This wild card can only be used as the last character of the digit strings and matches any number of trailing digits. For example, 60833374*
- − ? (Question mark) – This wild card can be used anywhere in the string and matches any single digit. For example: 608????114 or 6?833?7?23 or 60?33374*

16. Click the **Available Call To Numbers** from the **Calls To** section, and click **Add** to add a **Call To** number to the **Selected Call To Numbers** list. When a received call uses the criteria, the **Calls' To** settings determine the user's phone numbers that will use the selected criteria when called. The phone numbers in the **Available Call to Numbers** list include the user's Primary number and any configured Alternate Numbers.
17. Click **OK***.
18. Click the **Active** check box to activate a Selective Criteria or clear the **Active** check box to deactivate the Selective Criteria.
19. Click **OK***. The Advanced: User Modify page opens.
20. Click OK or Apply.

Do Not Disturb

Allows users to send their calls directly to voicemail (or Call Forward Busy destination) without ringing their phone(s). In addition, the Ring Reminder option can make their primary phone emit a short ring burst to remind them that the feature is enabled, and a call is being diverted.

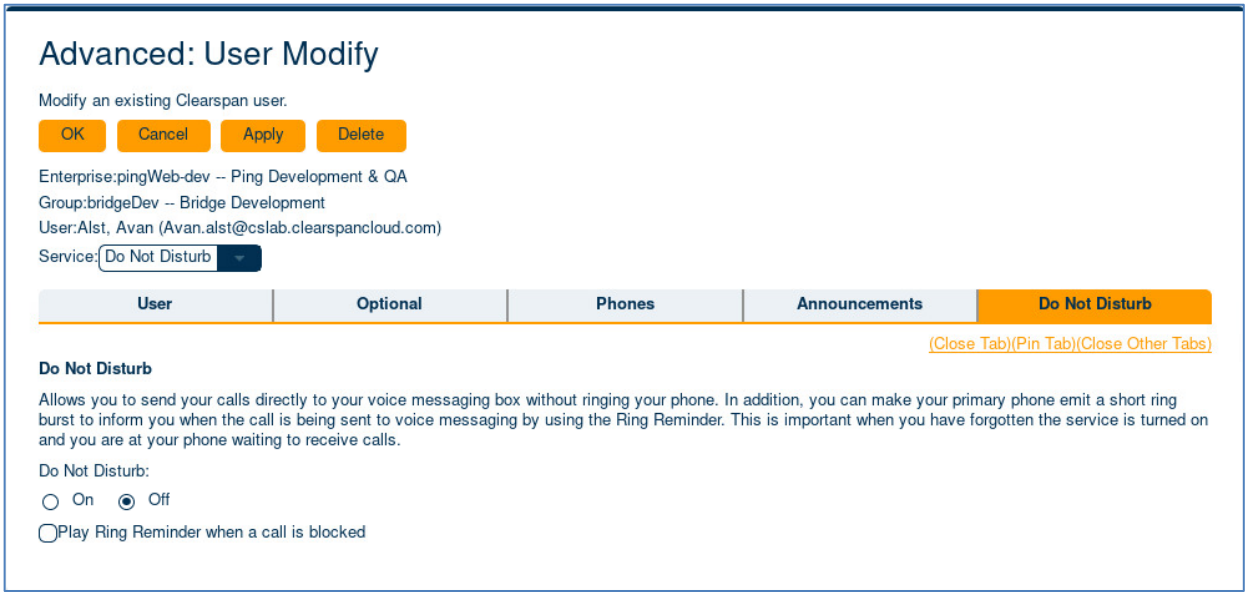


Figure 132 - Do Not Disturb Modify Page

Fax Messaging

The Fax Messaging feature allows users to receive faxes on a separate, dedicated phone number.

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.

2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user you want to set up fax messaging. The Advanced: User Modify page opens.
5. Select **Fax Messaging** from the **Service** Drop-down list.
6. Check the **Enable Fax Messaging** box to enable fax messaging for this user.
7. Select a **Phone Number**. A phone number is required when Fax Messaging is enabled.
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.
9. You can enter an **Extension** for Fax Messaging. This field is optional.
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 messages are not necessarily delivered to their final destination using encrypted protocols.

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

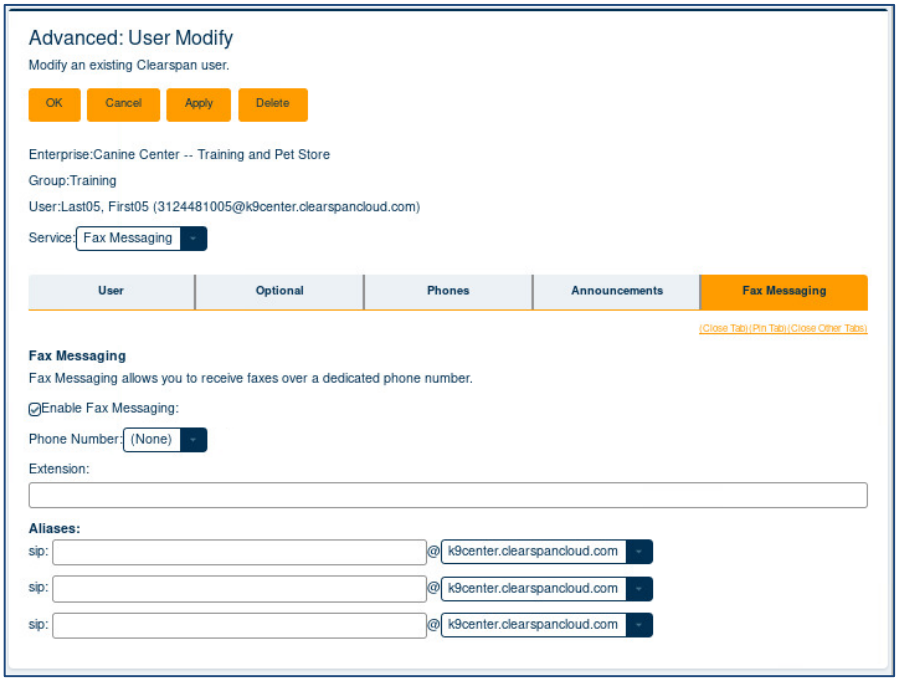


Figure 133 - Advanced: User Modify Page - Fax Messaging Tab

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 configured Primary device 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.

Note: Flexible Seating Guest is a service that must be assigned to the user on Clearspan.

1. Complete the steps for Configuring Flexible Seating Hosts.
2. Then, from the main menu, select **Provisioning** and then **Users**. The Users page opens.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click **Search** to view all the Users or enter Search parameters to filter the Search.
5. Click the **Edit** link in the row or click anywhere in the row of the user who will be the Flexible Seating Guest. The Advanced: User Modify page opens.
6. Select **Flexible Seating Guest** from the **Service** drop-down list.
7. When the **On** button is selected, the page refreshes and the Associated Host section is displayed.
8. Select the **Association Limit** check box, and enter the number of hours, if you want to limit the time that the association is active. If an Association Limit is not configured for the guest or the host, the guest is allowed to stay logged onto the host phone indefinitely.
9. Enter an **Unlock Phone PIN Code** if entry of a code is required at the time the user associates with the host phone using the voice portal. If used, the code must be between 4-10 characters.
10. Select the **Phone Device**. The drop-down provides all primary line and SCA devices associated with this user (Mitel and Polycom phones). When you select a phone device, the **Line/Port** field populates automatically.

Associating with a Flexible Seating Phone in OpEasy

1. In the **Associated Host** section of the Flexible Seating Guest tab of the User page, click **Search** to view all the Available Hosts for this group or enterprise that are built with the device type that matches the guest phone's device type.

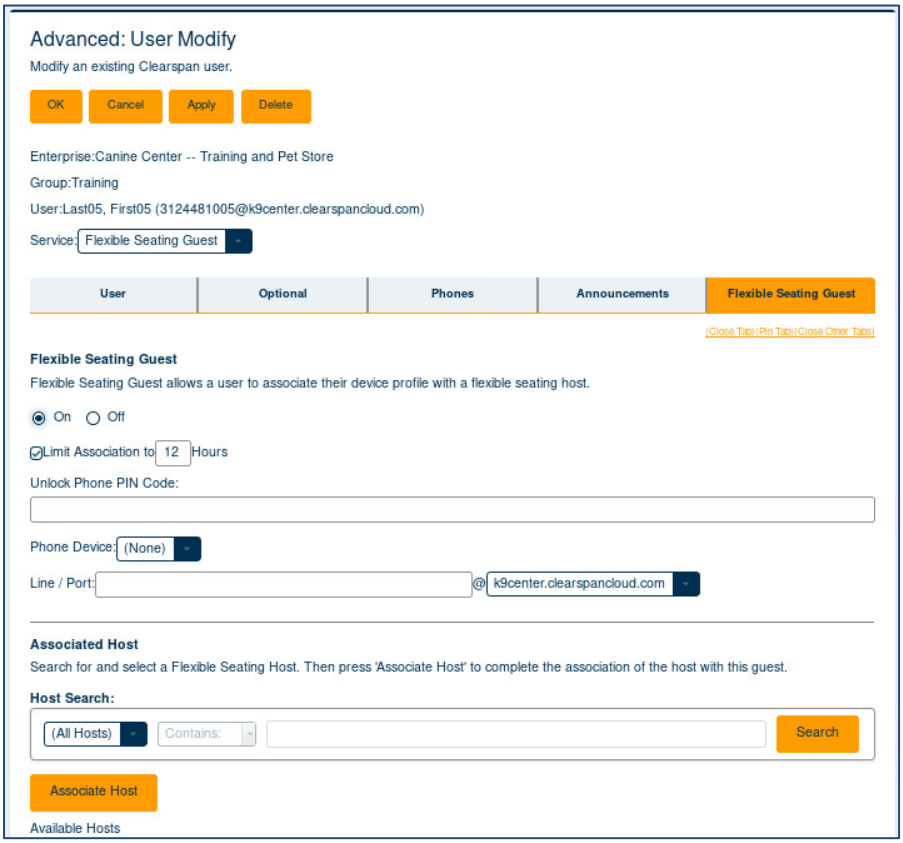


Figure 134 - Advanced: User Modify - Flexible Seating Guest Page

2. Select the host from the Available Hosts list and click **Associate Host**. The screen refreshes with information in the Flexible Seating Guest section no longer modifiable. The host association information is presented along with a button to Release Association.

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.

3. 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.

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 release association 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 release association from the host phone.

Disassociating a Flexible Seating Guest

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

- Click the **Release Association** button on the Flexible Seating Guest tab
- The Association Time Limit for the guest expires
- The host phone is used to call the voice portal and make menu selections to Disassociate
- Click the **Force Release Association** button 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

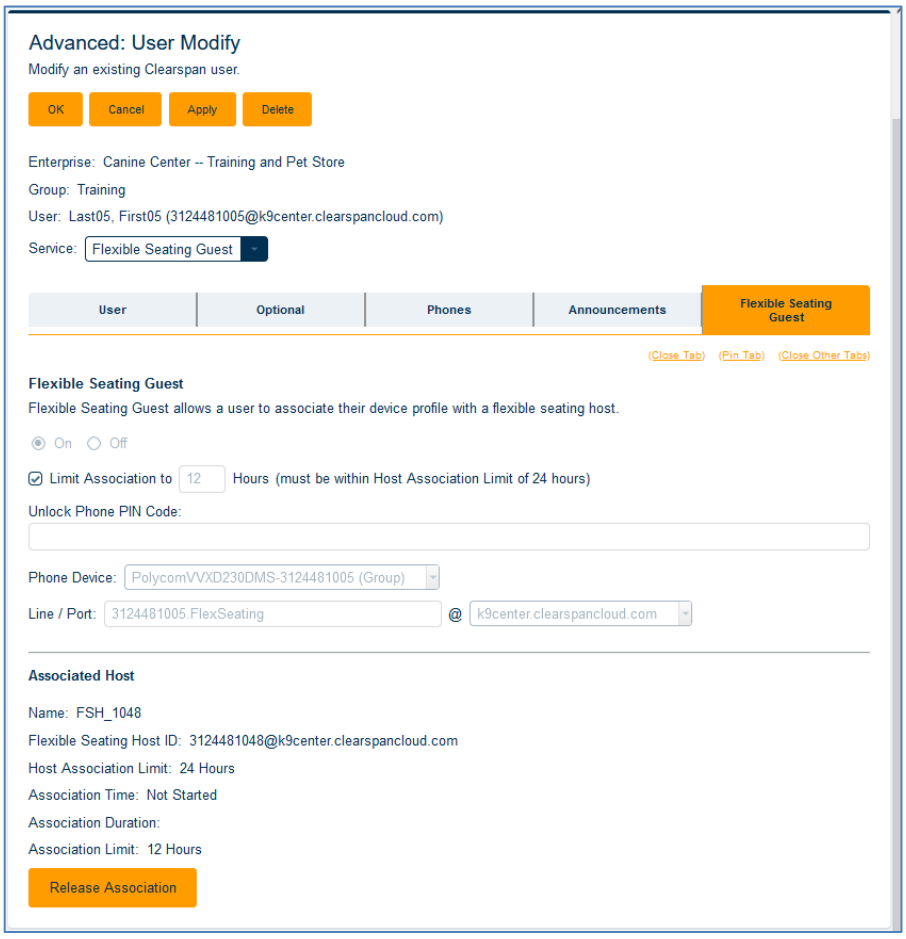


Figure 135 - Flexible Seating Host - Release Association

calls or calls into the voice portal.

Hoteling Guest

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

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user who will be the Hoteling Guest. The Advanced: User Modify page opens.
5. Select **Hoteling Guest** from the **Service** drop-down list.
6. Select **On** to enable this user as a Hoteling Guest.
7. Check the **Association Limit** check box to limit the time the Guest is Associated with the Host's Phone. The default is 12 hours.
8. Search for a **Hoteling Host** in the Associated Host section. Select a host from the list of Available Hosts.
9. Click the **Associate Host** button. The page is refreshed, and the Associated Host and AssociatedTime Limit is displayed in the Associated Hosts section.
10. Click **OK** or **Apply**. The Users page opens.

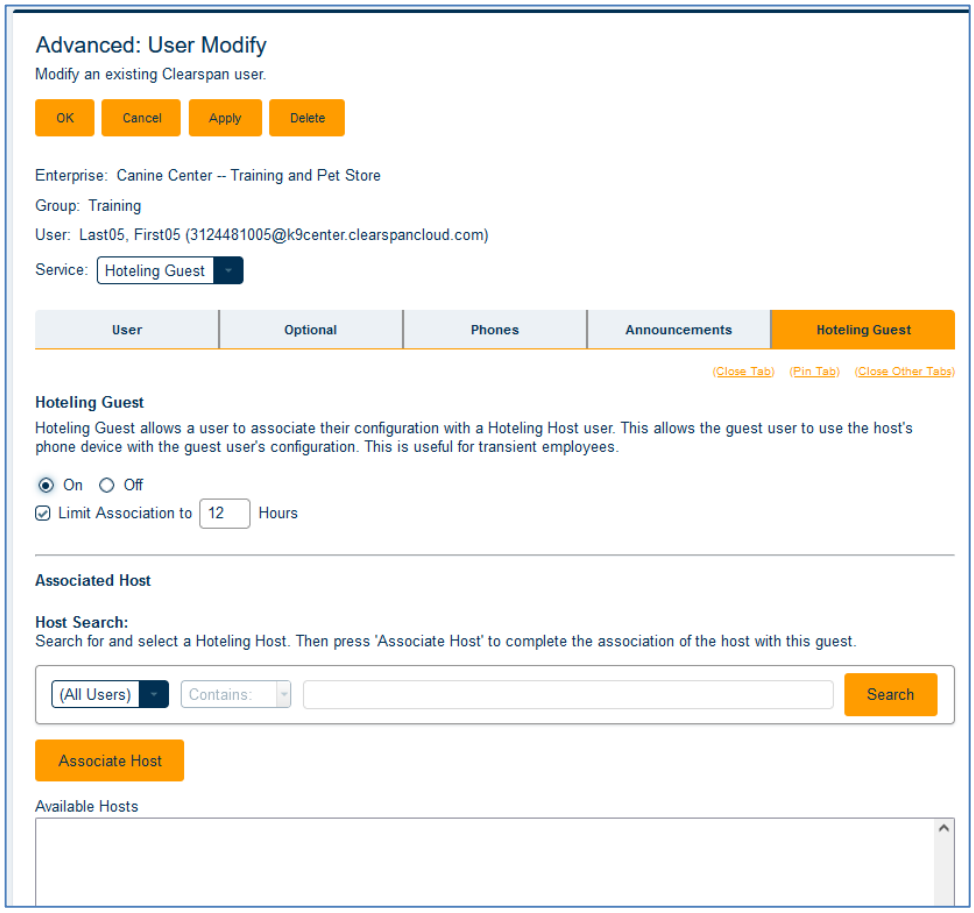


Figure 136 - Advanced: User Modify - Hoteling Guest Tab

Disassociating a Hoteling Guest

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

Hoteling Host

Hoteling Host allows 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 service profile. 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 opens.

2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the search.
4. Click the **Edit** link in the row or click anywhere in the row of the user who will be the Hoteling Host. The Advanced: User Modify page opens.
5. Select **Hoteling Host** from the **Service** drop-down list.

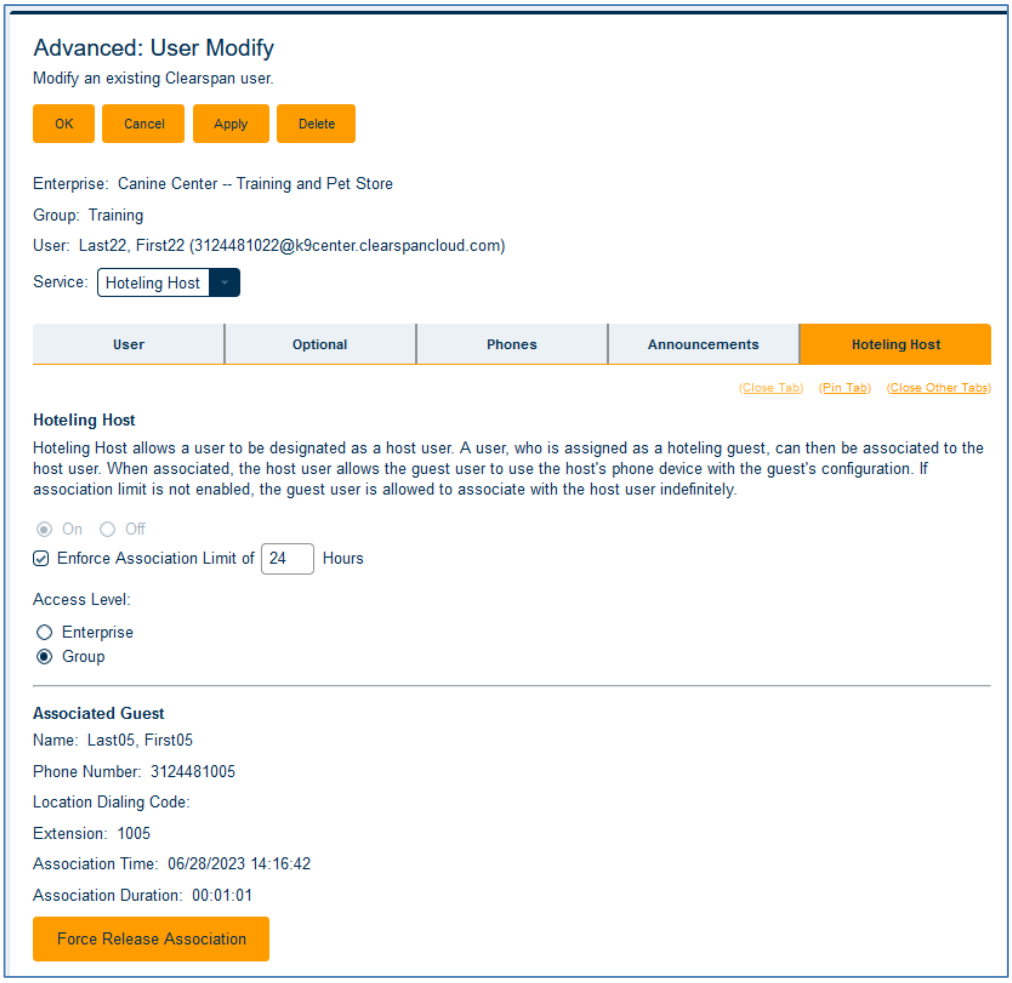


Figure 137 - Advanced: User Modify – Hoteling Host Tab

6. If the User is Host and has been Associated with a Guest, then the **ON** button is disabled, and the Associated Guest information is displayed.
7. Click **On** to enable this user as a **Hoteling Host**. The page is refreshed, and the Associated Guest section is displayed.
8. Choose the **Association Limit** check box to limit the time the Guest is Associated with the Host's Phone. The default is 24 hours.
9. Set the **Access Level** to Enterprise or Group.
10. Click **OK** or **Apply**.

Release Association with the Hoteling Host

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

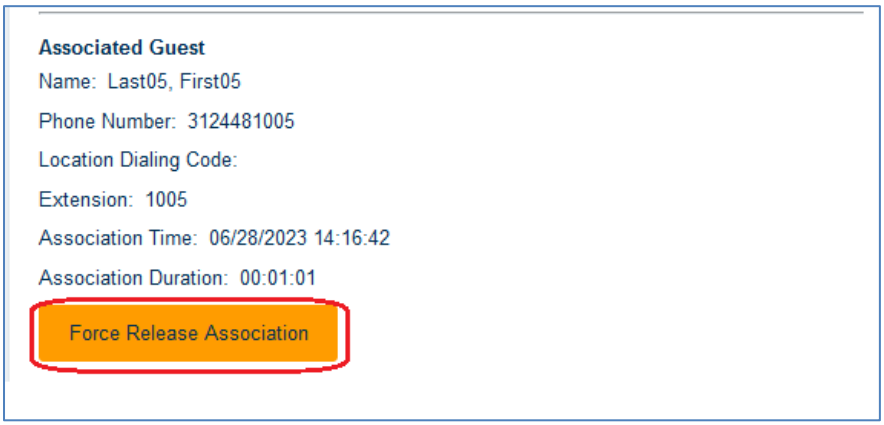


Figure 138 - Advanced: User Modify - Force Release Hoteling Association

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.

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
5. Select **Hunt Group** from the **Service** drop-down list. The Hunt Group tab opens.
6. Select the Hunt Groups in the **Available Hunt Groups** list that the User/Agent will be assigned to. You can use Shift+Click to select specific groups.
7. Click **Add** to assign the User/Agent to the selected Hunt Group(s) or click **Add All** to assign the User/Agent to all Hunt 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.

Note: Integrated IM&P is a service that must be assigned to the user on Clearspan.

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

Music On Hold

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

Note: Music On Hold is a service that must be assigned to the user on Clearspan.

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user for whom you want to configure Music On Hold settings. The Advanced: User Modify page opens.
5. Select **Music On Hold** from the **Service** drop-down list.
6. If **Music On Hold Profile** is not selected,

   Select a **Music On Hold Profile**, The Profile settings are filled in. Go to the last step.

   If no **Music On Hold Profile** is selected continue with the steps.
7. Select the **Enable Music On Hold** box to enable music on hold for this user in the General Settings section.
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.

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

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.

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

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

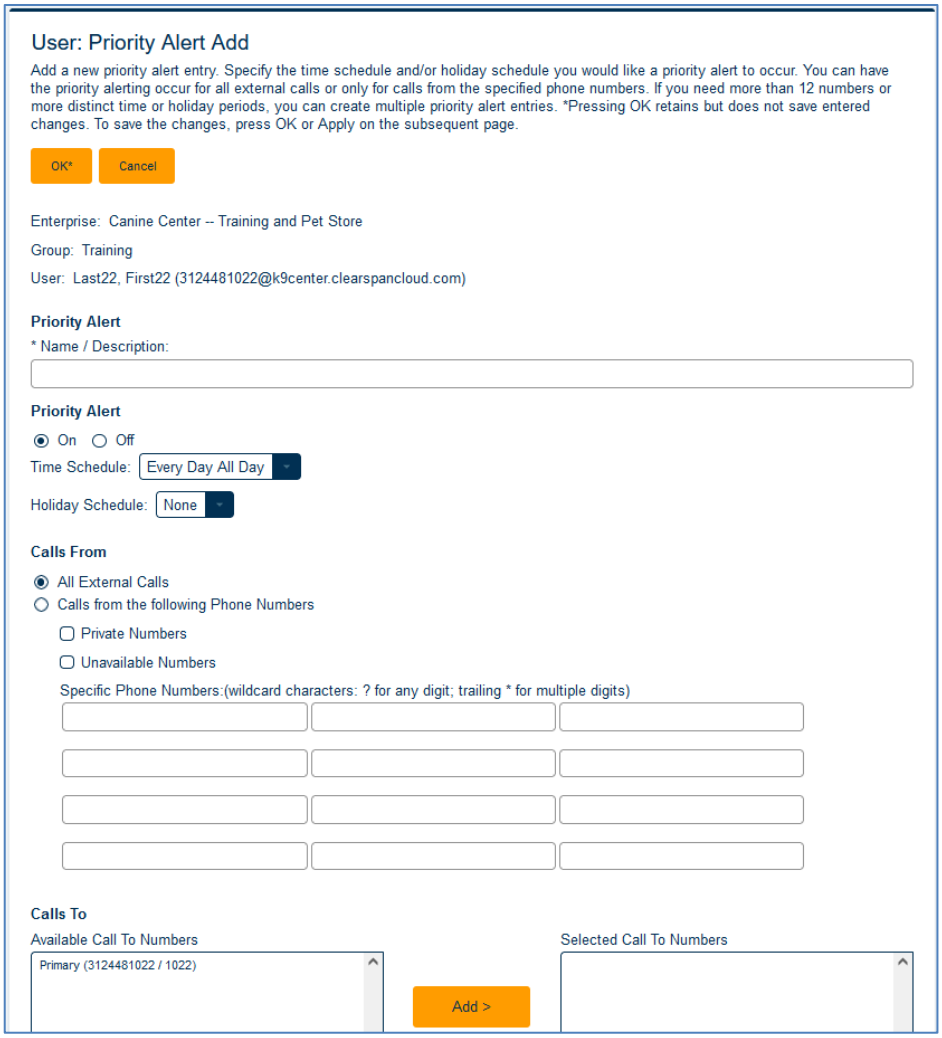


Figure 139 - Priority Alert Setup Page

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

Privacy

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

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

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

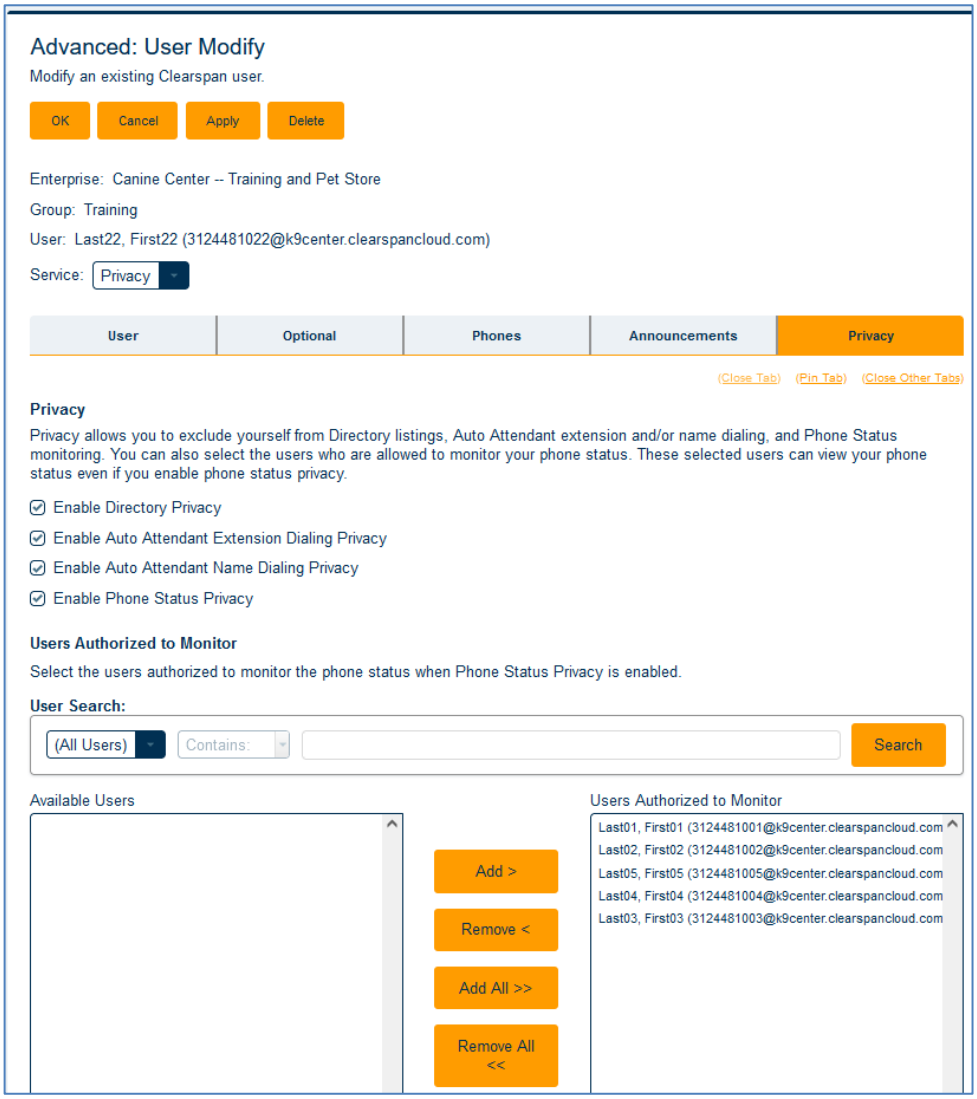


Figure 140 - Advanced: User Modify – Privacy Tab

6. Select the types of Privacy that you want to enable in the Privacy section. 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 view all the Users in the Users Authorized to Monitor section or enter Search parameters to filter 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 Users Authorized to Monitor list or click **Add All** to add all users to the list. Use **Remove** or **Remove All** to remove users from the Users Authorized to Monitor list.
9. Click **OK** or **Apply**.

Sequential Ring

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

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

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

Figure 141 - Advanced: User Modify Page – Sequential Ring Tab

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

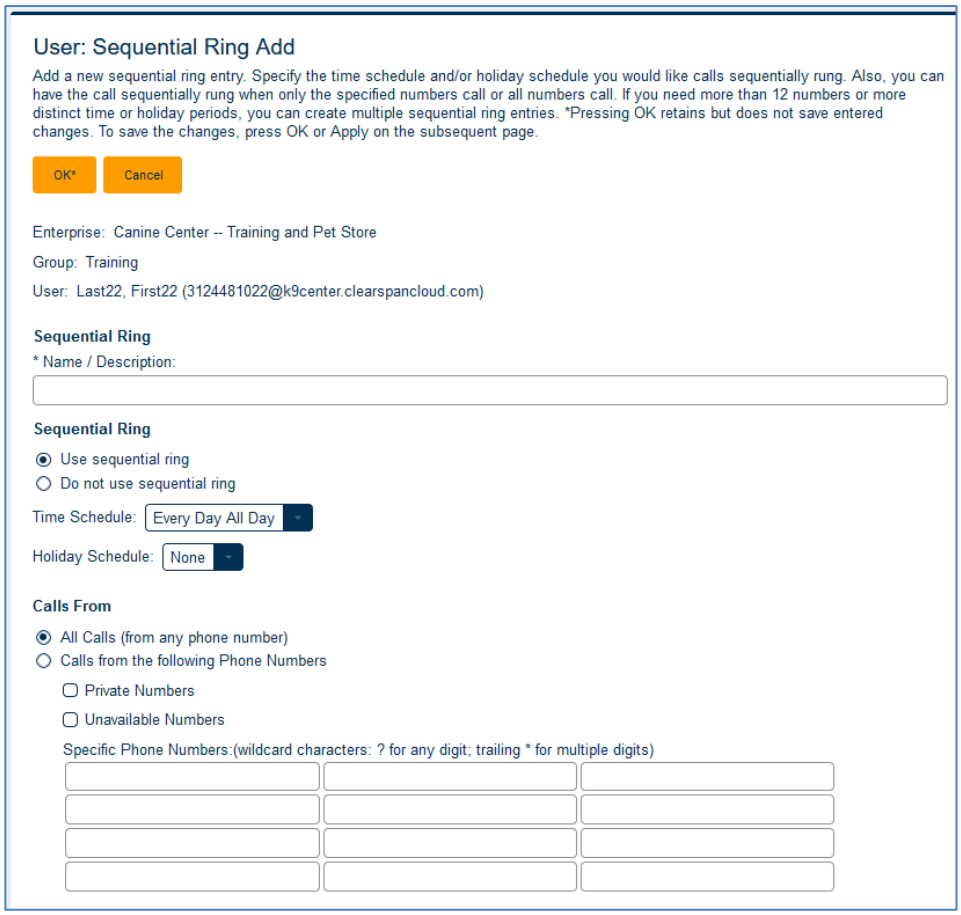


Figure 142 - User: Sequential Ring Add

a. Enter the Name or Description of the criteria, select the option to **Use sequential ring,** or

b. Select the Time Schedule and Holiday Schedule.

c. Select the option to receive a sequential ring from **All Calls (from any phone number)** or **Calls from the following Phone Numbers** and enter up to 12 phone numbers or digit patterns.

d. Select **Private Numbers** or **Unavailable Numbers** or both, to receive calls from private and unavailable numbers.

e. Click **OK**.

11. Click any row in the **Sequential Ring Criteria table** to modify an existing sequential ring entry. The **User: Sequential Ring Modify** page opens.

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

Simultaneous Ring

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

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

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

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

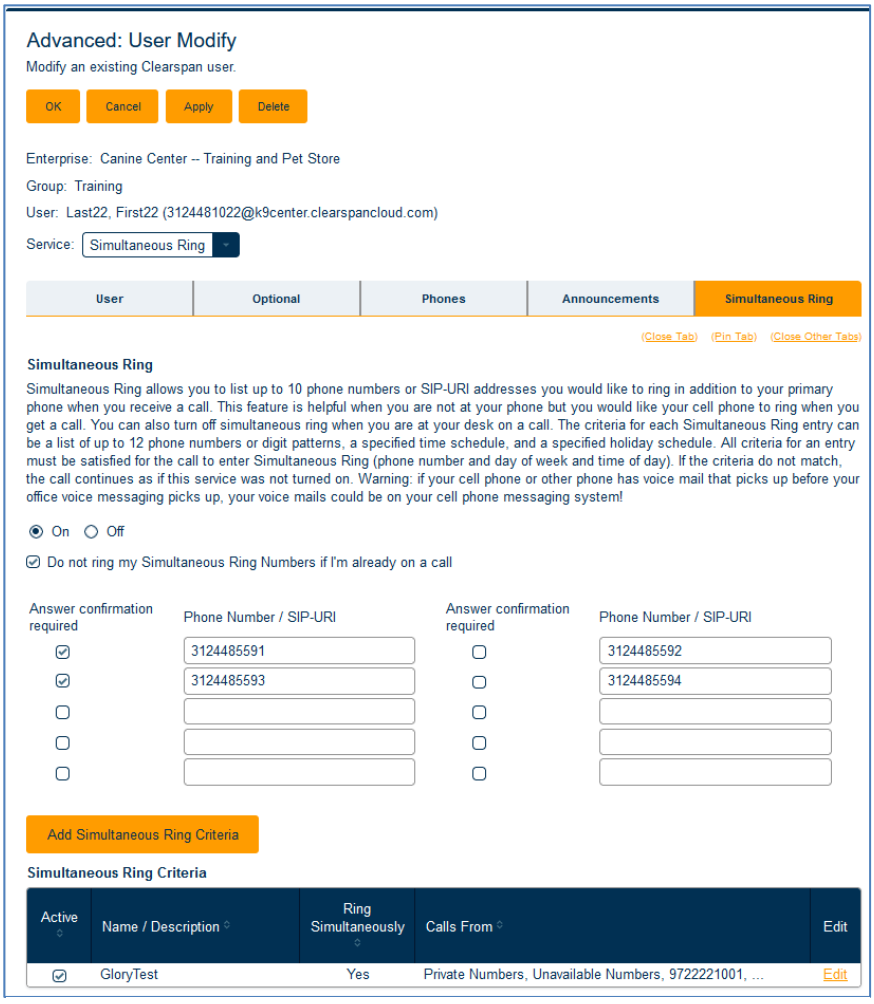


Figure 143 - Advanced: User Modify Page – Simultaneous Ring Tab

6. Select **On** to enable the Simultaneous Ring service.

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

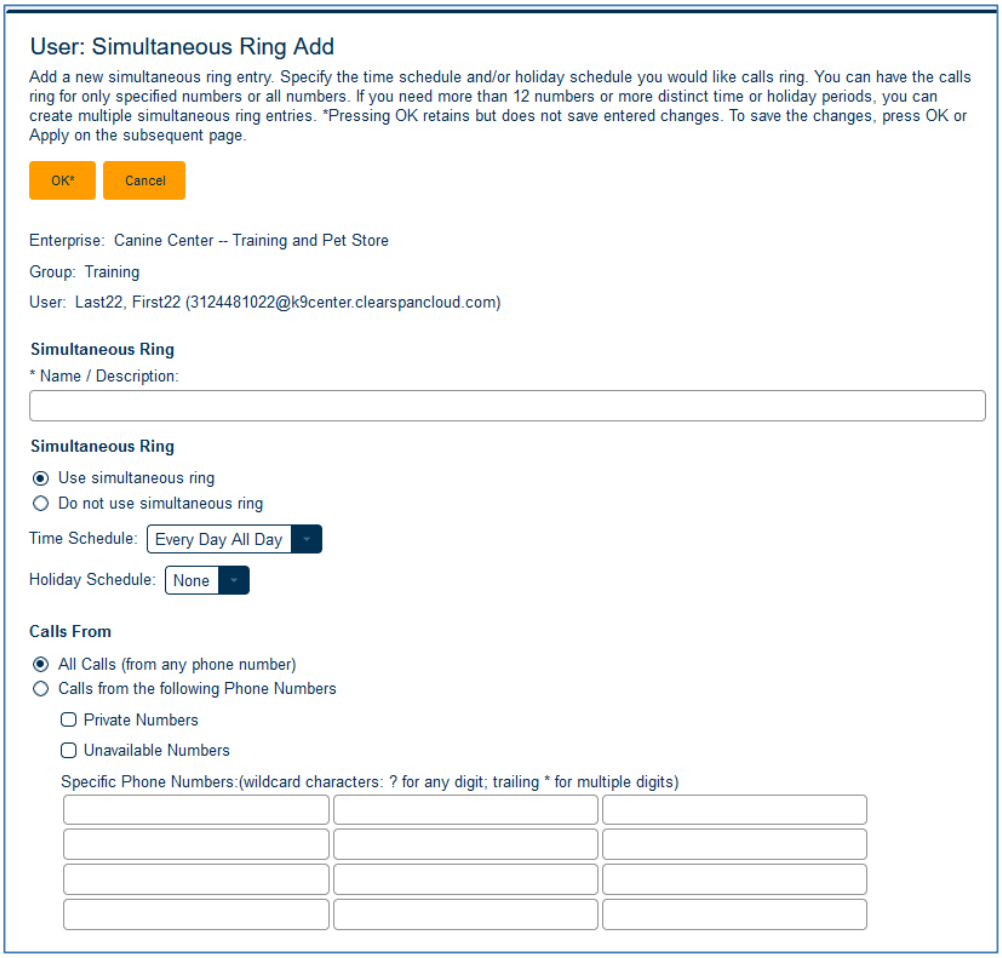


Figure 144 - User: Simultaneous Ring Add

   a. Enter the Name or Description of the criteria, select the option to **Use simultaneous ring,**
   b. Select the Time Schedule and Holiday Schedule.
   c. Select the option to receive a simultaneous ring from **All Calls (from any phone number)** or **Calls from the following Phone Numbers** and enter up to 12 phone numbers or digit patterns.
   d. Select **Private Numbers** or **Unavailable Numbers** or both, to receive calls from private and unavailable numbers.
   e. Click **OK**.

10. Click any row in the **Simultaneous Ring Criteria table** to modify an existing simultaneous ring entry. The **User: Simultaneous Ring Modify** page opens.

Speed Dial 8

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

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

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user for which to configure Speed Dial 8. The Advanced: User Modify page opens.
5. Choose **Speed Dial 8** from the **Service** drop-down list. The Speed Dial 8 tab opens.
6. If you want to assign a predefined Speed Dial 8 List to the user, select it from the **Initialize List Using** drop-down box, and click **Initialize List**. Initializing a predefined list overwrites any existing Speed Code entries.
7. If you want to assign or edit a specific Speed Code entry, enter or change the **Phone Number / SIP-URI** and a **Name/Description**. Enter a phone number as you would normally dial it.
8. Click **OK** or **Apply**.

Speed Dial 100

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

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

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

Adding Speed Dial 100 Entries

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user for which to configure Speed Dial 100. The Advanced: User Modify page opens.
5. Choose **Speed Dial 100** from the **Service** drop-down list. The Speed Dial 100 tab opens.
6. 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.

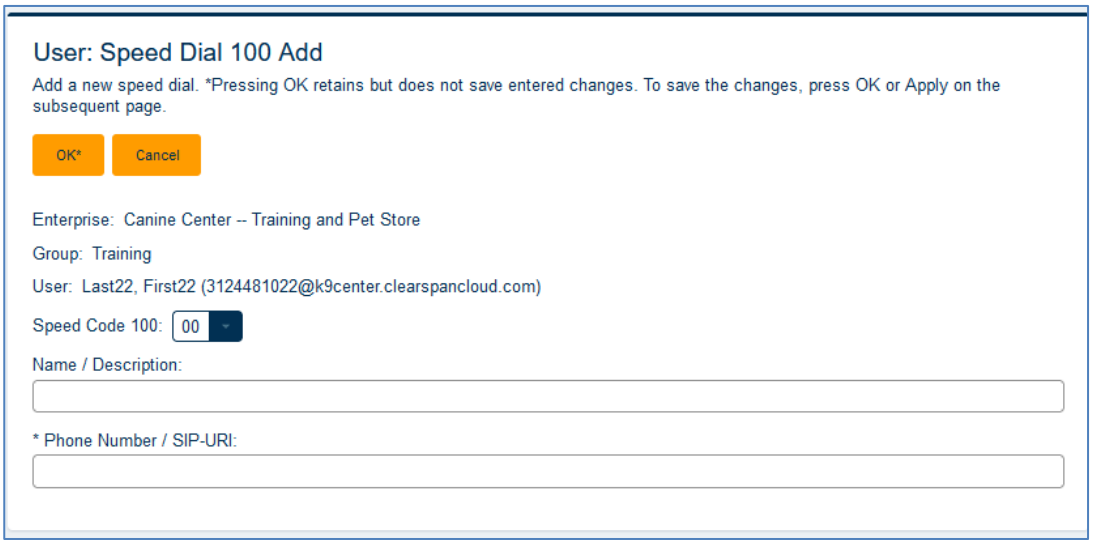


Figure 145 - User: Speed Dial 100 Add Dialog Box

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

Editing or Deleting Speed Dial 100 Entries

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

Voice Mail

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

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

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

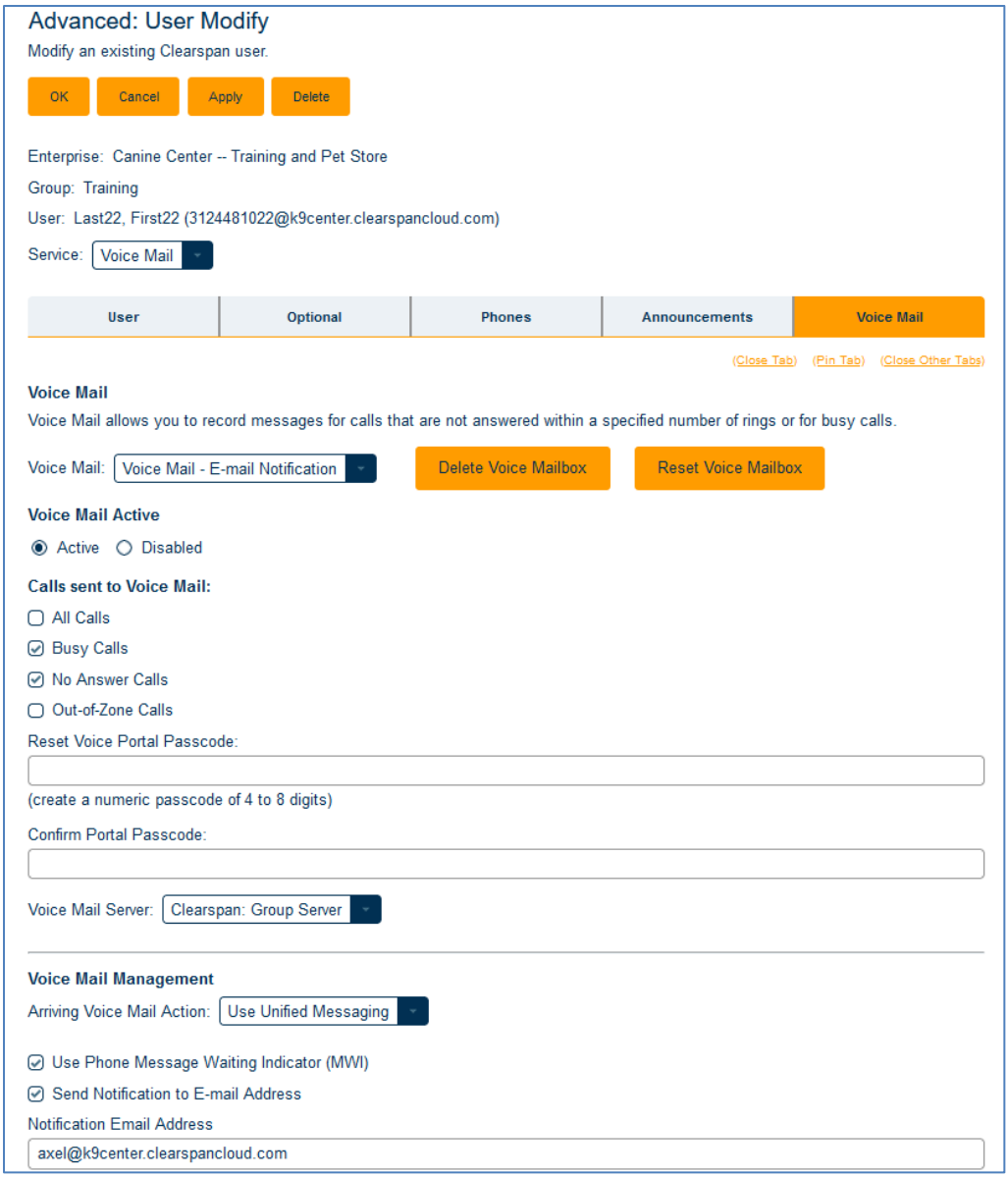


Figure 146 - Advanced: User Modify Page – Voice Mail Tab

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

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

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

Voice Mail Distribution Lists

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

Note: Voice Mail Distribution Lists is a service that must be assigned to the user on Clearspan.

Adding Entries to Voice Mail Distribution Lists

1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search** to view all the Users or enter Search parameters to filter the Search.
4. Click the **Edit** link in the row or click anywhere in the row of the user for which to configure Voice Mail Distribution Lists.
5. Select **Voice Mail Distribution Lists** from the **Service** drop-down list. The Voice Mail Distribution Lists tab opens.

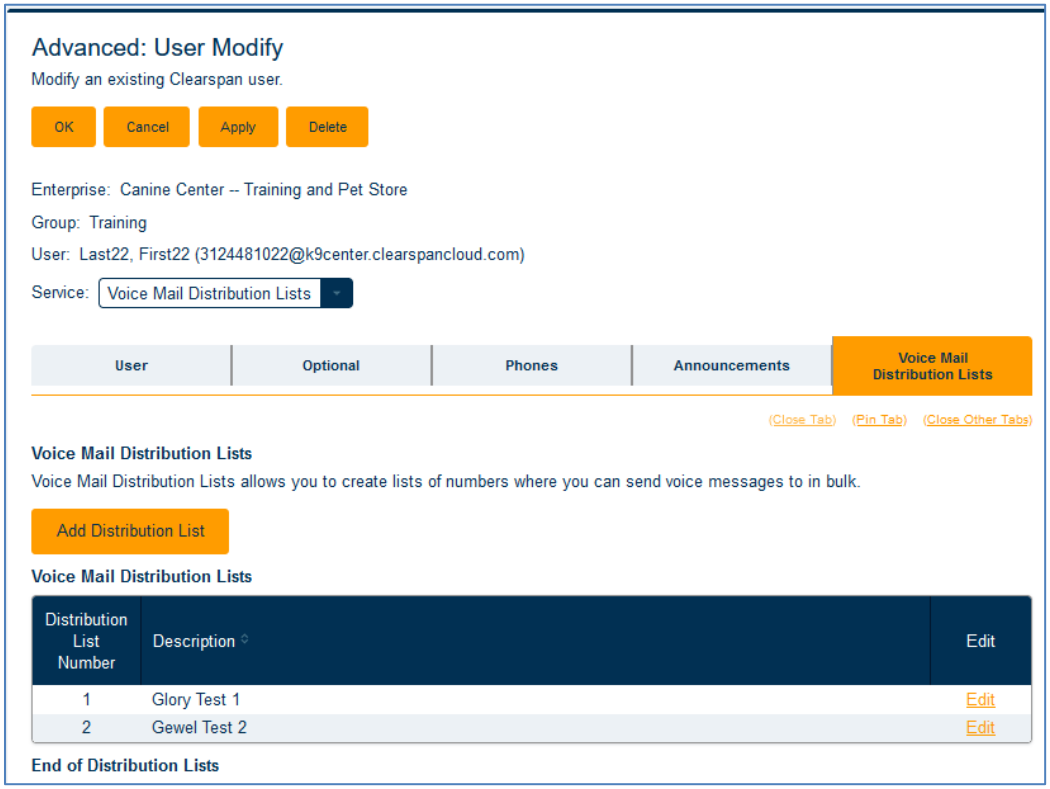


Figure 147 - Voice Mail Distribution Lists

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.

Removing an Entry in a Voice Mail Distribution List

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

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

Voice Mail Greetings

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

Note: Voice Mail Greetings is a service that must be assigned to the user on Clearspan.

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

Figure 148 - Advanced: User Modify Page – Voice Mail Greetings Tab

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

User Settings

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

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

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

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

New User E-mail Notification

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

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

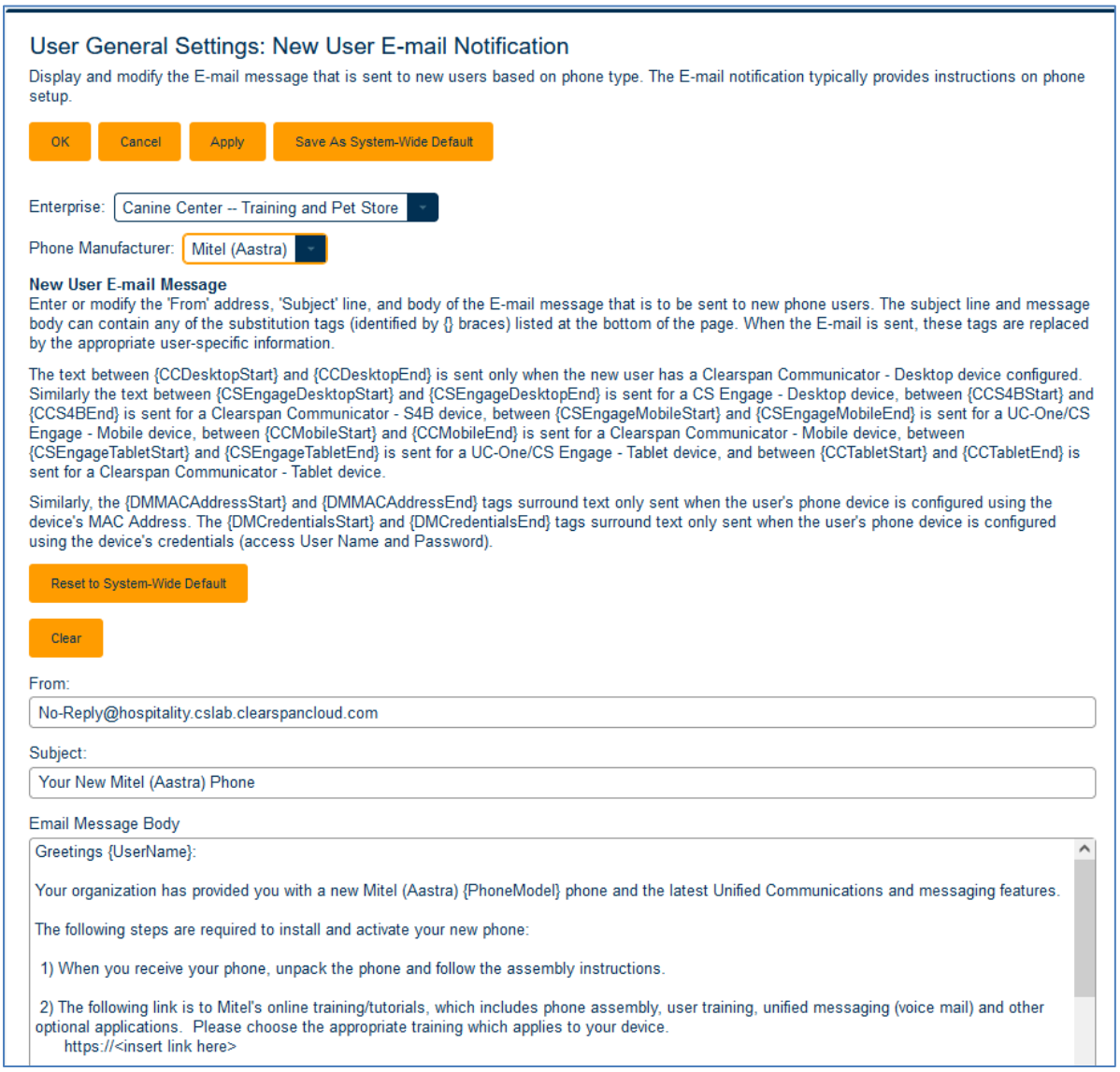


Figure 149 - User General Settings: New User E-mail Notification

Note: OpEasy validates the length of the new user email content for 8000 bytes and if the limit is exceeded then emails are not sent.

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 view all the Users.
3. Click the **Edit** link in the row or click anywhere on the row of the user you want to delete. The User Modify page displays with a Delete button.
4. Click **Delete.**

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

5. Click **Yes** 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.
   - The device is a Clearspan Bridge device type.

Note: If the user being deleted has an associated Clearspan PING account, i.e. has a Clearspan Bridge assigned as one of its devices, additional information will be requested on the disposition of the PING account. See the instructions in the next section.

7. If any of the devices associated with the user can be deleted, the User Delete page is displayed. Select either **User** or **User and Associated Phone Devices** from the **Settings to Delete** drop-box.

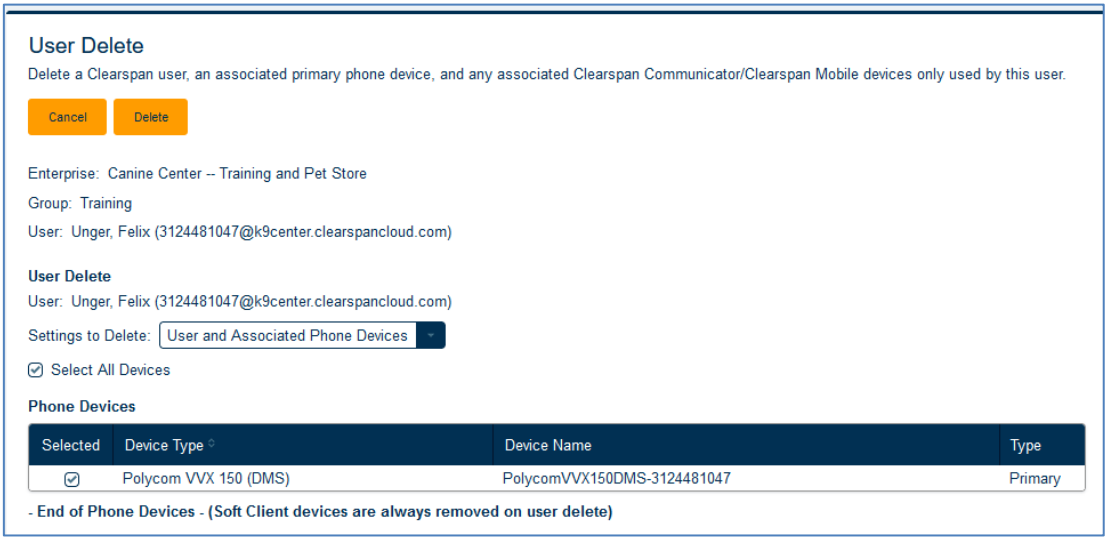


Figure 150 - User Delete Page

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

their primary device). Note that these devices are deleted independent of the “User Delete” page, which might not be displayed.

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

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

Special Instructions when Deleting a PING Client User

Clicking the ‘Delete’ button on the User screen when a Clearspan Bridge device is assigned to the user navigates the admin to a new GUI page with options to choose a ‘Ping User Dispositional State’.

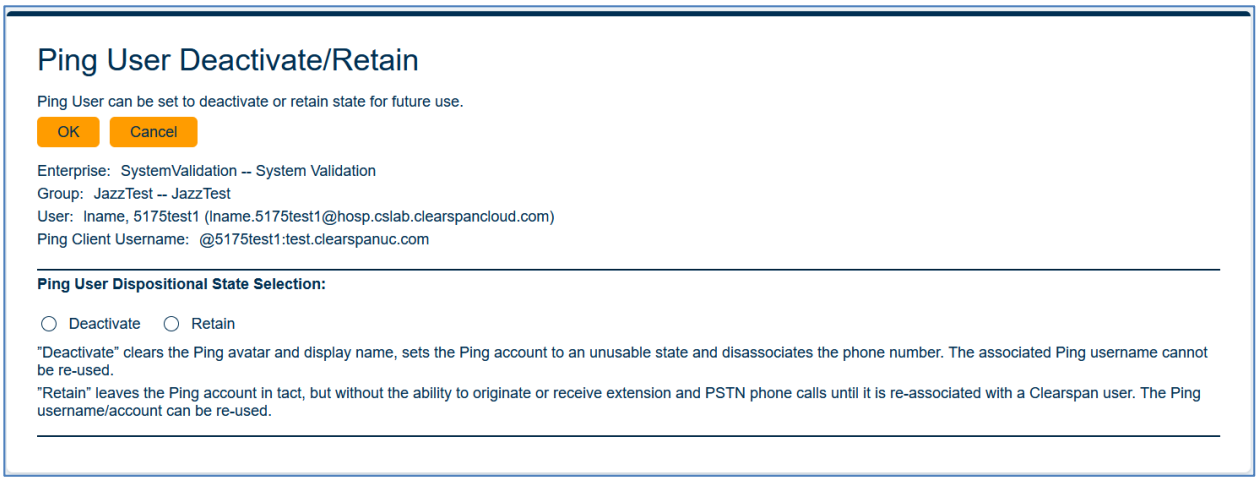


Figure 151 - Ping User Deactivate/Retain

A PING User Disposition state must be chosen.

- ‘Deactivate’ sets the Ping user account to an unusable state. The PING account cannot be re-assigned.
- ‘Retain’ disassociates the Ping user account from the Clearspan user. This option should be used, for example, when the user is being deleted from one Group in order to move it to a different Group within the same Enterprise. ‘Retaining’ the PING account leaves the chat history, call history, contacts, and team associations intact for re-association with the user account once created in the target Group.

Polycom Phone Users

When creating a user or adding a phone to an existing user, any phone device created for that user may be a Polycom phone. An OpEasy 3rd Party License is required for each added or modified Polycom phone. An error message appears if no license is available.

User Device Settings for Polycom Phones

For any of the supported Polycom phones, the Device Access: User Name and Password fields appear and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @.

When a phone uses device credentials, the MAC Address field is optional. However, if entered for a Polycom phone, the contents of the MAC Address field MUST be valid, matching the MAC address of the physical Polycom phone assigned to that phone device. The Polycom phone will not be able to load its configuration files if an incorrect MAC address is entered. Therefore, it is highly recommended to leave the MAC Address field empty. If Polycom Phone Support licensing is installed and enabled, the MAC address is automatically provisioned when the phone starts up.

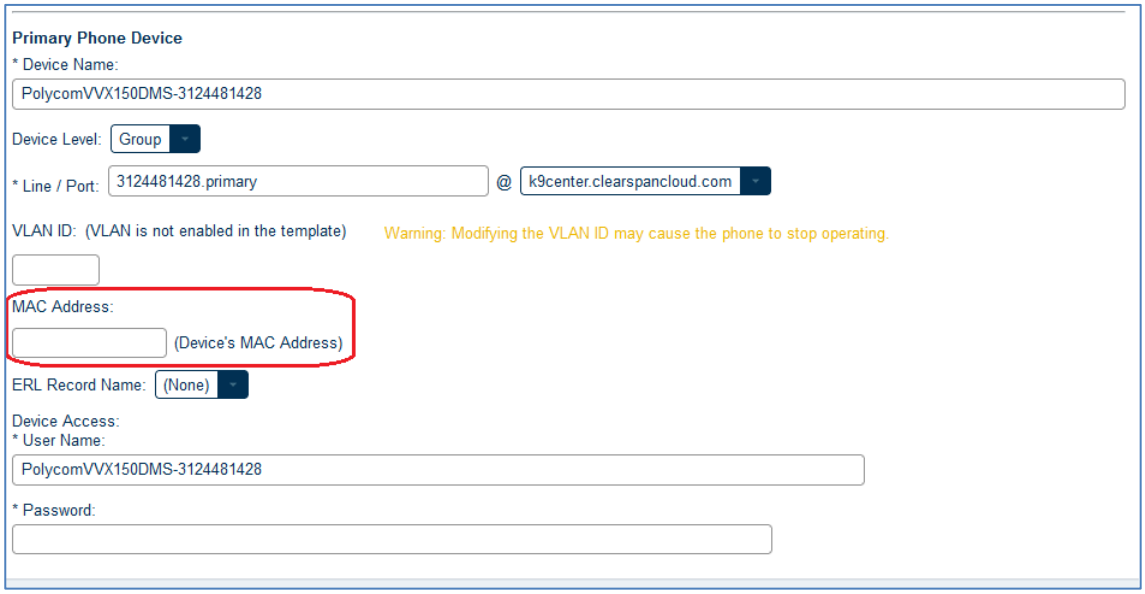


Figure 152 - User Add with Polycom Phone - Primary Phone Device Section

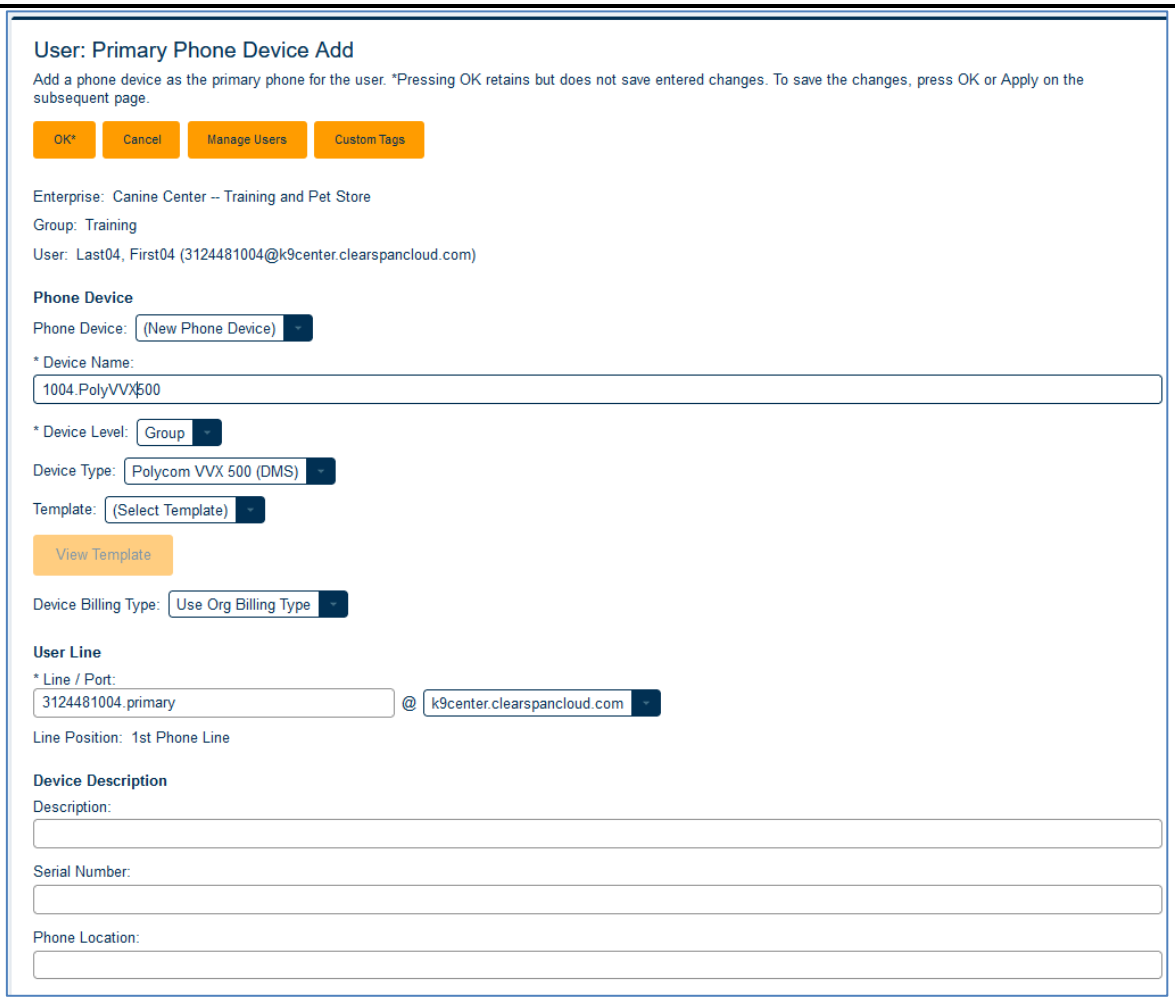


Figure 153 - User Primary Phone Device Settings for Polycom Phones

User General Settings for Polycom Phones

As with Mitel phones, when creating a user with a Polycom phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Polycom phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Polycom phone from the Users page of Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Polycom from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Polycom phone.

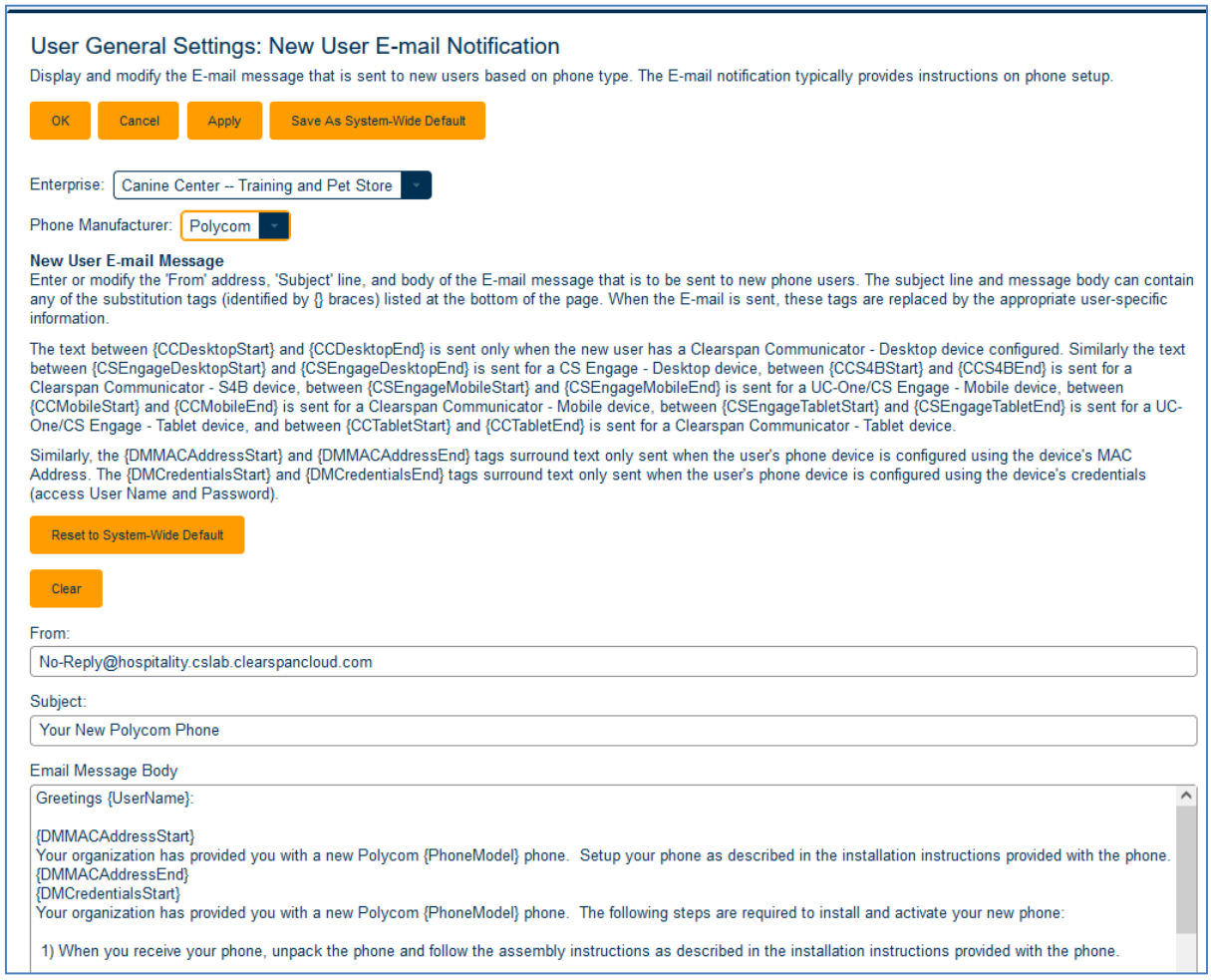


Figure 154 - User General Settings E-mail Notification for Polycom Phones

Virtual Users

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

The Virtual User types include:

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

Auto Attendants

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

Planning and Testing Auto Attendants

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

- 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 the Add button.

Click the **Add** button. The Auto Attendant tab displays by default.

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

4. If you select a service from the **Service** drop-down list, an additional Service Tab will appear.For example, if you select **Alternate Numbers**, the **Alternate Numbers** tab appears.
5. Enter a **Name** for the Auto Attendant.
6. Enter an **Auto Attendant ID** and domain.
7. Select the **Auto Attendant Type**, either **Basic** or **Standard** based on the license.
8. Select the **Department** for which to implement the Auto Attendant.
9. Select the **Phone Number** and/or **Extension** for which to implement the Auto Attendant.
10. **Activated** or **Deactivated** indicates the current status of the phone number selected. Change this setting if necessary. Select **Activated** (Recommended) if the phone will place and receive calls from outside the system or **DeActivated** if the calls will be internal only.

11. Choose to **Enable Video Support** and **Confirm Portal Passcode**. This field appears only when the group has Auto Attendant - Basic Video or Auto Attendant - Standard service assigned.
12. Enter the **Voice Portal Passcode** if Voice Mail is enabled for the Auto Attendant. The passcode must contain 4-8 digits as determined by the administrator.
13. For **Calling Line ID**, enter the **Last Name**, **First Name**, and **Phone Number** for the Auto Attendant.
14. Select the **Business Hours** and **Holiday Schedule** to use for the Auto Attendant.
15. Select **Enterprise**, **Group**, or **Department** as the dialing option for **Extension Dialing Scope** and **Name Dialing Scope**. Use the name and extension dialing scope controls to specify whether your Auto Attendant can make direct calls to users in the same group, department, or enterprise.
16. Choose the **LastName** and **FirstName** order for **Name Dialing Order**. This setting determines whether callers can enter either the last name or first name of the person they want to reach, or only the last name.
17. Determine the features to enable for the Auto Attendant. Click the **Available Service(s)** in the list on the left and click **Add**.
18. **User Defined Fields** – These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the **Use Default** check box and enter the value of the User Defined Field in the **Value** box.

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

Optional Tab

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

Menus Tab

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

Submenus Tab

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 opens when the Auto Attendant Type is set to **Standard**.

2. Search for a Submenu to edit or click **Add Submenu**.
3. Enter the **Submenu ID**.
4. Select **Default Greeting** or choose a **Personal Greeting** for the **Greeting Selection**. The Personal Greeting choices come from the Auto Attendant's Announcement Repository or its Group's Announcement Repository.
5. Select **Enable extension dialing at any time** if you want to enable that feature. When using extension dialing, you are not required to configure a key for extension dialing if you select this option.
6. In the Submenu Key Definitions section, configure a **Description**, an **Action**, and the **Action Data** for each key that you want to assign to the Auto Attendant feature.
7. Click **OK**.

Announcements Tab

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

Voice Mail Tab

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

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

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

Voice Mail Greetings Tab

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

Alternate Numbers Tab

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

Call Centers (Limited Provisioning)

The ability to **add** Call Centers via the OpEasy GUI and import spreadsheet with minimal configuration was added in OpEasy version 22.1. However, provisioning of many of the advanced Call Center features and functions must still be completed via the Clearspan administrative web portal. A Call Center is a virtual user service that allows business agents to receive incoming calls from a central phone number. Using this service, a business can establish technical assistance lines, customer support numbers, or order-taking centers. Multiple call centers can be supported for each business. Incoming calls to a call center are presented to agents according to the selected Call Distribution policies.

Add a New Call Center

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

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

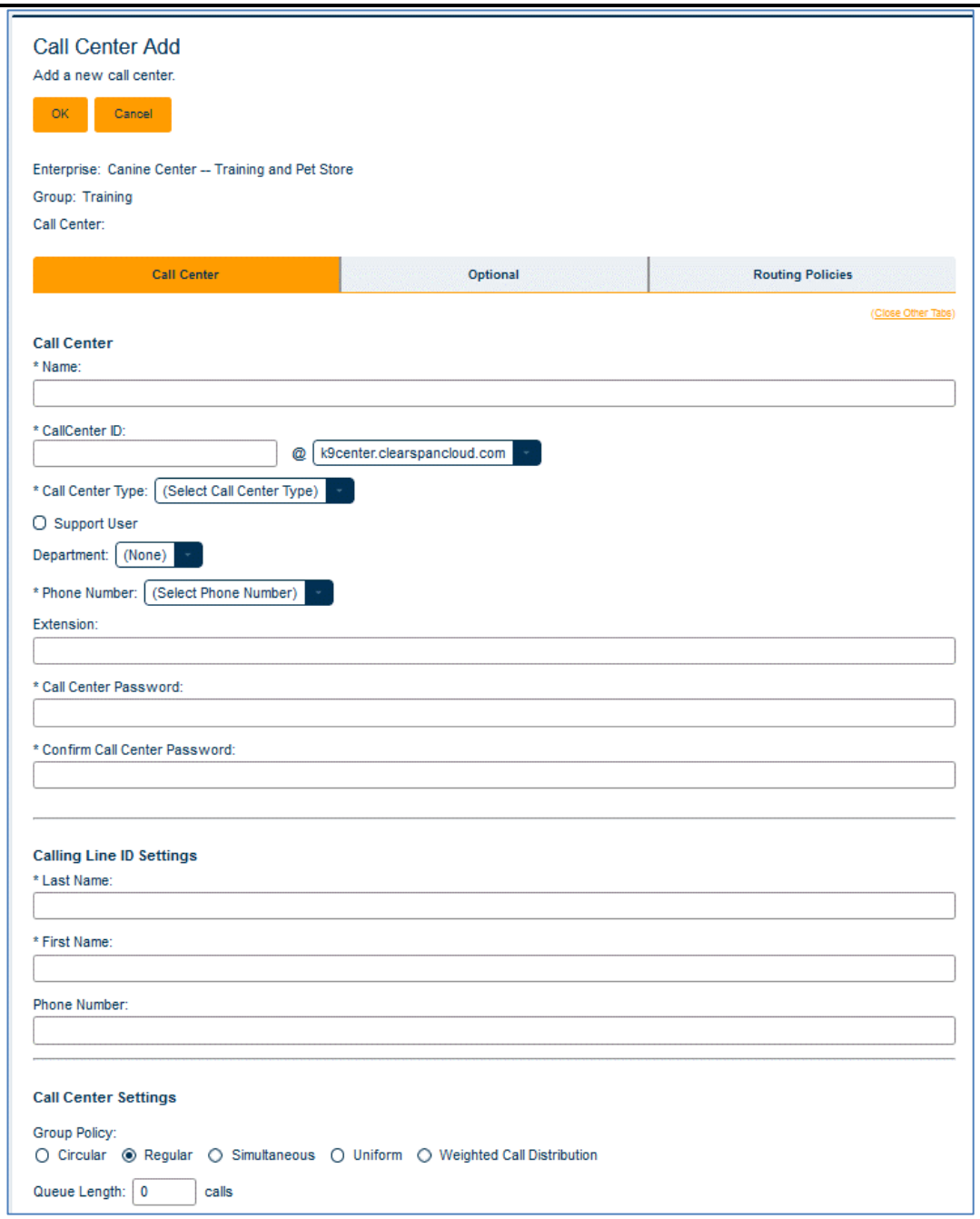


Figure 155 - Call Center Add Page

5. On the Call Center tab enter a descriptive **Name** for the Call Center and a unique **Call Center ID**. Call Center ID has no practical external use but is required as an internal data element for all Virtual Users

6. Select a Call Center Type
    - A **Basic** Call Center provides basic queuing capabilities distributing calls to devices and people. This is an inexpensive option for multiple receptionists and other call center applications that only require basic queuing capabilities. You can add a Basic Call Center via OpEasy, but provisioning of advanced Call Center features and functions must still be completed via the Clearspan administrative web portal.
    - **Standard** Call Centers provide such functions as agent states, supervising, and reporting. You can add a Standard Call Center via OpEasy, but provisioning of

advanced Call Center features and functions must still be completed via the Clearspan administrative web portal.

- A **Premium** Call Center is the most feature-rich Call Center solution provided by Clearspan. In addition to the capabilities provided by the standard offering, it provides features such as Night Service, Stranded Calls, and Bounced Calls routing policies. It is intended to meet the call center needs of most businesses. You can add a Premium Call Center via OpEasy, but provisioning of advanced Call Center features and functions must still be completed via the Clearspan administrative web portal.

7. Select a **Phone Number** and optional **Extension** for the Call Center. This will be the 'pilot' number for the Call Center queue.

8. Enter and confirm a **Password** for the Call Center ID.

9. Enter a **Last Name** and **First Name** in the **Calling Line ID Settings**. This name will be displayed when agents make outbound calls on behalf of the Call Center. An optional Calling Line ID **Phone Number** can also be set for the agent outbound calling function.

10. Under 'Call Center Settings,' choose a **Routing Type** *(Premium Call Center only)*
    - Priority Based routing is based on time-in-queue and agent availability regardless of skill assignment.
    - Skill Based *(Premium Call Center only)* routing selects available agents who may have joined multiple call center queues based on a provisioned skill level (1-20) within each call center.

11. Choose a **Group Policy**
    - **Circular:** Incoming calls are distributed to idle agents in the order they appear in the provisioned list, starting with the agent who follows the agent who received the previous call. When the search reaches the end of the list, the hunt loops back to the top and continues until it has tried all agents.
    - **Regular**: Incoming calls are distributed to idle agents in the order they appear in the provisioned list, starting from the first agent in the list each time.
    - **Simultaneous**: All agents are alerted simultaneously for each incoming call.
    - **Uniform**: Incoming calls are distributed to idle agents starting with the agent that has been idle the longest.
    - **Weighted**: Incoming calls are distributed to idle agents based on percentages assigned to the agents in the call center's profile. This feature supports an element of skills-based routing, since a higher percentage of calls can be routed to more highly skilled agents within the call center.
    - Set the **Queue Length** to the desired maximum number of unanswered incoming calls to be queued. When the queue is full, additional calls are treated according to the Call Center's Overflow policy.
    - **Enable video support** to allow video calls to agents.
    - **Play ringing when offering a call** connects the caller to ring back tone when their call is offered to an agent after having been queued to music or an announcement.
    - **Allow callers to dial < > to escape out of queue** is self-explanatory.
    - **Reset caller statistics upon entry to queue** if the accumulated wait time of a call is to be reset when the call enters this call center queue from another.

12. Under 'Reporting Settings' (Standard and Premium Call Centers only) enable/disable external Call Center Reporting.

13. Under 'Agent Settings,' the **Allow agents to join Call Centers** option controls the ability of agents to choose the call center queues from which they will be offered calls. The **Allow Call Waiting on agent's** option controls the default behavior of call centers that ignores the Call Waiting service, i.e. if the agent is on a call, they are seen as busy by the call center regardless of the enablement of the Call Waiting service.

14. Choose to enable/disable calls to agents who are in the 'wrap-up' state *(Standard and Premium Call Centers only)*.
15. Choose to enable/disable a maximum ACD wrap-up timer *(Standard and Premium Call Centers only)*.
16. Choose to enable/disable the automatic setting of each agent to a particular availability state after each call *(Standard and Premium Call Centers only)*.
17. Choose to enable/disable automatic answering of calls to agents after a provisioned number of seconds *(Premium Call Centers only)* this feature requires a compatible SIP endpoint for each agent that will respond to the 'Answer-after' tag.

Optional Tab

On the Optional tab, select the appropriate **Time Zone** and **Language** for the Call Center from the drop-down lists.

Routing Policies Tab

1. On the Routing Policies tab, use the **Bounced Calls** section to enable or disable 'bouncing' of a call presented to an agent after the agent's phone rings a configurable number of times without having been answered. When Bounced Calls is enabled, a call presented to an agent and not answered will be returned to the queue as the next call to be answered.
2. In the Overflow section, select the action to perform after unanswered, incoming calls have been queued for a configurable wait time. The options are:
    - Perform busy treatment as defined in the Call Forward Busy service assigned to the Call Center
    - Transfer to a specific phone number
    - Play ring back tone to the caller until they hang up
3. Choose to enable/disable the overflow policy and set the overflow threshold time.
4. Choose to enable/disable the playback of an announcement to callers immediately prior to the processing of the overflow action.

Flexible Seating Hosts

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

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

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

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

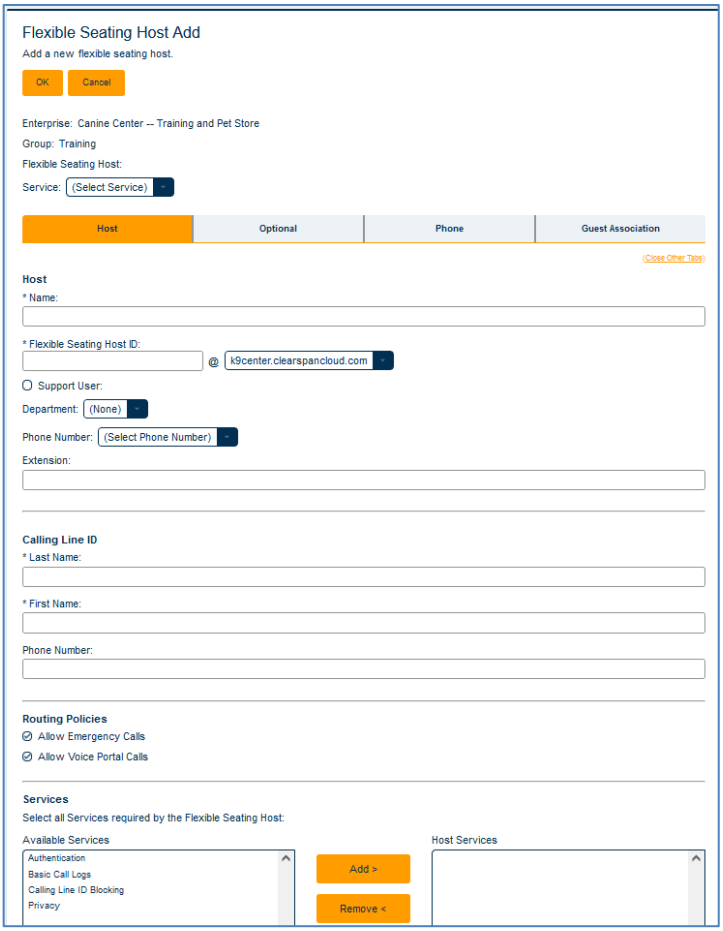


Figure 156 - Flexible Seating Host Add Page

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

Optional Tab

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

Phone Tab

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

Guest Association Tab

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

Privacy Tab

1. Select **Privacy** from the **Service** drop-down menu to access the Privacy tab.
2. For **Privacy Enable**, select the privacy settings for the Flexible Seating host.

- Enable Directory Privacy excludes the host from Directory listings.
- Enable Auto Attendant Extension Dialing Privacy excludes the host from auto extension dialing.
- Enable Auto Attendant Name Dialing Privacy excludes the host from auto name dialing.

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

After you have created a Flexible Seating host, configure users with the Flexible Seating Guest service to associate with the host device.
While a guest is associated with it, the host phone functions like the user's phone device, including all the key assignments and functions. When no guest is associated with the host phone, the phone can make emergency calls only or calls into the voice portal.

Group Paging

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

Only Group Administrator and above can configure the Group Paging.

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

Adding a new Group Paging

1. Select **Provisioning** from the main menu, and then select **Virtual Users** and **Group Paging**.
2. Select the **Enterprise** and **Group** from the drop-down list.
3. Click the **Add** button. The Group Paging Add page is displayed.

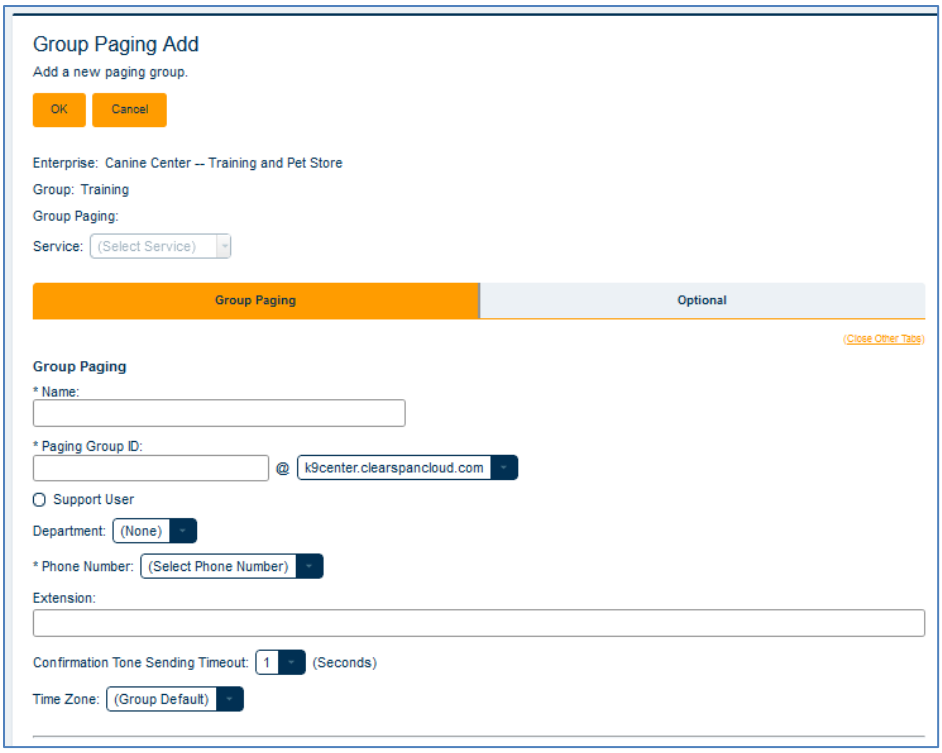


Figure 157 - Group Paging Add Page

Enter a **Name** for the Group Paging under the **Group Paging** tab.

4. Enter a **Paging Group** ID.
5. Select the **Support User** check box for Support.
6. Select **Department** from the drop-down list.
7. Select the **Phone Number**.
8. Enter the **Extension** number.
9. Select the time (seconds) for **Confirmation Tone Sending Timeout**.

10. Select the **Time Zone** from the drop-down list.
11. Enter **Last Name** and **First Name** for Group Paging under the **Calling Line ID Settings** tab.
12. Select **Paging Group** or **Originating User with Prefix** with prefix under **Calling Line ID deliver.**
13. Select all the Services required by the Group Paging under the **Services** tab.
14. **User Defined Fields** – These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the **Use Default** check box and enter the value of the User Defined Field in the **Value** box.
15. Click **OK**.

Modifying Group Paging

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

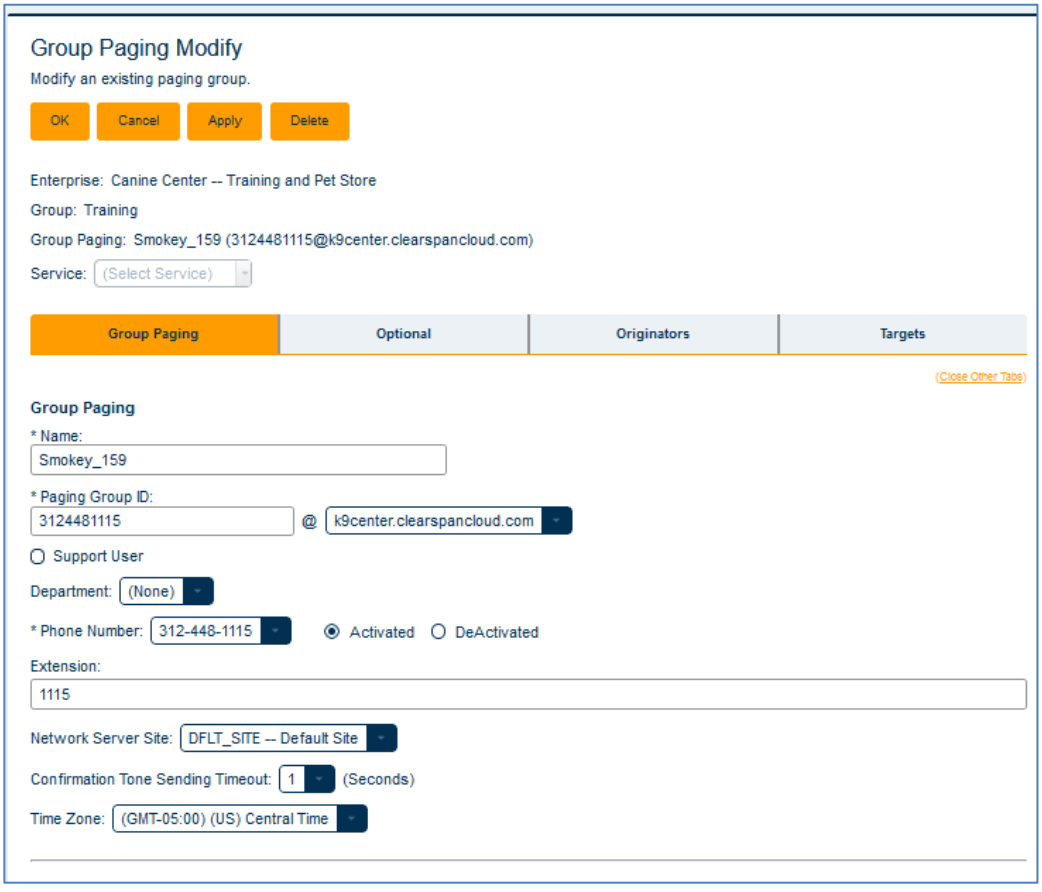


Figure 158 - Group Paging Modify Page

Optional Tab

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

Originators Tab

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

Targets Tab

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

Activate/Deactivate Group Paging

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

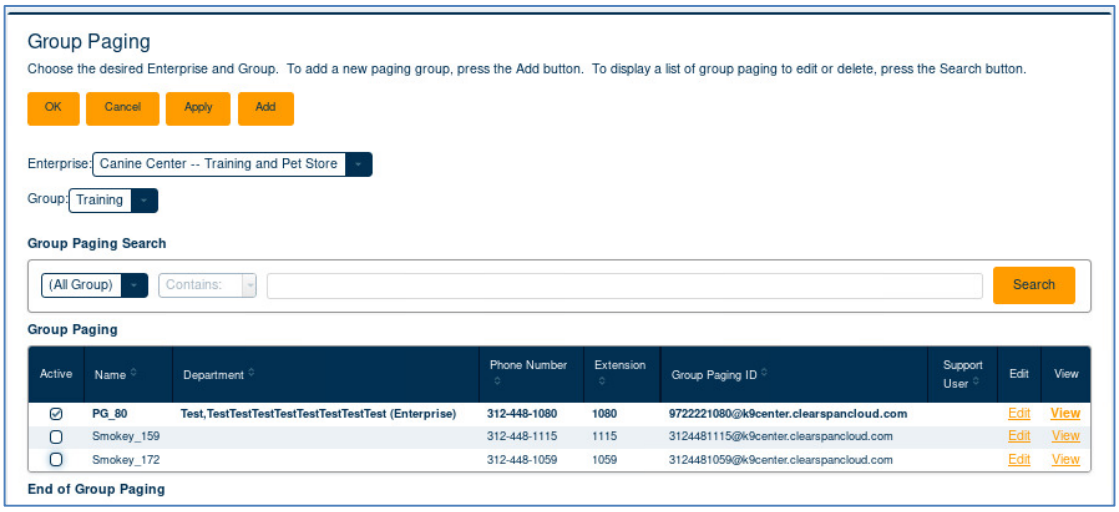


Figure 159 - Activate/Deactivate Group Paging

4. Click **OK**.

Hunt Groups

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

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

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

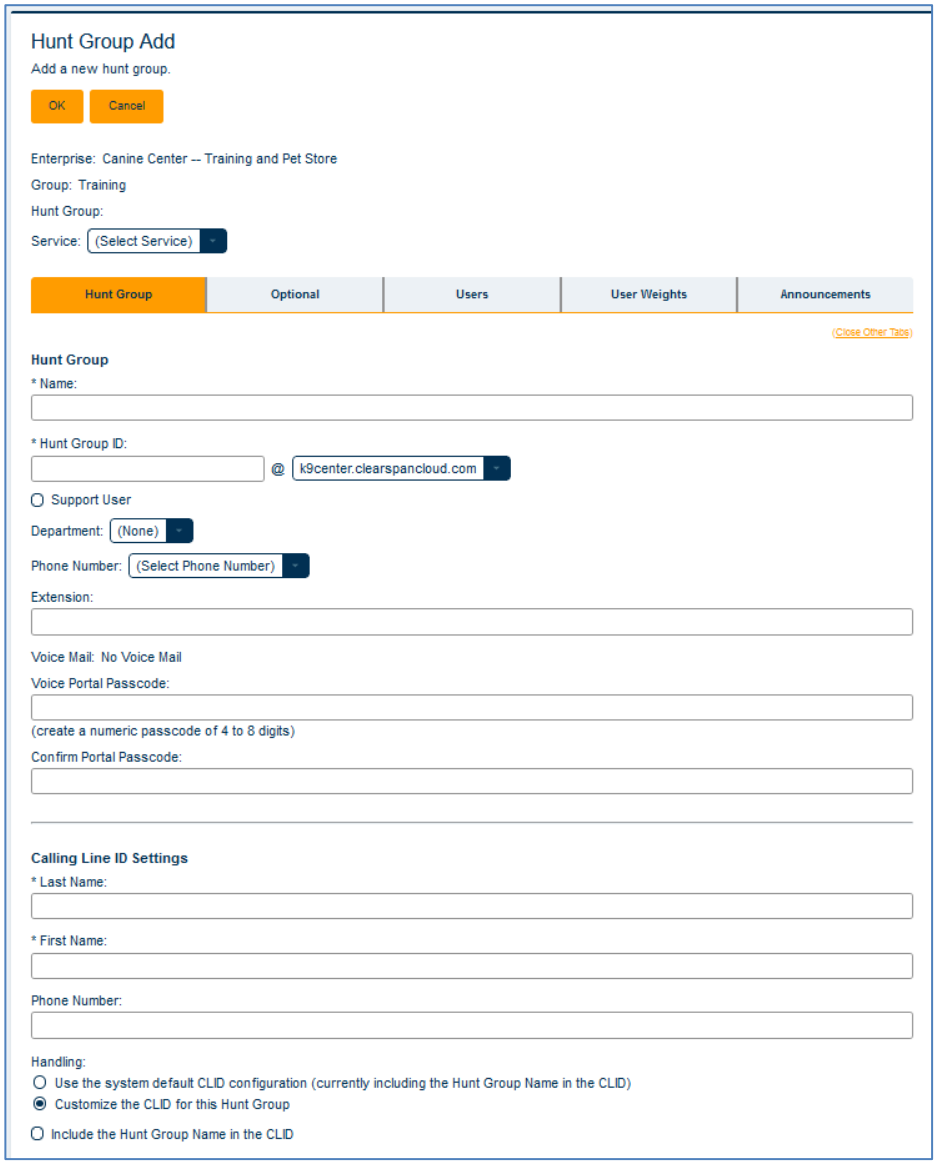


Figure 160 - Hunt Group Add Page

5. If you select a service from the **Service** drop-down list, an additional Service Tab will appear.

For example, if you select **Alternate Numbers**, the **Alternate Numbers** tab appears.

6. On the Hunt Group tab, enter a **Name** and unique **Hunt Group ID** for the hunt group, and select a domain from the drop-down list.
7. Select the **Support User** check box for Support.
8. Configure the Department, Phone Number, Extension, Network Server Site, and Voice Mail settings for the Hunt Group.
9. **Activated** or **Deactivated** indicates the current status of the phone number selected. Change this setting if necessary. Select **Activated** (Recommended) if the phone will place and receive calls from outside the system or **Deactivated** if the calls will be internal only.
10. Enter the Voice Portal Passcode and Confirm Portal Passcode.
11. Enter the **Last Name**, **First Name**, and **Phone Number** for Calling Line ID (CLID) Settings.
12. Specify the hunt group's Calling Line ID **Handling**.

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

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

calls not answered in the time specified.

21. Select **Enable Call Forwarding Not Reachable** to forward calls to the specified phone number when all agents are not reachable.
22. Select **Make Hunt Group busy when all available agents are not reachable** to apply busy treatment to calls when all available agents are not reachable. This setting is ignored if Enable Call Forwarding Not Reachable setting is not selected.
23. Enter the **Calls Forward to** number where you want the calls to be forwarded when all agents are unreachable.
24. Use **Add** and **Remove** to select all user services required by the Hunt Group.
25. **User Defined Fields**– These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the **Use Default** check box and enter the value of the User Defined Field in the **Value** box.

Optional Tab

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

Users Tab

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

User Weights

On the User Weights tab, weights can be assigned to users of hunt groups. The total weights must sum up to 100%.

Announcements Tab

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

Call Forward Tab

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

Call Forward Selective Tab

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

To configure selective call forwarding for the Hunt Group:

1. From the main menu, select **Provisioning** and then **Virtual Users**.

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

Voice Mail Tab

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

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

CAUTION: E-mail copies of Voice Mail messages are not necessarily delivered to their final destination using encrypted protocols.

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 selecta file from an available Announcement Repository. If you choose Personal Greeting, select the **Personal Audio Greeting** or **Personal Video Greeting** file to use.
3. In the No Answer Greeting Settings section, select the **No Answer Greeting Type** to either Use **Extended Away Greeting** or **Use Normal No Answer Greeting**, as configured on this page.
4. To configure Extended Away Greeting Settings, select an **Audio Greeting** or **Video Greeting** file from an available Announcement Repository. Select the **Disable Message Deposit** check box to prevent callers from leaving a Voice Mail message.
5. To configure Normal No Answer Greeting Settings, set the **Greeting Source** to the standard **System Greeting** or select one of the alternate greetings configured on this page.
6. To configure Unavailable Greeting Settings, select an **Audio Greeting** or **Video Greeting** file from an available Announcement Repository.
7. To configure an Alternate No Answer Greeting, select an **Audio Greeting** or **Video Greeting** file from an available Announcement Repository and enter a **Name** that describes the greeting.
8. Click **OK** or **Apply**.

Alternate Numbers Tab

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

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 view all the Virtual Users or enter Search parameters to filter the Search. The search in the following figure is an example of the Virtual User Inventory page.

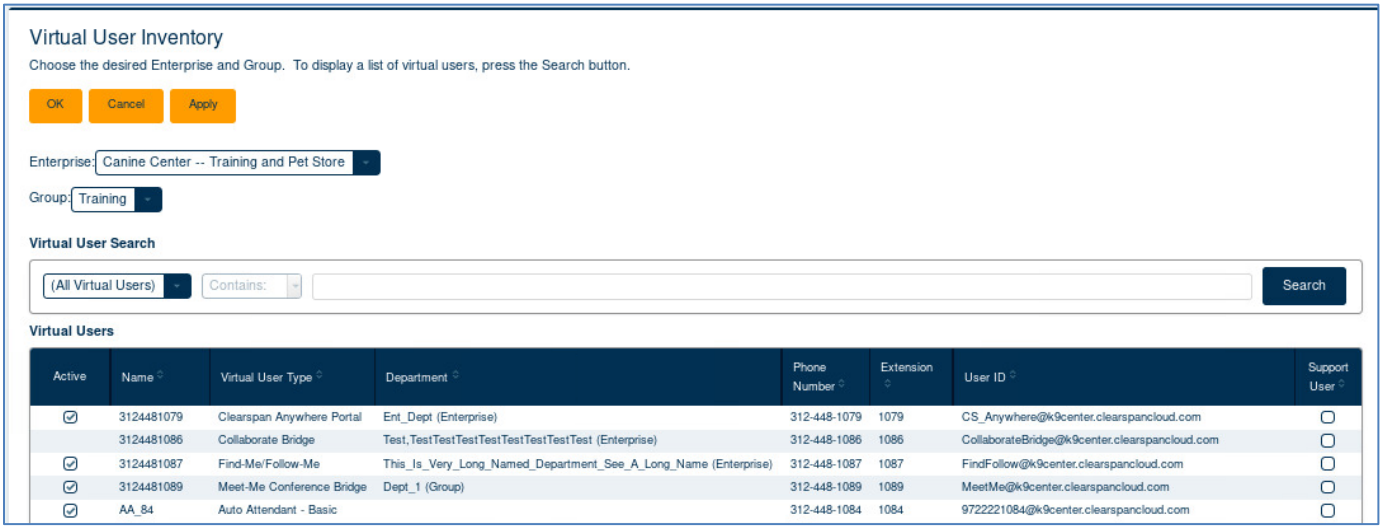


Figure 161 - Virtual User Inventory Search

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, Auto Attendant, etc.
- Enterprise–Enterprise Import allows you to configure Enterprise settings such as Departments, Emergency Call Notification, Voice VPN policies, Phone Numbers and Account ID.
- Group–Group Import allows you to configure group settings such as Announcements, Authorization Codes, Call Pickup Groups, Departments, Emergency Call Notifications, Phone Numbers, User Profiles and so on. The Manage Groups tab allows creating, modifying, and deleting Groups. It handles Import and Export of the Group profile information, authorizing and assigning the Group Services and Service Packs, Group Call Processing Policies, Password and Passcode rules for the Group, and setting up the Group Voice Portal access.

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

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

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

Note:

- Advanced Import and Enterprise Import includes Multiple Enterprises option in the Enterprise drop down list for SR and above administrator level.
- When Multiple Enterprises are selected from the Enterprise drop down list, Provisioning Spreadsheet accepts a zip file with multiple worksheets for the selected Import type.

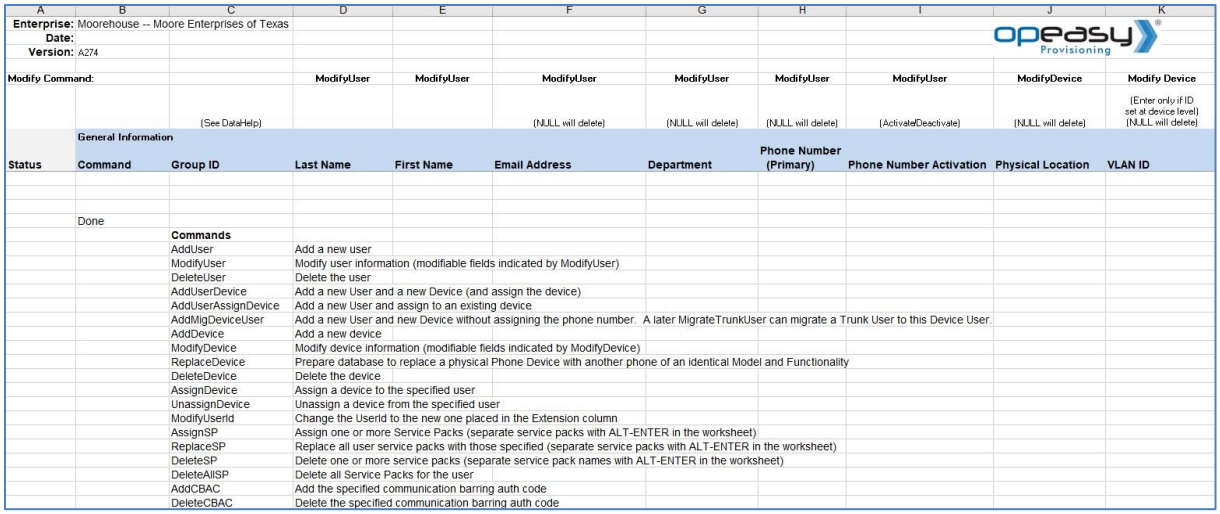
Opening a Worksheet

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

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

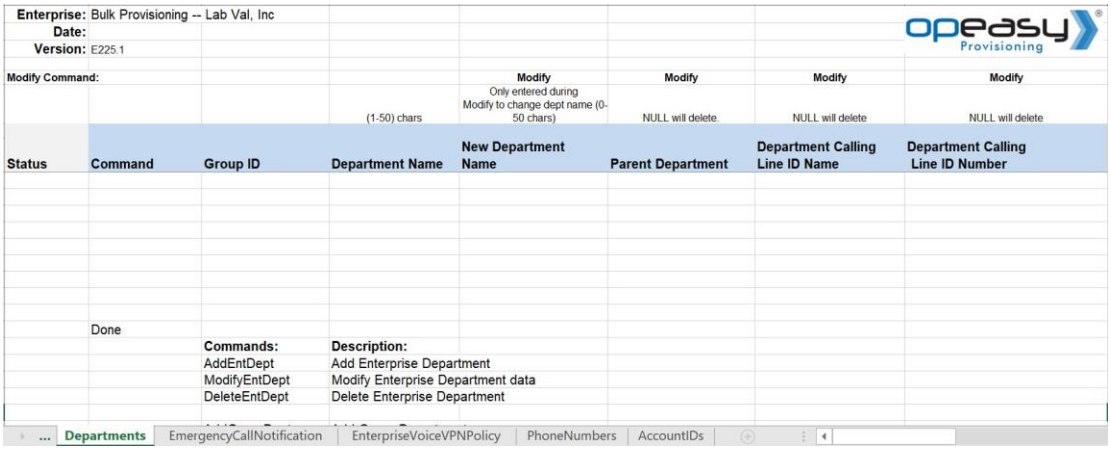
Editing the Worksheet

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



	A	B	C	D	E	F	G	H	I	J	K
1	**Enterprise:**	Moorehouse -- Moore Enterprises of Texas									
2	**Date:**										
3	**Version:**	A274									
4											
5	**Modify Command:**			**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyDevice**	**Modify Device**
6			(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)	(NULL will delete)	(Enter only if ID set at device level) (NULL will delete)
7		**General Information**									
8	**Status**	**Command**	**Group ID**	**Last Name**	**First Name**	**Email Address**	**Department**	**Phone Number (Primary)**	**Phone Number Activation**	**Physical Location**	**VLAN ID**
9											
10											
11											
12		Done									
13			**Commands**								
14			AddUser	Add a new user							
15			ModifyUser	Modify user information (modifiable fields indicated by ModifyUser)							
16			DeleteUser	Delete the user							
17			AddUserDevice	Add a new User and a new Device (and assign the device)							
18			AddUserAssignDevice	Add a new User and assign to an existing device							
19			AddMigDeviceUser	Add a new User and new Device without assigning the phone number. A later MigrateTrunkUser can migrate a Trunk User to this Device User.							
20			AddDevice	Add a new device							
21			ModifyDevice	Modify device information (modifiable fields indicated by ModifyDevice)							
22			ReplaceDevice	Prepare database to replace a physical Phone Device with another phone of an identical Model and Functionality							
23			DeleteDevice	Delete the device							
24			AssignDevice	Assign a device to the specified user							
25			UnassignDevice	Unassign a device from the specified user							
26			ModifyUserId	Change the UserId to the new one placed in the Extension column							
27			AssignSP	Assign one or more Service Packs (separate service packs with ALT-ENTER in the worksheet)							
28			ReplaceSP	Replace all user service packs with those specified (separate service packs with ALT-ENTER in the worksheet)							
29			DeleteSP	Delete one or more service packs (separate service pack names with ALT-ENTER in the worksheet)							
30			DeleteAllSP	Delete all Service Packs for the user							
31			AddCBAC	Add the specified communication barring auth code							
32			DeleteCBAC	Delete the specified communication barring auth code							

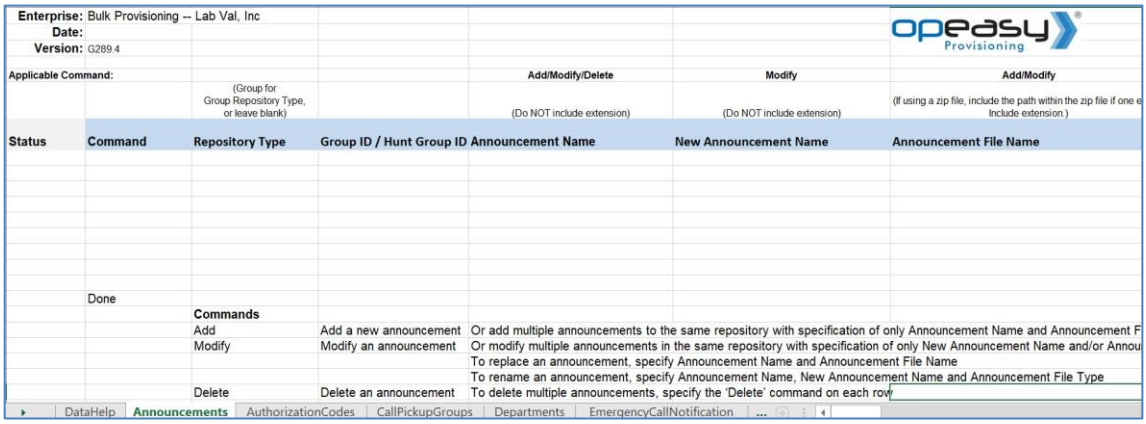
Figure 162 - Import Advanced – Get Worksheet – New Worksheet



Enterprise:	Bulk Provisioning -- Lab Val, Inc							
Date:								
Version:	E225.1							
Modify Command:				**Modify**	**Modify**	**Modify**	**Modify**	
			(1-50) chars	Only entered during Modify to change dept name (0-50 chars)	NULL will delete.	NULL will delete	NULL will delete	
Status	**Command**	**Group ID**	**Department Name**	**New Department Name**	**Parent Department**	**Department Calling Line ID Name**	**Department Calling Line ID Number**	
	Done							
		Commands:	**Description:**					
		AddEntDept	Add Enterprise Department					
		ModifyEntDept	Modify Enterprise Department data					
		DeleteEntDept	Delete Enterprise Department					

... Departments | EmergencyCallNotification | EnterpriseVoiceVPNPolicy | PhoneNumbers | AccountIDs

Figure 163 - Import Enterprise – Get Worksheet – New Worksheet

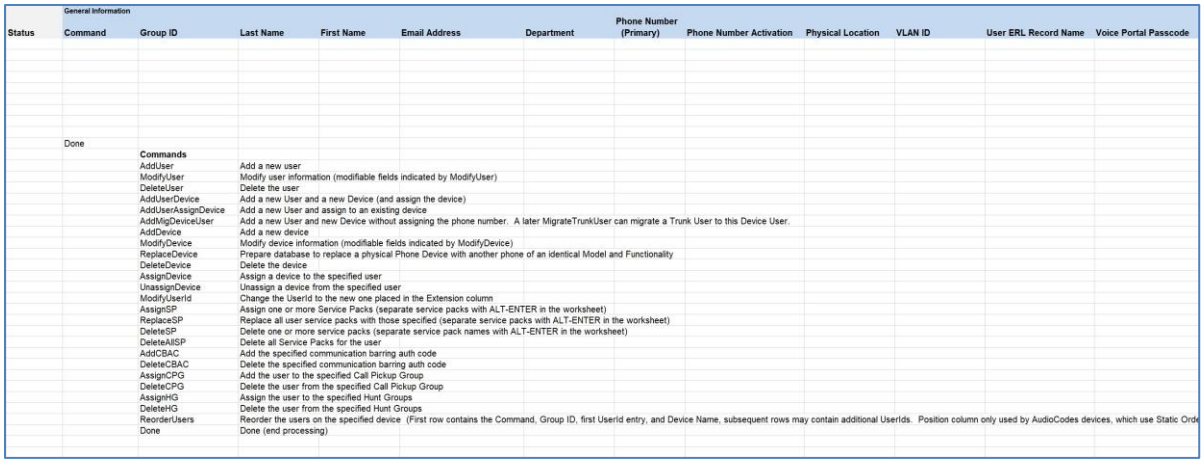


Enterprise: Bulk Provisioning -- Lab Val, Inc						
Date:						
Version: G289.4						
Applicable Command:				Add/Modify/Delete	Modify	Add/Modify
		(Group for Group Repository Type, or leave blank)		(Do NOT include extension)	(Do NOT include extension)	(If using a zip file, include the path within the zip file if one e Include extension.)
Status	**Command**	**Repository Type**	**Group ID / Hunt Group ID**	**Announcement Name**	**New Announcement Name**	**Announcement File Name**
	Done					
		Commands				
		Add	Add a new announcement	Or add multiple announcements to the same repository with specification of only Announcement Name and Announcement F		
		Modify	Modify an announcement	Or modify multiple announcements in the same repository with specification of only New Announcement Name and/or Annou		
				To replace an announcement, specify Announcement Name and Announcement File Name		
				To rename an announcement, specify Announcement Name, New Announcement Name and Announcement File Type		
		Delete	Delete an announcement	To delete multiple announcements, specify the 'Delete' command on each row		

DataHelp | Announcements | AuthorizationCodes | CallPickupGroups | Departments | EmergencyCallNotification | ...

Figure 164 - Import Group – Get Worksheet – New Worksheet

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



	General Information						Phone Number					
Status	**Command**	**Group ID**	**Last Name**	**First Name**	**Email Address**	**Department**	**(Primary)**	**Phone Number Activation**	**Physical Location**	**VLAN ID**	**User ERL Record Name**	**Voice Portal Passcode**
	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 User.									
		AddDevice	Add a new device									
		ModifyDevice	Modify device information (modifiable fields indicated by ModifyDevice)									
		ReplaceDevice	Prepare database to replace a physical Phone Device with another phone of an identical Model and Functionality									
		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 ID, first UserId entry, and Device Name, subsequent rows may contain additional UserIds. Position column only used by AudioCodes devices, which use Static Orde									
		Done	Done (end processing)									

Figure 165 - Advanced Worksheet Commands – Users Tab

Only those rows with “Commands” entered will be processed.

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

Each spreadsheet shows the acceptable commands for that spreadsheet.

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

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

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

Importing the Worksheet

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

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

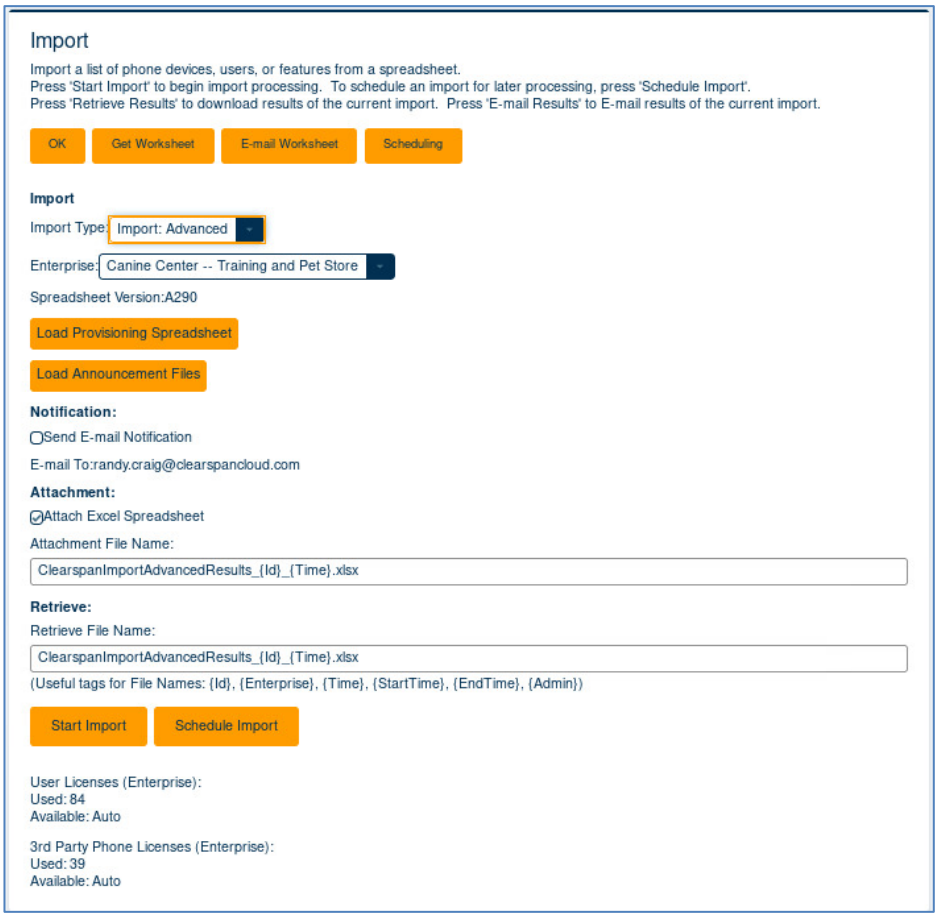


Figure 166 - Import Page - Advanced

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

10. Click **Start Import**. Worksheet processing starts and the **Progress Messages** box is updated to reflect the text "**Import waiting to start…**"

Note:

- A User License is required for each added or modified user, and a 3rd Party PhoneLicense is required for each added or modified Polycom phone. The import abortson 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.
- Clicking Start Import for a Multiple Enterprise queues the worksheets in a zip file.scheduled to run each worksheet individually.

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

Viewing Import Results

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

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

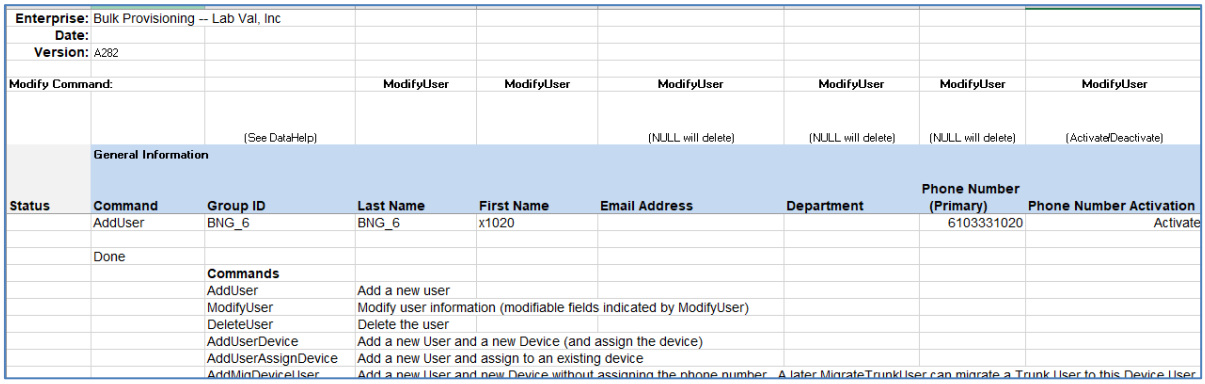
Enterprise:	Bulk Provisioning -- Lab Val, Inc						
Date:							
Version:	A282						
Modify Command:			**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUse**
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will dele
	General Information						
Status	**Command**	**Group ID**	**Last Name**	**First Name**	**Email Address**	**Department**	**Phone Numb (Primary)**
	Done						
		Commands					
		AddUser	Add a new user				
		ModifyUser	Modify user information (modifiable fields indicated by ModifyUser)				
		DeleteUser	Delete the user				

Figure 167 - Spreadsheet Processed Successfully – User Deleted

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

- Users
- AlternateNumbers
- Announcements
- AutoAttendant
- BLF
- CallCenterAgent
- CallCenterSupervisor
- CallForwarding
- CallForwardingSelective

- CallRecording
- ClearspanAnywhere
- CutsomRing
- DeviceTypeConversion
- FaxMessaging
- FlexSeatingGuest
- Hoteling
- IntegratedIM&P
- MigrateTrunkUser
- MusicOnHold
- PriorityAlert
- Privacy
- SCA
- SequentialRing
- SimultaneousRing
- SpeedDial
- UserDefinedFields
- VMDistribution
- Voicemail

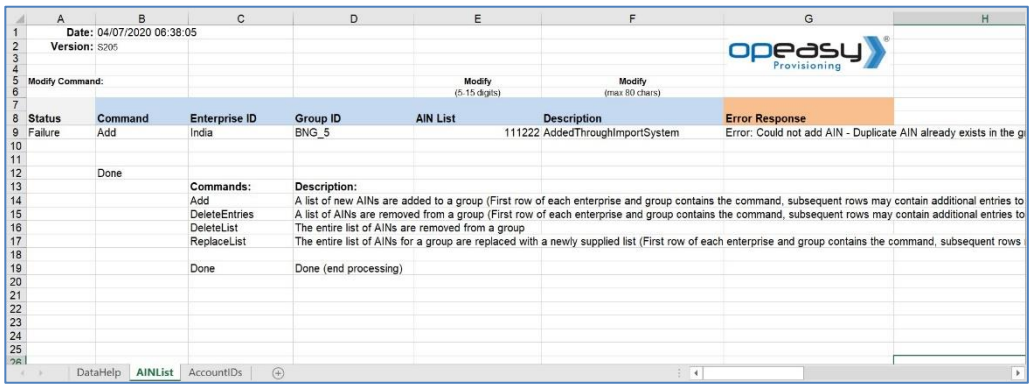


Enterprise:	Bulk Provisioning -- Lab Val, Inc							
Date:								
Version:	A282							
Modify Command:			**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**	**ModifyUser**
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)
	General Information							
Status	**Command**	**Group ID**	**Last Name**	**First Name**	**Email Address**	**Department**	**Phone Number (Primary)**	**Phone Number Activation**
	AddUser	BNG_6	BNG_6	x1020			6103331020	Activate
	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 User					

Figure 168 - Advanced Import Excel Sheet

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

- AINList
- AccountIDs
- Domains



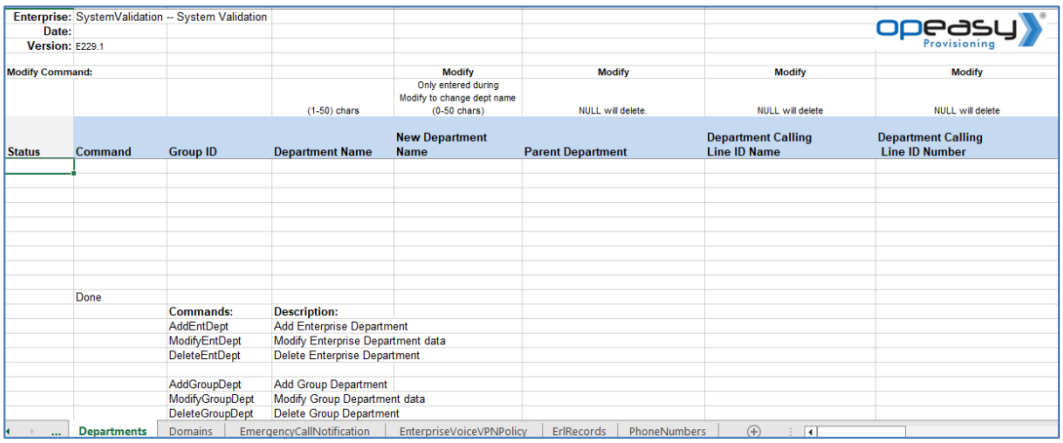
	A	B	C	D	E	F	G	H
1		Date:	04/07/2020 06:38:05					
2		Version:	S205					
3								
4								
5	Modify Command:				Modify	Modify		
6					(5-15 digits)	(max 80 chars)		
7								
8	Status	Command	Enterprise ID	Group ID	AIN List	Description	Error Response	
9	Failure	Add	India	BNG_5	111222	AddedThroughImportSystem	Error: Could not add AIN - Duplicate AIN already exists in the g	
10								
11								
12		Done						
13			Commands:	Description:				
14			Add	A list of new AINs are added to a group (First row of each enterprise and group contains the command, subsequent rows may contain additional entries to				
15			DeleteEntries	A list of AINs are removed from a group (First row of each enterprise and group contains the command, subsequent rows may contain additional entries to				
16			DeleteList	The entire list of AINs are removed from a group				
17			ReplaceList	The entire list of AINs for a group are replaced with a newly supplied list (First row of each enterprise and group contains the command, subsequent rows				
18								
19			Done	Done (end processing)				
20								
21								
22								
23								
24								
25								

DataHelp | AINList | AccountIDs

Figure 169 - Import System Excel Sheet

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

- AccountIDs
- BroadWorksSchedule
- Departments
- Domains
- Emergency Call Notification
- EnterpriseVoiceVPNPolicy
- ErlRecords
- PhoneNumbers



Enterprise:	SystemValidation -- System Validation							
Date:								
Version:	E229.1							
Modify Command:				Modify	Modify	Modify	Modify	
				Only entered during Modify to change dept name				
			(1-50) chars	(0-50 chars)	NULL will delete.	NULL will delete	NULL will delete	
Status	Command	Group ID	Department Name	New Department Name	Parent Department	Department Calling Line ID Name	Department Calling Line ID Number	
	Done							
		Commands:	Description:					
		AddEntDept	Add Enterprise Department					
		ModifyEntDept	Modify Enterprise Department data					
		DeleteEntDept	Delete Enterprise Department					
		AddGroupDept	Add Group Department					
		ModifyGroupDept	Modify Group Department data					
		DeleteGroupDept	Delete Group Department					

... | Departments | Domains | EmergencyCallNotification | EnterpriseVoiceVPNPolicy | ErlRecords | PhoneNumbers

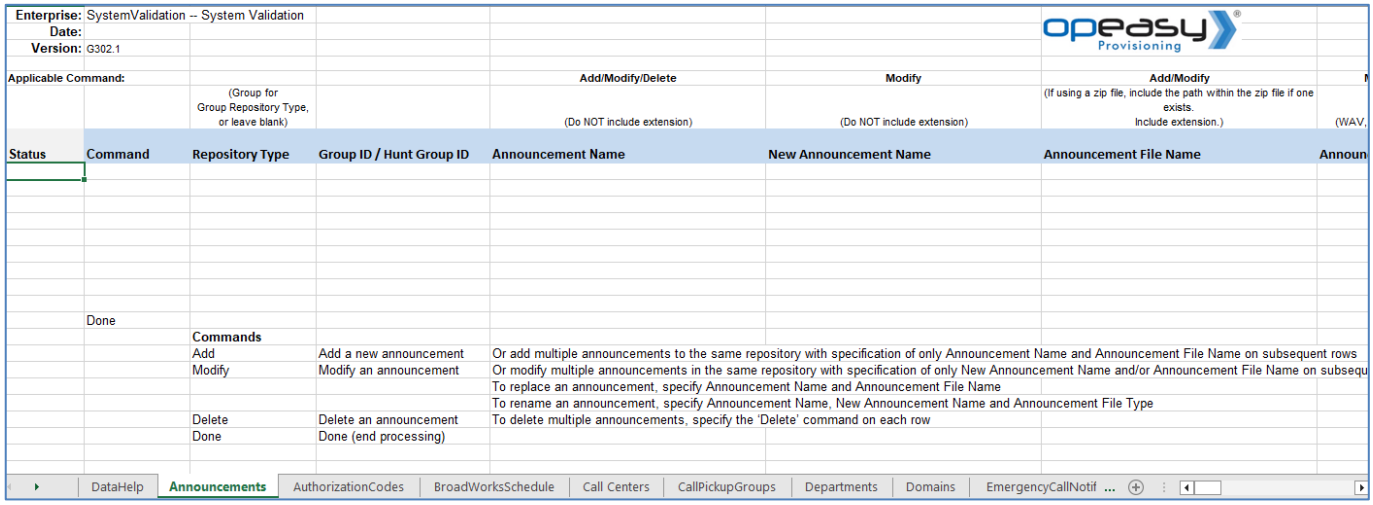
Figure 170 - Import Enterprise Excel Sheet

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

- Announcements
- AuthorizationCodes
- BroadWorksSchedule
- Call Centers

- CallPickupGroups
- Departments
- Domains
- Emergency Call Notification
- ErlRecords
- FlexSeatingHosts
- FSH Guest Association
- FSH Privacy
- Gbl Settings – AudoCodes500&800
- Gbl Settings – AudioCodes MP
- Gbl Settings – CC Mobile
- Gbl Settings – CC S4B
- Gbl Settings – CC Tablet
- Gbl Settings – Cisco
- Gbl Settings – CSEngage Desktop
- Gbl Settings – CS MobileTablet
- Gbl Settings – Grandstream
- Gbl Settings – Media5
- Gbl Settings – Mitel Aastra
- Gbl Settings – Mitel DECT112
- Gbl Settings – Mitel MiVoice
- Gbl Settings – Panasonic
- Gbl Settings – Polycom
- Gbl Settings - Poly D230
- Gbl Settings – Poly EdgeB
- Gbl Settings – Poly EdgeE
- Gbl Settings – UC1 Engage MobTab
- Group Paging
- Hunt Groups
- HG AlternateNumbers
- HG CallForwarding
- HG CallForwardingSelective
- HG Voicemail
- ManageGroups
- MusicOnHold

- PhoneNumbers
- SpeedDial8
- SpeedDial100
- UserDefinedFields
- UserProfiles
- VirtualOnNetExtensions
- VoicePortals



Enterprise:	SystemValidation -- System Validation						
Date:							
Version:	G302.1						
Applicable Command:				**Add/Modify/Delete**	**Modify**	**Add/Modify**	
		(Group for Group Repository Type, or leave blank)		(Do NOT include extension)	(Do NOT include extension)	(If using a zip file, include the path within the zip file if one exists. Include extension.)	(WAV,
Status	**Command**	**Repository Type**	**Group ID / Hunt Group ID**	**Announcement Name**	**New Announcement Name**	**Announcement File Name**	**Announ**
	Done						
		Commands					
		Add	Add a new announcement	Or add multiple announcements to the same repository with specification of only Announcement Name and Announcement File Name on subsequent rows			
		Modify	Modify an announcement	Or modify multiple announcements in the same repository with specification of only New Announcement Name and/or Announcement File Name on subsequ			
				To replace an announcement, specify Announcement Name and Announcement File Name			
				To rename an announcement, specify Announcement Name, New Announcement Name and Announcement File Type			
		Delete	Delete an announcement	To delete multiple announcements, specify the 'Delete' command on each row			
		Done	Done (end processing)				

DataHelp | Announcements | AuthorizationCodes | BroadWorksSchedule | Call Centers | CallPickupGroups | Departments | Domains | EmergencyCallNotif ...

Figure 171 - Import Group Excel Sheet

Importing the Worksheet with Multiple Enterprises

The Import page allows you to set up Worksheet processing and view results with multiple enterprises selected. Advanced and Enterprise data can be imported for SR and above admin level.

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

3. Select the **Multiple Enterprises** from the **Enterprise** drop-down list.

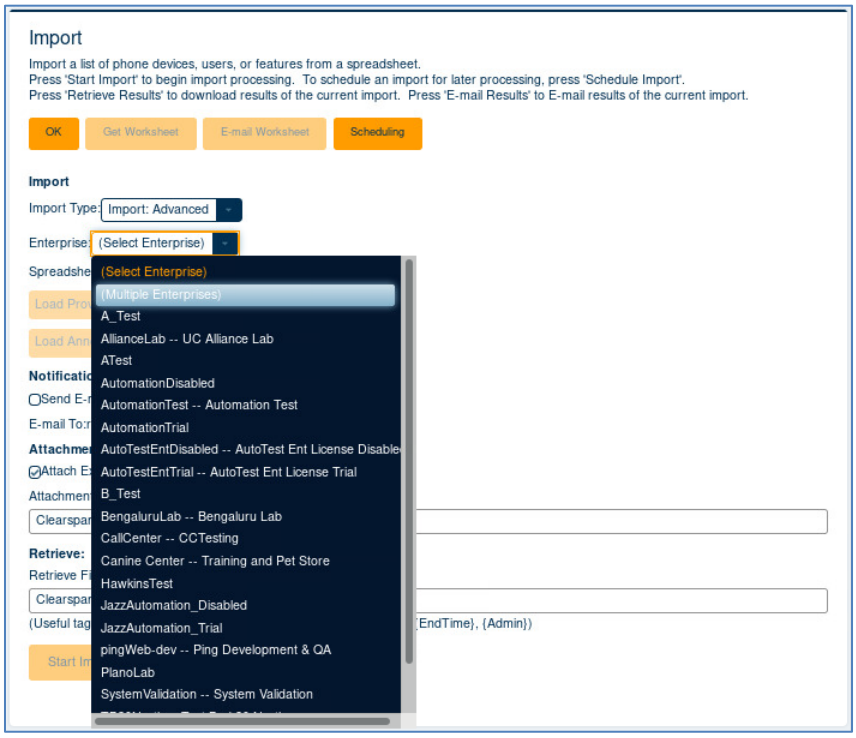


Figure 172 - Import Worksheet - Advanced with Multiple Enterprises

Selecting Multiple Enterprises enables the Provisioning Spreadsheet to accept a zip file with multiple worksheets for the selected import type.

4. Browse to the filename (zip file) of the **Provisioning Spreadsheet** that you want to run. Zip file contains. ‘xlsx’ extension worksheet files of all the selected **Import Type**.
5. Click **Start Import**. The following message is displayed, “Import queued to start. 'Scheduling' page contains list of all Scheduling requests with progress and result of each worksheet uploaded in the .zip file”.

   Clicking Start Import for a Multiple Enterprise queues the worksheets in a zip file scheduled to run each worksheet individually.

Viewing Import Results with Multiple Enterprises

1. Click the **Scheduling** button. The Scheduling page is displayed which lists the current status of the individual worksheets for the multiple enterprises selected with different **Request ID**.
2. Click the **Results** link of each individual worksheet in the Scheduling Requests table. The Scheduling Results: Import Advanced page is displayed.
3. Click **Retrieve Results**. The Import worksheet for the selected enterprise is downloaded.

   Similarly, Click the **Results** link for the rest of the worksheets for the selected enterprise and click **Retrieve Results** to download the import worksheets.
4. Click **OK**. The Scheduling page is displayed.
5. Click **OK.** The Import page is displayed.

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. The export function is not available to admins restricted to Basic privileges.

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.

Note:

- Advanced Export and Enterprise Export includes Multiple Enterprises option in the Enterprise drop down list for SR and above administrator level.
- Selecting Multiple Enterprises enables a list box selection containing entire list of Enterprises which allows a SR and above level administrator to select more than one Enterprises.

Exporting User Defined Fields

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

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

User Defined Field Name

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

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

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

Notes:

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

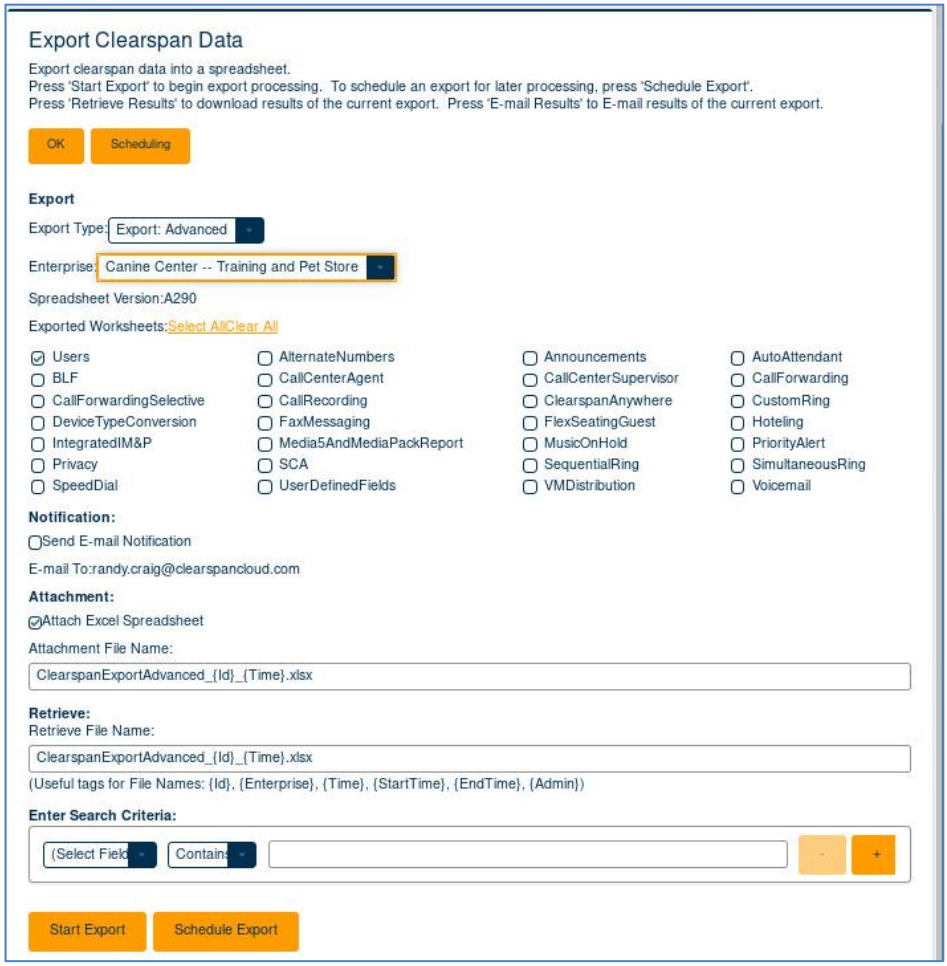


Figure 173 - Export-Advanced Clearspan Data

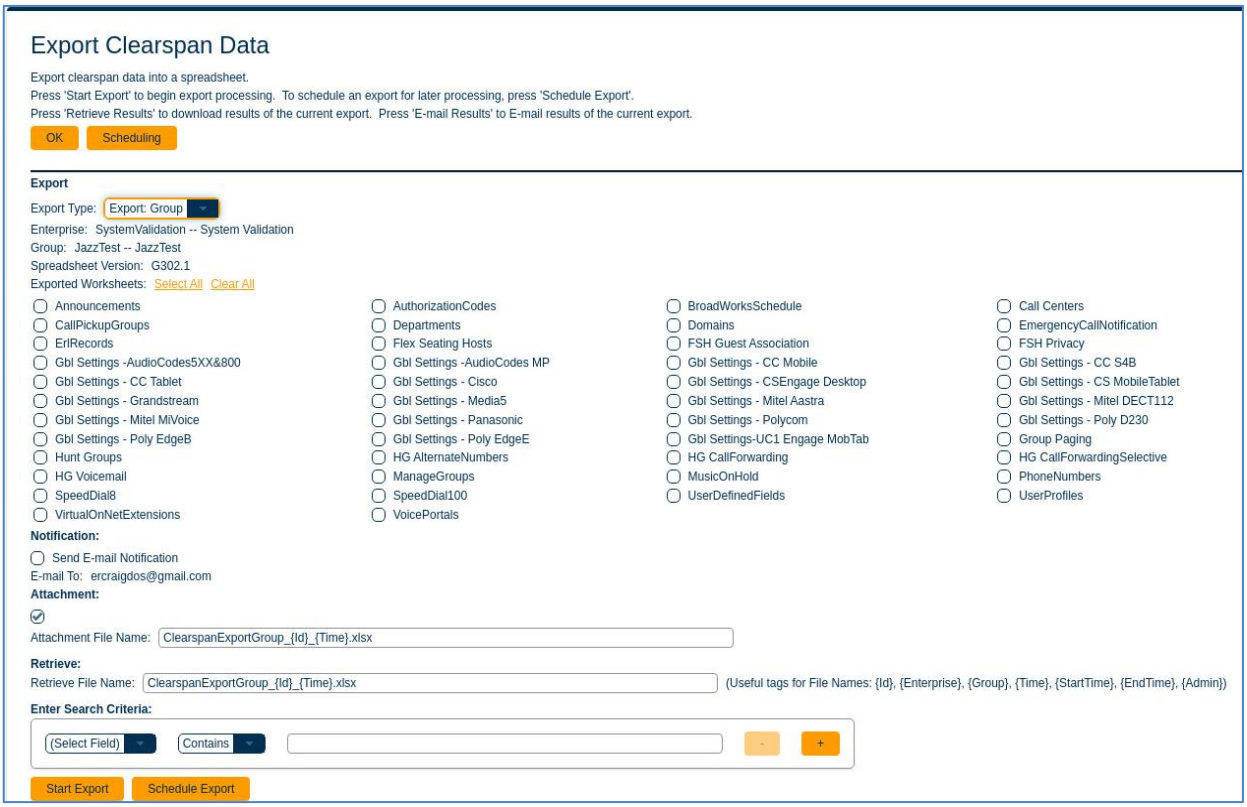


Figure 174 - Export - Group

Selecting Data to Export

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

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

Note:

- Clicking Start Export for Multiple Enterprises selected creates an individual request for each enterprise selected from Multiple Enterprises list.
- Scheduling page lists all the Enterprises requests, processing in a queue in the order received.

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.

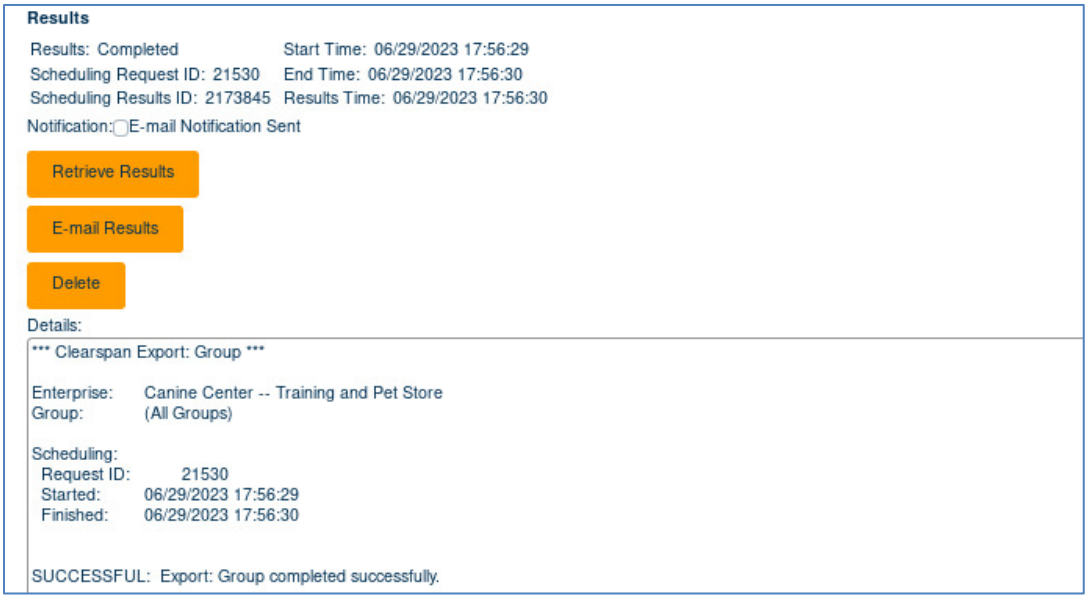
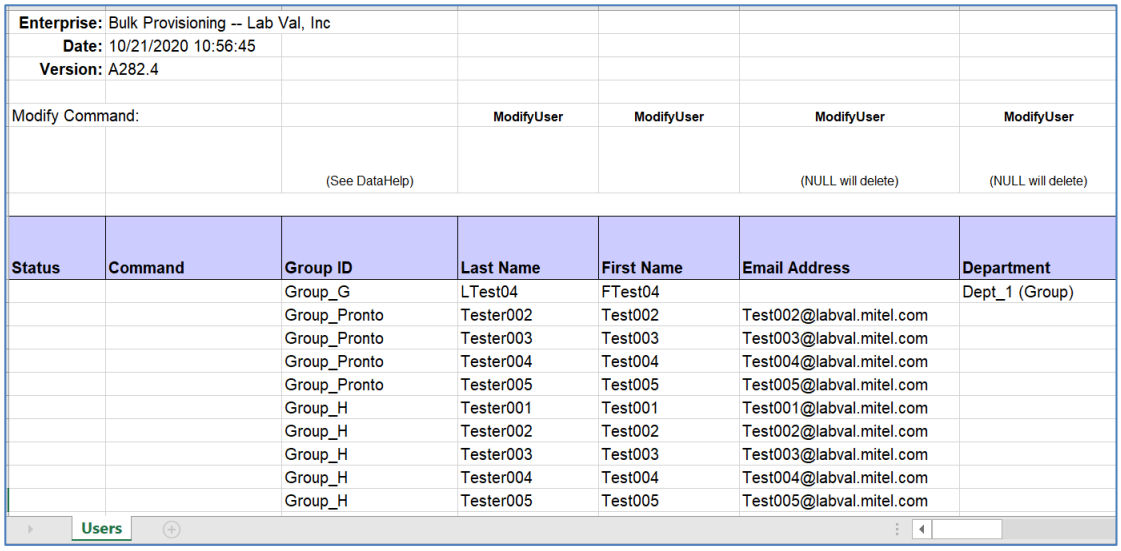


Figure 175 - Export Clearspan Data – Advanced Export Complete

Viewing the Export Results

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

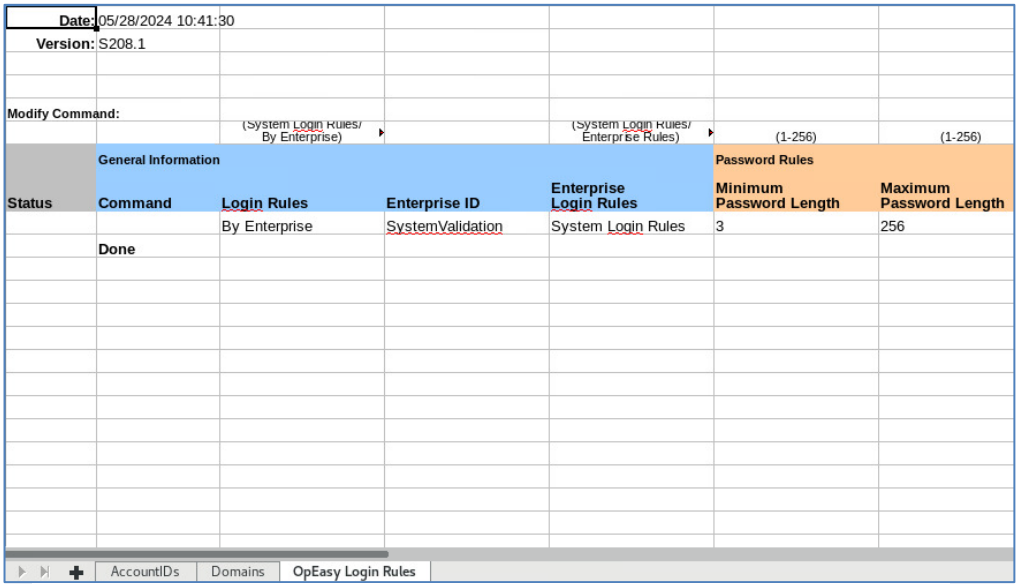
Sample Spreadsheets for Export



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

Users

Figure 176 - Advanced Export Results Spreadsheet



Date:	05/28/2024 10:41:30					
Version:	S208.1					
Modify Command:		(System Login Rules/ By Enterprise)		(System Login Rules/ Enterprise Rules)	(1-256)	(1-256)
	General Information				**Password Rules**	
Status	**Command**	**Login Rules**	**Enterprise ID**	**Enterprise Login Rules**	**Minimum Password Length**	**Maximum Password Length**
		By Enterprise	SystemValidation	System Login Rules	3	256
	Done					

AccountIDs | Domains | OpEasy Login Rules

Figure 177 - System Data Export Results

Enterprise:	SystemValidation -- System Validation						
Date:	05/28/2024 10:46:35						
Version:	E229.1						
Modify Command:		**Modify**	**Modify**		**ModifyEvent**		**ModifyEvent**
		(0 - 40) chars	(0 - 40) chars	(Holiday or Time)	(0-40) chars		(mmddyyyy)
Status	**Command**	**Schedule Name**	**New Schedule Name**	**Schedule Type**	**Event Name**	**Event Name**	**Start Date**
		TestAuto		Holiday			
		TestAutoTime		Time			
	Done						
		Commands	**Description**				
		Add	Add Schedule (First row for each user contains the command and settings, subsequent rows contain Event information.)				
		Modify	Modify Schedule (First row for each user contains the command and settings, subsequent rows contain Event information.)				
		Delete	Delete Schedule				
		AddEvent	Add Event to an existing Schedule. Multiple Events may be added in a single command.				
		ModifyEvent	Modify an existing Event. Multiple Events may be modified in a single command.				
		DeleteEvent	Delete Event				

BroadWorksSchedule | Departments | Domains | EmergencyCallNotification

Figure 178 - Enterprise Data Export Results

Enterprise:	SystemValidation -- System Validation								
Date:	05/28/2024 10:50:41								
Version:	G302.1								
Modify Command:			**Modify**		**Modify**	**Modify**	**Modify**	**Modify**	**Modify**
Valid Values:			(True/False)		Standard, Premium)	(Rename Only)			
	General Information								
Status	**Command**	**Group ID**	**Active**	**Call Center ID**	**Call Center Type**	**New Call Center ID**	**Call Center Name**	**Department**	**Phone Number**
		JazzTest	True	HospBasic@hosp.cslab.clearspanc	Basic		BasicCC		6413295979
		JazzTest	True	cola.budget@hosp.cslab.clearspanc	Standard		Budget Review		6413295215
		JazzTest	True	cola.council@hosp.cslab.clearspanc	Premium		Council-Meeting		6413295214
		JazzTest	True	Jazz.CC@hosp.cslab.clearspancloud	Standard		Jazz CallCenter		6413295998
		JazzTest	True	cola.safety@hosp.cslab.clearspanc	Standard		Public Safety Forum		6413295216
		JazzTest	True	techSupport@hosp.cslab.clearspanc	Standard		Technical Support		6413295230
	Done								
		Commands	**Description**						
		Add	Add Call Center.						
		Modify	Modify Call Center.						
		Delete	Delete Call Center.						

AuthorizationCodes | Call Centers | BroadWorksSchedule | CallPickupGroups | Departments | Domains | ErlRecords | Flex Seating Hosts

Figure 179 - Group Data Export Results

Selecting Data to Export with Multiple Enterprises

Advanced and Enterprise data can be exported for SR and above admin level.

1. In OpEasy, click **Export** from the menu tree or from the main Provisioning menu.
2. Select the Advanced or Enterprise from the **Export Type** drop down list.
3. Select **Multiple Enterprises** from the **Enterprise** drop-down list. This opens a box listing all the enterprises.

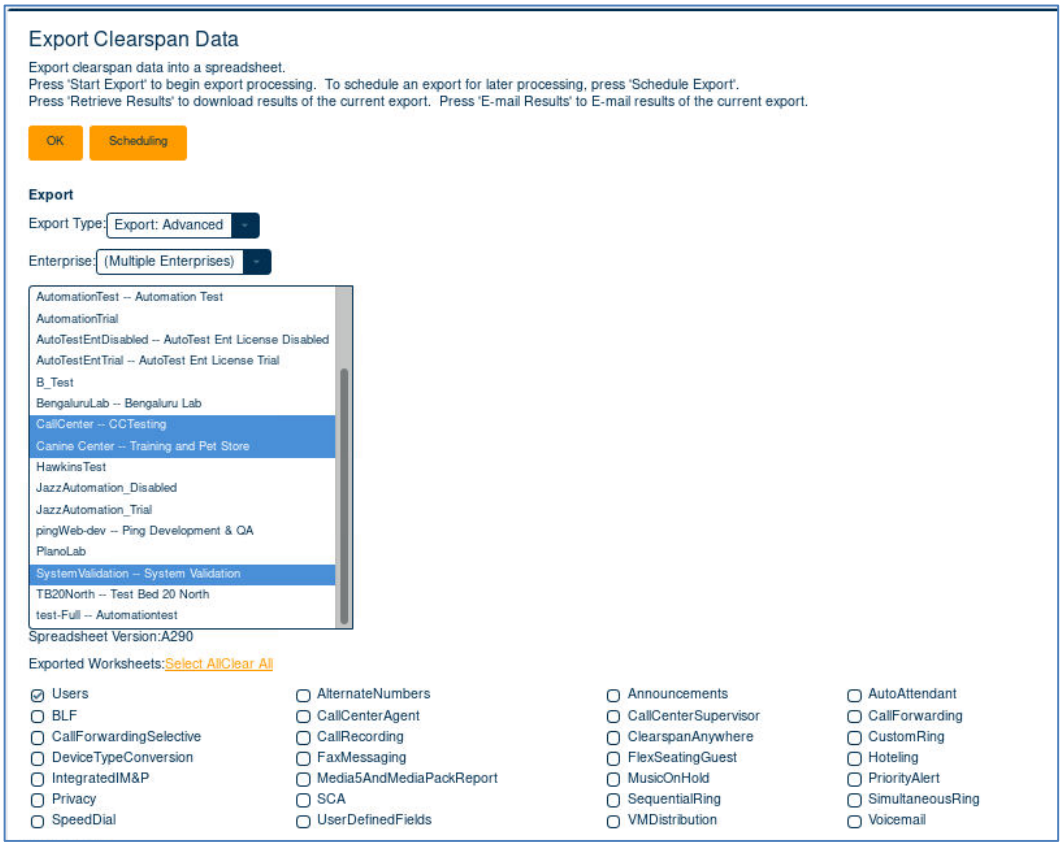


Figure 180 - Advanced Export with Multiple Enterprises

4. Select multiple enterprises from the Enterprise list.
5. Click **Start Export.** The following message is displayed, Export queued to start. 'Scheduling' page contains list of all Scheduling requests with progress and result of each enterprise selected in 'Multiple Enterprises'.

Viewing the Export Results with Multiple Enterprises

1. Click **Scheduling.** The Scheduling page is displayed and lists the current status for the Exports for multiple enterprises selected with different **Request ID**s.
2. Click **Refresh** to get the status updates on processing.
3. Click the **Results** link in the Scheduling Request table. The Scheduling Results: Export: Advanced page is displayed.
4. Click **Retrieve Results**. The export worksheet for the selected enterprise is downloaded.

   Similarly Click the **Results** link for the rest of the worksheets for the selected enterprise and click **Retrieve Results** to download the export worksheets.
5. Click **OK**. The Scheduling page is displayed.
6. Click **OK.** The Export Clearspan Data page is displayed.

Scheduling an Import or Export

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

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

Note:

- Do not use the Start Import or Start Export button until you have provided the Schedule information.
- For Multiple Enterprises, Clicking the Scheduled Import/Export navigates to the Scheduling page that displays the list of all the enterprises selected in Multiple Enterprises separated by '::'.

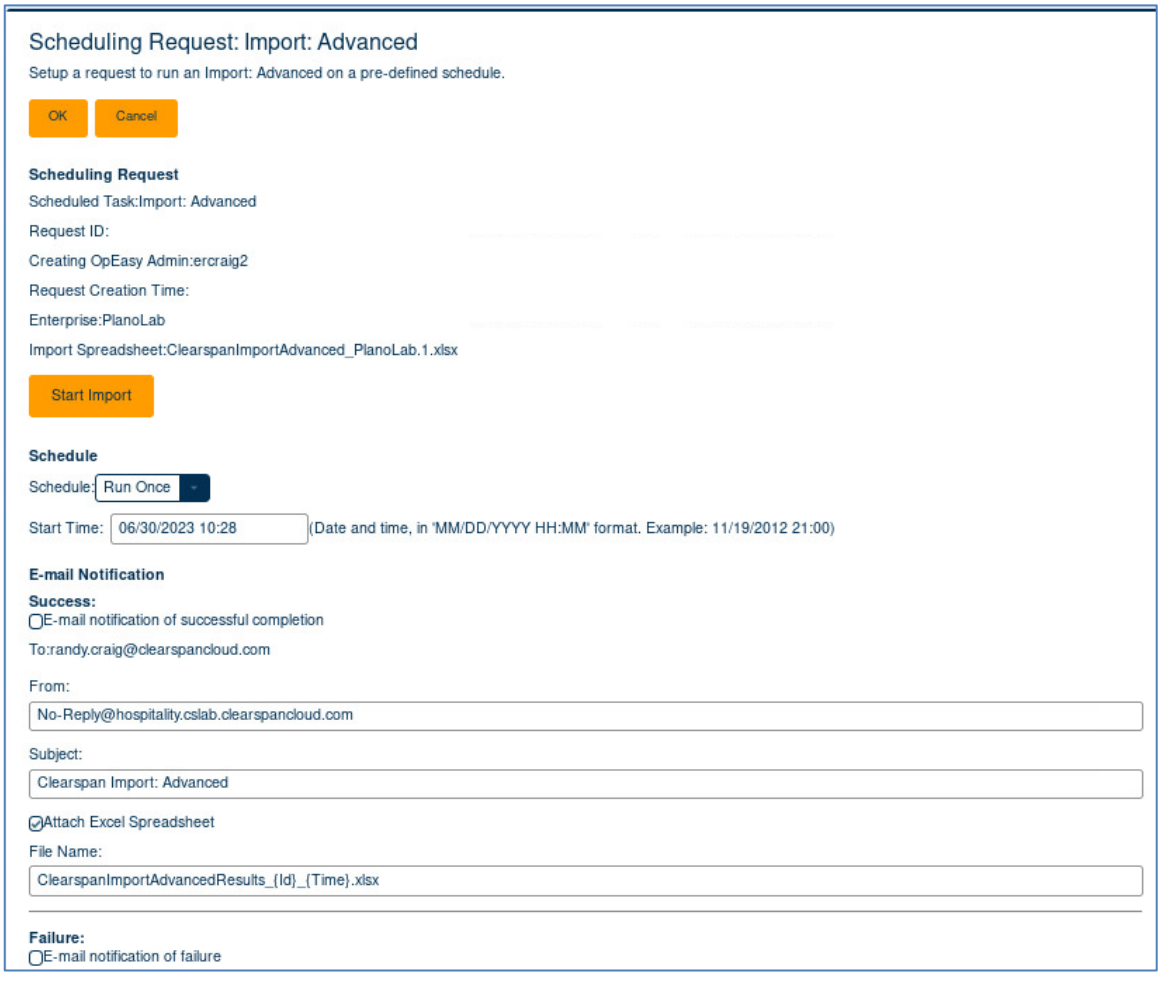


Figure 181 - Scheduling Request: Import: Advanced

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

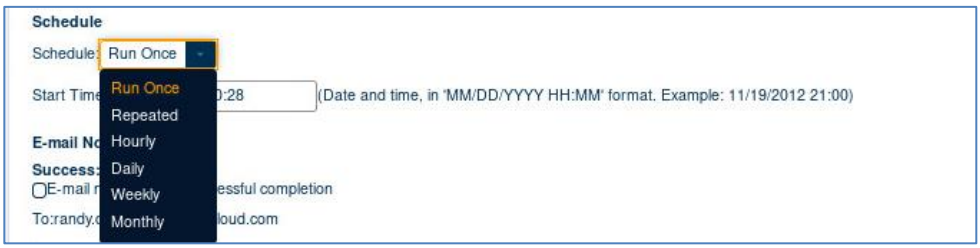


Figure 182 - Selecting the Schedule Type

- 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.

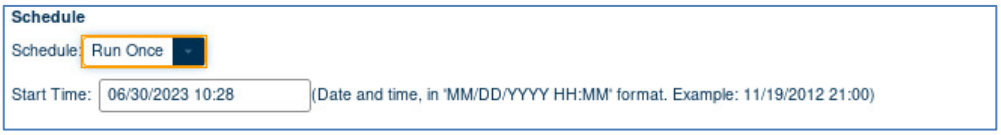


Figure 183 - Schedule Run Once

- 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.

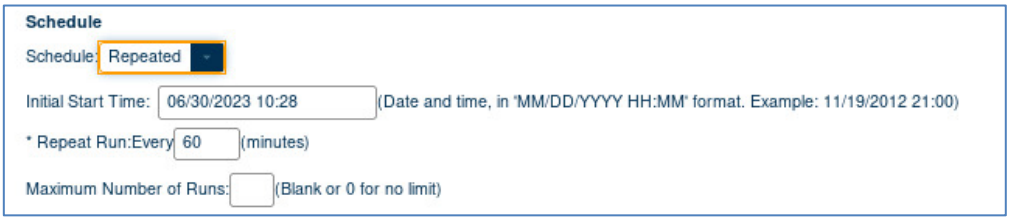


Figure 184 - Schedule Repeated

- 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.

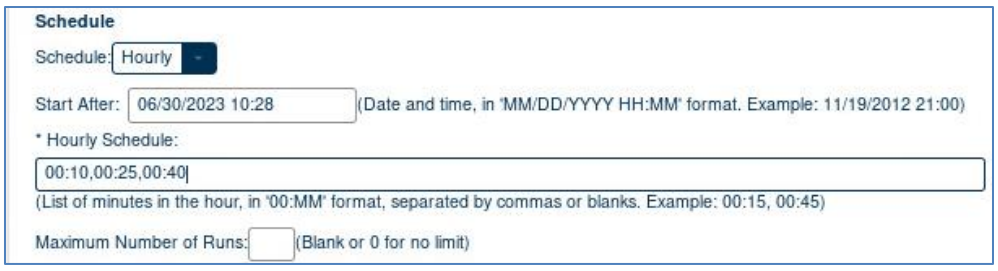


Figure 185 - Schedule Hourly

- 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.

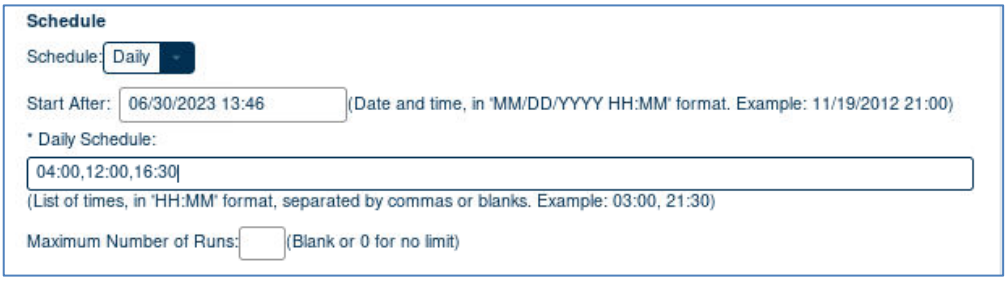


Figure 186 - Schedule Daily

- 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.

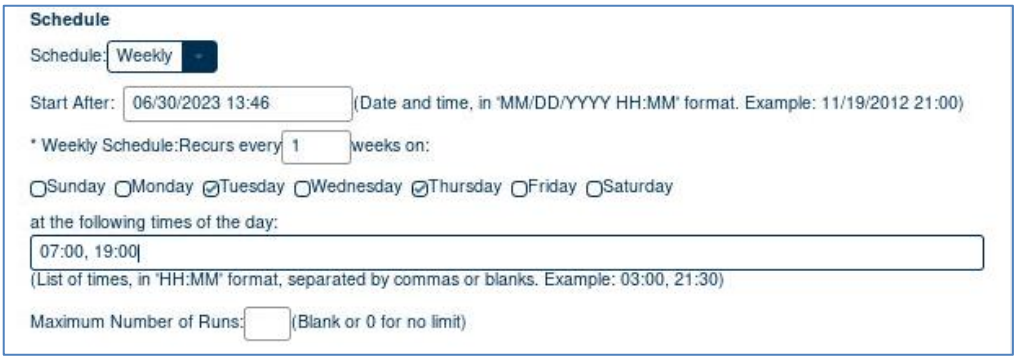


Figure 187 - Schedule Weekly

- 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.

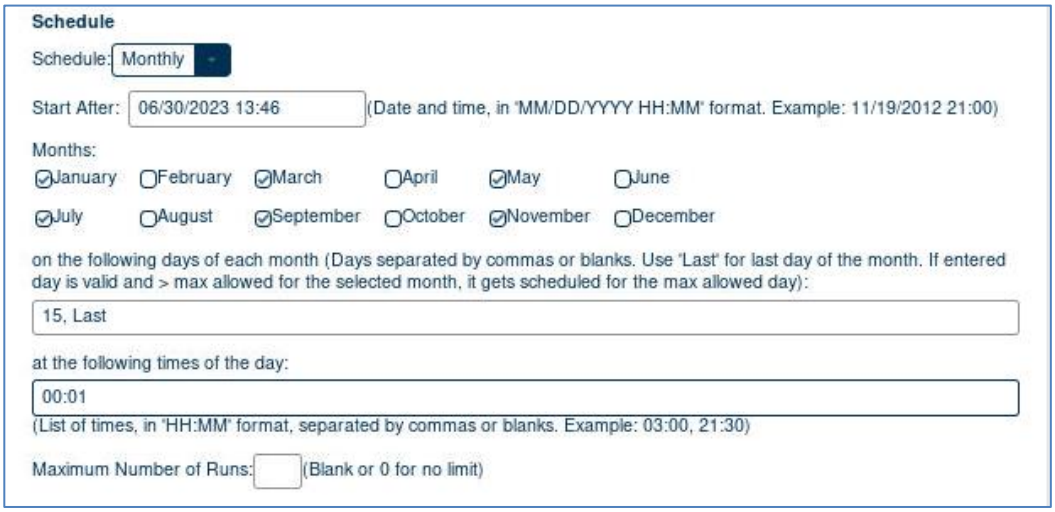


Figure 188 - Schedule Monthly

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 the figure below: E-mail Notification Section - Setup for an example.

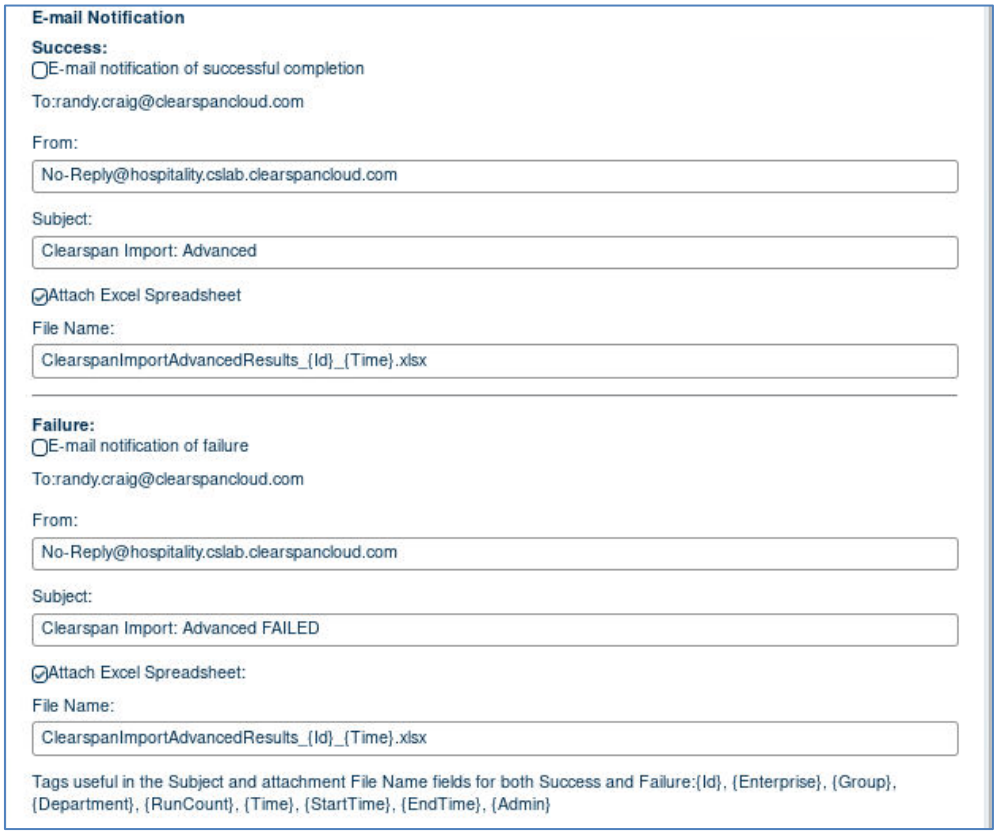


Figure 189 - E-mail Notification Section - Setup

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.

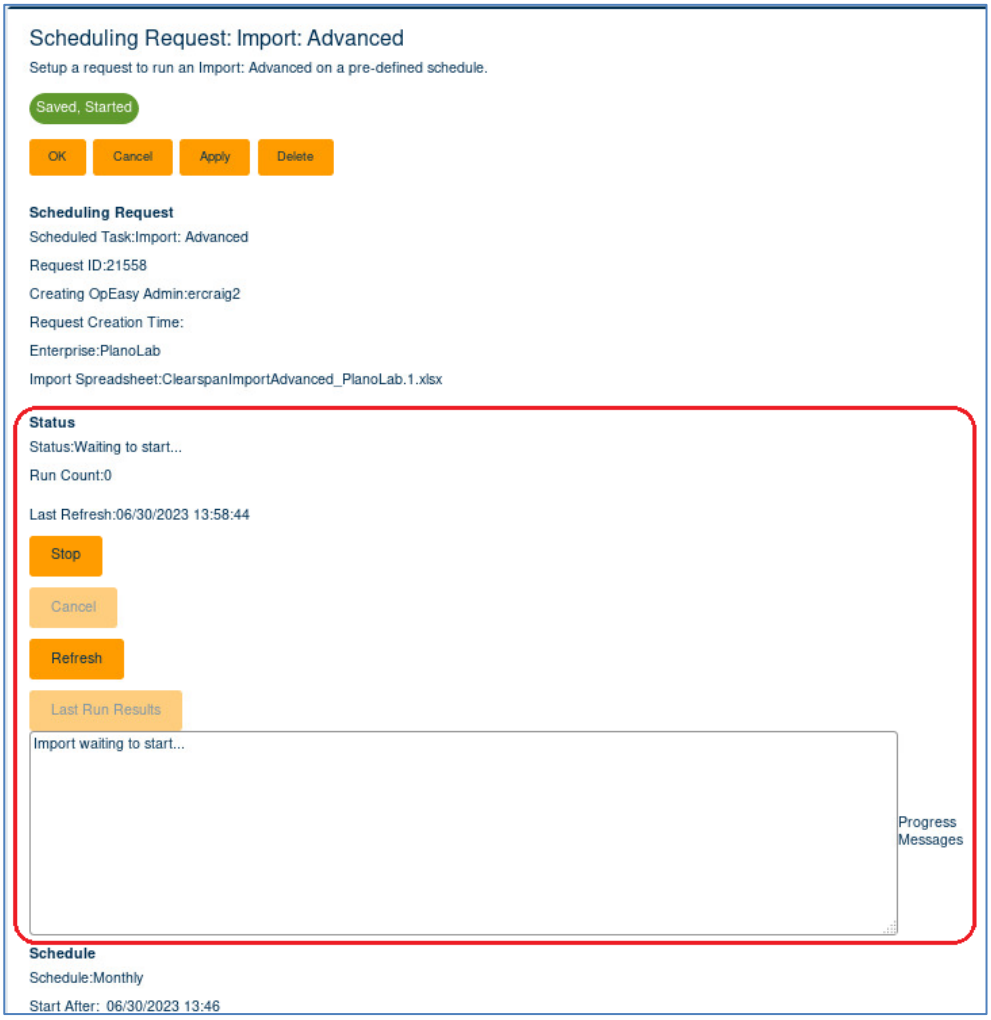


Figure 190 - Status Section

Viewing Scheduled Imports and Exports

The Scheduling page displays imports and exports that have been scheduled to run now or on a pre-defined schedule. You can also delete a schedule on this page.

1. Click **Provisioning** and then **Scheduling** in the menu tree or click on the **Scheduling** button on the Import page. The Scheduling page opens, displaying the Scheduling Requests of the Administrator. You can select (All Enterprises) in the Enterprise drop-down box to display the scheduled imports and exports of all enterprises.
2. Select the **Scheduled Task** from the drop-down list. This filters the list of schedules.

   The following example illustrates a scheduled worksheet import that has not yet started.

Figure 191 - 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.

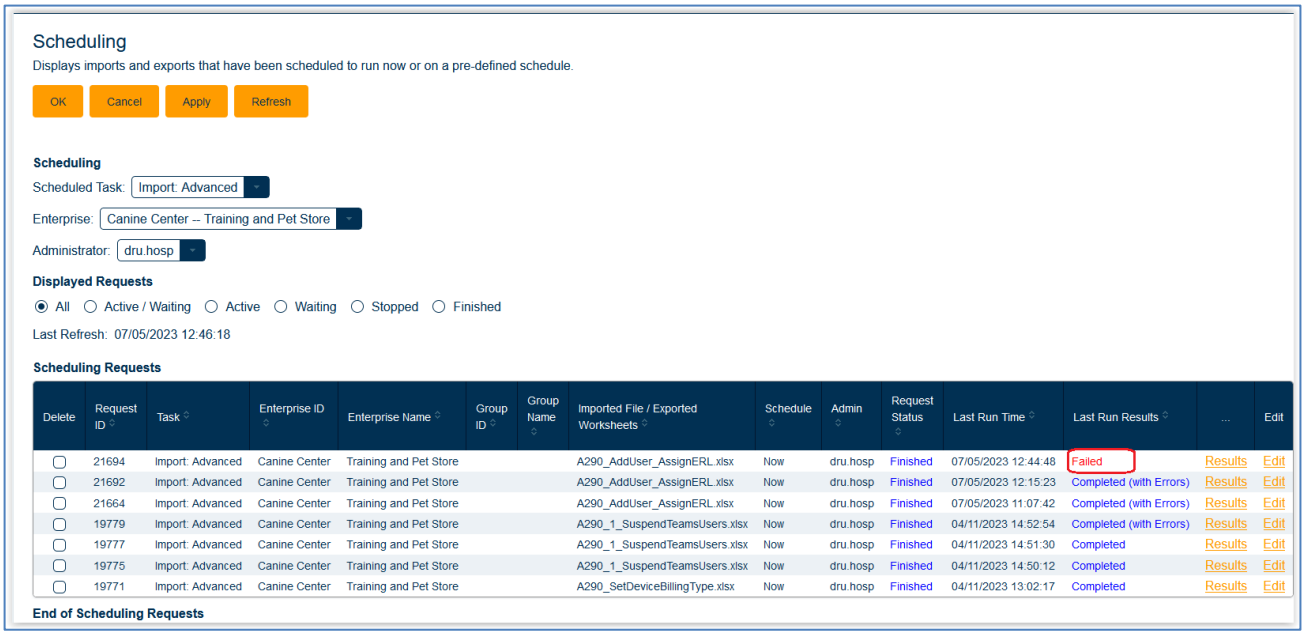


Figure 192 - Worksheet Run Failed

3. Click **Refresh** to update the screen.
4. Click the **Results** link in the row of the schedule for which you want to see the results.

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.
- For Multiple Enterprises, the export progress and results are displayed by clicking on the Request row that was created individually for each enterprise.

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

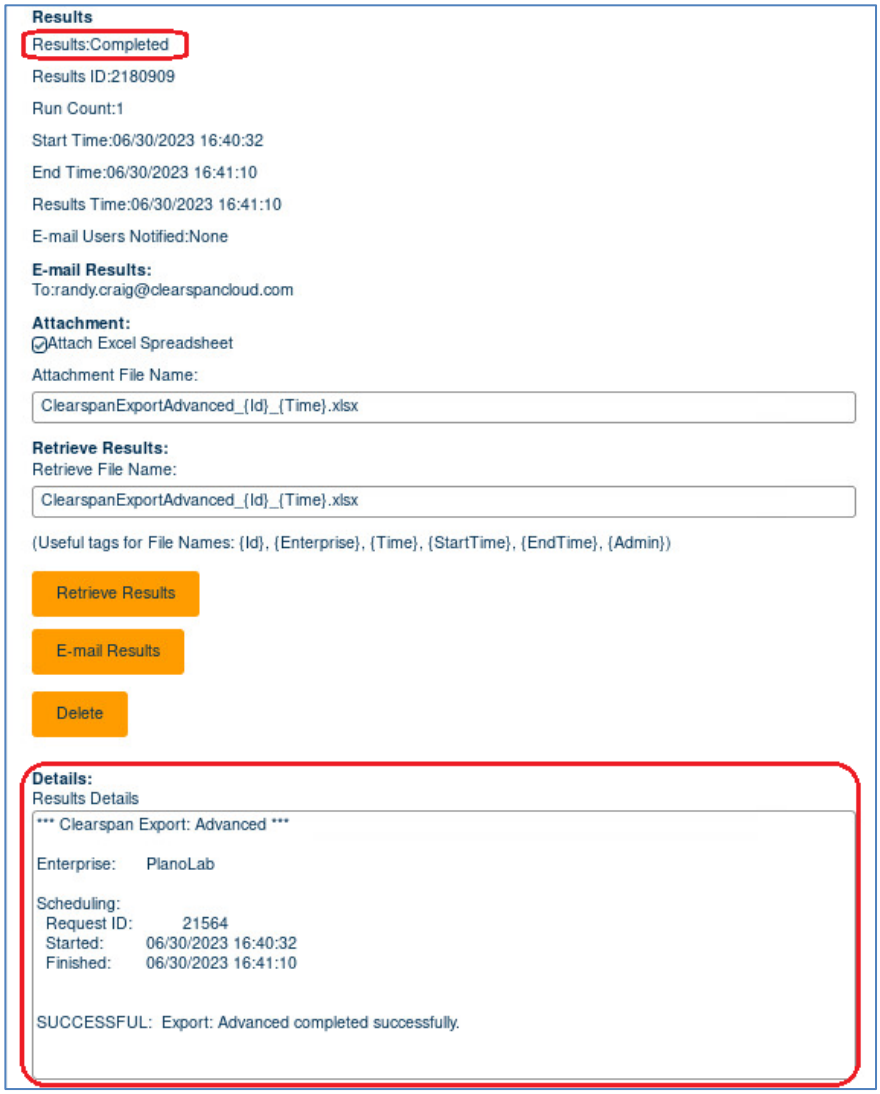


Figure 193 - Scheduling Results – Import

Restarting a Scheduled Import or Export

1. From the main menu, select **Provisioning** and then **Scheduling**.
2. Click the **Edit** link in the row or click anywhere in the row of the schedule you want to edit. The Scheduling Request page opens. The spreadsheet content is already specified. The status is marked as “Finished”.
3. Click **Restart Import** or **Restart Export**. The Import or Export restarts.

Deleting a Scheduled Import

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

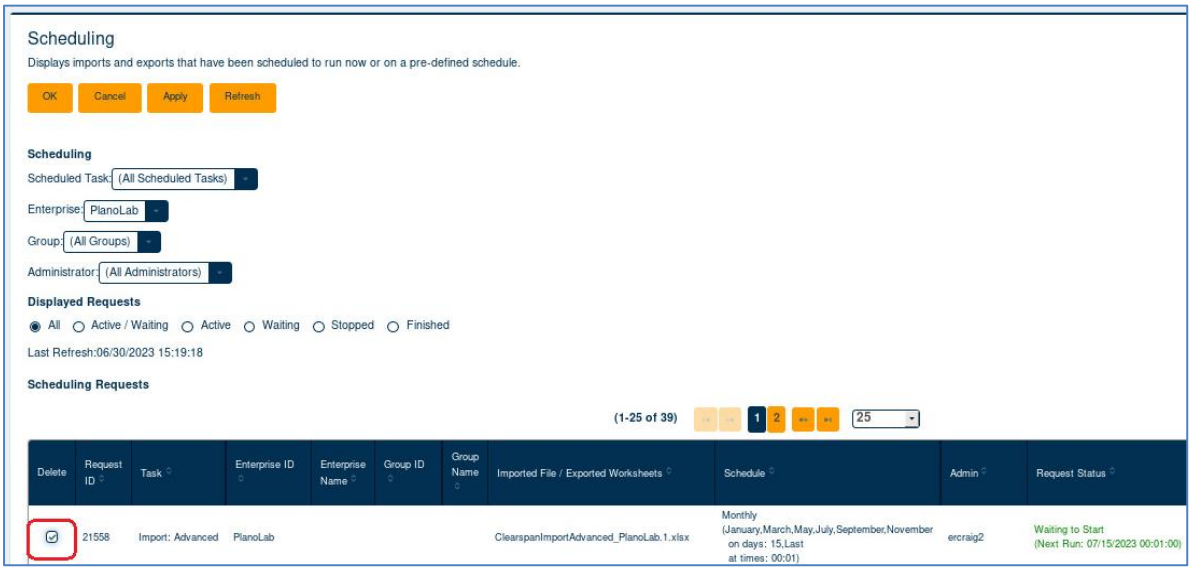


Figure 194 - Scheduling Page – Delete

Enterprise Settings

The Enterprise Settings pages allow you to configure the departments in an Enterprise, add or change the phone numbers assigned to an Enterprise, and configure Service Packs within an Enterprise.

Adding Enterprise Departments

1. You can use Enterprise Settings to add new departments for an Enterprise.
2. From the main menu, select **Provisioning** and then **Enterprise Settings**.
3. Select **Departments**.
4. Select the **Enterprise** from the drop-down list.
5. Click **Add**. The Enterprise Departments Add page opens.
6. Enter a Department Name and Parent Department.
7. Click **OK**.

Modifying or Deleting Enterprise Departments

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Departments**.
3. Select the **Enterprise** from the drop-down list.
4. Click **Search** to view all the Departments or enter Search parameters to filter the Search.
5. Click the **Edit** link in the row or click anywhere for any Department you want to edit. The Department Modify page opens.
6. Click **Delete** to delete the Department or make any desired changes and click **OK**.

Selecting the Available Device Types for an Enterprise

You can limit the list of device types available in an enterprise. Then only those device types appear in menus when creating a device, displaying or modifying Phone Templates, selecting Phone Manufacturer for Global Settings, and so on.

Removing a device type from the list prevents access to any existing phone templates for that device type, even if they are in use by existing phone devices. It is best to remove any existing phone devices and templates before removing the associated device type from an enterprise.

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Device Types**. The Enterprise Device Types page opens.
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.

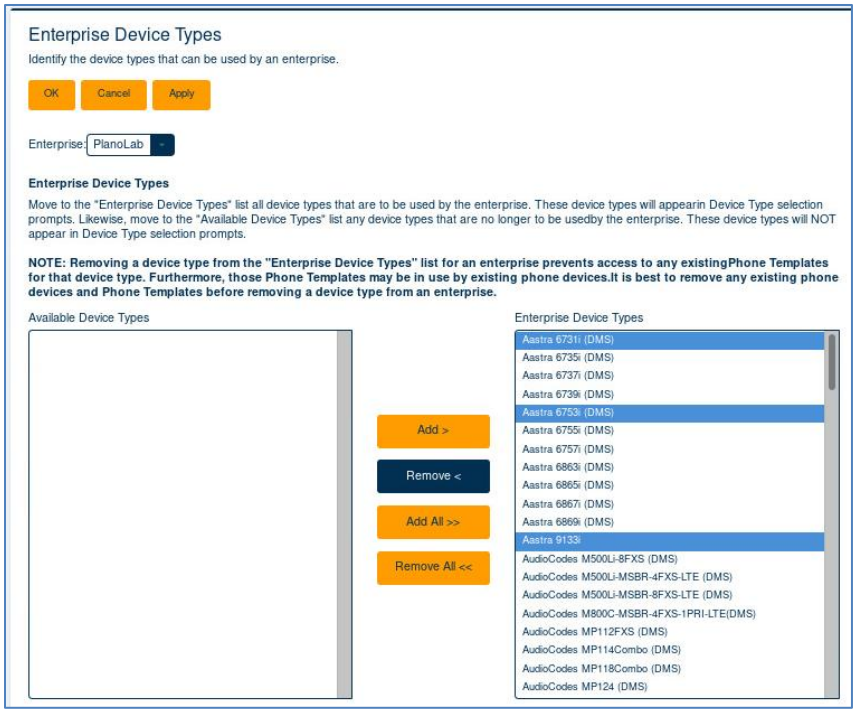


Figure 195 - Enterprise Device Types Page

If you selected Multiple Enterprises, choose one or more enterprises to move from **AvailableEnterprises** 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 device types from Available Device Types to Device Types To Remove.

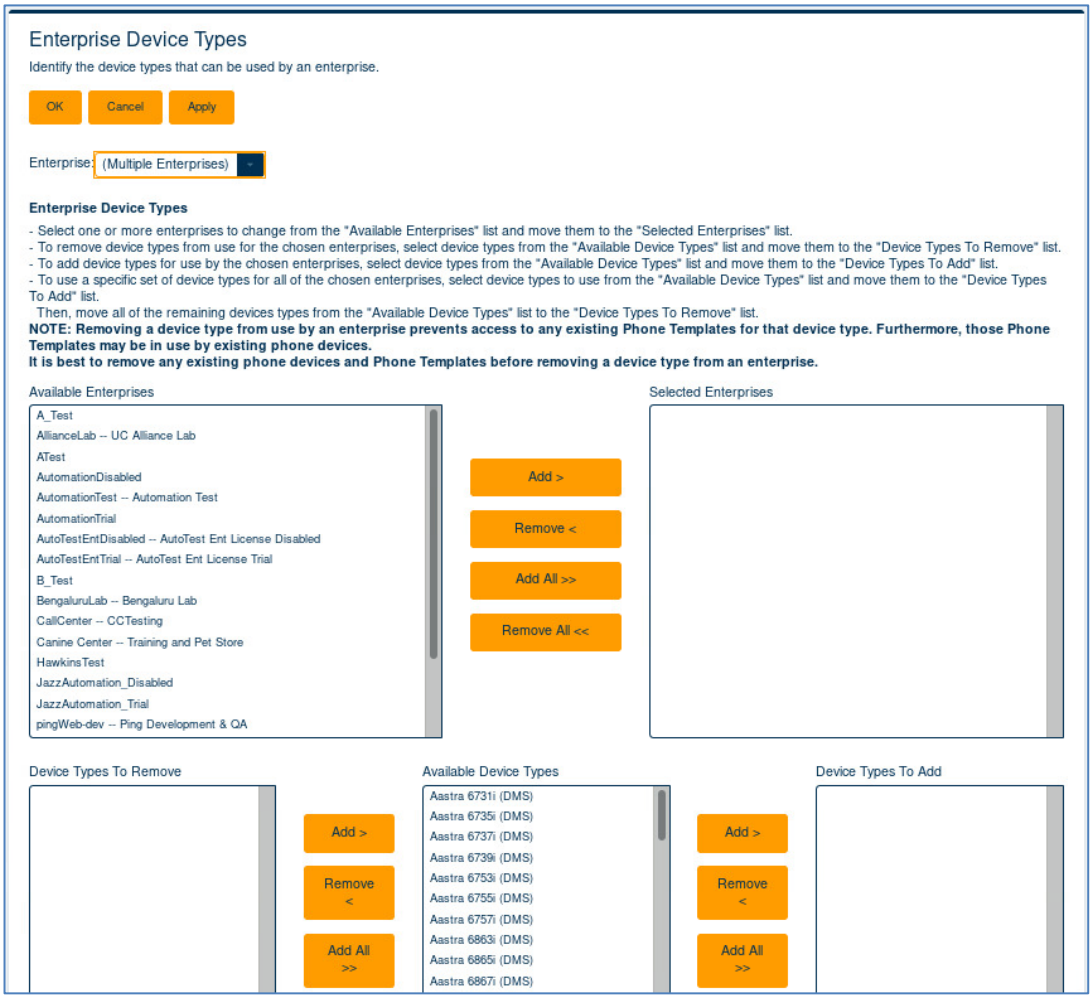


Figure 196 - Enterprise Device Types Page – Multiple Enterprises

5. Click **OK**.

Configuring Custom Device Type Tags for an Enterprise

You can add, modify, and delete custom tags for devices of a specified device type in a selected enterprise. A tag can be created for any device type supported by OpEasy and any other device type for Mitel and Polycom phones even though those device types are not supported by OpEasy.

1. From the main menu, select **Provisioning** and then **Enterprise**.
2. Select **Device Type Tags**.
3. Select the **Enterprise** from the drop-down list, if necessary.
4. Select the **Device Type**.
5. Click **Add** to add a new tag or click **Edit** in the row for any tag you want to edit. The Enterprise Device Type Tag page opens.

6. Enter a **Tag Name** and **Tag Value**, change the **Tag Value**, or click **Delete** to remove the custom tag.
7. Click **OK**.

Adding Emergency Call Notification for selected Enterprise

When an emergency number is called, along with providing precise location details, a notification will be triggered to Front desk or Security office.

1. From the main menu, select **Provisioning** and then **Enterprise Settings.**
2. Select **Emergency Call Notification**.
3. Select the **Enterprise** from the drop-down list.
4. Select the Send Notification email to check box and enter the email address.

Note: When the User dials the emergency number 911 from the phone which is provisioned under the selected Enterprise, the User will get an email notification to configure the email address.

5. Select the **Allow Group Override** check box to control the edits in Group Settings.
6. Click **Apply** to save the changes.
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** (Group or User).
4. Click **Add**. The Music on Hold Profile Add page opens.
5. Enter a **Name** and **Description**. The name must be 1-80 characters. The description is optional.
6. Follow these steps if a **Group** profile type is being added:
   a. Choose the types of calls to **Enable music during**. Music On Hold can be enabled for callson hold, parked calls, and busy camped-on calls.
   b. Select a Preferred Audio Codec.
   c. Select a preferred Music Source.
      - If **Music Source** is set to **System Settings**, the **External Device Settings** and **Custom Announcement Settings** are not applicable.
      - If **Music Source** is set to **External Device**, select a **Device Name** from the list of

pre-provisioned MoH devices.

- Enter the Line Port, Port Number, and SIP Contact of the external device.

- If **Music Source** is set to **Custom Announcement**, select an **Audio File Action**.
  - If the chosen **Audio File Action** is one of the '**Add'** options, enter a descriptive **Announcement Name** for the Custom Announcement, then click the Load Audio File button to browse your PC for an appropriately encoded audio file to use for MOH.

Note: Music on Hold, and audio Announcement files in general, must be recorded as .wav files in 16kHz, 8 or 16-bit mono format with u-law or PCM encoding to be accepted for upload and use by the Clearspan system. The maximum audio length is 10 minutes for a Music on Hold Custom Announcement.

  - If the chosen **Audio File Action** is **Use Existing Announcement**, enter the name of the audio file in the announcement file repository to use for MoH.

d. Internal callers can be connected to a different MOH source from external callers. If desired, select the **Use Alternate Source** box under **Internal Calls Settings** and provision options as described above.

e. Click **OK**.

7. Follow these steps if a **User** profile type is being added:

a. Enable or disable **Music on Hold**

b. Select a **Music Source**.

- If **Music Source** is set to **Group Settings**, the **Custom Announcement Settings** are not applicable.
- If **Music Source** is set to **Custom Announcement**, select an **Audio File Action**.
  - If the chosen **Audio File Action** is one of the '**Add'** options, enter a descriptive **Announcement Name** for the Custom Announcement, then click the Load Audio File button to browse your PC for an appropriately encoded audio file to use for MOH.

Note: Music on Hold, and audio Announcement files in general, must be recorded as .wav files in 16kHz, 8 or 16-bit mono format with u-law or PCM encoding to be accepted for upload and use by the Clearspan system. The maximum audio length is 10 minutes for a Music on Hold Custom Announcement.

  - If the chosen **Audio File Action** is **Use Existing Announcement**, enter the name of the audio file in the announcement file repository to use for MoH.

c. Internal callers can be connected to a different MOH source from external callers. If desired, select the **Use Alternate Source** box under **Internal Calls Settings** and provision options as described above.

d. Click **OK**.

Modifying or Deleting Enterprise MOH Profiles

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Music on Hold (MOH) Profiles.**
3. Select the **Enterprise** from the drop-down list and select the **Profile Type**.
4. Click the **Edit** link in the row or click anywhere for any profile you want to edit. The Music On Hold Profile Modify page opens.
5. Make changes to the profile or click **Delete** to delete the profile.
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** in the row or click anywhere for any tag you want to edit. If there are several tag values for one tag name (in multiple groups), the “Multiple Values” hyperlink appears, which you can click to view the list, and then click **Edit**.
   The Enterprise Device Type Tags page opens.
6. Enter a **Tag Name** and **Tag Value**, change the **Tag Value**, or click **Delete** to remove the custom tag.
7. Click Add or Remove to choose the **Assigned Groups** for the enterprise device type tags.
8. Click **OK**.

Adding Phone Numbers to an Enterprise

You can use Enterprise Settings to add phone numbers assigned to an Enterprise.

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Phone Numbers**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Add**. The Enterprise Phone Number Add page opens.
5. Select a group from the **Assign to Group** drop-box.
6. Choose whether to activate the phone numbers.

7. Enter the ranges of phone numbers to add to the Enterprise.
8. Click **OK**.

Viewing or Modifying the Enterprise Phone Numbers

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Phone Numbers**. The Enterprise Phone Numbers page opens.
3. Select the **Enterprise** and the **Group** from the drop-down lists.
4. Click the **Include Enterprise Phone Numbers When Selecting a Phone Number for a User** check box, if you want to include enterprise phone numbers in the list of available phone numbers that are to be selected when provisioning users, auto attendants, or hunt groups.

   When this check box is selected, the phone numbers that are assigned to the enterprise (but not to a group) are included in the phone number selection list appended with "(Enterprise)" to indicate that the phone number is not currently assigned to the group. When an enterprise phone number is selected for a user, and the user information is saved, the phone number is automatically assigned to the appropriate group.
5. Select **Displayed by Group** in the **Phone Number Ranges**.

   Displayed by Group: When this check box is selected, the display expands to show the group to which each phone number or range is assigned; the Group column is empty if the phone numbers or ranges are only assigned to the Enterprise. When this check box is not selected, "(Multiple)" is displayed in the Group column if phone numbers in the range are assigned to different groups or are assigned to the Enterprise. Clear this box if you want to view ranges of phones numbers in the Enterprise, without regard to the group assignments.
6. To edit a phone number range, click the **Edit** link in the row or click anywhere for any phone number range you want to edit. The Enterprise Phone Number Modify page opens, showing the Enterprise, Phone Number and the group assigned. Click **Activated** or **Deactivated** to activate or deactivate the phone number and click **OK**.
7. Click **OK** again to save the changes.

Adding a Service Pack

You can use Enterprise Settings to create Service Packs for an Enterprise, choosing which features to include and specifying a name for the pack.

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Service Packs**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Add**. The Service Pack Add page opens.
   You can also search for an existing Service Pack and click the **Copy** link to create a new Service Pack based on that one, and then modify it.

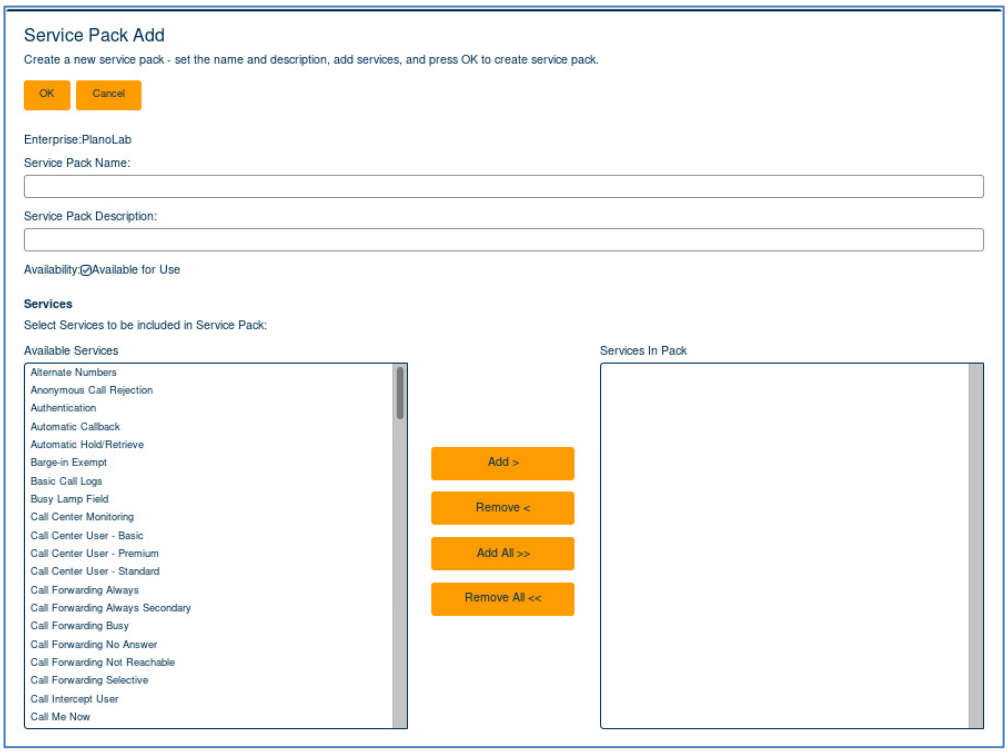


Figure 197 - Service Pack Add Page

5. Enter a Service Pack Name and Service Pack Description.
6. Select the **Available for Use** check box when the Service Pack is ready for use.
7. Use the **Add** and **Remove** buttons to select the features to include in the pack.
8. Click **OK**.

Modifying or Deleting a Service Pack

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Service Packs**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Search** to view all the Service Packs or enter Search parameters to filter the Search.
5. Click the **Edit** link in the row or click anywhere for any Service Pack you want to edit. The Service Pack Modify page opens.

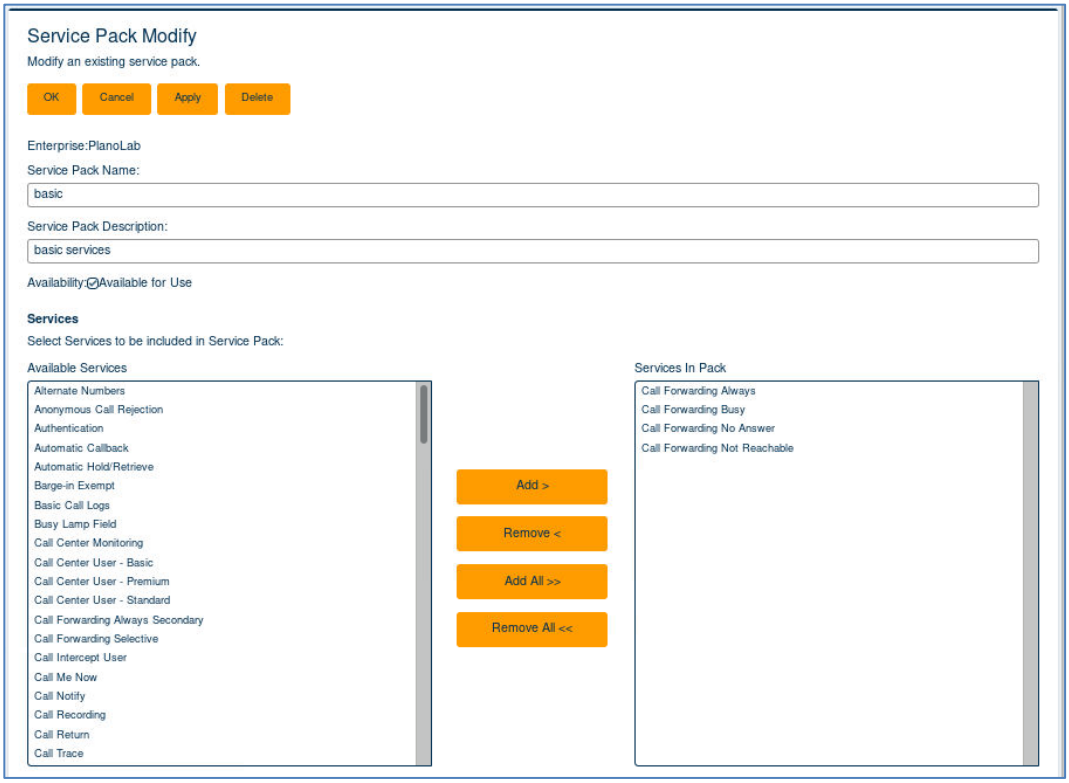


Figure 198 - Service Pack Modify Page

6. Click **Delete** to delete the Service Pack or make any changes and click **OK**.

Authorizing Groups to Use a Service Pack

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Service Packs**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Search** to view all the Service Packs or enter Search parameters to filter the Search.
5. Click the **Authorize** link on the row for any Service Pack you want to authorize. The Service Pack Group Authorization page opens.
6. Select the check boxes beside each group that you want to authorize for this Service Pack.
7. Click **OK**.

Configuring the Voice VPN

You can use OpEasy to add, view, modify and delete the Voice VPN settings for a selected enterprise, and search for existing Voice VPN entries. Only one location code and one policy selector can be included in the search criteria.

Only Enterprise Administrators and above can configure the Voice VPN.

Viewing and Searching Voice VPN Entries

To view, and search existing Voice VPN entries:

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Voice VPN**. The **Voice VPN** page displays:

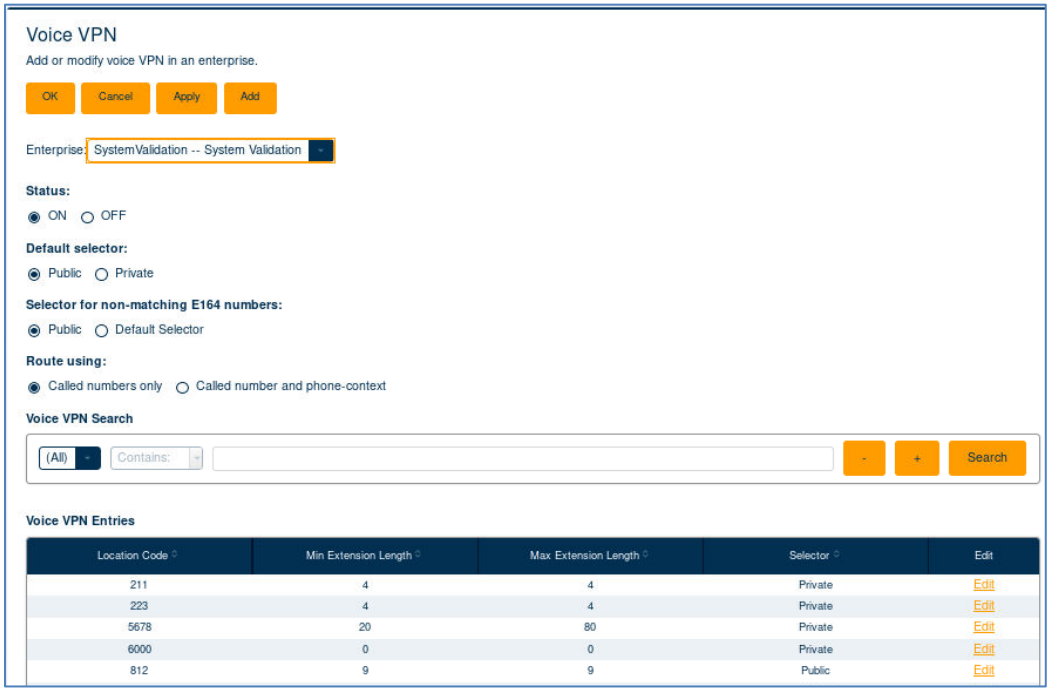


Figure 199 - Voice VPN Page

3. Select the **Enterprise**. The existing **Voice VPN Entries** displays.
4. You can search for Voice VPN entries using the **Location Code** and **Selector** filters.
5. Click **Search** to view the **Voice VPN Entries** table.

Configuring Voice VPN Settings

To configure the Voice VPN settings:

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Voice VPN**. The **Voice VPN** page displays.
3. Select the **Enterprise**.
4. Enable the Status and select the Default selector and the Selector for non-matching E164 numbers.

5. Select the options for the Voice VPN Routing.
6. Click OK or Apply.

Adding Voice VPN Entries

To add a new voice VPN entry:

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Voice VPN**. The **Voice VPN** page displays.
3. Click **Add** to add a new Enterprise Voice VPN entry, the **Enterprise Voice VPN Add** page displays:

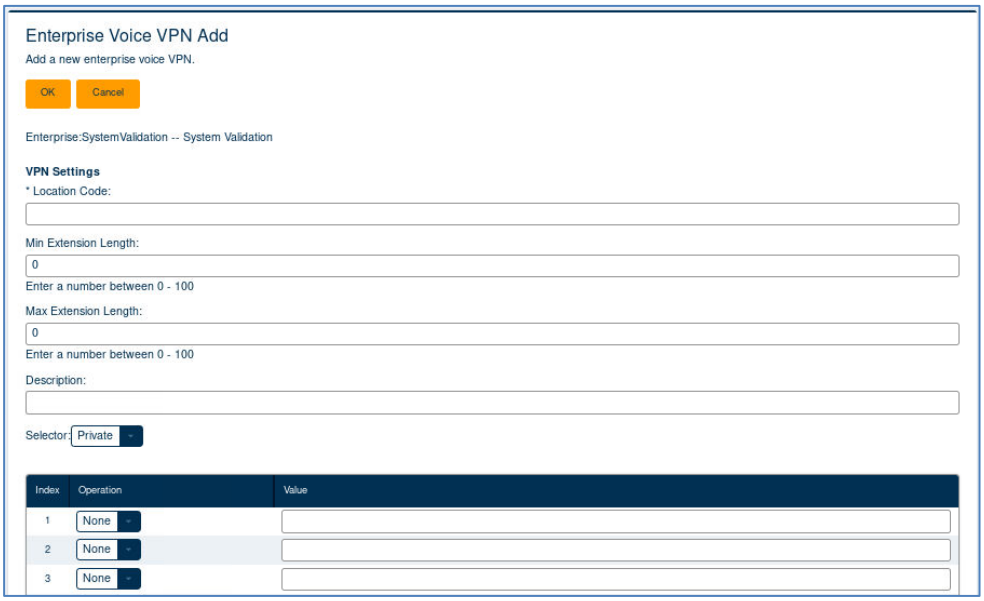


Figure 200 - Enterprise Voice VPN Add Page

4. Enter the Location code.
5. Enter the **Minimum Extension Length** in the range of 1 to 100.
6. Enter the **Maximum Extension Length** in the range of 1 to 100.
7. Enter the **Description**.
8. Choose the Selector option from the following:
   - Private
   - Public
   - Route
   - Treatment
9. Select the **Operation** from the **Digit Manipulation** table and enter the **Value** for each Operation.
10. Click **OK**.

Editing Voice VPN Entries

To edit a voice VPN entry:

1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
2. Select **Voice VPN**. The **Voice VPN** page displays.
3. Click **Edit** in the **Voice VPN Entries** table, or click anywhere in the row of the Voice VPN Entry, the **Enterprise Voice VPN Modify** page displays:

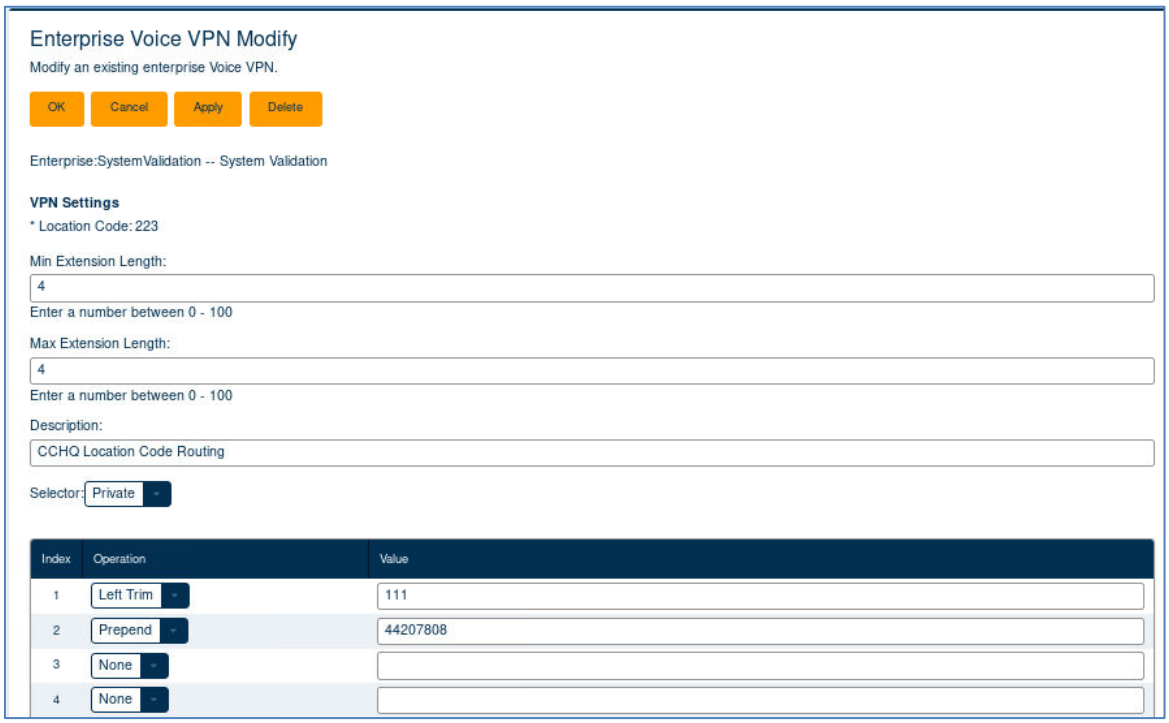


Figure 201 - Voice VPN Modify Page

4. Enter the **Minimum Extension Length** to match in the range of 1 to 100.
5. Enter the **Maximum Extension Length** to match in the range of 1 to 100.
6. Enter a **Description**.
7. Choose the **Selector** option from the following:
   - Private
   - Public
   - Route
   - Treatment
8. Select the **Operation** from the **Digit Manipulation** table and enter the **Value** for each Operation.
9. Click **OK** or **Apply**.

Deleting Voice VPN Entries

To delete a Voice VPN Entry:

1. From the main menu, select **Provisioning** and then **Enterprise Settings**
2. Select **Voice VPN**. The Voice VPN page displays.
3. Click **Edit** in the **Voice VPN Entries** table or click anywhere in the row of the Voice VPN Entry to edit an existing Enterprise Voice VPN entry, the **Enterprise Voice VPN Modify** page displays.

4. Click **Delete**. The Enterprise Voice VPN entry is deleted.

Group Settings

The Group Settings pages allow you to use custom tags for devices in a group, redirect calls within a group during specified time periods, and manage phone directory servers for an enterprise or group.

Adding or Deleting Group Announcements

OpEasy allows you to upload, delete, or configure audio or video announcement files to repositories. Announcements repositories are kept for Users, Auto Attendant and Hunt Group virtual users, and Groups. Once an announcement is saved to a repository, OpEasy allows you to assign it to Voice Mail Greetings, Auto Attendant menus, and Music On Hold. You can search, upload, rename, or delete announcements for a group on the Group Announcement Repository page. You can also use this page to view announcement types, size, and usage.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select **Announcement Repository**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
   - To upload a new file, click Add. Enter an Announcement Name and click Browse to choose the audio or video file to upload. Supported file types include WAV, WMA, MOV, or 3GP. Click OK. The new announcement appears in the Announcements list.
   - To rename or replace an announcement, search for the announcement. Search results appear in the list at the bottom of the page. Click Edit on the row of the announcement you want to modify. Make any desired changes on the Group Announcement Modify page, and then click OK.
   - To delete an announcement, select it in the search results list and click Delete Selected Announcements, or click Delete on the Group Announcement Modify page. You cannot delete announcements that are in use.
4. Click **OK**.

Adding or Deleting Group Authorization Codes

You can add, modify, or delete group authorization codes.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Auth Codes**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary. The **Group Communication Barring Authorization Codes** page opens as shown in the following figure.

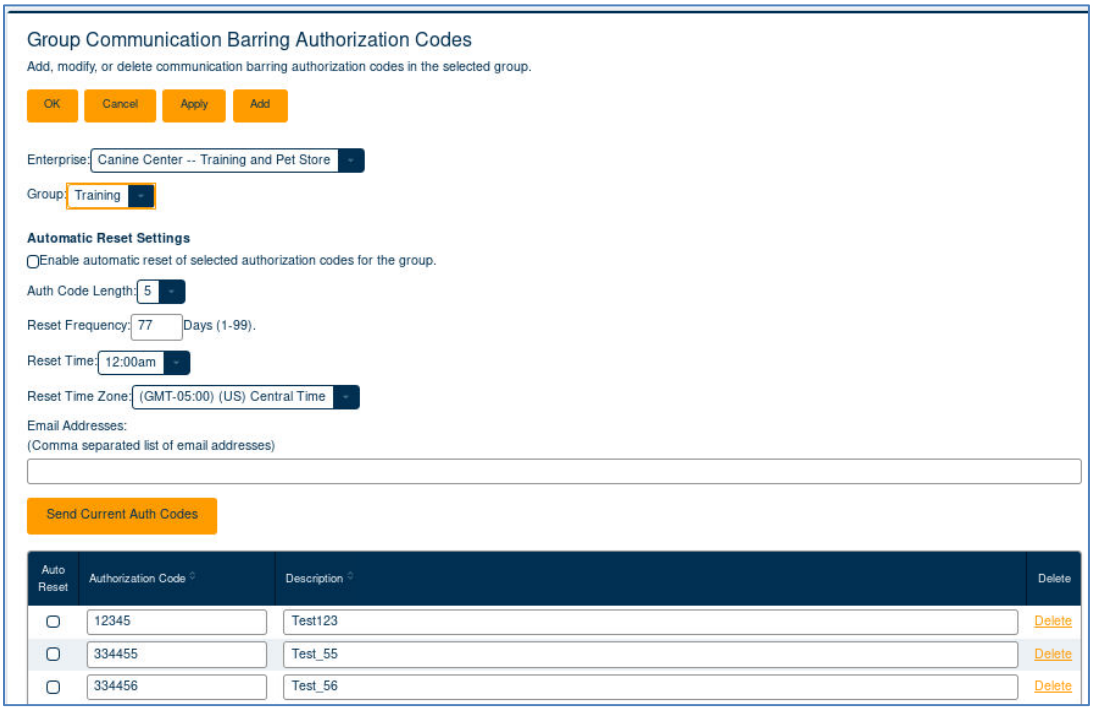


Figure 202 - Group Communication Barring Authorization Page

4. To automatically reset the selected authorization codes for the group, configure the following settings in the **Automatic Reset Settings** table:
   a. Select the **Auth Code Auto Reset** check box to automatically reset the selected authorization codes. The Auth Code Auto Reset is disabled by default.
   b. Select the **Auth Code Length** of the automatically generated authorization codes. The valid authorization code length contains 2 to 14 digits. The default value contains 4 digits.
   c. Enter the **Reset Frequency** to specify the frequency (number of days) in which the authorization codes are to be reset. The valid reset frequency is 1 to 99 days. The default reset frequency is 1 day.
   d. Select the time of day that the authorization codes are to be reset from the **Reset Time** drop-down list. The drop-down list contains options from 12:00am to 11:00pm. The default reset time is 12:00am
   e. Enter the Email Addresses to which the new authorization codes are delivered when they are reset.
   f. Click **Send Current Auth Codes** to send an email on demand which contains the currently configured authorization codes. Only the authorization codes selected for Auto Reset are included in the email.
5. To add a new group-level Communication Barring Authorization Code, click **Add**, click **Auto Reset** check box in the Auth Code table to automatically reset the authorization code when is a group is configured for automatic reset of authorization codes. The check box is not selected by default when a new authorization code is added. Enter the **Authorization Code**, **Description,** and Click **OK**.
6. Click **Delete** at the end of the row if you want to remove an authorization code.
7. Click **OK**.

Configuring Call Pickup Groups

1. You can configure the call pickup to enable users to answer any ringing line in their call pickup group.
2. From the main menu, select **Provisioning** and then **Group**.
3. Select Group **Call Pickup**.
4. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
5. Click **Add** to add a new group or click **Edit** link in the row or click anywhere for any group you want to edit.
6. Select a name for the group and configure the group by adding or removing users. You can also click **Delete** to remove the group.
7. Click **OK**.

Configuring Group Departments

You can configure the departments in a group.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select Group **Departments**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click **Add** to add a new department or click **Edit** in the row or click anywhere for any department you want to edit. You can also click **Edit** and then **Delete** if you want to remove the department.
5. Enter a Department Name.
6. Configure the Department Calling Line ID Name and Department Calling Line ID Number, if needed.
7. Click **OK**.

Configuring Custom Device Type Tags for a Group

You can add, modify, and delete custom tags for devices of a specified device type in a selected group.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select Group **Device Type Tags**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Select the **Device Type**.
5. Click **Add** to add a new tag or click **Edit** in the row or click anywhere for any tag you want to edit. The Group Device Type Tags page opens.
6. Enter a **Tag Name** and **Tag Value**, change the **Tag Value**, or click **Delete** to remove the custom tag.
7. Click **OK**.

Configuring Emergency Call Notification for a Group

When an emergency number is called, along with providing precise location details, a notification will be triggered to Front desk or Security office.

1. From the main menu, select **Provisioning** and then **Group Settings.**
2. Select **Emergency Call Notification**.
3. Select the **Enterprise** from the drop-down list.
4. Select the **Group** from the drop-down list.
5. Select the **Send Notification email to** check box and enter the email address.

Note: User can provide the same or different email address to a particular Group by selecting the Group from this page. When the User dials the emergency number 911, the configured email address will get the email notifications.

6. Click **Apply** to save the changes.
7. Click **OK**.

Configuring Target capacity for a paging group

You can configure the Target Capacity per Paging Group.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Group Paging**.
3. Select the **Enterprise** and **Group** from the drop-down list. It displays the **Group Paging Target Capacity** for this group.
4. Enter the **Maximum number of Target Users per Paging Group for this Group** that should not exceed the value configured for enterprise. Number of targets also includes nested targets of paging group.
5. Click **OK**

Configuring Music On Hold (MOH) for a Group

You can use Group Settings to add new Music On Hold profiles for groups or departments within a group. If no user MOH settings are configured, group MOH settings are used; if no group MOH settings are configured, enterprise MOH settings are used. MOH profiles are available to Solution Resellers, but not to Enterprise, Group, or Department Administrators. The Music On Hold service must be assigned.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select **Music On Hold**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Search for a Music On Hold Type to edit, or click **Add** to create a new Music On Hold Type.
5. Select a **Music On Hold Profile** if you want to base these group settings on an existing enterprise-level MOH profile.

6. Choose the types of calls to **Enable music during**. Music On Hold can be enabled for calls on hold, parked calls, and busy camped-on calls.
7. Select a Preferred Audio Codec and Music Source.
8. For External Device Settings, select a device if **Music Source** is set to **External Device**. Enter the Line Port, Port Number, and SIP Contact of the external device.
9. If **Music Source** is set to **Custom Announcement**, select an **Audio Announcement** or **Video Announcement** from the Group Announcement Repository.
10. To configure the group's music on hold to be different for internal and external calls, select the **Use Alternate Source** box and configure the Internal Calls Settings.
11. Click **OK**.

Configuring Night Forwarding

You can redirect calls placed to a user within the group to a specified phone number or SIP-URI. You can configure the redirection manually by enabling the feature, or you can configure it to be automatic by choosing a specific schedule. The Night Forwarding feature must be authorized for the group.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select Group **Night Forwarding**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Set **Group Night Forwarding** to **On** to enable this feature manually, or set it to **Schedule** to choose specific **Business Hours** or a **Holiday Schedule** during which to forward calls made to this group.
5. Enter the Forward-To Number.
6. Click **OK** or **Apply**.

Configuring Phone Directory Management

Phone Directory Management allows management of Lightweight Directory Access Protocol (LDAP) phone directories for enterprises and groups. There can be one directory for an enterprise or a different directory for each group. This configuration supports the LDAP lookup key on the phone.

Adding a Phone Directory Server

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Phone Directory Management**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Choose to Use one directory for the enterprise (all groups), or to Use a separate directory for each group.
5. Click **Apply**. Click **OK**.
6. Click **Add** to add a phone directory when *Use a separate directory for each group* is selected. The Phone Directory Management Add page opens.
7. Select the **Enabled** box.

8. Enter the Server URI, Server Root DN, Server User Id, Server Password and Confirm ServerPassword.
9. Choose whether the Query will **Remove Extensions from Results**, and select whether to
10. The **Field Mapping** section displays default values, but you can change any of the following if you want: Last Name Field, First Name Field, Work Phone Field, Home Phone Field, Cell Phone Field, ID Field, Sort Field, Append Field, Additional Search Field.
11. Click **OK**. The Phone Directory Management page opens, displaying the new LDAP setup.

Testing LDAP

1. Use Phone Templates to add an LDAP Lookup button to a template.
2. Assign the template to a phone.
3. Press the LDAP button on the phone.
4. The Directory Lookup message should display.
5. Perform lookups to test the searches.

Editing a Phone Directory Server

1. From the main menu, select **Provisioning** and then **Group**.
2. Select **Phone Directory Management**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click the **Edit** link at the end of row or click anywhere in the row. The Phone Directory Modify page opens. You can modify any of the columns.
5. Click **OK** or **Apply**.

Deleting a Phone Directory Server

1. From the main menu, select **Provisioning** and then **Group**.
2. Select **Phone Directory Management**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click the **Edit** link at the end of the row or click anywhere in the row. The Phone Directory Modify page opens.
5. Click the **Delete** button. The delete warning dialog box opens.
6. Click **Yes**. The server is deleted.

Viewing or Assigning Group Phone Numbers

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Phone Numbers**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. To edit a phone number range, click the **Edit** link in the row or click anywhere for any phone number range you want to edit. The Group Phone Number Modify page opens. Make any required changes and click **OK**.

5. Click **OK** again to save the changes.

Assigning Phone Numbers to a Group

You can use Group Settings to manage phone numbers assigned to a Group.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Phone Numbers**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Assign**. The Group Phone Number Assign page opens.
5. Select the group from the **Assigned to Group** drop-down list.
6. Choose whether to activate the phone numbers.
7. 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.
8. Click **OK**.

Configuring a Predefined Speed Dial 8 List

You can use Group Settings to configure a predefined Speed Dial 8 list that can be assigned to users.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Speed Dial 8** Lists.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Add**. The Group **Speed Dial 8** List Add page opens.
5. Enter a **Name** for the Speed Dial List, which is required and can be up to 80 characters long.
6. Optionally, you can enter a **Description** up to 300 characters long.
7. Enter a **Phone Number/SIP-URI** for each Speed Code you want to define. Enter a phone number as you would normally dial it.
8. Click **OK**.

Configuring a Predefined Speed Dial 100 List

You can use Group Settings to configure a predefined Speed Dial 100 list that can be assigned to users.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Speed Dial 100** Lists.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click **Add**. The Group **Speed Dial 100** List Add page opens.
5. Enter a **Name** for the Speed Dial List, which is required and can be up to 80 characters long.
6. Optionally, you can enter a **Description** up to 300 characters long.

7. Click **Add Speed Dial 100**. The Group Speed Dial 100 Entry Add page opens.
8. Select the **Speed Code 100** number that you want to define, and enter a **Name/Description** and **Phone Number/SIP-URI**. Enter a phone number as you would normally dial it.
9. Click **OK**.

Assigning Predefined Speed Dial Lists to Users

After a Speed Dial 8 or Speed Dial 100 List has been defined, you can use Group Settings to assign the Speed Dial list to selected users.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select the type of predefined list that you want to assign to users: **Speed Dial 8 Lists** or **Speed Dial 100 Lists**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Click the **Edit link** in the row or click anywhere on the row of the Speed Dial List that you want to assign to users.
5. On the Group Speed Dial List Modify page, click **Initialize User Speed Dial Settings**.
6. On the Group Speed Dial List: Initialize User Settings page, search for users, and then select the check box for each user to which you want to assign the Speed Dial List.
7. Click Initialize Selected Users.
8. Click **OK**.

Configuring Virtual Extensions

You can use Group Settings to configure virtual on-net extensions for an Enterprise.

1. From the main menu, select **Provisioning** and then **Group Settings**.
2. Select **Virtual Extensions**.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Search for a **Virtual Extension** to edit or click **Add** to create a new Hunt Group.
5. Click **Add**. The Virtual On-Net Enterprise Extension Add page opens.
6. Enter an **External Phone Number**, a valid phone number not already in use by another Virtual On-Net User or assigned to a user in the Enterprise.
7. Enter a valid **Extension** not already in use by another Virtual On-Net User or assigned to a user in the Enterprise.
8. Enter a valid **Last Name** and **First Name** for the directory. Enter a **Calling Line ID Last Name** and **Calling Line ID First Name** for displaying the name in internal calls.
9. Select a **Virtual On-Net Call Type** from the list of system-defined types.
10. Click **OK**.

911 Services

ERS ERL Management

OpEasy provides administrative integration with the Intrado Emergency Routing Service (ERS). The Intrado ERS is a cloud-based service that provides emergency call routing and location information to a local Public Safety Answering Point (PSAP) for 911 calls. When a customer uses the ERS for E911 they must provision Emergency Response Location (ERL) records and subscriber records in the ERS. The ERL records contain physical location information (street address, floor, suite number, desk location, etc.) to which emergency responders can travel. The subscriber records contain either phone number or line/port information for a user. Each subscriber record is associated with one, and only one, ERL record to provide the location of the caller when a 911 call is placed. However, each ERL may be associated with many subscriber records. The OpEasy integration allows the administrator to provision ERL records using OpEasy and assign an ERL to a device, and then OpEasy will provision a subscriber record in the Intrado ERS automatically.

Viewing and Searching ERS ERL Records

1. From the main menu, select **911 Services** and then **Emergency Routing Service (ERS).** The OpEasy Emergency Routing Service menu page opens.

2. Select **ERL Management**

3. Select an ERS account to view and/or search and then select a search criterion from the drop-down list. Click the **Search** key to execute.

   The ERS ERL Records page displays a table containing a list of ERL records based on the selected ERS account and any ERL search criteria.

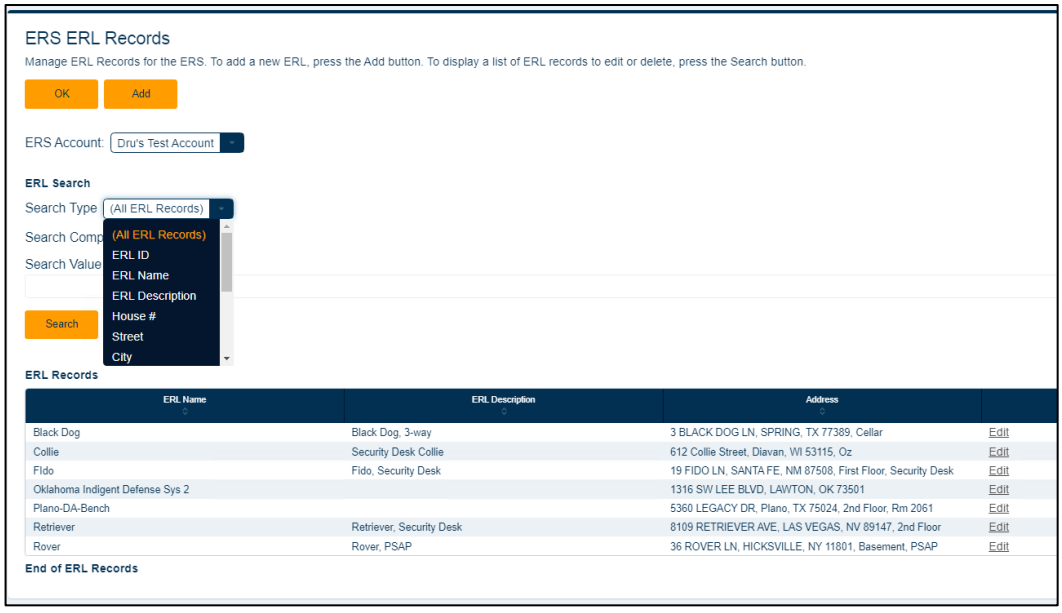


Figure 203 - ERS ERL Records Page

Adding an ERS ERL Record

To add a new ERS ERL entry:

1. From the main menu, select **911 Services** and then **Emergency Routing Service.**
2. Select **ERL Management**. The **ERS ERL Records** page displays.
3. Click **Add** to add a new ERS ERL Record, the **ERL Record Add** page displays:

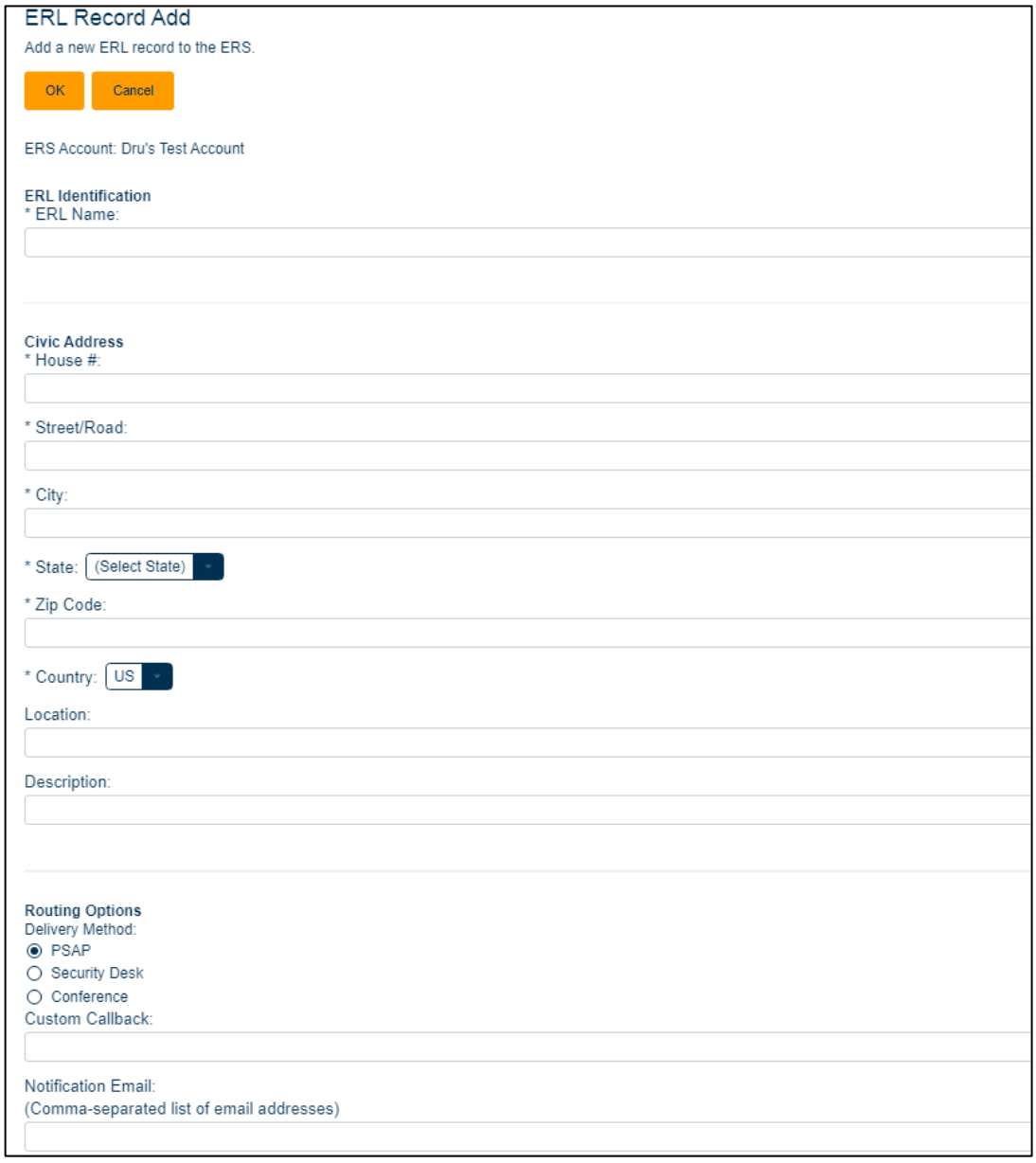


Figure 204 - ERL Record Add Page

4. Enter an **ERL Name** (required) that uniquely describes this Emergency Response Location (ERL). Maximum length is 120 characters. This name is also displayed in the **ERL Record**

Name drop-down selection (or search results field) that appears on the device add/modify pages in OpEasy.

5. Enter the **House #** (required) of the house/building number of the physical address for this ERL.
6. Enter the **Street/Road** (required) of the street/road name of the physical address for this ERL.
7. Enter the **City** (required) name for the location of this ERL.
8. Select the **State** (required) from the dropdown list for the location of this ERL.
9. Enter the **Zip Code** (required) for the location of this ERL.
10. Select the **Country** (required) from the dropdown list for the location of this ERL.
11. Enter **Location** (optional): This is a text field that contains additional information that could be helpful for Emergency Responders, such as floor, suite, office number, etc.
12. Enter **Description** (optional): This is a text field that contains a description to identify the location referenced by this ERL (e.g. Main Office, Payroll Dept, etc.).
13. Select one of three 911 call **Delivery Method**s:
    - **PSAP** – Emergency call is routed to the Public Safety Answering Point nearest to the caller.
    - **Security Desk** – Emergency call is routed to the organization's Security Desk
    - **Conference** – Emergency call is routed to the PSAP as well as the Security Desk and a three-way conference is established between the emergency caller, the PSAP operator, and the Security Desk.
14. Enter a **Custom Callback** number (optional) that is presented to the PSAP. Setting this field overrides the global callback setting to provide a customer callback number per ERL. This field can be used to provide a callback number that routes to a central answering point, security desk, or receptionist at the caller's address.
15. Enter a **Notification Email** address (optional) or a comma separated list of email addresses (johnsmith@company.com) or SMS addresses (2145551212@txt.att.net) that will receive notifications when an emergency call is made.
16. If the Security Desk or Conference **Delivery Method** is selected, enter the **Security Desk DID** (required) number. This is a 10-digit, public, Direct Inward Dial number for the security desk.
17. If the Security Desk or Conference **Delivery Method** is selected, select a **Notification Display** option from the dropdown list.
    - **Original** – the original 10-digit DID or the extension number of the caller displays as the callback number.
    - **Remapped** – The 10-digit number from the Extension Bind (Configured in the ERS account) or the custom callback number displays as the callback number.
18. If the Security Desk Delivery Method is selected, select Unmuted or Muted from the dropdown list.
    - Unmuted – the security desk operator is not muted when an emergency call is received via the Conference Delivery Method.
    - Muted – the security desk operator is muted when an emergency call is received via the Conference Delivery Method. When an emergency call is received, a message is

played to the security desk operator indicating that they are monitoring the call. The security desk operator and the caller cannot interact, and the security desk operator cannot unmute themself.

Editing or Deleting an ERS ERL Record

1. From the main menu, select **911 Services** and then **Emergency Routing Service (ERS).** The OpEasy Emergency Routing Service menu page opens.
2. Select **ERL Management**
3. Select an ERS account to view and/or search and then select a search criterion from the drop-down list. Click the **Search** key to execute.

   The ERS ERL Records page displays a table containing a list of ERL records based on the selected ERS account and any ERL search criteria.

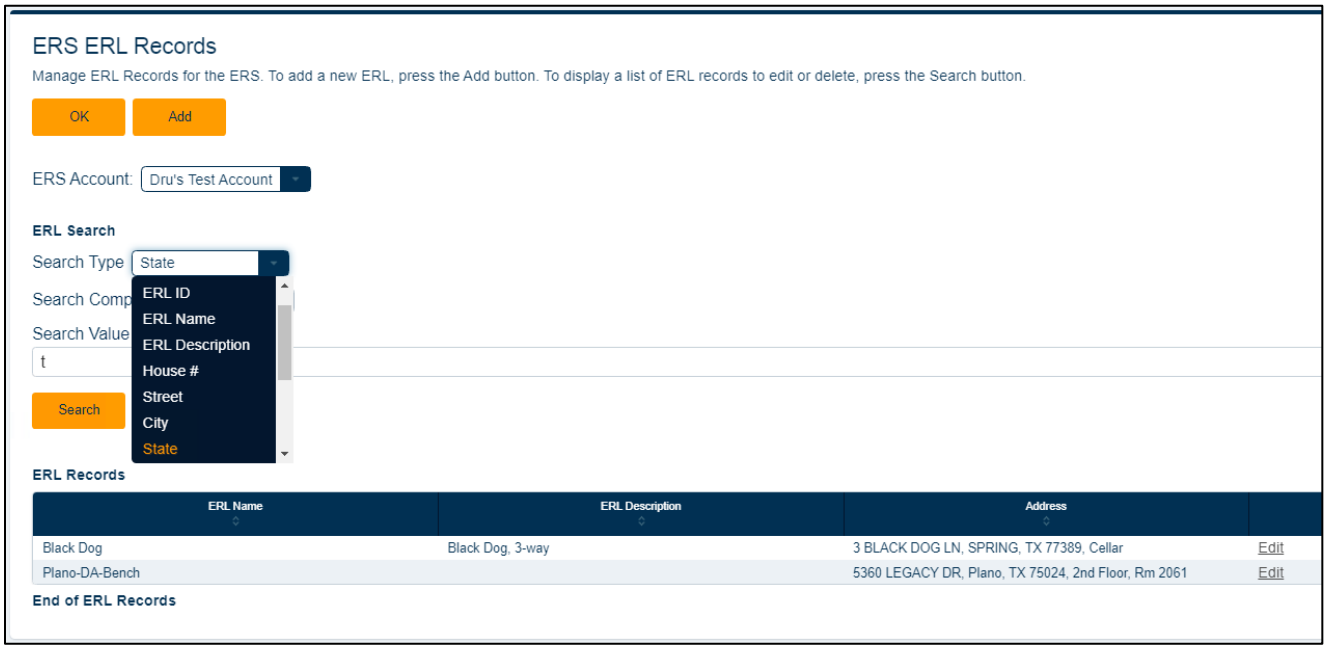


Figure 205 - ERS ERL Records Page

4. Select an Entry from the search results table, the ERL Record Modify page opens:

Figure 206 - ERL Record Modify Page

5. Modify the desired field(s). Click **Apply** or **OK** to save the changes; or click the **Delete** button to remove the ERS ERL record.

Administrative Tools

Managing OpEasy Licenses

Licensing Allocation for Users and Third-party Phones

OpEasy tracks the maximum number of users and third-party phones that administrators are allowed to manage using OpEasy. Solution Reseller administrators can allocate the system user licenses and 3rd Party licenses to their Enterprises as needed. If an administrator attempts to add or modify users or third-party phones beyond the set number of licenses, OpEasy aborts the operation and displays an error message.

Note: If any Group in Clearspan has user limit set to less than 100, OpEasy automatically sets it to 5000, the maximum number of users for a group. This prevents errors when adding users in OpEasy.

Configuring License Allocations

System Administrators, and Solution Resellers who have full access to licensing privileges can use the OpEasy Licensing page to allocate OpEasy Licenses for both users and third-party phones to the various Enterprises.

1. From the main menu, select Administrative Tools and then Licensing and OpEasy License Allocation.

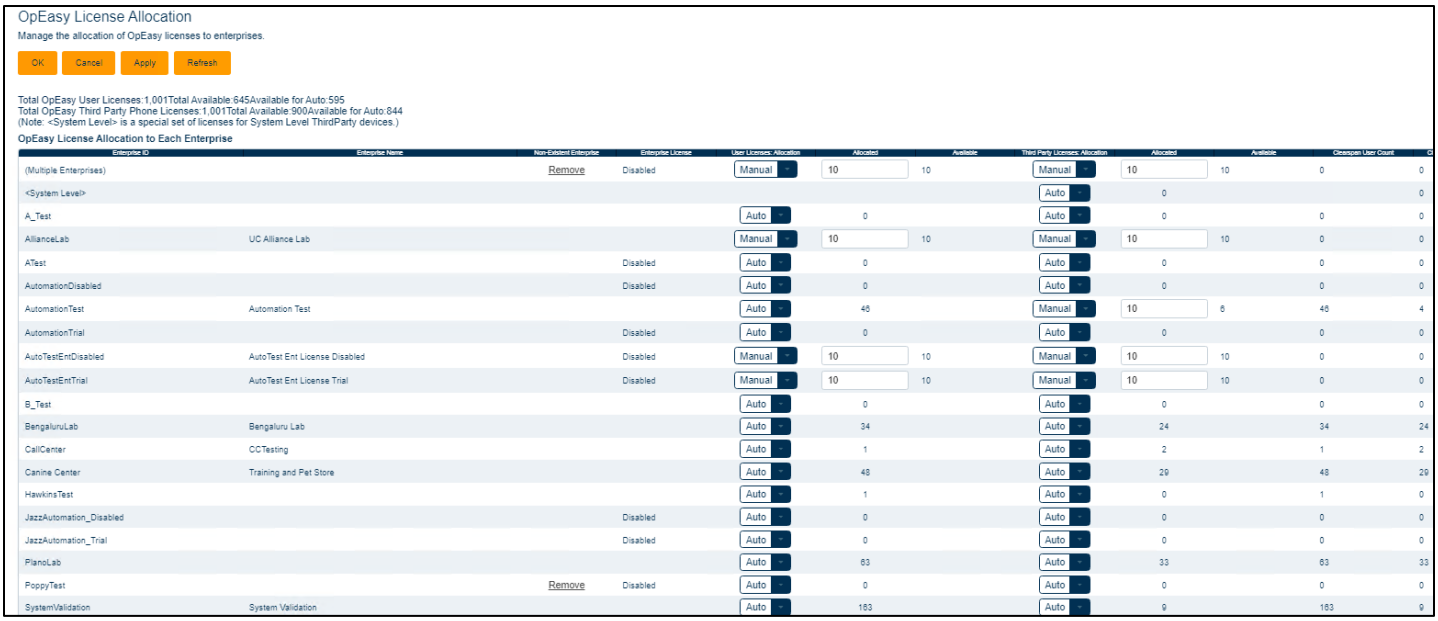


Figure 207 - OpEasy Licensing Page

The OpEasy License Allocation page opens. It shows the total number of OpEasy user and third-party phone licenses, as well as how many are unallocated. **Total Available** is the total number of unused and available OpEasy licenses (User or Third-party Phone), including any licenses manually allocated to one or more enterprises but that have not been used by those enterprises. **Available for Auto** is the number of unused and available OpEasy licenses (User or Third-party Phone) but does NOT include any unused and available licenses that are manually allocated to one or more enterprises. **Available for Auto** identifies the number of OpEasy

licenses that can be used by an Enterprise setup for automatic (“Auto”) allocation, which cannot and does not include any available licenses reserved for other Enterprises through the use of Manual allocation.

2. In the Enterprise Allocations table, set **User Licenses Allocation** to **Auto** or **Manual** for each Enterprise. Auto ensures that the license allocation always matches the total phones provisioned for proper support, and each time a new phone is added, the allocation is increased unless system licenses have been exhausted.

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

   Clicking the **Remove** link in the **Non-Existent Enterprise** column removes the selected enterprise from the OpEasy Licensing Allocation of the Enterprise table.

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

Managing Unique IDs

OpEasy allows you to assign IDs at the System, Enterprise, and Group levels that are prepended to an extension for use as a unique Auto Install Device ID. If a user is built as Extension Only or the User Profile rule for MAC Address uses something other than Phone Number, the Unique ID is used.

1. From the main menu, select **Administrative Tools** and then **Unique ID Management**. The Unique ID Management page open, showing a default Unique ID Length of 4 digits and a default Unique ID Position that is before the extension.

2. Select a **System Unique ID**, a unique ID for a System-level device.

Figure 208 - OpEasy Unique ID Management Page

3. Click the **Edit** link at the end of the row or click anywhere in the row to select an **Enterprise Unique ID** on the Unique ID Management: Enterprise page.

4. On the Unique ID Management: Enterprise page, click the **Edit** link at the end of the row or click anywhere in the row to select a **Group Unique ID** on the Unique ID Management: Group page.

5. Click OK

Note: If the System, Enterprise, or Group has no assigned Unique ID, then the Select first available Unique ID hyperlink appears. Click the hyperlink to select the first available Unique ID.

Login Management

Login Management allows OpEasy administrators to manage subordinate administrator accounts. Login management is available to all levels of administrator except Department Administrator. Login Management allows you to perform the following tasks:

- Search for subordinate OpEasy administrators
- Add or delete subordinate OpEasy administrators
- Disable OpEasy administrator accounts
- Change OpEasy administrator passwords
- Modify OpEasy administrator email addresses
- Change the level of an OpEasy administrator account
- Customize OpEasy administrator privileges
- Identify OpEasy administrator accounts as Support Administrators
- Configure login into OpEasy through Single Sign On (SSO) or Two-Factor Authentication (2FA)
- View OpEasy administrator accounts by
    - All accounts
    - Support Administrators only
    - Administrator status (that is, 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 opens. You can search for OpEasy administrators and filter the list using the options at the top of the screen. You can sort the results using the sort buttons at the top of each column.

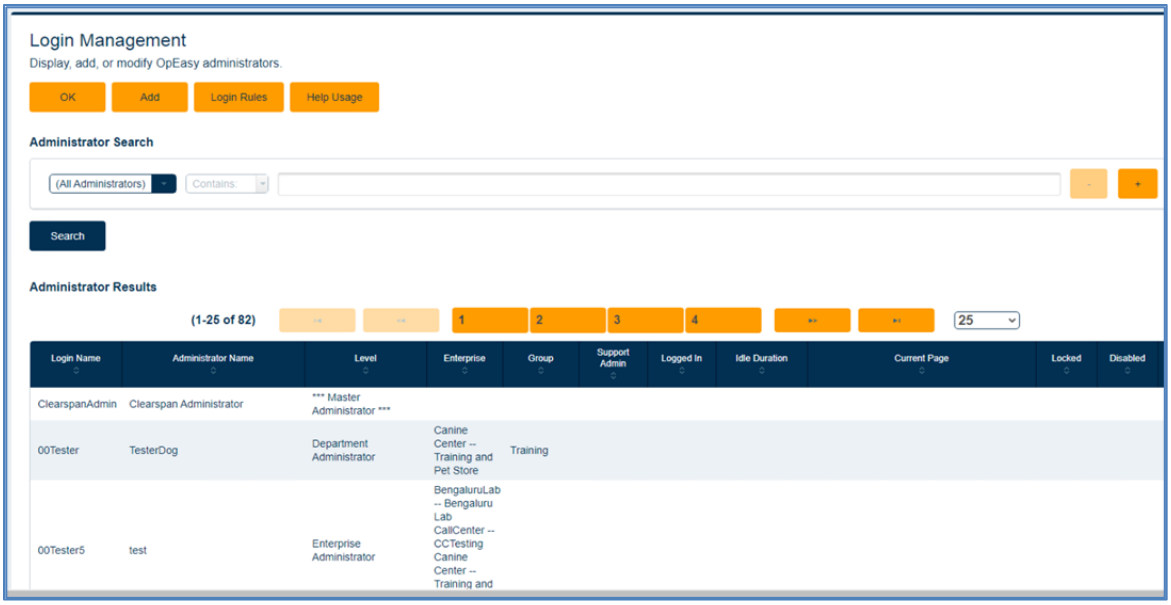


Figure 209 - Login Management Page

2. Click Add to create a new administrator account or click anywhere on the row to modify an administrator account. The OpEasy Administrator page opens.

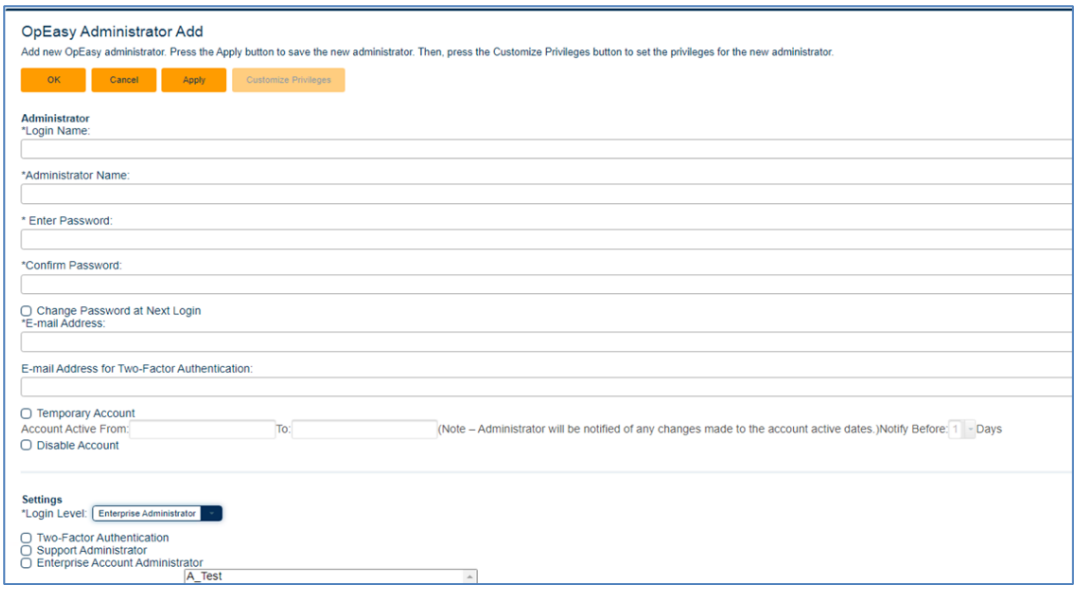


Figure 210 - OpEasy Administrator Add Page

3. Enter a unique **Login Name**. This is the character string to be used along with a password to identify an administrative user and grant access.

4. Enter or change the **Administrator Name**. This is typically the actual name of the administrator rather than the login name, which is often shorter or different from the administrator's name.
5. Enter a **Password** and **Confirm Password** for the administrator account. The following default password rules apply, although they can be changed by advanced administrators:
   - At least one upper case character
   - At least one lower case character
   - At least one non-alphanumeric character
   - Minimum password length of eight characters
   - Cannot be the reverse of the previous password
6. Enable **Change Password at Next Login** if you want that this administrator is required to change the account password at the next login.
7. Enter the administrator's **E-mail Address**.
8. Enter the administrator's **E-mail Address for Two-Factor Authentication**.
9. Click **Temporary Account** and select the **Account Active From** and **Account Active To** date range. You will be notified every time you enter or modify the **Account Active From** and **Account Active To** dates.
10. Select the number of days from the **Notify before** drop-down box. Email notifications will be sent the same number of days prior to the expiry date. The values in the **Notify before** drop-down list is in the range of 1 day to 15 days.
11. You can select the **Disable Account** setting to disable this administrator's account without deleting it.
12. Set the administrator's **Login Level**.
13. Enable **Must Login only using Single Sign-On (SSO)** to prohibit the administrator from logging in directly to OpEasy or **Two-Factor Authentication (2FA)** for an administrator to be configured.
14. Choose selections for **Support Administrator**, **Clearspan Pilot Program Administrator**, **Enterprise**, **Group**, and **Department**, if those settings are configurable for this administrator.
15. Click **Apply**
16. Click **Customize Privileges** if you want to change the privileges for this administrator.
17. Click OK. Click **OK** or **Apply**.

Note: When a user with an expired account, or disabled account logs into OpEasy, the error message "Name or Password you entered is incorrect." is displayed.

Modifying Administrator Login Rules

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

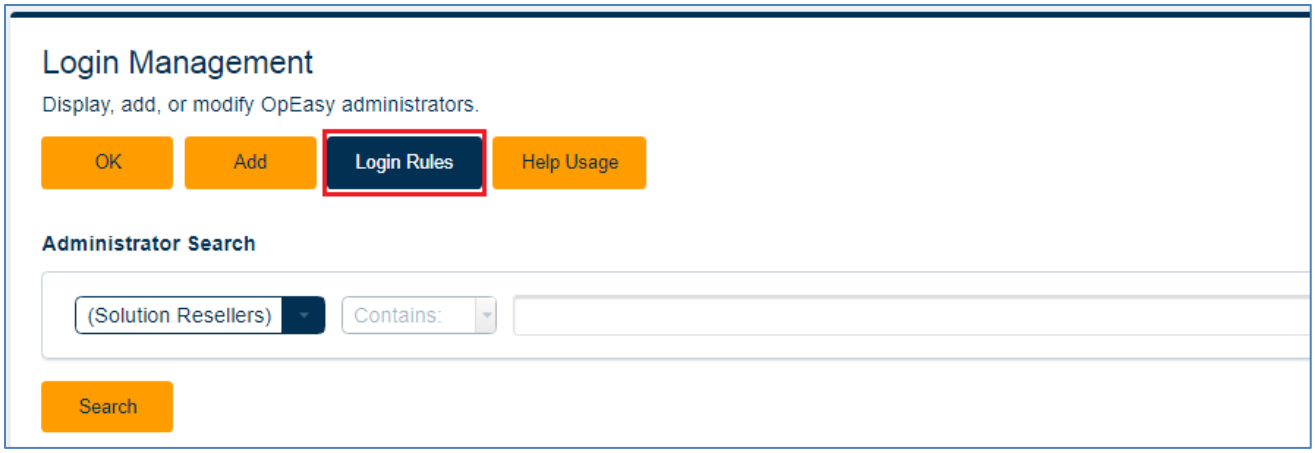


Figure 211 - Select Login Rules

The Login Rules Modify page displays. You can view System-level or Enterprise-level rules used for OpEasy logins and rules used to validate passwords for OpEasy administrators.

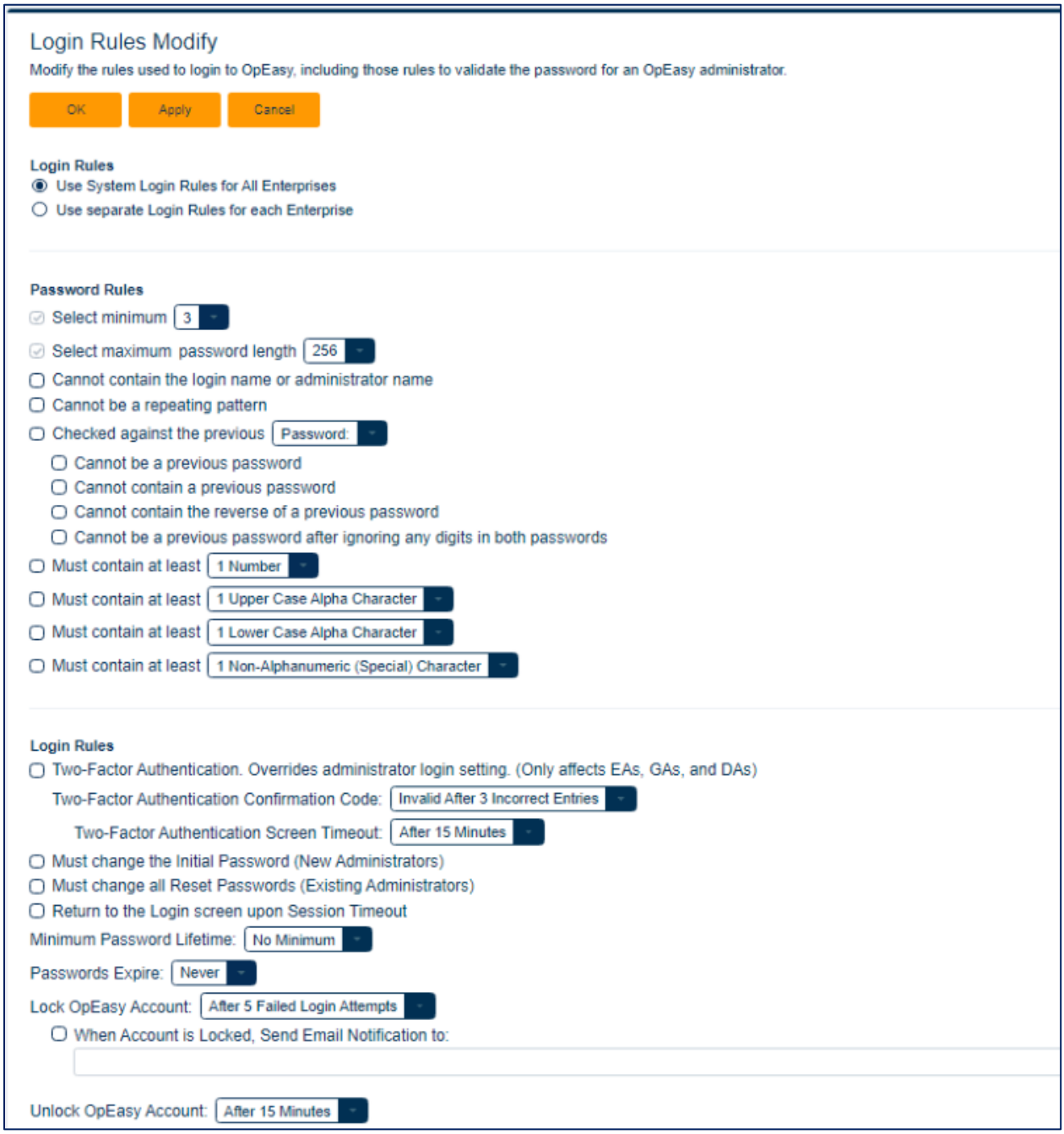


Figure 212 - OpEasy Login Rules Page

Common Tasks

This section provides instructions for common administrator tasks that involve management of Clearspan phones.

A *Clearspan device* is what is created via OpEasy or via the Clearspan web portal, which defines the characteristics of a phone device such as the user of the phone, its template, and so on. The Clearspan device can exist without association to a physical phone. The *physical phone* is the actual terminal that is assigned a MAC address. The physical phone must have an associated Clearspan device to make the phone functional on Clearspan. These instructions assume the following:

- Device Management is used to manage the configuration of the Clearspan device.
- DHCP is used to provide an IP address to the phone and the network path to the Clearspan XSP server, where the phone's configuration is obtained.

Set Up a New Phone for a New User

Follow these steps to set up a new phone for a new user.

1. Power up and connect the phone to the network.
2. Factory default the phone.
3. Perform phone specific installation.

Setting Up a New Mitel Phone

1. Near the end of the startup process, an Auto Install page appears, and the user is prompted for the Device ID. Enter the Auto Install Device ID set for the Clearspan device and press the button labeled "Done".
2. A confirmation screen appears containing the name of the user of the phone device identified by the Device ID. If that information is for the correct Clearspan device, press "OK".
3. Auto Install creates device credentials for the phone and updates the Clearspan device with both the MAC address of the phone and the new device credentials. Auto Install then restarts the phone to complete the install process.

Setting Up a New Polycom Phone

1. After the startup process completes, the 'QSetup' button appears on the phone.
2. Press the 'QSetup' button and at the 'Server User' and 'Server Pwd' prompts, enter the Device Access Username and Password respectively.

Note: The Device Access Username is available via OpEasy Phone Management, but the Device Access Password is blanked out. If you are unsure of the current password, enter a new password using Phone Management so that you are assured the password you enter in the phone matches the one defined for the Clearspan device.

3. Confirm the changes when prompted and the phone restarts.
4. After the restart completes, the phone is ready for use.

Replace a Physical Phone with a Different Type of Phone

Follow these steps to replace a physical phone with a phone of a different type.

1. Using OpEasy, navigate to **Provisioning | Users**, and modify the user associated with the device you want to replace.
2. From the User Modify page, select the **Phones** tab and click **Edit** for the device that is to be replaced.
3. The User: Primary Phone Device Modify page opens. The current Phone Device appears in the drop-down box. From this page, either click the **Unassign Device** button to disassociate the user from this phone device or click the **Delete Device** button to disassociate the user from this phone **and** delete the phone device.
4. Click **Yes** to confirm unassignment or deletion of the device. The Advanced: User Modify page display, and the list of Phone Devices no longer includes the Primary phone type.
5. Click to Add Primary Phone.
6. The User: Primary Phone Device Add page opens. The default Phone Device field value is New Phone Device.
   - If you want to build a new device, take this default and supply the Device Name, Device Level, Device Type, Template and MAC Address of the new phone.
   - If you have previously created a phone device that you choose to use for this user, rather than taking the default of (New Phone Device), use the drop-down box to find the phone you want. Note that the Device Level, Device Type, Template and MAC Address should be populated because this device was previously created.
7. After all fields for the new device are set as needed, click **OK** twice. The Advanced: User Modify page opens. Note that the new primary phone device appears in the Phone Devices list.
8. Click **OK** on this page to implement the change.
9. Power down and remove the original phone from the network and put the new phone in its place. Because the new phone's MAC Address was provided at the time the device was created, the phone should be functional immediately after the reboot process.
10. If the original device was only unassigned and you have no further use for it, delete it via Provisioning | Phone Management.

Disassociate a Clearspan Device from a Physical Phone

To remove a physical phone from its associated Clearspan device, removing the MAC Address of the physical phone from the Clearspan device definition, follow these steps.

- If using the OpEasy User Interface:

1. Navigate to Provisioning | Phone Management and find the device that is to be disassociated.
2. Clear the MAC Address field for that device.
3. Save the change.
   - If using the OpEasy Advanced Import worksheet, from the User worksheet:
4. For the device or devices that are to be disassociated, use the "ModifyDevice" command.
5. Enter the text "null" in the MAC Address column(s).

6. Import the worksheet using Advanced Import to affect the changes.

Reuse a Clearspan User / Device and Reset Voicemail

You might want to assign a set of phones to a new set of users, and reset the related Voicemail boxes, such as with phones placed in college dormitories. Follow these recommended steps to re-use the Clearspan users/devices and refresh the Voicemail boxes.

Close User Accounts

1. Perform an export of the existing users/devices via the Advanced Export function, including the Users and Voicemail worksheets.
2. If the phone numbers are to be inactive during the interim period, use the Users worksheet to modify each user's **Phone Number Activation** setting to 'deactivate'.
3. If the phone numbers are not deactivated, use the Voicemail worksheet to modify each user's **Active** column to 'false', which completely disables voicemail for the user.

Re-open User Accounts

1. Perform an export of the existing users/devices via the Advanced Export function, including the Users and Voicemail worksheets.
2. Use the Users worksheet to modify each user to both:
   for the new user (if the names are customized to each user).
   a. Set each user's **Phone Number Activation** column to 'activate'.
3. Use the Voicemail worksheet to modify each user to both:
   a. Set the **Active** column to 'True', which allows Voicemail functionality.
   b. Reset the user mailbox by entering 'reset' in the **Surgemail Account** column. The reset command rebuilds the mailbox, so entry of the 'Mail Server Email Address' and 'Mail Server User Id' is also required.

Appendix A: Microsoft™ Teams Sync

Clearspan can provide PSTN calling services for Microsoft Teams users. OpEasy provisioning interoperates with Office365 to enable or disable Calling Services. However, after provisioning of Calling Services is complete, an O365 administrator must login to O365 and initiate a "sync" function to activate the changes. Alternately, each Enterprise has the option to 'grant consent' for OpEasy to perform the sync function through its integration without involving the O365 administrator. If OpEasy has been 'granted consent,' an O365 Sync request can be initiated via OpEasy using the following methods:

- OpEasy Web Application: Sync Teams button on the Provisioning - Users page
- Advanced Import: SyncTeams Command on the Users tab or SCA tab of the import spreadsheet
- OpEasy API: SyncTeams Command in the Users Task

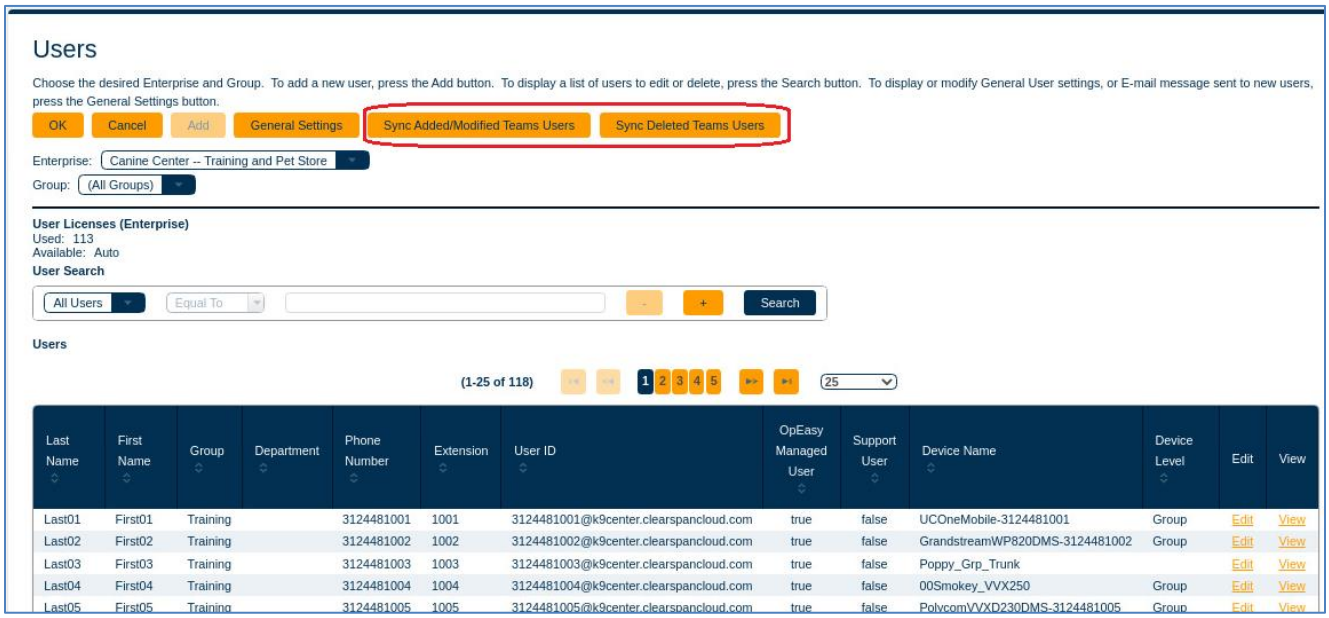


Figure 213 - Advanced Provisioning: Users Page with Teams Sync

An O365 Teams sync can only be initiated by an OpEasy administrator that has been granted the new "Sync Teams" privilege.

IMPORTANT: The sync operation is to be used ***only once*** after making all Teams user provisioning changes as it is resource intensive. Sending multiple requests will overload the Teams Powershell sessions which can make Microsoft throttle the enterprise requests for Provisioning/Un-provisioning.

The Sync Teams button is rendered when the following conditions are true:

- The selected Clearspan Enterprise is assigned to a Teams Enterprise that has been granted consent to perform provisioning actions in O365.
- The logged-in OpEasy Administrator has been granted Full Access to the "Sync Teams" privilege.

Appendix B: OpEasy Setup for Panasonic Phones

OpEasy supports the provisioning of Panasonic KX-TGP600 phone model. The phone can support a maximum of 8 handsets. The following settings must be configured within OpEasy prior to installing Panasonic phones at users' desks, as described in the following sections:

- User Profiles – One or more User Profiles must be created so that the administrator can build Panasonic phones for provisioning.
- Phone Templates

Key Definitions – In addition to the Panasonic standard soft keys, some OpEasy-configured soft keys may be assigned to Panasonic phones.

Global Settings – System, Enterprise, and Group level settings must be configured for Panasonic phones.

Definitions – One or more templates must be created for the Panasonic phone.

Notes:

- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.

- Users: – Users must be created with a Panasonic phone.
- Phone Management – Panasonic phones can be added or modified under the Phone Management page of Provisioning.

Note: For Panasonic phones, OpEasy does not support Auto Install and MAC Address Capture like the Mitel and Polycom phones, respectively. For security reasons and to help in managing the Panasonic phones, the MAC address of the base station must be entered when provisioning the Panasonic device in OpEasy.
In addition, the following phone capabilities and features are not supported: the Panasonic phone's "Import/Export" Phonebook feature, Shared Call Appearances (SCAs), Busy Lamp Field (BLF), ACD, and Multicast paging.

User Profiles for Panasonic Phones

In order to allow administrators to quickly set up users with Panasonic phones, one or more User Profiles should be created. When creating a User Profile, the administrator selects the Panasonic phone as the Device Type. The Panasonic phone will be created as the primary phone device for the new user. "MAC Address" is the device's MAC address and not auto generated.

Phone Templates for Panasonic Phones

Key Definitions for Panasonic Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Panasonic is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Panasonic phones are displayed.

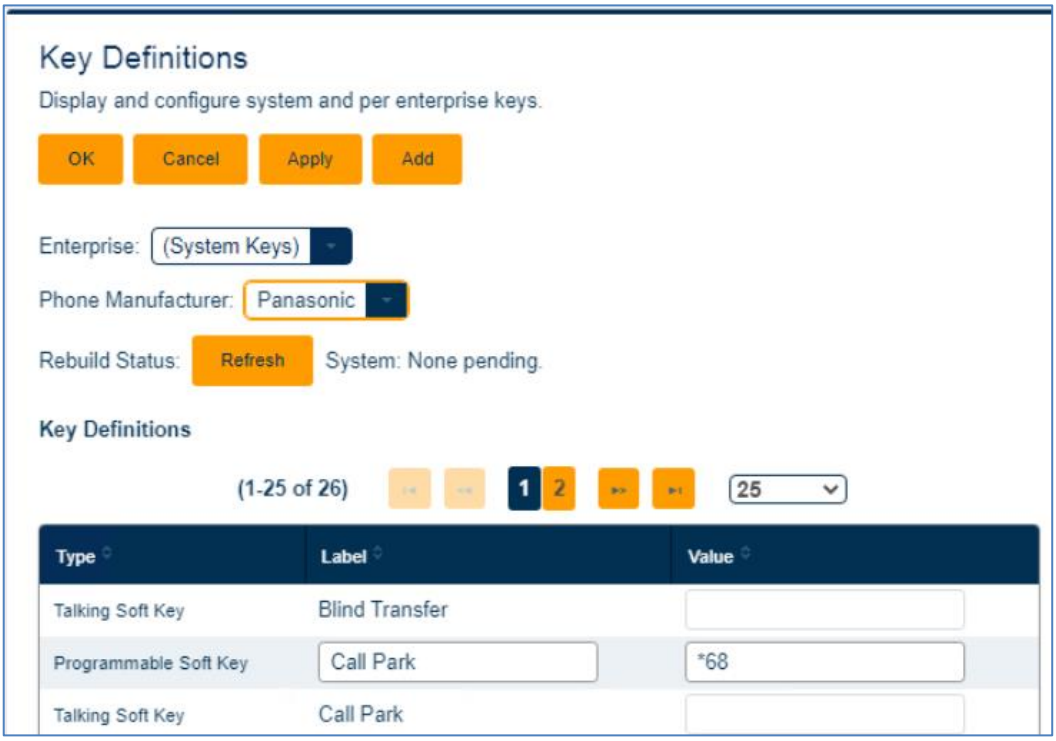


Figure 214 - Key Definitions for Panasonic Phones

Phone Templates: Global Settings for Panasonic Phones

The following settings are configured on the Phone Templates / Global Configuration File Settings page of Provisioning.

System, Enterprise, and Group Extra Settings for Panasonic Phones

To enter extra settings that are to be applied to all Panasonic phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Group Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Enterprise Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings,** and Click **Yes** on theconfirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous.Are you sure you want to update Extra Settings?”). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files**page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

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

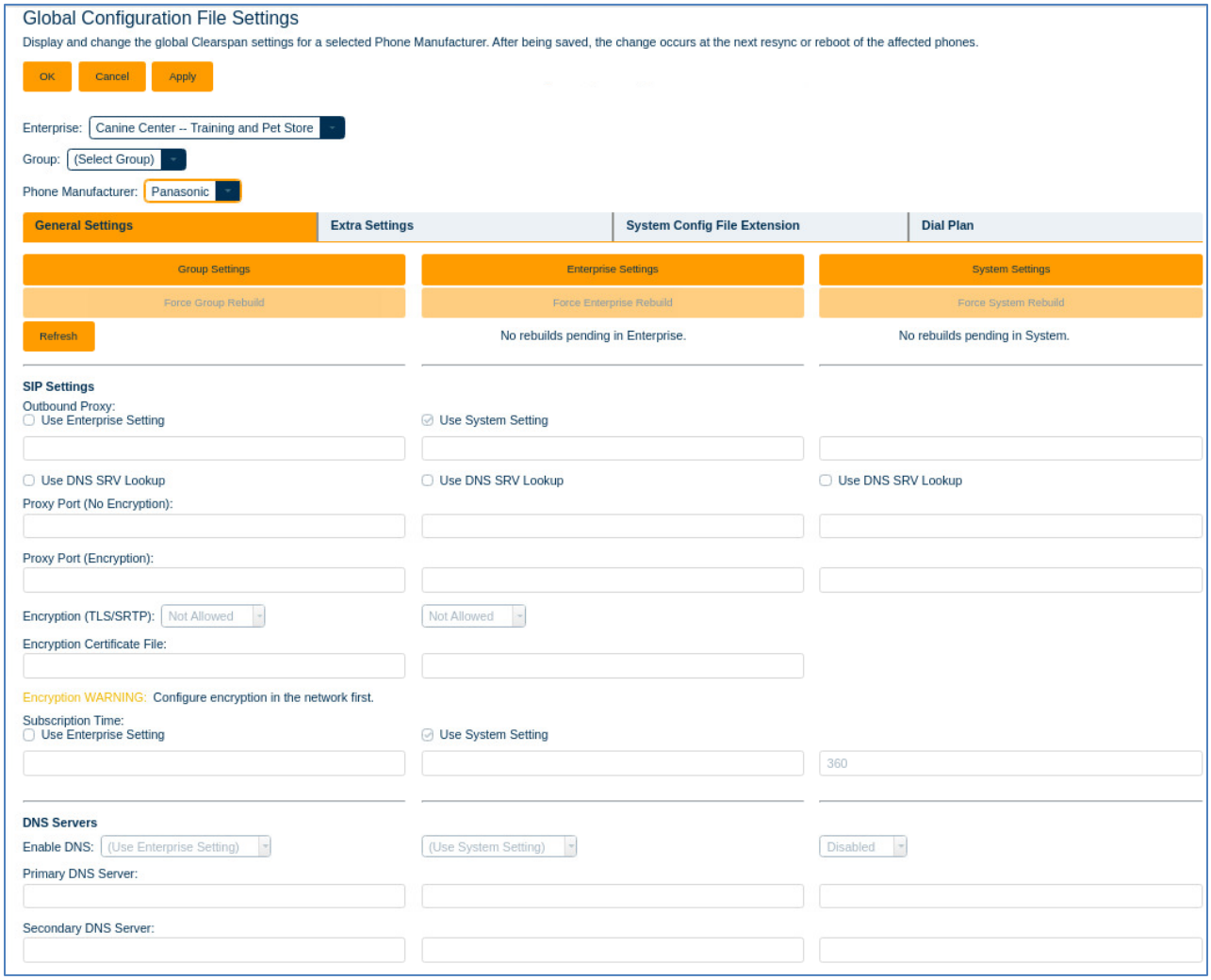


Figure 215 - Global Settings - Panasonic Phones

System, Enterprise, and Group System Configuration File Extension Settings for Panasonic Phones

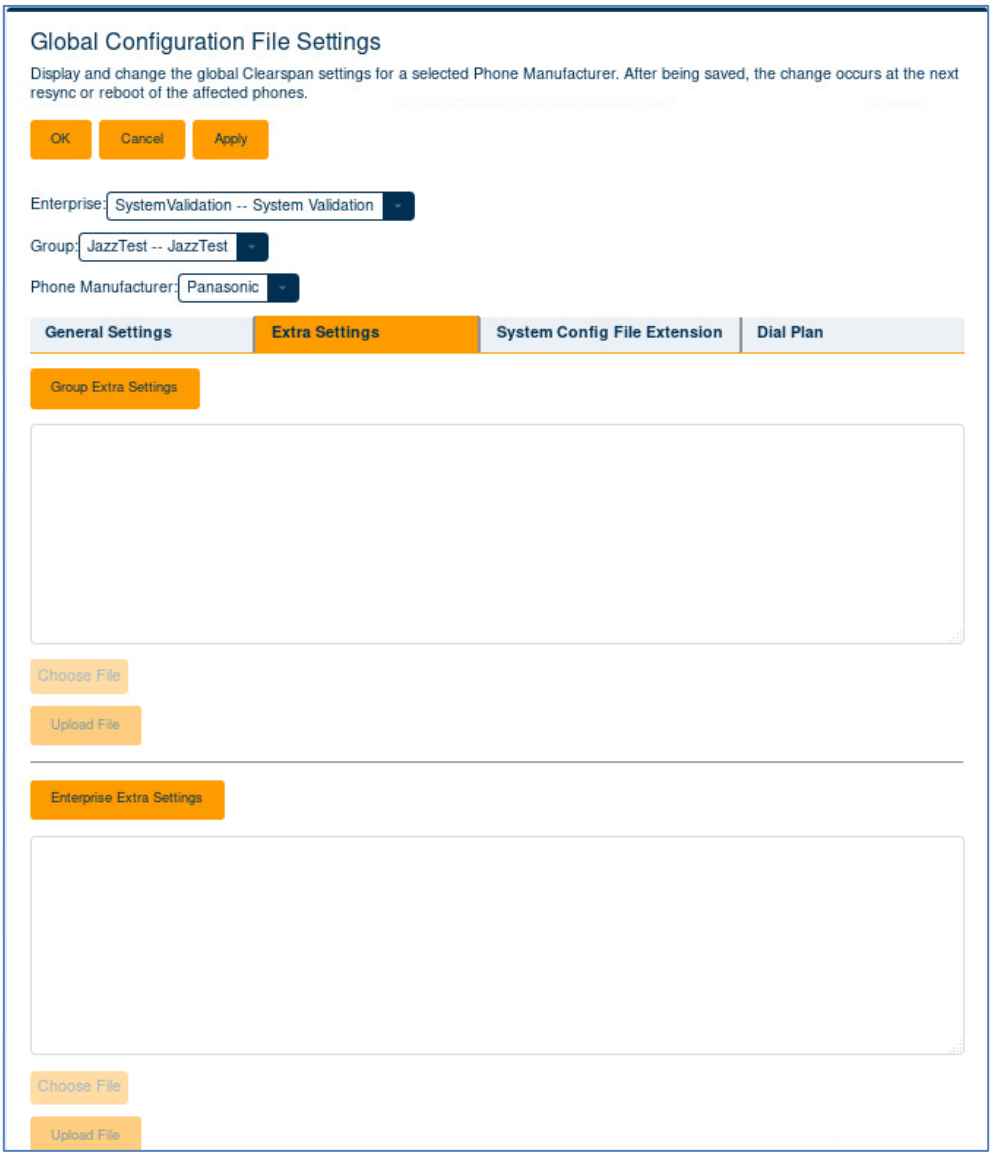


Figure 216 - Global Extra Settings for Panasonic Phones

The Device Type for each Panasonic phone model includes a **KX-TGP600.cfg** file that contains system-wide configuration settings used in the configuration files for all Panasonic phones of that phone model. These settings can be extended by choosing **Phone Template** from the **Provisioning** menu, selecting **Global Settings** and selecting **Panasonic** as the Phone Manufacturer, clicking on the **System Config File Extension** tab, and entering the additional settings on that tab.

Note that the KX-TGP600.cfg file and the settings on the System Config File Extension tab have a lower priority than ALL other Global Settings (including Global Extra Settings) and Template Settings. However, the System Config File Extension tab settings have higher-priority than the settings in the KX-TGP600.cfg file being extended.

Only Super Users and System Administrators can access the **System Config File Extension** settings.

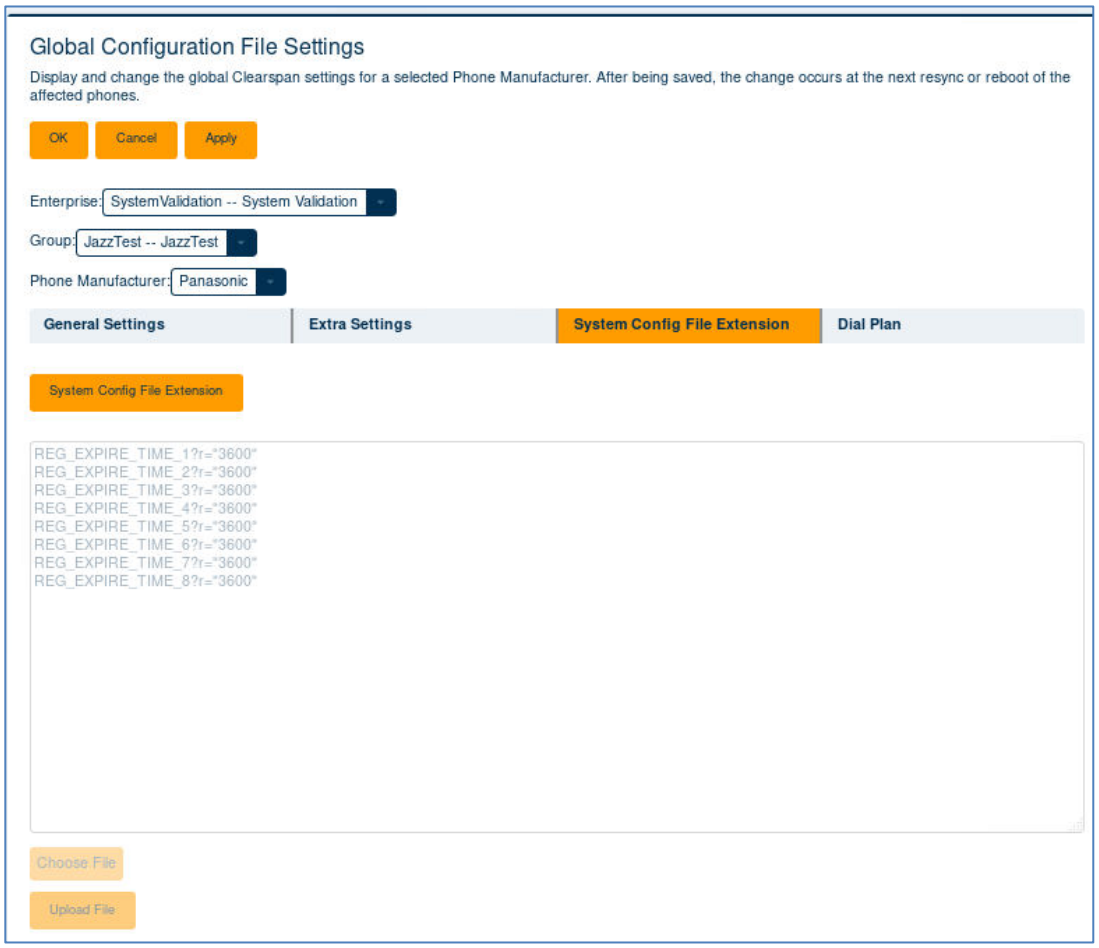


Figure 217 - System Config File Settings for Panasonic Phones

Click Dial Plan to enter dial plan information for System, Enterprise, or Group levels or click **Use Enterprise Setting** to use enterprise settings or click **Use System Setting** to use system settings.

The dial plan information entered must be in Panasonic format and can include any Panasonic-specific setting.

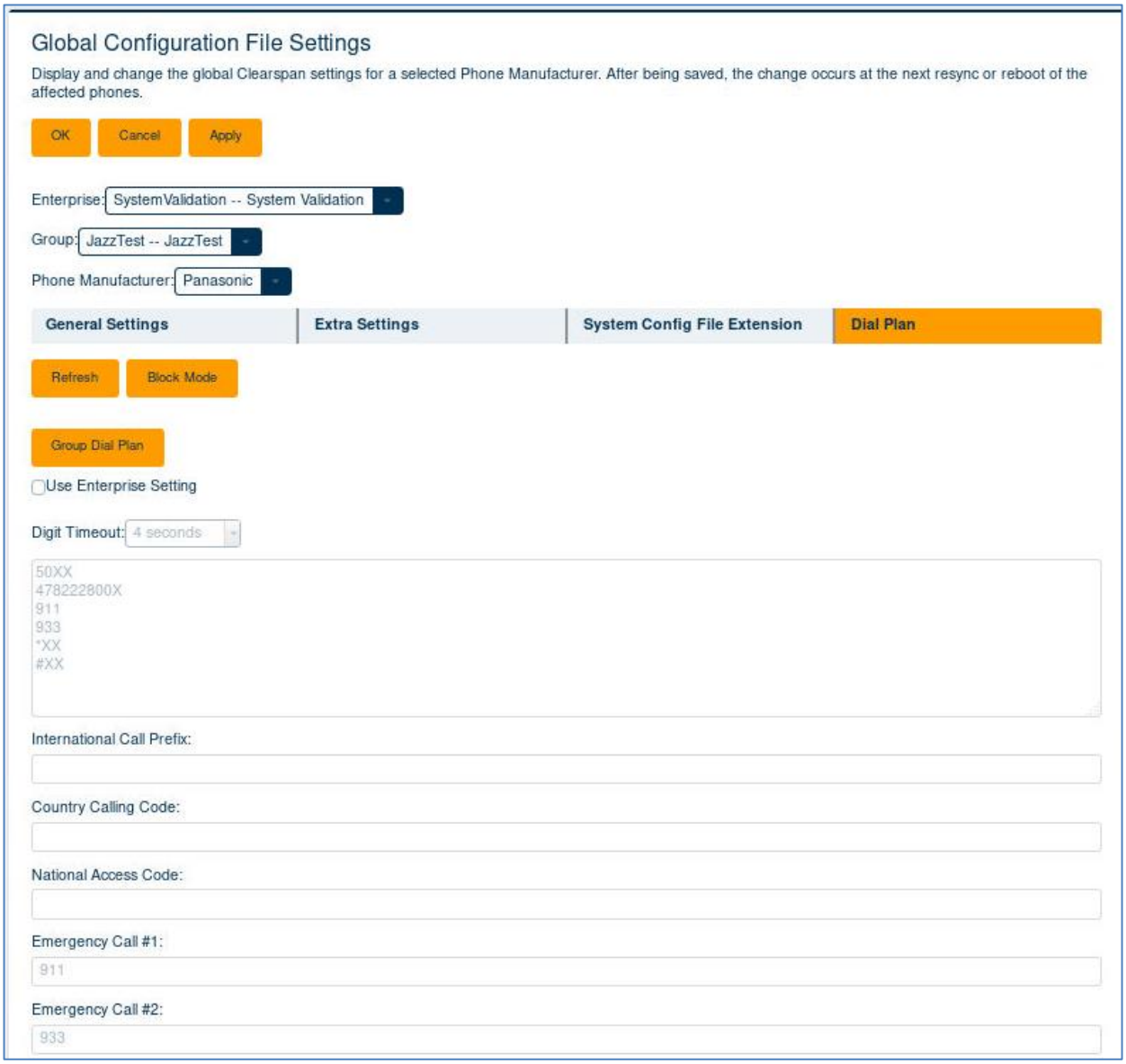


Figure 218 - Global Settings – Dial Plans Tab for Panasonic Phones

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.

Tab / Section	Field	Settings
SIP Settings		
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Panasonic phones.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port(No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV
	Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Panasonic phones when encryption is not used by the Panasonic phone.The port number may be 0, 5060, or another port.
	Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Panasonic phones when encryption is used by the Panasonic phone.
	Encryption (TLS/SRTP)	Select the setting for encryption.
	Encryption Certificate File	Name for the certificate file; must be entered if Encryption is set to Required
DNS Servers		
	Enable DNS	Enable or disable DNS
	Primary DNS Server	Server address for primary DNS server.
	Secondary DNS Server	Server address for backup DNS server
Time Settings		
	Time Server	Enter the hostname or IP address of a timer server.
	Time Zone	Select the time zone that the phones are in.
Device Settings		
	Admin Password	Enter a password that is entered into the phone to access the advancedsettings within the phone.
	User Password	Enter a password that is entered into the phone to access the user settings within the phone

Tab / Section	Field	Setting
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 thehighest 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
	Collector Server Address	Enter the hostname or IP address of the server to which quality monitoring messages are sent by the phone
	Collector Server Port	Enter the port to use on the collector server. The default port number is 5060
	Alert Report MOSQ Critical	Criteria (critical) to send the VQ report when the MOSQ occurs
	Alert Report MOSQ Warning	Criteria (warning) to send the VQ report when the MOSQ occurs.
Handset Settings		
	Power on Display Logo Path	URI for logo image file displayed when power is turned on.
	Display Wallpaper Dark Path	Specifies the wallpaper for DARK display setting in IDLE mode.
	Display Wallpaper Light Path	Specifies the wallpaper for LIGHT display setting in IDLE mode.
General Settings		
	Conference Server	Specifies the conference server to use for conference calls.
	Firmware File	Text Field that contains the URL of the firmware file to be loaded.

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Phone Templates: Definitions for Panasonic Phones

As with Mitel phones, Panasonic phones can only be created using a phone template. Create templates for the Panasonic phone as described in the *Phone Templates* section, with the differences

described in the following table and shown in the following figures.

Tab / Section	Field	Setting
General		
General Settings	Time Zone	Select the **Time Zone** from the drop-down list. **'Use Global Settings'** uses the time zone from Global Settings in Phone Templates. **User Time Zone** uses the time zone of the first primary user assigned to the phone. **Use DHCP** uses the time zone from the DHCP server. You can also select a specific time zone.
	URI for Soft Keys	Select the URI for Soft Keys from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for key definitions using OpEasy phone applications.
	Use VLAN	Select the "Use VLAN" check box if the phone must be assigned to and use a VLAN
	Outbound Proxy	Enter the proxy information for this phone if you want the information to appear in the Edge Device Utilization report.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
	Outbound Proxy Port	Enter the proxy information for this phone if you want the information to appear in the Edge Device Utilization.
	Encryption (TLS/SRTP)	Select the setting for encryption.
	Encryption Certificate File	Name for the certificate file; must be entered if Encryption is set to Required.
	Subscription Time	Use Global Settings for subscription time or clear the' check box and enter the subscription time in seconds.
Panasonic Settings	Voice Quality Monitoring	Select the 'RTCP Extended Reports (RTCP XR) Enabled' checkbox to have the Panasonic phones send RTCP messages for quality monitoring purposes.
	Conference Server	Select the conference server to use for Conference Calls.
	Handset 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 **PhoneLine**. A single **Clearspan Line Position** can appear on one or more **Phone Lines**, which are on separate buttons on the phone.

Tab / Section	Field	Setting
	Line Label	Choose the Line Label, which determines the label shown on the phone display. Choosing Text allows youto enter up to 16 characters of text along with the Extension, represented by the tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to “{First Name} {Last Name}” or “{Last Name}, {First Name}”. When a single number is used for all handsets, the handset name display for all handsets comes from the Line Label for Clearspan Line Position 1. When different numbers are used for the handsets, the handset name display comes from Line Label for Clearspan Line Position 1 for handset 1, Line Label for Clearspan Line Position 2 for handset 2, and so on.
Soft Keys		
Programmable Soft Keys	Park Retrieve Soft Key	“Park” is the only supported programmable soft key in“Talking” status and also appears when the call is parked on the handset and ready to be retrieved.
	Call Park in FunctionMenu	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”. The defined soft keys are used for all handsets configured online.
Incoming Calls		
	Line	Displays the line number on the phone.
	Ring Handset 1-8	Sets the ringtone for each line on each handset. Ring tones range from Ring 1- Ring 32. If None is selected,the handset on that line does not ring or accept incoming calls on that line.
Outgoing Calls		
	Handset	Displays the number of the handset
	Line 1-8	Select the boxes to configure which lines can be used to make calls. By default, all lines are checked.

Tab / Section	Field	Setting
	Default Outgoing Line	Specifies line used to make calls.
Extra Settings		
	Extra Settings	Enter extra settings that are to be applied to all Panasonic phones using this template. The extra settings for the Panasonic phone are in an XML format,as are all Panasonic phone settings.

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

Example Template

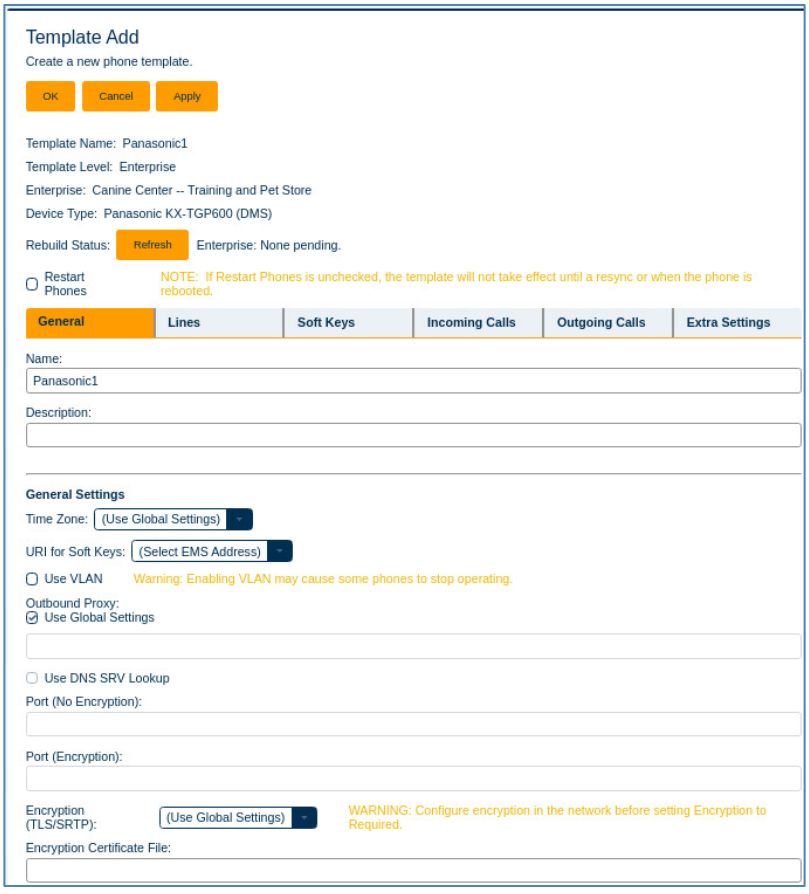


Figure 219 - Template Add General Tab- Panasonic

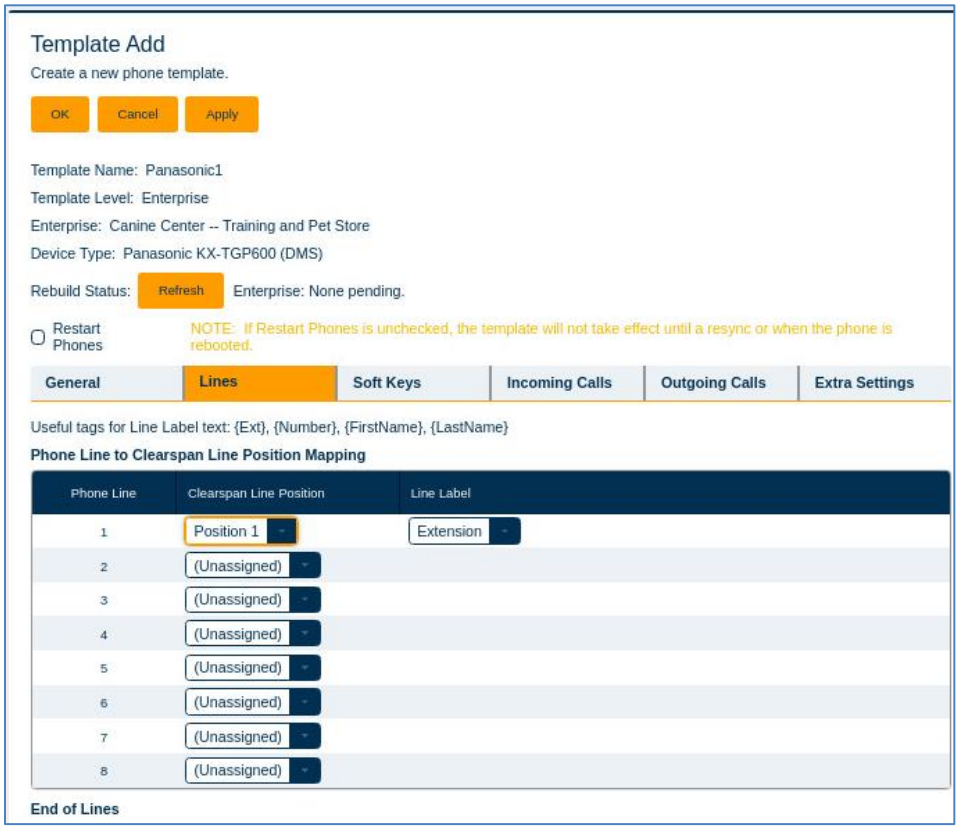


Figure 220 - Template Add - Lines Tab - Panasonic

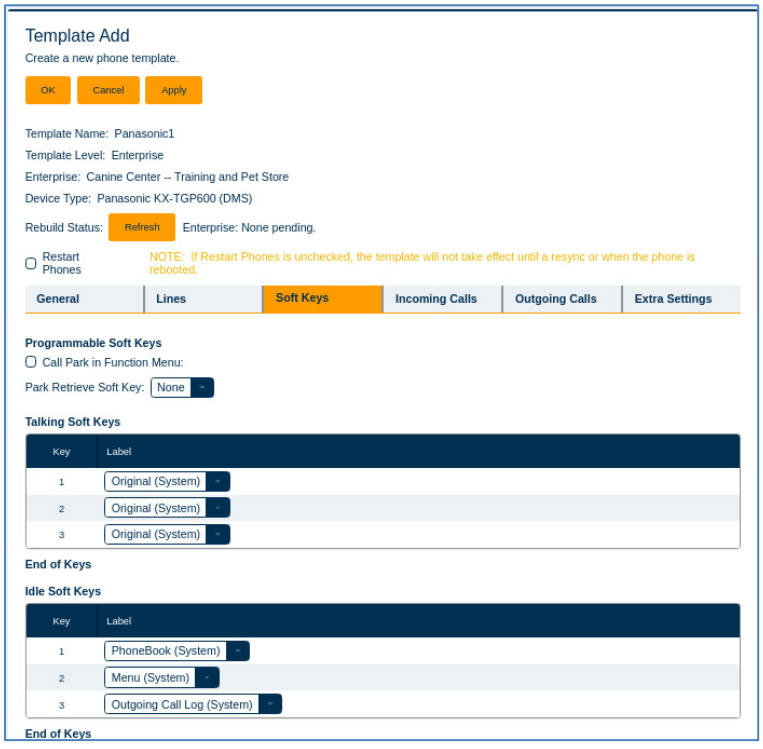


Figure 221 - Template Add - Soft Keys Tab - Panasonic

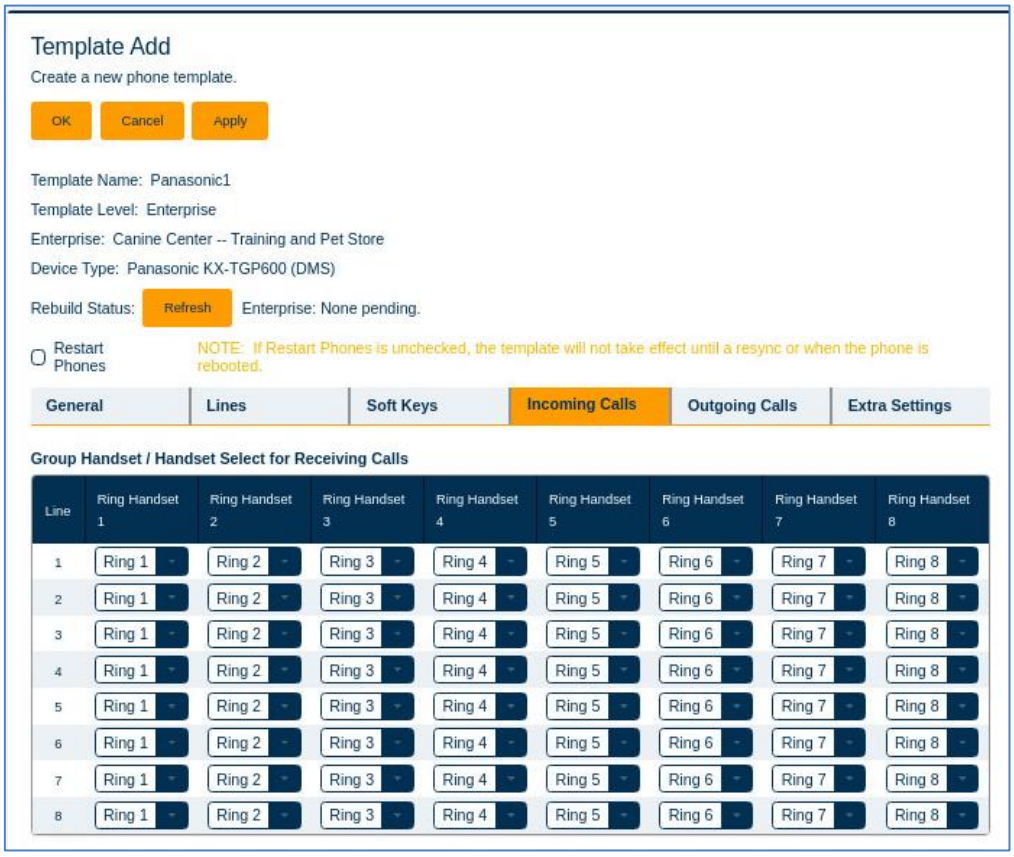


Figure 222 - Template Add - Incoming Calls Tab - Panasonic

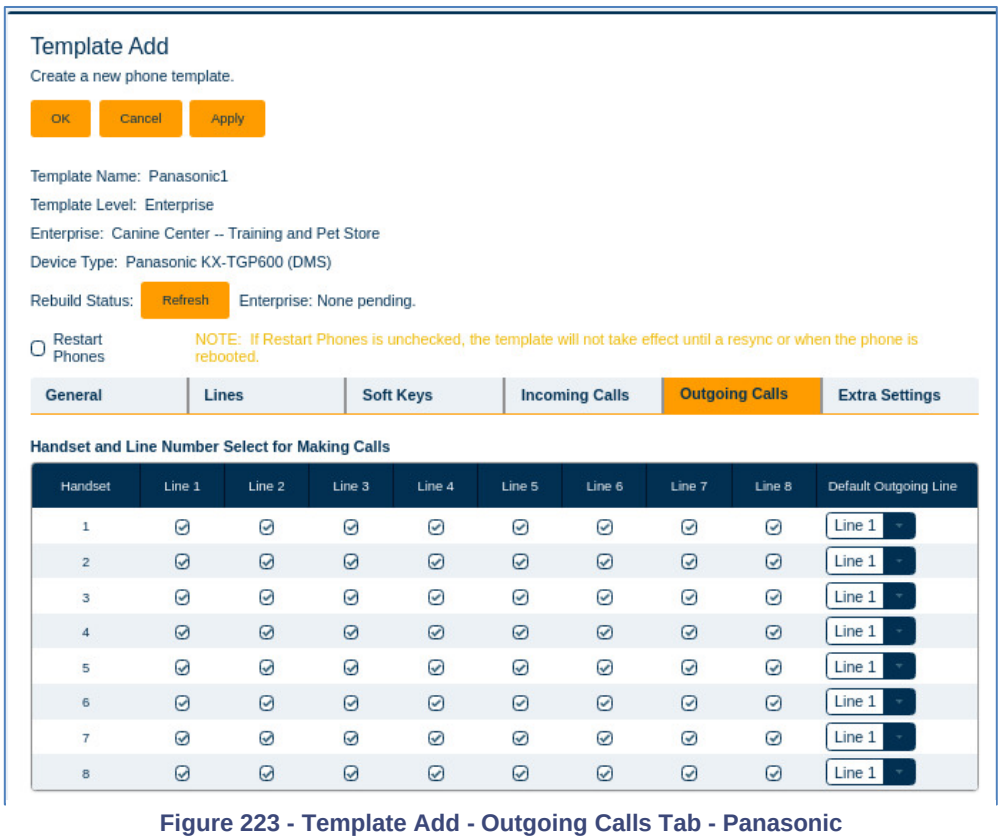


Figure 223 - Template Add - Outgoing Calls Tab - Panasonic

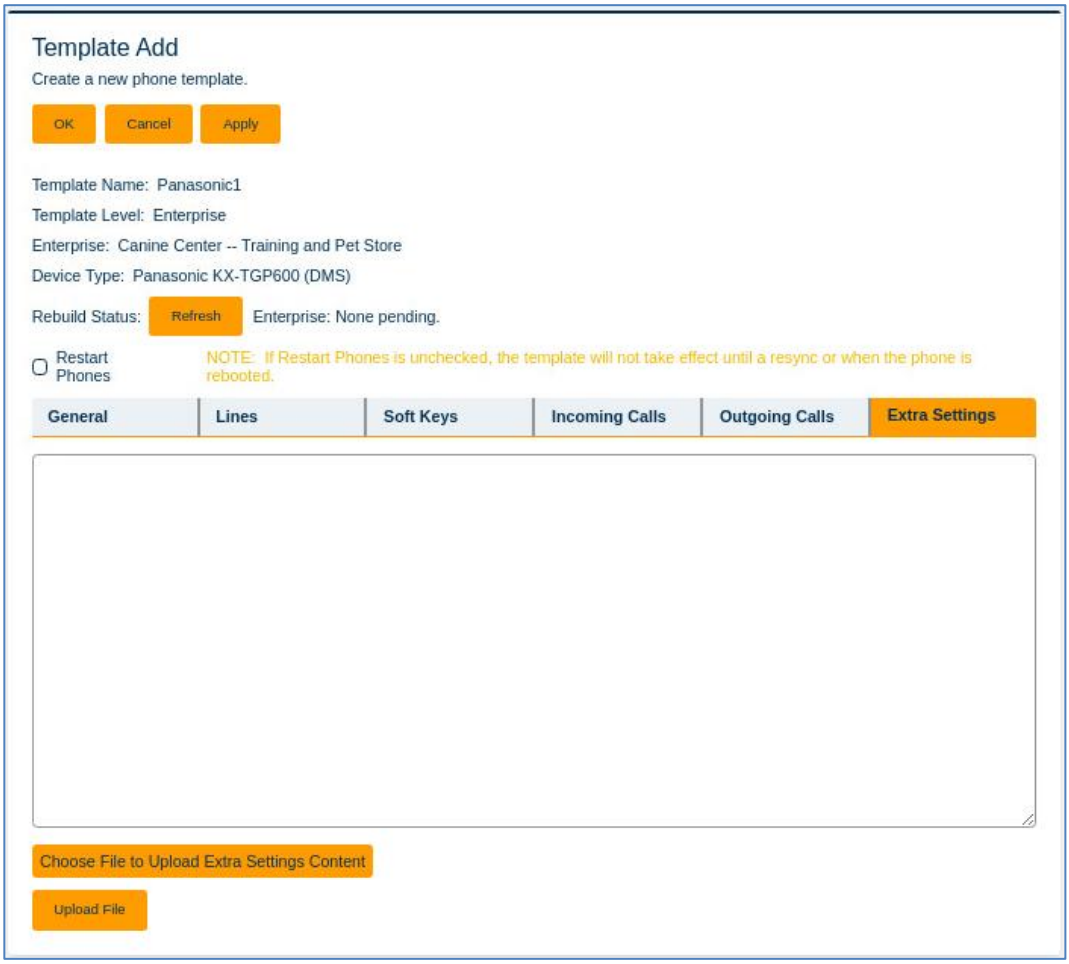


Figure 224 - Template Add - Extra Settings Tab - Panasonic

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 at the bottom of the **User Add** page when a **User Profile** is selected that includes the Panasonic Device Type, and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @.

Device access 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 definition. The Panasonic phone will not be able to load its configuration files if incorrect device credentials and/or an incorrect MAC address are entered.

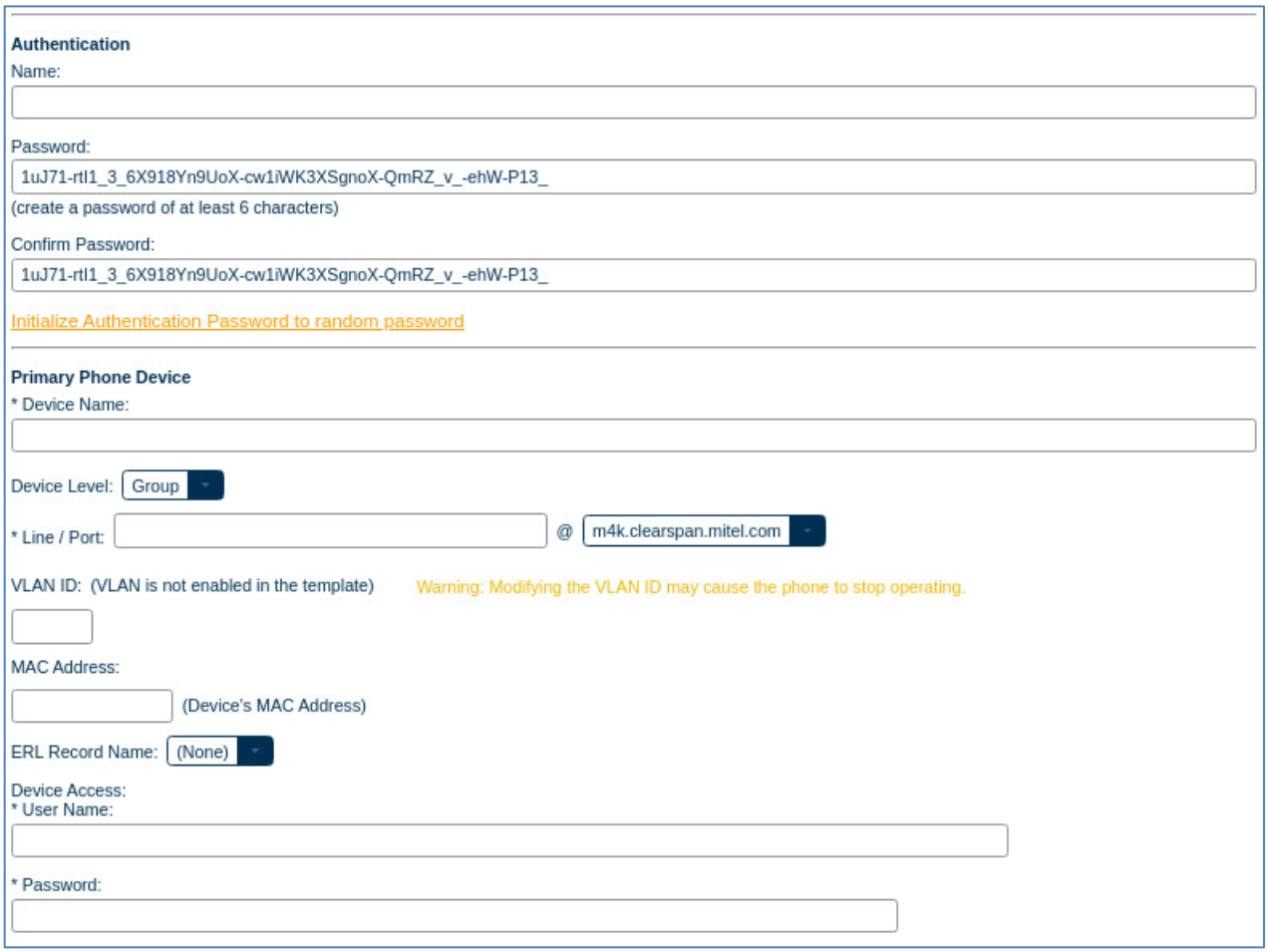


Figure 225 - Bottom Section of User Add Page when Panasonic User Profile is Selected

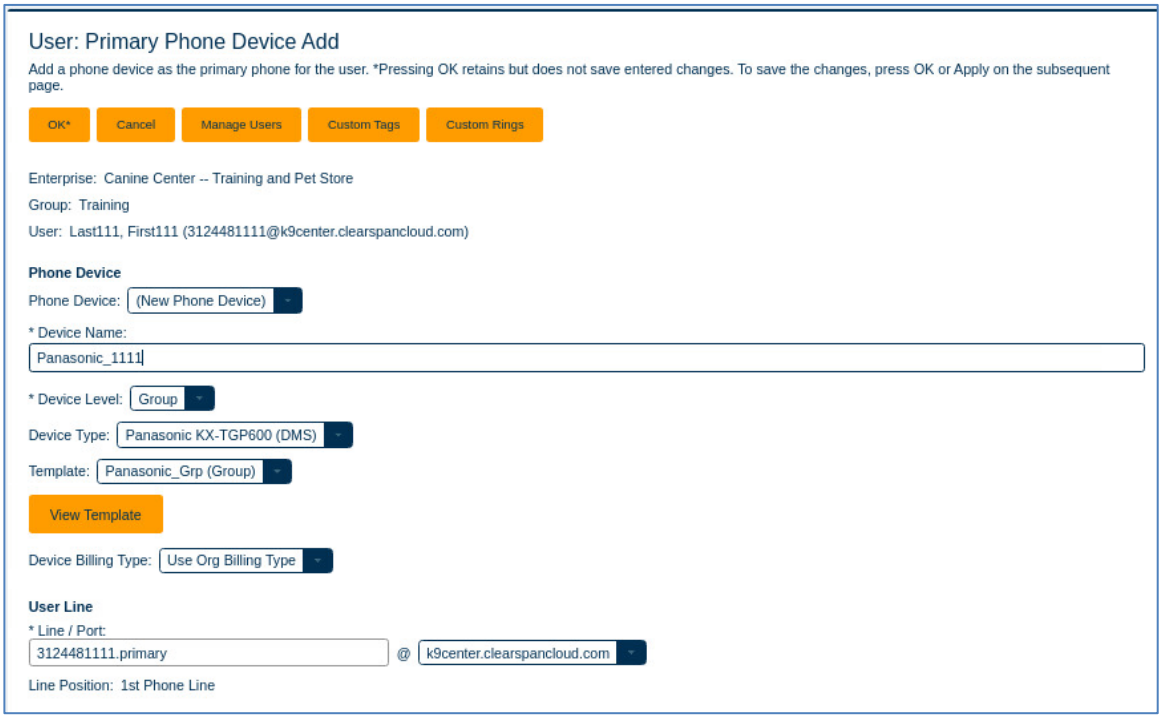


Figure 226 - User: Primary Phone Device Add

User General Settings for Panasonic Phones

As with Mitel phones, when creating a user with a Panasonic phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Panasonic phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Panasonic phone from the Users page of Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Panasonic from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Panasonic phone.

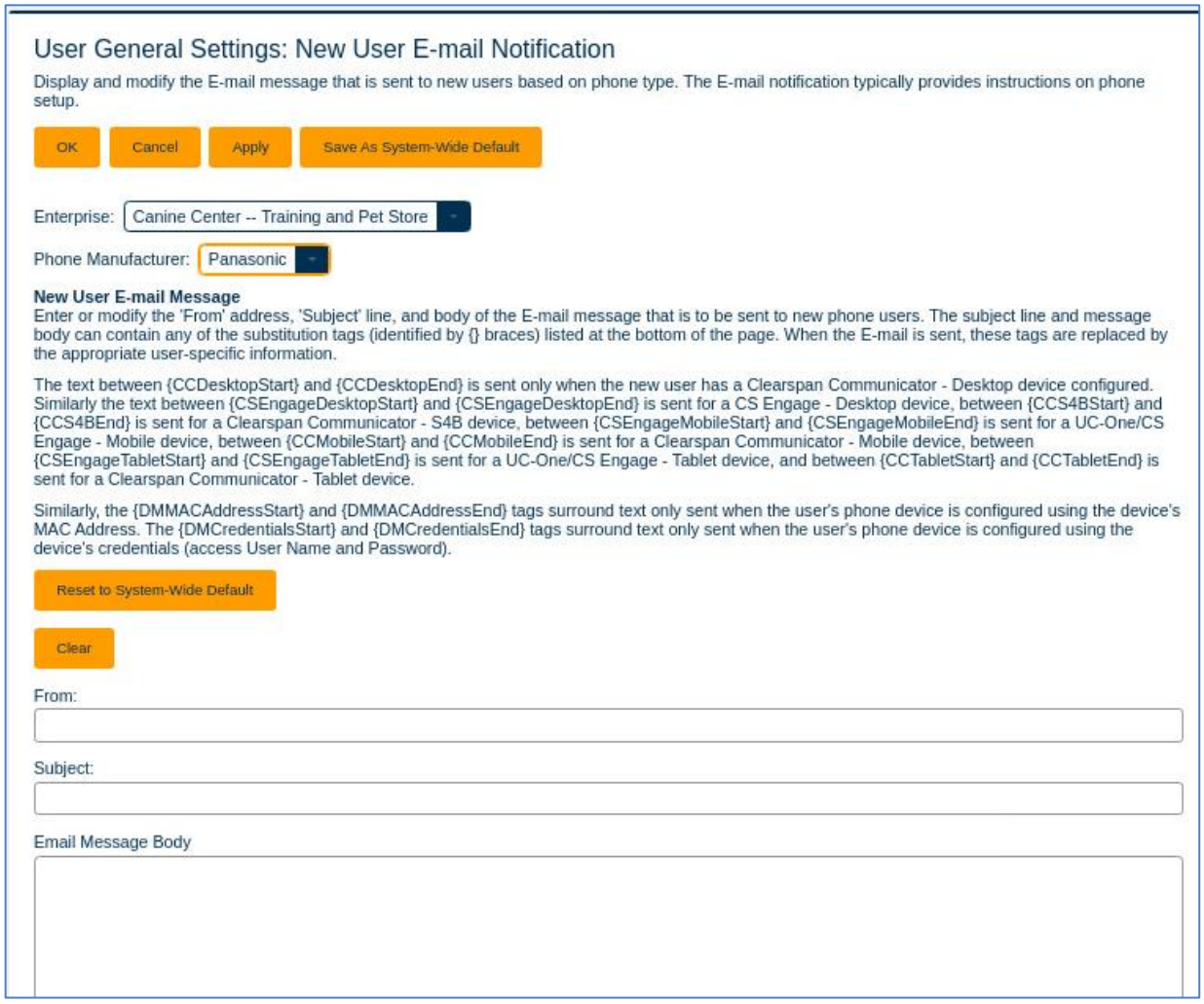


Figure 227 - New User E-mail Notification - Panasonic

Phone Management for Panasonic Phones

As with Mitel phones, Panasonic phones can also be added or modified under the Phone Management page of Provisioning.

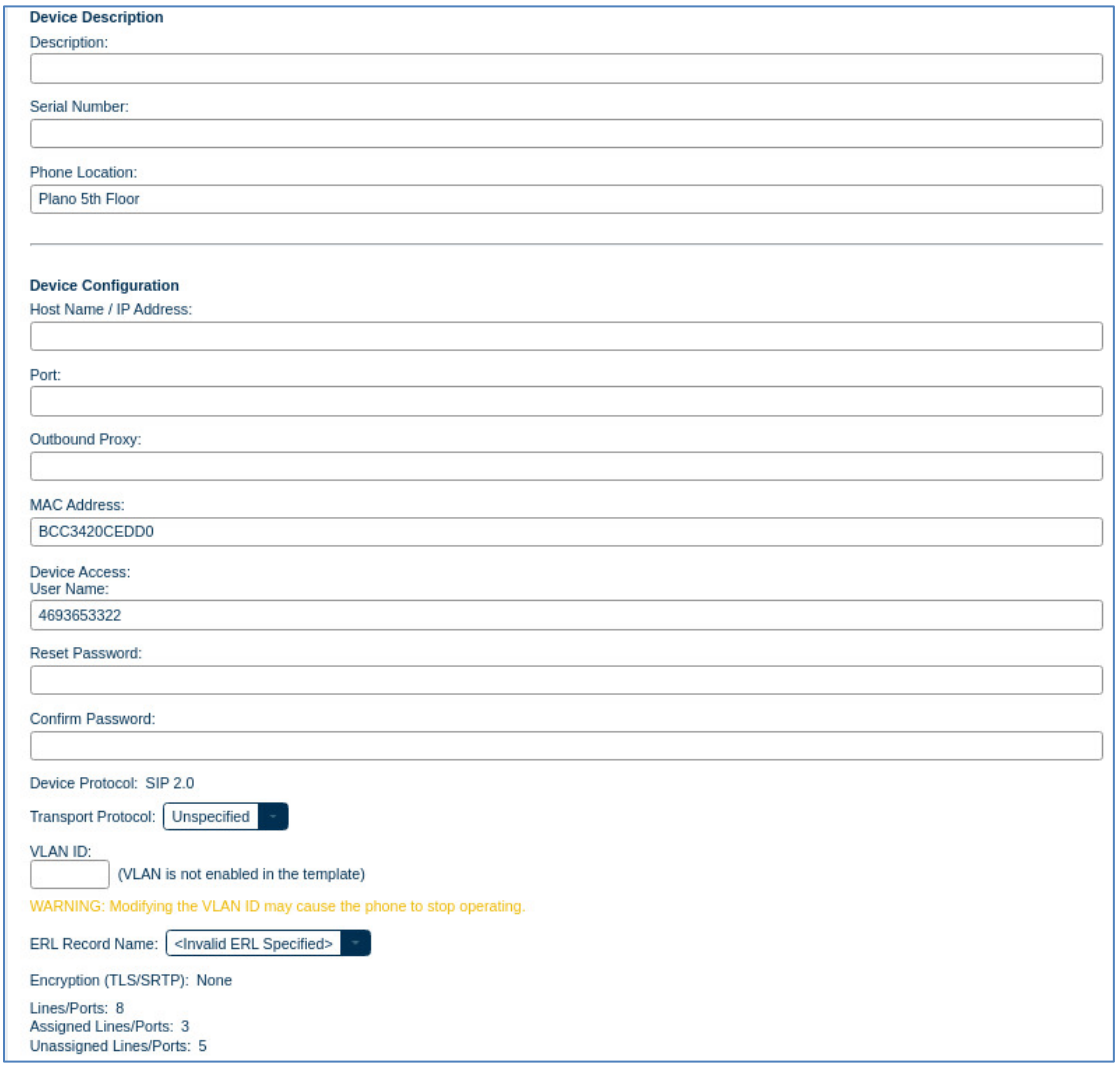


Figure 228 - Phone Device Page for Panasonic Phones

Installing Panasonic Phones

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

Appendix C: OpEasy and Clearspan Setup for Cisco Phones

The following settings must be configured within OpEasy prior to installing Cisco phones at users' desks, as described in the following sections:

- Cisco Phone Support: – Support for Cisco phones requires a 3rd Party system license to be installed.
- User Profiles: – One or more User Profiles must be created for each type of Cisco phone so that the administrator can build Cisco phones for provisioning.
- Phone Templates

Key Definitions – In addition to the Cisco standard soft keys, some OpEasy-configured soft keys may be assigned to Cisco phones.

Global Settings – System, Enterprise, and Group level settings must be configured for Cisco phones.

Definitions – One or more templates must be created for each type of Cisco phone.

Notes:
. • For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.

• You can configure extra settings only if you have the full access privilege to view and edit extra settings.

User General Settings – The E-mail message sent to new Cisco phone users will be different from the message sent to Mitel phone users.

Users: – Users must be created with a supported Cisco phone.

Phone Management –Cisco phones can be added or modified under the Phone Management page of Provisioning.

Cisco Phone Support

Cisco Phone Support must be licensed within the appropriate Enterprises for the level of administrators that will be configuring Cisco phones if Enterprise Licensing is in use.

A subset of Cisco IP phone models is supported in OpEasy. Additionally, only Cisco phones equipped and licensed with Cisco's 'MultiPlatform Phone' (MPP) firmware are capable of interoperability with the Clearspan VoIP platform. MPP firmware and licensing must be acquired directly from Cisco. This link provides information on the firmware migration process.

User Profiles for Cisco Phones

To allow administrators to quickly set up users with Cisco phones, one or more User Profiles should be created for each type of Cisco phone that will be used. When creating a User Profile, the administrator selects one of the supported Cisco phones as the Device Type. The selected type of Cisco phone will be created as the primary phone device for the new user.

Clearspan Setup for Cisco Phones

The following section contains tasks that must be performed on Clearspan before configuring the Cisco Phones:

Creating the System Device Management Tag Set

To create the Cisco Device Management Tag set:

Launch the Clearspan Provisioning Portal with System Administrator credentials.

Navigate to System > Resources > Device Management Tag Sets.

Click **Add** and enter **Cisco Tags** to create the tag set.

Click **Cisco Tags** to edit the tag set and click **Add** to include the tags in the following table:

Tag Name	Default Tag Value	Comments
%ASSIGNED_VLAN_ID%	4095	Default of 4095 indicates disabled
%DAYLIGHT_SAVING_TIME_RULE%	start=3/8/7/2:0:0;end=11/1/7/2:0:0;save=1	Default rule is for North America
%FIRMWARE_PROTOCOL%	http	Can be “http” or “https” to be used for firmware download
%FIRMWARE_VERSION_68XX%	Sip68xx.11.1.2MPP-351.loads	For model 6851 and 6871
%FIRMWARE_VERSION_78XX%	sip78xx.11.1.2MPP-351.loads	For models 7821, 7841, and 7861
%FIRMWARE_VERSION_88XX%	sip88xx.11.1.2MPP-351.loads	For models 8811, 8841, 8845, 8851, 8861 and 8865

Modifying Firmware Version for a Group

The firmware version can be changed for a specific group or device.

To modify the firmware version for a group:

1. Launch the Clearspan Provisioning Portal.
2. Navigate to the Group > Utilities > Device Configuration.

3. Click **Edit** on the appropriate Device Type in the list, for example Cisco 7841 (DMS).

Note: At least one of the devices must exist in the Group.

4. Select the **Custom Tags** tab.
5. Click **Add** and enter the required version for the tag. For example, Tag Name: “%FIRMWARE_VERSION_78XX%”.

Configuration 1-Minute Delay

When the phones download a modified configuration file, it will reboot and then wait for up to 1 minute before processing and applying any latest updates.

BLF Configuration

Cisco phones support using the BroadWorks BLF List URI. Using this method, the phone will automatically populate unused buttons, so you do not need to specify which button to use for the BLF keys manually or in OpEasy (they are assigned in the order received from BroadWorks). You can disable using Line Keys for phones that support expansion modules, so that all BLF entries will be populated on the Expansion Module Programmable Keys.

The phones also allow administrators to provision specific BLF users to monitor on a specific key, but in this case, you will specify the BLF List URI along with the User Id of the specific user to monitor each key.

Installation Instructions

Upon bootup, the phone will use the FQDN returned from the DHCP server and look for the model-specific configuration file (in dms/Clearspan).

The default Profile Rule is set to “/$PSN.xml”, which is appended to the FQDN and resolves to the model series name.

The initial model-specific configuration file, for example “7841-3PCC.xml” provides:

- A Profile Rule to download a configuration file created by OpEasy.

Note: This file is generated by OpEasy and contains the authentication username and password and the path for the MAC.xml file

- A softkey to the OpEasy Setup application to allow installation of the phone.

When the phone starts, it will display a **Setup** button, which is pressed to install the phone.

Installer Setup

The installer presses the **Setup** button on the phone, which:

Prompts the installer for the unique Device ID (unique ID entered into the MAC address field)
Finds the device with this ID and prompts the installer to verify the identity of this user (Y/N)

Saves the device's MAC address to the Clearspan device (overwrites the ID with correct MAC)

Sets a device tag (%MI_UPDATE_PWD%) to 1 to indicate the phone requires generation of an authentication password.

Prompts the installer to reboot the device.

Note: An **Exit** button appears on the phone, but do not exit the application, press the **Settings** button, and restart the phone

Restart to Download Configuration

The Installer will restart the phone (it will take up to 2 minutes for the phone to activate):

- After 1 minute, the phone will download the configuration file from OpEasy which now contains the device credentials.

After 1 more minute, the phone will download the MAC.xml file using the provided credentials and apply the configuration.

Subsequent Restarts

During Subsequent restart, the phone restart always returns to the redirected path and has the required credentials to download MAC.xml updates.

Resetting a Password

To regenerate the password if a phone loses its password and cannot download the MAC.xml file:

1. From the Clearspan Web Portal, navigate to the appropriate device.
2. Click the **Custom Tags** tab.
3. Select the **%MI_UPDATE_PWD%** tag and click **Edit**.
4. Change the Tag Value from 0 to 1 and press **OK**.
5. Restart the phone (the phone will download the OpEasy configuration file containing the credentials).
6. Restart the phone again to use the credentials to download the MAC.xml file.

Figure 229 - Resetting a Password

Phone Templates for Cisco Phones

Key Definitions for Cisco Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Cisco is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Cisco phones are displayed.

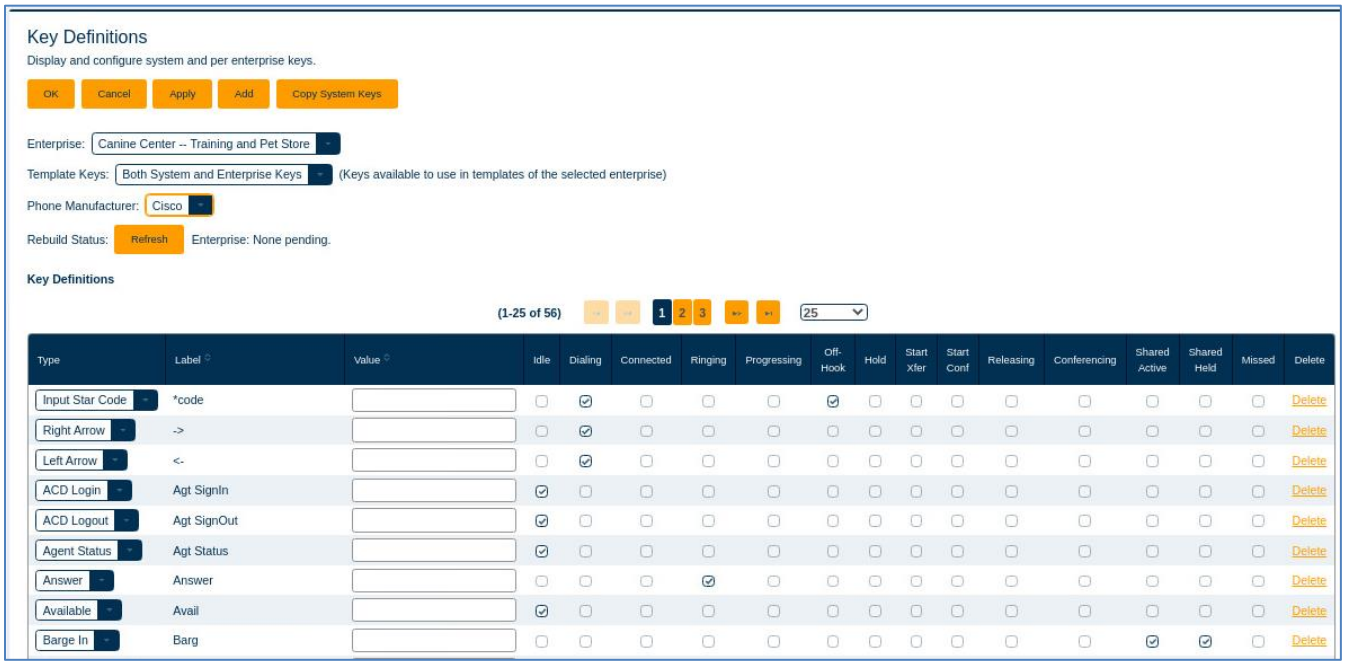


Figure 230 - Key Definitions for Cisco Phones

To define a new key:

Select an Enterprise and a phone from the **Phone Manufacturer** drop-down box on the Key Definitions page and click **Add**. **Template Keys** drop-box sets the keys that will be displayed,

Enter or Select the following in the Key Definition fields.

Field	Setting
Type	Select the type of key or feature that is being defined. • ACD Login • ACD Logout • Agent Status • Answer • Available • Barge In • Barge Silent • Blind Xfer • Call • Call Forward • Call Info • Cancel • Conference • Conference Line • Decline • Delete Char • Directory • Disposition Code • DND • Extension Mobility Sign In • Extension Mobility sign Out • Emergency • End Call • Favorites • Function • Group Pickup • Hold • Input Star Code • Join • Last Call Rtn • Left arrow icon • Line • Messages • Miss • New Call • Option • Park

Field	Setting
	• Pause Rec • Pickup • Privacy Hold • Recents • Redial • Resume • Resume Recording • Right arrow icon • Settings • Start Rec • Stop Rec • Start Rec • Stop Rec • Trace • Transfer • Transfer line • Unavailable • Unpark
Label	The label that is displayed on the key.
Value	Enter the string value to be assigned to the key.
Idle/Dialing /Connected/Ringing/ Progressing/Off-Hook/ Hold/Start Xfer/Start Conf/Releasing /Conferencing/Shared Active/Shared Held/Missed/ Delete	Select the phone states in which this soft key should appear.

System, Enterprise, and Group Global Settings for Cisco Phones

To configure global Cisco phone settings, choose Phone Templates from the Provisioning menu, and then select Global Settings and select Cisco as the Phone Manufacturer. The common global settings for Cisco phones are shown on the General Settings tab and described in the following table.

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

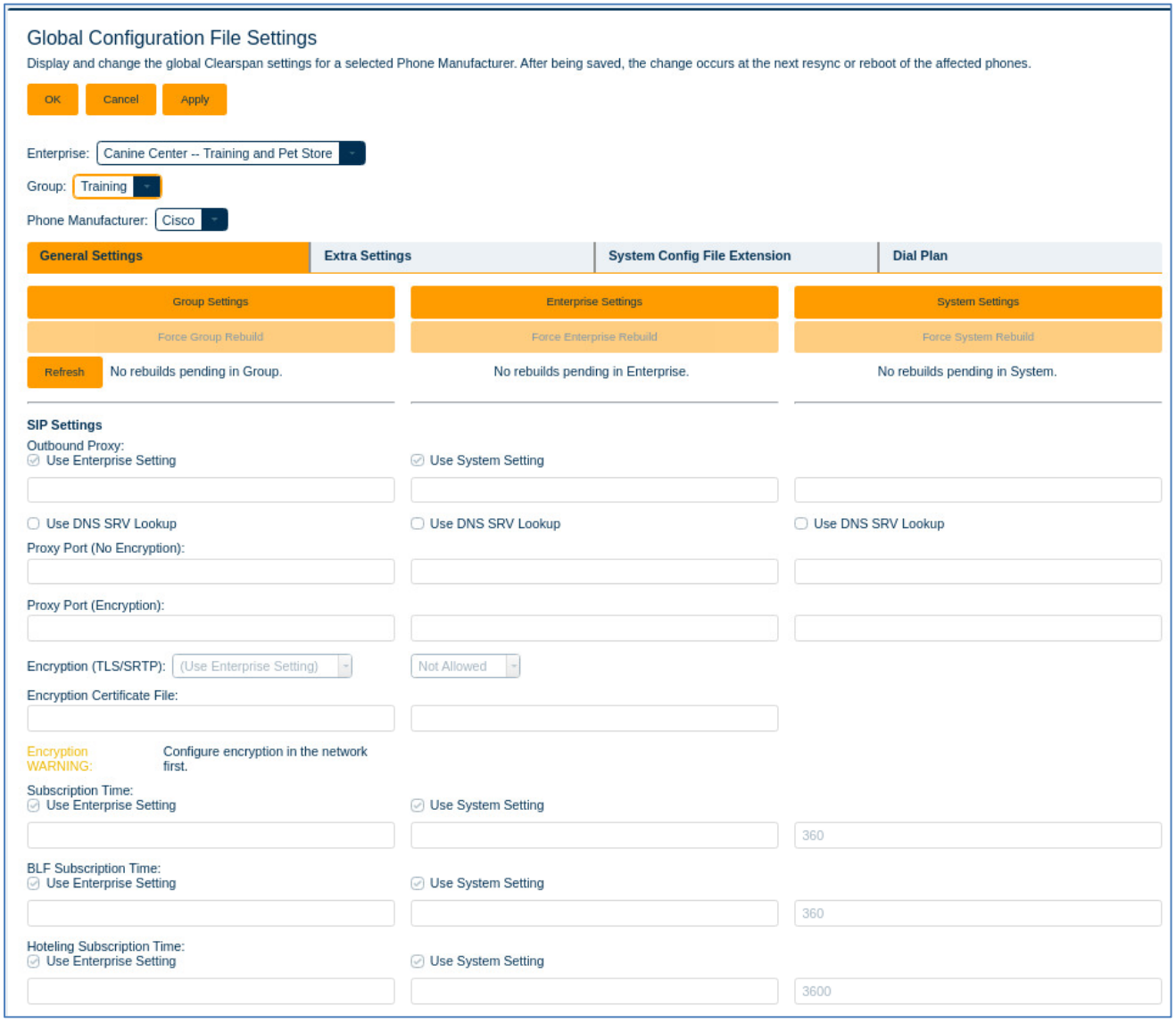


Figure 231 - Global Settings for Cisco Phones

Tab / Section	Field	Setting
SIP Settings		
	Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used bythe Cisco phones.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port(No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
	Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is not used by Cisco phones.
	Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Ciscophones when encryption is used by Cisco phones.
	Encryption (TLS/SRTP)	Select the setting for encryption. Required indicates encryption is required. Not Allowed indicates

		encryption is not allowed.
	Encryption Certificate File	Enter the encryption certificate filename.
	Subscription Time	Enter the subscription time to be used in seconds or select Use EnterpriseSettings
	BLF Subscription Time	Enter the BLF Subscription Time to be used in seconds. The default valueat system level is 360 seconds.
	Hoteling Subscription Time	Enter the Hoteling Subscription Time to be used in seconds. The default value at system level is 3600 seconds.
Time Settings		
	Time Server	Check box that indicates that the Time Server settings are to be set basedon the values configured in Cisco Enterprise/System Global Settings.
	Time Server 1	Enter the hostname or IP address to configure the FQDN used for the first-time server.
	Time Server 2	Enter the hostname or IP address to configure the FQDN used for the second-time server.
	Time Zone	Select the time zone that the phones are in.
Device Settings		
	Network Discovery	Enable/disable the Cisco Discovery Protocol
	LAN Port Mode	Select the LAN speed, normally Auto. The other options include 10 MbpsHalf-Duplex, 10 Mbps Full-Duplex, 100 Mbps Half-Duplex, 100 Mbps Full-Duplex, 1000 Mbps Full-Duplex.
	Admin Password	Enter a password and Confirm Admin Password that is entered into the phone to access the advanced settings within the phone.
	User Password	Enter a password and Confirm User Password that is entered into the phone to access the user settings within the phone.
	Web Interface	Enable/Disable the web interface of the phone.
	Direct Action URL	Enable/Disable access to the Direct Action URL.
Voice Codecs		
	Voice Codec #1 to #3	Identify the voice codecs that the Cisco phone is to use when placing orreceiving calls. The codecs are in priority order, with codec #1 as the highest priority codec to codec #3 as the lowest priority codec.
Quality Monitoring		
	Quality Monitoring	Choose to ON/OFF quality monitoring.
	Collector Server Address	Enter the hostname or IP address of the server to which quality monitoringmessages are sent by the phone.
	Collector Server Port	Enter the port to use on the collector server. The default port number is 5060.
General Settings		
	Conference Server	Select the conference server to use for conference calls.
	Firmware Server	Text field that contains the location of the firmware to

be loaded.

System, Enterprise, and Group Extra Settings for Cisco Phones

To enter extra settings that are to be applied to all Cisco phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Group Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Enterprise Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings,** and Click **Yes** on the confirmation box (the confirmation box displays, “Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?”). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

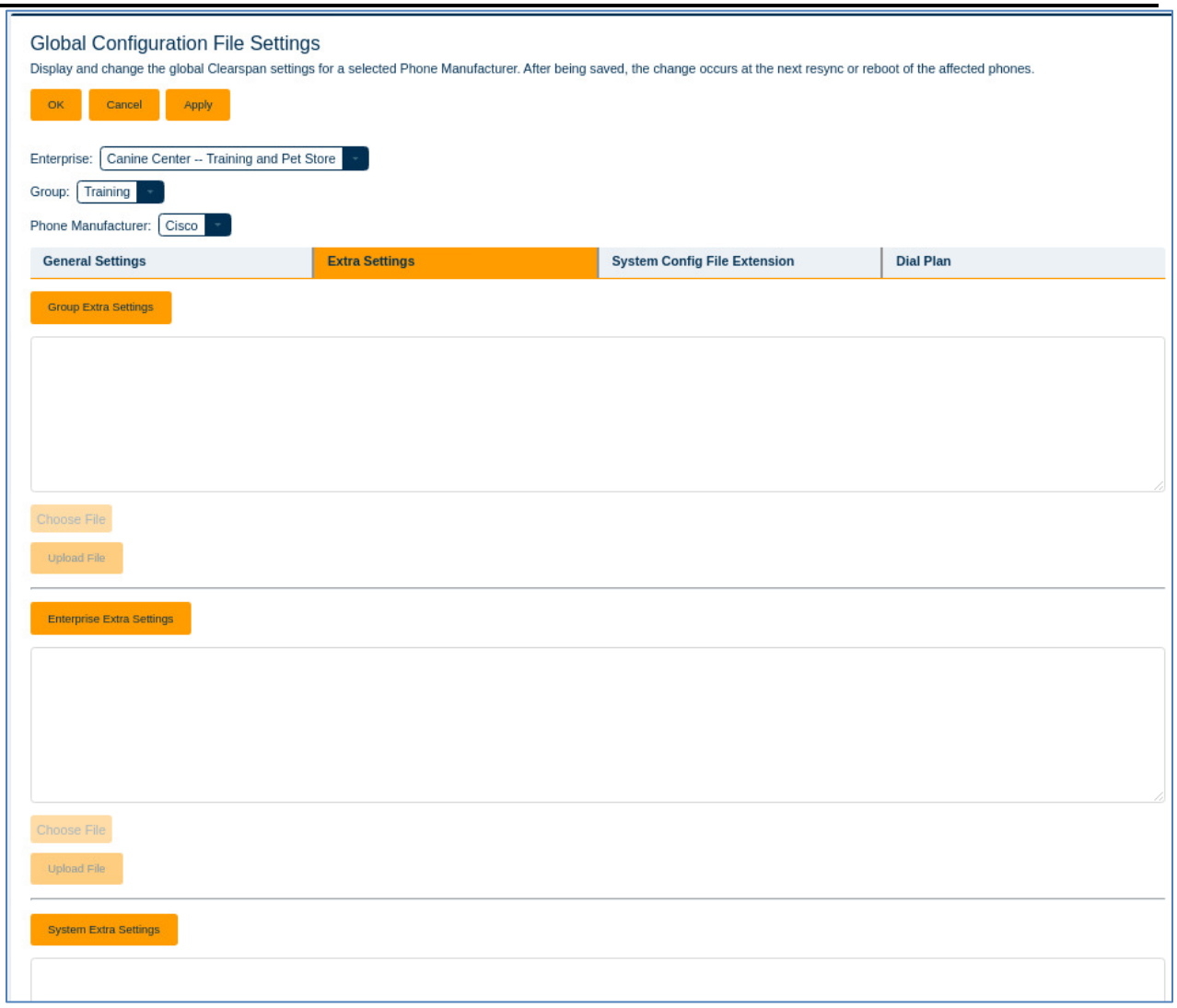


Figure 232 - Global Settings - Extra Settings Tab for Cisco Phones

System, Enterprise, and Group System Configuration File Extension Settings for Cisco Phones

Choose **Phone Template** from the **Provisioning** menu, select **Global Settings** and select Cisco as the Phone Manufacturer, click the **System Config File Extension** tab to add the System Config File Extension settings. The additional settings must be in an XML format as are all Cisco configuration settings.

The settings on the **System Config File Extension** tab have lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings.

Only Super Users and System Administrators can access the **System Config File Extension** Settings.

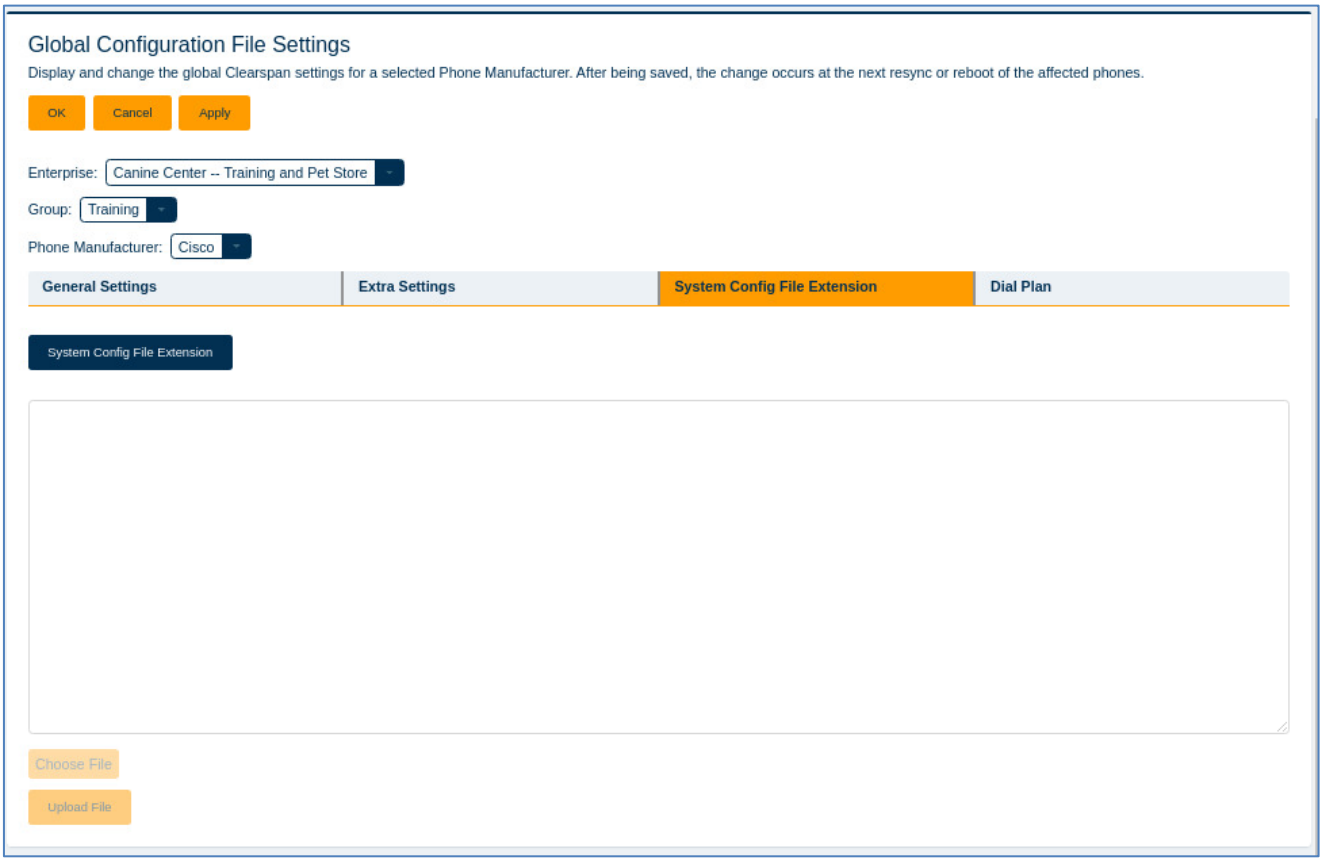


Figure 233 - Global Settings - System Config File Extension Tab for Cisco Phones

System, Enterprise, and Group Dial Plans for Cisco Phones

Click the **Dial Plan** tab on the **Global Configuration File Settings** page to enter dial plan information for System, Enterprise, or Group levels or click **Use Enterprise Setting** to use enterprise settings or click **Use System Setting** to use system settings. The **Long Digit Timeout** and **Short Digit Timeout** allows values in the range of 1 to 64 second(s). The dial plan information entered must be in Cisco format and can include any Cisco-specific setting.

Phone Templates: Definitions for Cisco Phones

As with Mitel phones, Cisco phones can only be created using a phone template. Create templates for Cisco phones as described in the following table. Refer to the Phone Templates section for more information on creating, editing, renaming, and deleting a phone template.

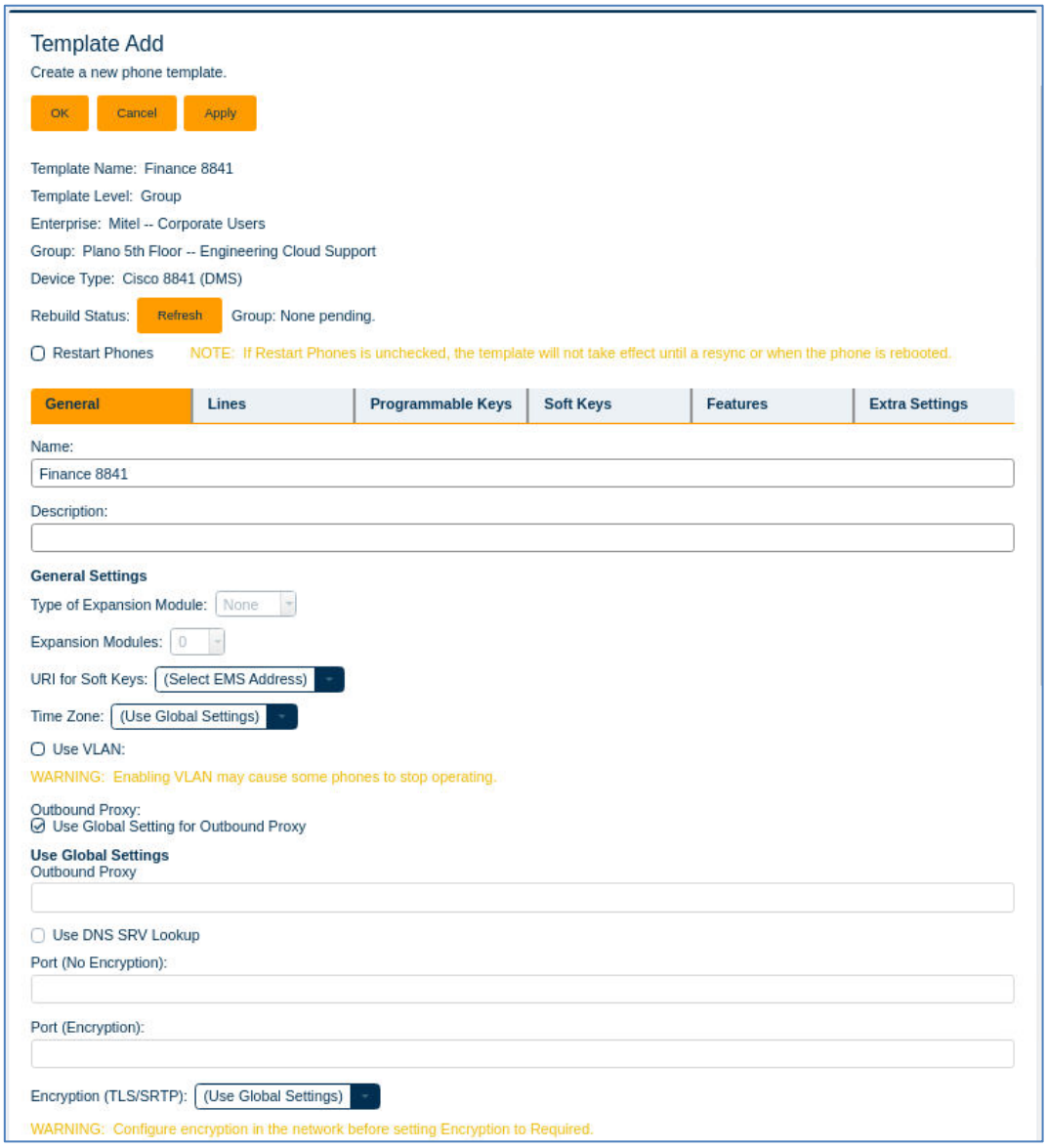


Figure 234 - Template Add - General for Cisco Phones

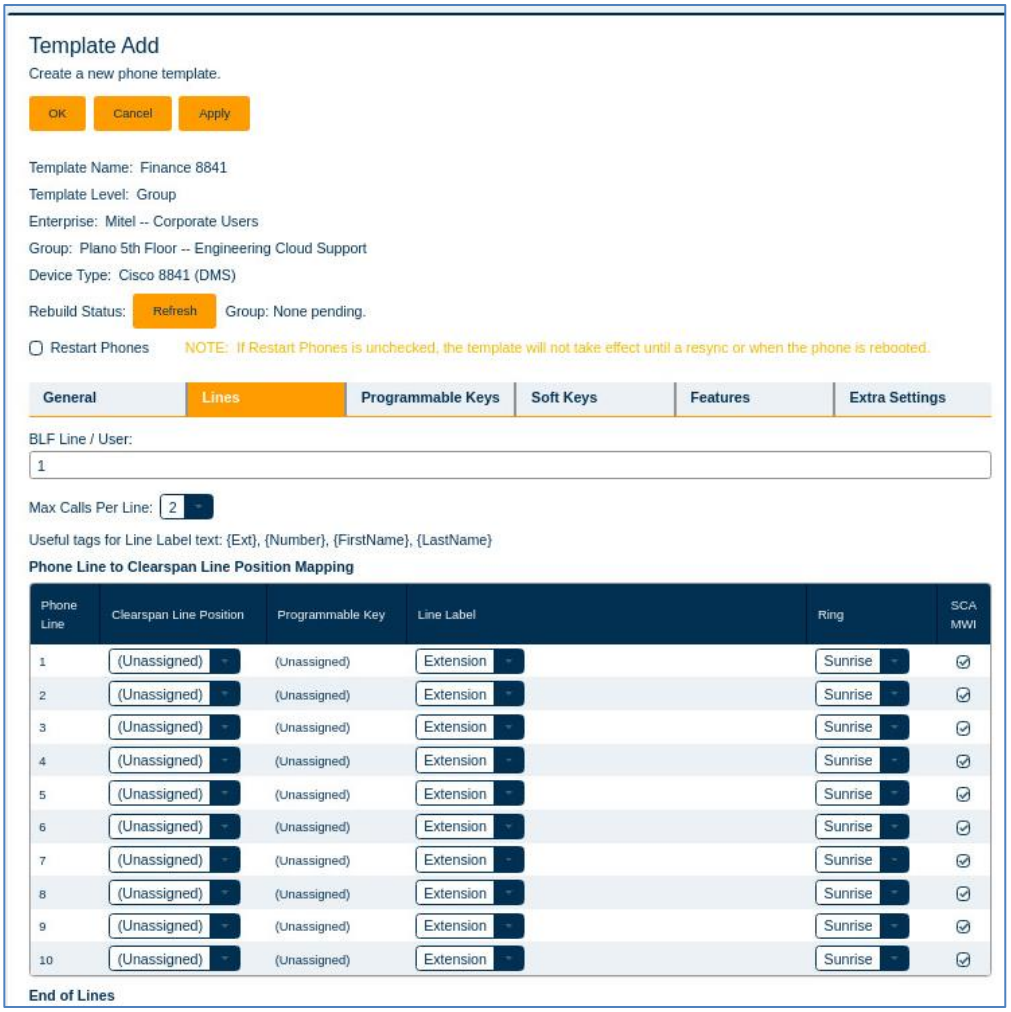


Figure 235 - Template Add – Lines for Cisco Phones

Tab / Section	Field	Setting
General	Name	Template name.
	Description	Description of the template.
	Type of Expansion Module	Select the supported key expansion module for the selected device type. If the device type does not support the key expansion modules this drop-down box will be disabled. This option is displayed for the Cisco 6851, 8851, 8861, and 8865 phone models.
	Expansion Modules	Select the number of expansion modules to be configured for the device type. The list contains the number of expansion modules supported by the selected device type.
	URI for Soft Keys	Select the **URI for Soft Keys** from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for key definitions using OpEasy phone applications.

	Time Zone	Select the **Time Zone** from the drop-down list. **'Use Global Settings'** uses the time zone from Global Settings in Phone Templates. **User Time Zone** uses the time zone of the first primary user assigned to the phone. **Use DHCP** uses the time zone from the DHCP server. You can also select a specific time zone.
	Outbound Proxy	Enter the proxy information for this phone.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
Tab / Section	**Field**	**Setting**
	Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is not used by Cisco phones.
	Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is used by Cisco phones.
	Encryption (TLS/SRTP)	Select the setting for encryption.
	Encryption Certificate File	Enter the encryption certificate filename
	Subscription Time	Use Global Settings for subscription time or clear the **'Use Global Settings'** check box and enter the subscription time in seconds.
	BLF Subscription Time	Use Global Settings for subscription time or clear the **'Use Global Settings'** check box and enter the BLF subscription time in seconds
	Hoteling Subscription Time	Use Global Settings for subscription time or clear the **'Use Global Settings'** check box and enter the Hoteling subscription time in seconds.
	Conference Server	Select the conference server as configured on the Conference Server Addresses page from the drop-down box.
	Logo File URL	Enter the URL of the image to be used as the logo. The image size must be 64x64 pixels and the image should be in Portable Network Graphics (PNG) format or JPEG format.
	Picture File URL	Enter the URL of the picture to be used as the screen saver. The image size must be 128x128 pixels the image should be in PNG format or JPEG format.
	Background Image	Select the phone background image. The 8800 series phones support the use of a picture file as a background image. • Select Picture to use the picture referenced by the Picture File URL setting as the background image of the phone. • Select Logo to use the picture referenced by the Logo File URL setting as the background image of the phone.
	Screen Saver	Select the phone screen saver.

Screen Saver Wait Time	Enter the number of seconds before the screen saver is activated. The screen saver wait time should be 30 seconds or greater.
Line ID Mapping:	Select one of the following options for shared call appearance line ID mapping: • Horizontal First – (default) a second call will make the same LED flash on which the first call was received. • Vertical First – a second call will make the next available line ID LED flash

Tab / Section	Field	Setting
Lines	Phone Line	Each phone line can be assigned only to a single user.
	BLF Line/User	Change the BLF Line/User if necessary. This value applies when the Busy Lamp Field (BLF) feature is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI. **Note:** The Direct Voice Mail feature with BLF Key is not available for on the Cisco 6851 phones, dial *55 followed by the extension, andpress # to connect to the Voice Mail.
	Allow Use of Programmable Keys for BLF List	Select to allow BLF lines to appear on the Programmable Keys of a Cisco phone. This setting is displayed only when an Expansion Module is selected on the General tab of the template. If an Expansion Module is not selected the BLF lines are allowed on Programmable Keys by default.
	Max Calls Per Line	Select the maximum number of calls allowed for each phone line. The allowed values are in the range of 2 to 10.
	Clearspan Line Position	Select the Clearspan Line Position that you want to assign. This is the Clearspan line to use for the Phone Line. A single Clearspan Line Position can appear on one or more Phone Lines, which are on separate buttons on the phone.
	Line Label	Select the possible labels for the line. The valid values are: Extension - (default) the extension is displayed as the line label. Phone Number - the phone number is displayed as the line label. Text - administrator specified text is displayed as the line label. When this value is selected, a text field appears, where the administrator enters the text to be used as the line label. The following substitution tags can be used in the text: {Ext} - the extension of the line is substituted. {Number} - the phone number of the line is substituted. {FirstName} - the first name of the user assigned to the line is substituted. {LastName} - the last name of the user assignedto the line is substituted.
	Ring	Select the ring to use for the specified Clearspan Line Position. There are 13 ring tones including the default tone.
	SCA MWI	Enable or Disable the message waiting indicator for SCA lines

.

Tab / Section	Field	Setting
Programmable Keys	Key	Static text indicating the programmable line key number.
	Label	Select the valid feature keys as defined in the Template Key Definitions for Cisco. The valid key types are: • Line • Any key that is a 'Function' type defined on theGlobal Key Definitions page.
	Phone Line	When the key is defined as a Line, the associated line number is displayed as static text. If the key is not defined as a line, then a drop-down list that containsthe valid lines keys is displayed. A line key may be required depending on the type of key selected in the label column.
Soft Keys	Soft Key Position	Select the position of a specific soft key within the soft keys displayed on the phone.
	Label	Configure any or all the soft keys defined under the Key Definitions for Cisco phones. Only the keys available to Cisco phones are selectable in the Label drop-down list.
	Phone Line	When the key is defined as a Line, the associated line number is displayed as static text. If the key is not defined as a line, then a drop-down list that contains the valid lines keys is displayed. A line key may be required depending on the type of key selected in the label column.
Features	ACD Agent	Enable or Disable access to management of the ACD Agent features.
	ACD Line	Drop-down list used to assign the phone line to be used as the ACD line. The valid values are a list of lines that are available based on the settings in the Lines tab.
	Call Information	Check box used to enable access to the Call Information feature.
	Queue Status	Check box used to enable access to the Queue Status feature.
	Disposition Code	Check box used to enable access to the Disposition Code feature.
	Trace	Check box used to enable access to the Trace feature.
	Emergency Escalation	Check box used to enable access to the Emergency Escalation feature.
	Clearspan Call Logs	Enable/ Disable the Clearspan Call Logs.
	Clearspan Directory	Enable/ Disable the Clearspan Directory Type - a drop-down list to select the directory type.The valid options are: • Enterprise • Group • Personal

	LDAP Directory	Enable/ Disable the LDAP Directory
	Hoteling	Select the phone line to be used as the Hoteling line. The valid values are list of lines that are available based on the settings in the Lines tab.
Extra Settings		Enter extra settings that are to be applied to all Cisco phones using this template. The extra settings for the Cisco phones are in an XML format, as are all Cisco phone settings.
Template Users		The **Template Users** tab contains the standard components that help find the devices that are using the template.

Expansion Keys Tab

The **Expansion Keys Tab** is available only when the number of Expansion Modules are selected on the **General** tab. Only the Cisco 6851, 8851, 8861, and 8865 phone model supports the Expansion Module. The Cisco 6871, 7811, 7821, Cisco 7841, and Cisco 7861 phone models do not support Expansion Modules.

The following table lists the Cisco Phone Models and the maximum number of expansion modules supported by the phone:

Phone Model	Maximum Number of Expansion Modules Supported
Cisco 6851	1
Cisco 8851	2
Cisco 8861	3
Cisco 8865	3

The **Expansion Keys** Tab contains the **Expansion Keys** table to configure the keys for an expansion module assigned to the phone.

The **Expansion Keys** table contains the following columns:

- Key – static text displaying the expansion key number
- Label – drop-down list that contains the valid feature keys as defined in the Template Key Definitions for Cisco.
- Phone Line – drop-down list that contains the valid lines keys. A line selection may be required depending on the type of key selected in the label column.

Figure 236 - Template Add – Expansion Keys for Cisco Phones

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

Cisco Phone Users

When creating a user or adding a phone to an existing user, any phone device created for that user may be a Cisco phone. An OpEasy 3rd Party License is required for each added or modified Cisco phone. An error message appears if no license is available.

User Device Settings for Cisco Phones

For any of the supported Cisco phones, the Device Access: User Name and Password fields appear and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @.

Device credentials and MAC address fields are required and MUST be valid, matching the MAC address of the physical Cisco phone assigned to that phone device. The Cisco phone will not be able to load its configuration files if incorrect device credentials and/or an incorrect MAC address are entered.

User General Settings for Cisco Phones

When creating a user with a Cisco phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Cisco phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Cisco phone from the Users page of

Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Cisco from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Cisco phone.

Phone Management for Cisco Phones

Cisco phones can be added or modified under the Phone Management page of Provisioning.

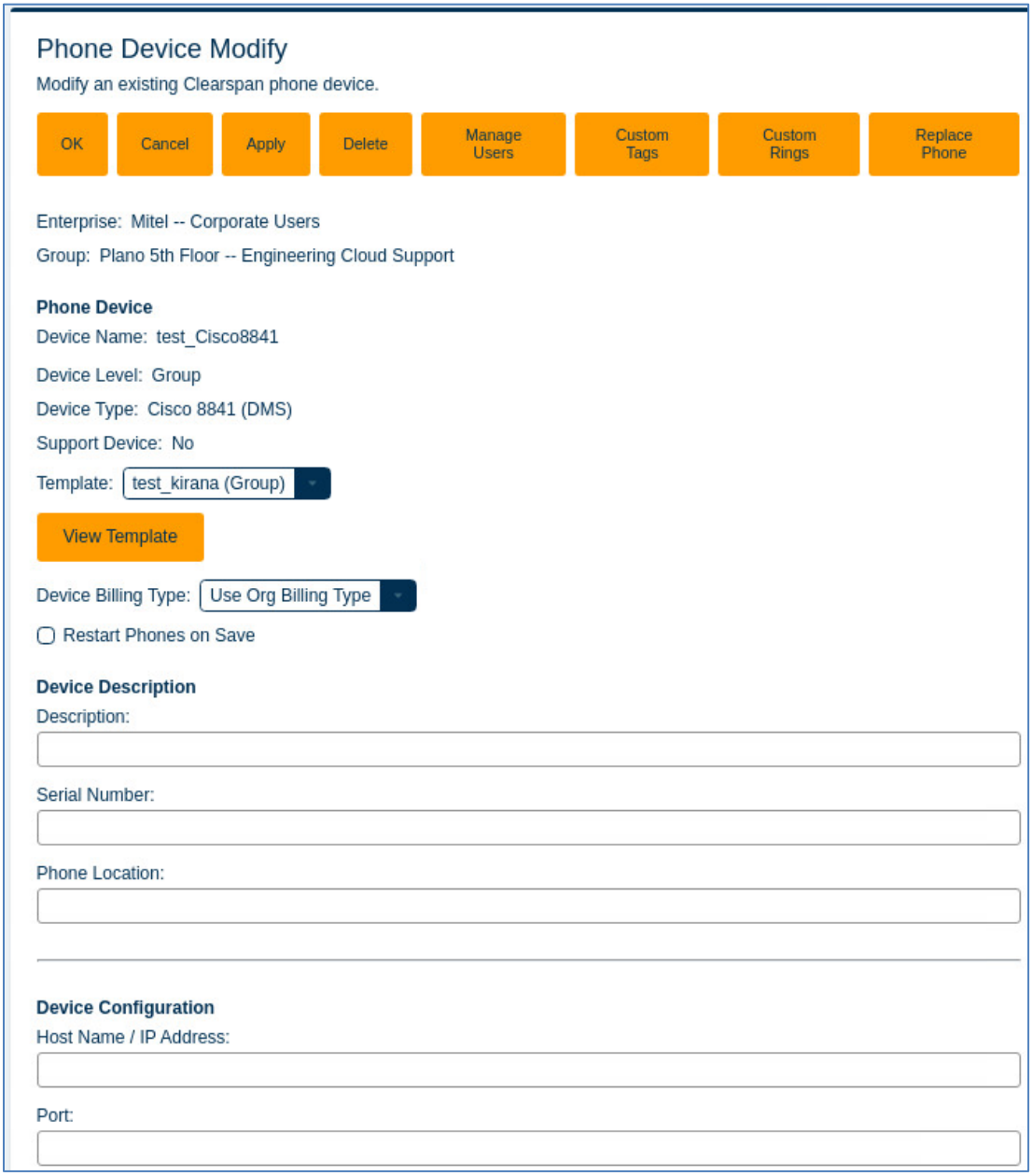


Figure 237 - Phone Device Modify Page - Cisco

Installing Cisco Phones

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

Appendix D: Mitel Key Definitions

OpEasy web application access 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.

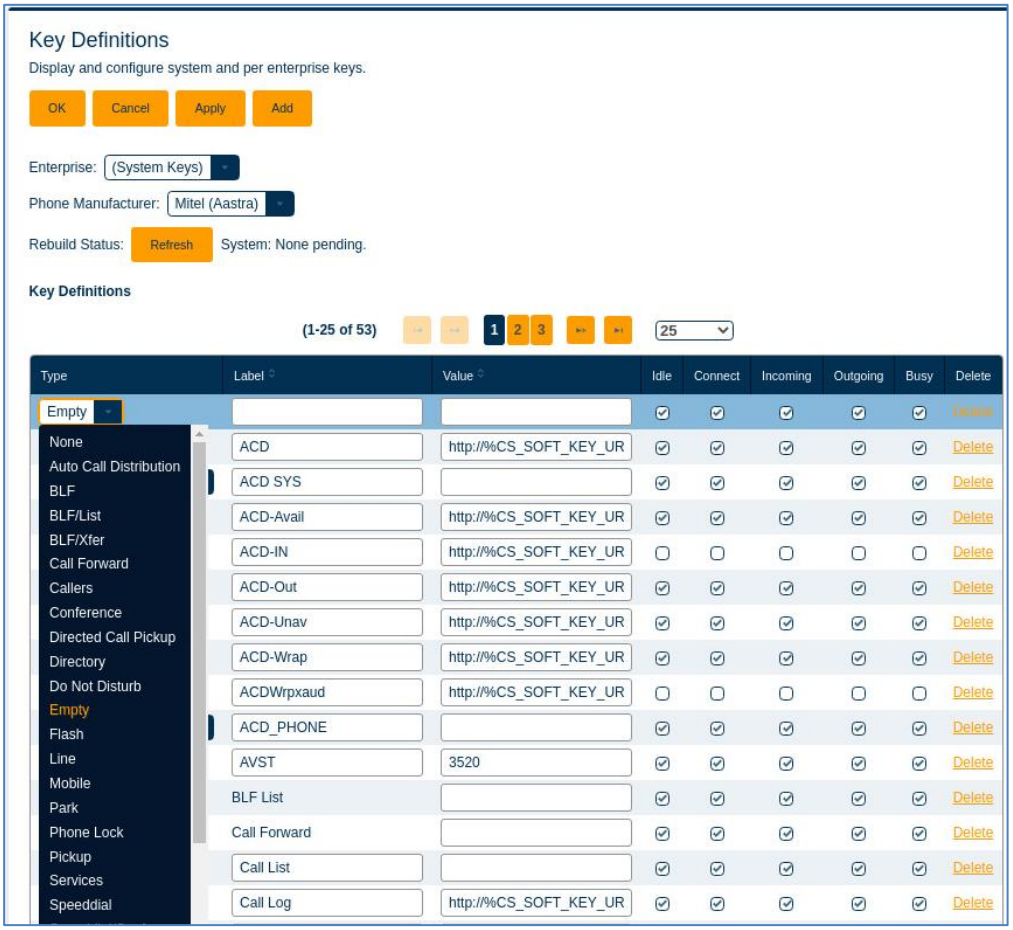


Figure 238 - Key Definitions Page - Mitel Phones

All OpEasy web application access is 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 URIfor 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 deployed with SSL enabled.

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 Clearspan technical support team can troubleshoot the cause.

The support organization normally determines when this button should be used (generally for issues that may be intermittent, and information needs to be collected). In those cases, a button may be added to a user phone using the following key definition:

```
http://%CS_SOFT_KEY_URI%/callmark.php
```

This function logs the event in the phone_app_log table of the OpEasy database, logs the event in the CSInterface log and also sends an SNMP trap to notify support that the event has occurred. Log information includes the time that it occurred, the MAC address of the phone, the phone's device name and the currently active or last active line/port.

User Guide

The support team communicates to users when they should press this button. Typically, when the issue occurs, the user simply presses the button, allowing the support team to receive notification of the problem.

CLID Block

You can add the CLID Block key to support Calling Line ID Delivery Blocking per Call. Hides the user's calling line ID for the next call. A CLID Block softkey can be added with the following definition:

%BWFAC-CLID-DELIVERY-BLOCKINGPER-CALL-1%

User Guide

Before placing a call, the user presses the **CLID Block** key; and then places the call as usual.

Directory Lookup

The directory application provides functions to search from an LDAP directory and then display the list on the user's phone for dialing.

LDAP Lookup: Servers are provisioned in OpEasy (for an enterprise or for groups), allowing the phone to display the appropriate directory for each user.

Important: One of the available functions within directory lookup is the ability to add a number to the user's Speed Dial list. If this feature must be available, then the application must know which Speed Dial type the user has provisioned, which is done by adding the parameter “speedtype” with one of the following values:

- Speedtype=0 – Indicates directory uses Speed Dial 8
- Speedtype=1 – Indicates directory uses Speed Dial 100

If this function is not required, this parameter may be omitted, otherwise you will likely need 2 separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides LDAP lookup using Speed Dial 100:

```
http://%CS_SOFT_KEY_URI%/ad.php?speedtype=1
```

LDAP Servers and Credentials

LDAP servers and credentials can be set up for an entire enterprise or a separate one for each group as needed. This is provisioned with OpEasy via Provisioning | Group Settings | Phone Directory Management.

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

Secure vs. Non-Secure Access

Note that the URI field for the directory uses the format of 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.

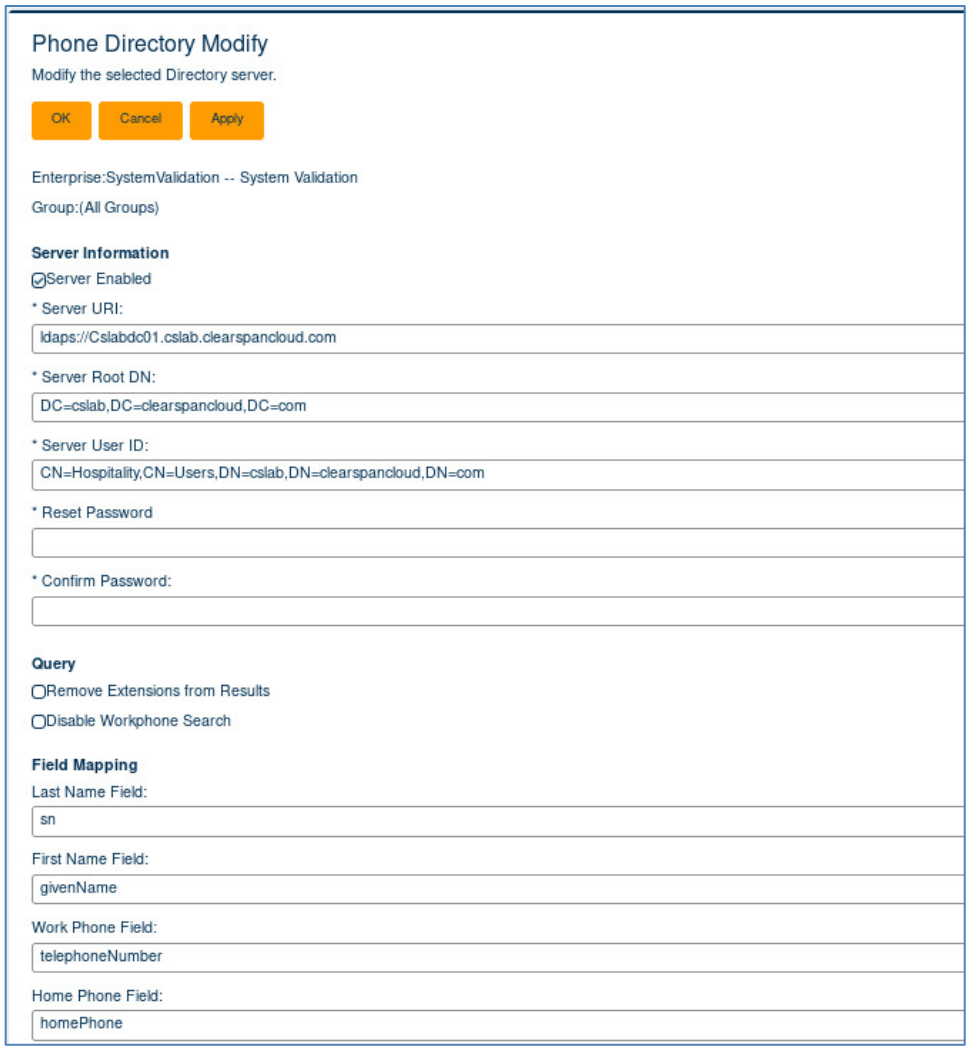


Figure 239 - Phone Directory Modify Page

If a secure LDAP connection cannot be established because the server cannot validate the client’s certificate, contact your system administrator.

Directory Search

When the directory application is launched, the user is prompted with “Enter Name” to perform a search. The following functions are available from this screen:

Directory Search

BackSpace:	Back space entered characters to correct the entry
Space:	Add a space character to the entry.
abc:	Change from alpha to digits, etc.
Lookup:	Perform a lookup search with the entered name
Cancel:	Exit the application.

Directory Search → Lookup

Pressing “Lookup” retrieves the list of possible names from what was entered. The user may then move up or down in the list to select one of the entries. The following functions are available on the search results screen:

Dial:	Dial the selected name from the list (using the default phone)
Display:	Display additional phone numbers for the selected name
Back:	Return to the previous page
Cancel:	Exit the application
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)

Directory Search → Lookup → Dial

Pressing “Dial”, dials the selected entry from the list using the first number in the list (default number).

Directory Search → Lookup → Display

Pressing “Display”, performs an added search for this entry to find and display any additional phone numbers available for the selected name. The following functions are available on this results screen:

Dial:	Dial the selected name from the list.
Edit:	Edit the number if it cannot be dialed as shown (add prefix, etc.)
Speed Dial:	Add this number to Speed Dial
Back:	Return to the previous page.
Cancel:	Exit the application.

Directory Search → Lookup → Display → Dial

Pressing “Dial”, dials the selected number from the list.

Call Logs

The OpEasy Call Logs (recent call list) web 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 provides the phone display with missed calls information 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.

Important: The function to add a number to the user's Speed Dial list requires the Call Logs application to know which Speed Dial type the user has provisioned. This is accomplished by adding the parameter “speed-type” to the soft key URL with one of the following values:

- Speedtype=0 – Indicates directory uses Speed Dial 8
- Speedtype=1 – Indicates directory uses Speed Dial 100

Your System Administrator might provide two separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides Call Logs using Speed Dial 100:

```
http://%CS_SOFT_KEY_URI%/calllog.php?speedtype=1
```

User Guide

When the Call Logs application is launched, the user is presented the “Missed” calls display. The phone numbers listed are in chronological order with the most recent missed call at the top.

The following functions are available on this screen:

Select Missed

Dial:	Dial the selected name from the list.
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Dialed:	View the calls that were dialed.
Received:	View the calls that were received.

Select Missed → Navigate to Number

The list of phone numbers is displayed as a menu. The user presses the up and down navigation buttons to select an entry. If multiple pages exist, the Page Up or Page Down buttons are visible (also, the page number and total pages are displayed e.g., 1/5). Once at the selected entry, press either Dial or Display.

Select Missed → Navigate to Number → Dial

Pressing “Dial” dials the phone number for the selected entry.

Select Missed → Navigate to Number → Display

Pressing “Display”, shows details including the name, phone number and the date/time for the entry. The following functions are available on this screen:

Dial:	Dial the selected name from the list
Add Speed:	Add this number to Speed Dial
Back:	Return to the previous page.

Select Missed → Navigate to Number → Display → Add Speed

Pressing “Add Speed” adds the number to the user's speed dial list (it is added to the next available empty speed dial code in the list). The screen displays “Speed Dial Entry Added” to confirm the number was added. The following function is available on this screen:

Done:	Return to the previous main page (i.e. Missed, Dialed or Received)

Rather than dialing or displayed missed calls, from the “Missed” calls screen, the phone user may also view dialed or received calls.

Select Missed → Received → Dialed

Or

Select Missed → Dialed

The user is presented the “Dialed” calls display. The phone numbers listed are in chronological order with the most recent dialed call at the top. Navigation to an entry on the list is allowed just as described from the “Missed” calls display.

The following functions are available on this screen:

Dial:	Dial the selected name from the list.
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Missed:	View the calls that were missed.
Received:	View the calls that were received.

From either the “Missed” display or the “Dialed” display, the received calls can be displayed.

Select Missed → Dialed → Received

Or

Select Missed → Received

The user is presented the “Received” calls display. The phone numbers listed are in chronological order with the most recent received call at the top. Navigation to an entry on the list is allowed just as described from the “Missed” calls display.

The following functions are available on this screen:

Dial:	Dial the selected name from the list.
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Dialed:	View the calls that were dialed.
Missed:	View the calls that were missed.

Mobile

The softkey on the desk phone for the user to answer the mobile calls on the desk phone and move the calls back and forth between the mobile and the desk phone.

The new System Key Definition (with Key Type 'mobile') is available in the Top Soft Keys or Expansion Unit keys.

This functionality is available for Mitel 6930 and Mitel 6940 phones.

RSS Feeds

The RSS Feed application provides several channels of information to the user's phone display.

This function may be added to a user phone using the following the following key definition:

```
http://%CS_SOFT_KEY_URI%/rss.php
```

The URIs for the various RSS feeds are maintained in ".rss" files in /var/www/html/rss. There is a definition file for each category provided for the user.

User Guide

Pressing the RSS button provides a menu with 5 main categories:

- CNN (News)
- Weather
- ESPN (Sports)
- Movies
- Today (Today in history, quote of the day, and so on.)

RSS

Select:	View the selected channel
Move Up:	Move up in the list.
Move Down:	Move down in the list.
Exit:	Exit the application

RSS → Select

Pressing “Select” brings up a list of topics or articles from the selected channel. Each subsequent

Select:	View the selected topic or article.
Back:	Return to the previous page.

page provides the following functions:

Speed Dial 8/100

The OpEasy Speed Dial web application provides users with the ability to dial from their Clearspan® Speed Diallist. 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 Speed Dial 100.

Important: This application must know which Speed Dial type the user has provisioned. This is done by adding the parameter “is100” to the soft key URL with one of the following values:

- Is100=0 – Indicates Speed Dial uses Speed Dial 8
- Is100=1 – Indicates Speed Dial uses Speed Dial 100

Your System Administrator might provide two separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides Speed Dial using Speed Dial 100:

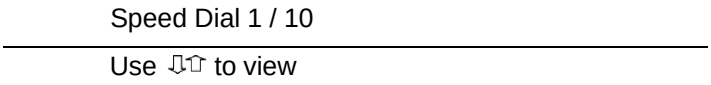
```
http://%CS_SOFT_KEY_URI%/cs.php?is100=1
```

User Guide

The Speed Dial 8 and 100 applications are available for assignment to any program key, soft key or hard key on a Mitel phone. However, the application’s capabilities on phones that have no soft keys are significantly reduced in that no adds, edits, moves or deletes are allowed. This section is divided to describe functionality for phones that have no soft keys vs. phones that have soft keys.

Speed Dial 8/100 Functionality for Phones with no Soft Keys

When the Speed Dial application is launched on a phone that has no soft keys, the user is presented a screen similar to the following that identifies the number of Speed Dial entries.



The list of Speed Dial entries may be scrolled through via the navigation keys. The user navigates to the required entry and presses the Line key to initiate a call to the selected speed dial number.

The speed dial entries are managed by editing the user on OpEasy and selecting the ‘Speed Dial 8’ or ‘Speed Dial 100’ service. There is no ability to add, delete or modify entries via the phone.

Speed Dial 8/100 Functionality for Phones with Soft Keys

When the Speed Dial application is launched on a phone that has soft keys, the user is prompted with the “Speed Dial” menu to select the entry to dial or modify. The list is displayed as a menu (the

user may move Up or Down the list to select an entry). If multiple pages exist the Page Up or Page Down buttons are visible (also, the page number and total pages are displayed, for example, 1/5). From this display the user has the following options:

Speed Dial

Dial:	Dial the selected name from the list.
Display:	Display phone number and name for the entrySelect
Options:	additional options (Add, Delete, etc.)
Cancel:	Exit the application.

Speed Dial → Dial

Pressing “Dial”, of course, dials the phone number for the selected entry.

Speed Dial → Display

Pressing “Display”, shows the phone number and the name assigned to the selected entry. The following functions are available on this screen:

Dial:	Dial the phone number for the selected entry.
Edit:	Edit the phone number for the selected entry
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Display → Dial

Pressing “Dial”, of course, dials the phone number for the selected entry.

Speed Dial → Display → Edit

Pressing “Edit” displays the speed dial entry and allows the user to modify the phone number. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry.
Space:	Add a space character to the entry.
abc:	Change from alpha to digits, etc.
Done:	Save changes and return the previous screen
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Display → Done

Pressing “Done” saves the change and return to the previous screen.

Speed Dial → Options

Pressing the “Options” button provides a menu with the following 4 options:

Add (add a new entry)

Edit (edit the selected entry)

Delete (delete the selected entry)

Move (move the selected entry to a new speed code)

The following functions are available on this screen:

Select:	Execute the selected option
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Options → Add

Selecting the “Add” function allows the user to add a new Speed Dial number to their list. The user is prompted to enter the following:

“Enter Speed Code”

“Enter Number”

“Enter Name”

Each of these screens provides the following functions:

Backspace:	Back space entered characters to correct the entry.
Done:	Save changes and return the previous screen.
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Options → Add → Done

Pressing “Done” saves the change and continues. After the name has been entered it returns to the previous screen.

Speed Dial → Options → Edit

Selecting the “Edit” function allows the user to modify the name for the selected speed dial entry. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry

Space:	Add a space character to the entry.
abc:	Change from alpha to digits, etc.
Done:	Save changes and return the previous screen.
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Options → Edit → Done

Pressing the “Done” button saves the change and return to the previous screen.

Speed Dial → Options → Delete

Selecting the “Delete” function allows the user to delete the selected speed dial entry. The user receives a confirmation screen asking if they want to delete the displayed speed dial entry. The user must press one of the following:

Yes:	Will delete the entry and return to the previous screen.
No:	Will just return to the previous screen without change.

Speed Dial → Options → Move

Selecting the “Move” function allows the user to modify the speed code for the selected speed dial entry. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry.
Done:	Save changes and return the previous screen.
Back:	Return to the previous page.
Cancel:	Exit the application.

Speed Dial → Options → Move → Done

Pressing the “Done” button saves the speed dial entry to the new code and returns to the previous screen.

Appendix E: Polycom Key Definitions

Call Fwd Off

#21

Call Fwd On

*21

Call Pickup

*98$Tinvite$

Call-Park

$Chold$*68$P(ParkNum)N4$$Tinvite$Call-Rtv

CallMRtrv

*88$P(ParkNum)N4$$Tinvite$

Conf

Direct Pickup

Empty

Favorites Line

Paging

Park

Park Rtrv

Pickup

Recent

Retrieve

Speed 8/Speed100

ZipDial/ZipDial2

Appendix F: Panasonic Key Definitions

Blind Transfer

Call Park

Used to park or retrieve a call in a preset parking zone.

Conference

Establishes a multi-party conversation.

Flash/Recall

Disconnects the current call and allows you to make another call without hanging up.

Incoming Call Log

Makes a call using the Incoming Call Log.

Intercom

Intercom Call

Intercom calls can be made between handsets/desk phones.

Menu

Mute

Disables your microphone while listening to the other party.

Noise Reduction

Original

Outgoing Call Log

Outgoing Log

Makes a call using the Outgoing Call Log.

Page

(Paging) Makes a voice announcement to the handsets or the desk phones simultaneously.

Park Rtrv

Pause

PhoneBook/PhoneBook

(PhoneBook) Makes a call using the PhoneBook.

Private Hold

Redial

Redials the last number

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