Clearspan[®] OpEasy[®] Advanced Provisioning Guide

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Contents

Revisio	on History	x
Overvie	ew	12
	Initial System-Level Setup	14
	Setting Up Users with Phones	
Phone	Templates	
	Viewing Phone Template Definitions	
	Viewing, Adding, or Editing Key Definitions Deleting a Key Definition	
	Creating a Mitel Phone Template	
	Configuring General Settings	23
	Assigning Lines	
	Configuring Soft Keys	
	Configuring Hard Keys	29
	Configuring Features	
	Configuring MiVoice Conference Phone Applications	31
	Configuring Extra Settings	31
	Editing a Mitel Phone Template	33
	Searching for Template Users	34
	Renaming a Phone Template	
	Copying a Phone Template	
	Deleting a Phone Template	
	Creating or Editing an AudioCodes Template Creating or Editing an AudioCodes MP-5XX/M500Li Template	
	Creating or Editing an AudioCodes MP-5XX/MS00El Template	
	Creating or Editing a Clearspan Communicator/Engage Template	
	Creating or Editing a Connect Mobile/Tablet Template	
	Creating or Editing a Grandstream WP820 Template	59
	Creating or Editing a Media5 Template	61
	Creating or Editing a Mitel DECT 112 Template	63
	Creating or Editing a Polycom Phone Template	65
	Key Definitions for Polycom Phones	66
	Phone Templates: Definitions for Polycom Phones	67
	Creating or Editing a Poly Edge-B Phone Template	79
	Creating or Editing a Poly VVX D230 Phone Template	
	Creating or Editing a UC ONE/CS Engage Mobile Template	
	Viewing or Editing Global Settings	92

	Editing System, Enterprise, and Group Extra Settings	95
	System Configuration File Extension	98
	System, Enterprise, and Group Mitel Phone Global Settings	99
	System, Enterprise, and Group Mitel MiVoice Conference Phone GlobalSettings	
	System, Enterprise, and Group Mitel Dect-112 Global Settings	
	System, Enterprise, and Group AudioCodes Global Settings	
	System, Enterprise, and Group AudioCodes MP5XX/M500Li/M800C Global Settings System, Enterprise, and Group Media5 Global Settings	
	System, Enterprise, and Group Clearspan Communicator Global Settings	
	System, Enterprise, and Group UC ONE/CS Engage Global Settings	
	System, Enterprise, and Group Clearspan Mobile/Tablet Global Settings	
	System, Enterprise, and Group Grandstream Global Settings	
	System, Enterprise, and Group Poly/Polycom Global Settings	114
	System, Enterprise, and Group Extra Settings for Polycom Phones	116
	System, Enterprise, and Group System Configuration File Extension Settings forPolycom Phones	117
	System and Enterprise Custom Rings for Polycom Phones	118
	Initialize MAC Address Capture for Polycom Phones	119
	System, Enterprise, and Group Global Settings for Poly Edge-B Phones	120
	System, Enterprise, and Group Global Settings for Poly VVX D230 DECT Phones	123
	System, Enterprise, and Group Extra Settings for Poly VVX D230	125
	Dial Plans	126
	AudioCodes	126
	AudioCodes MP-5XX/M500Li/M800C	127
	Grandstream Phones	129
	Media5	130
	Mitel Phones	131
	Mitel MiVoice	132
	Poly/Polycom	133
	Server Addresses	134
	Viewing EMS Addresses	134
	Viewing Conference Server Addresses	135
Phone Ma	nagement	136
	Viewing Phone Device Templates	
	Changing the Phone Template on a Device	138
	Phone Devices Table:	139
	Restarting Phone Devices	
	Adding a Phone Device	
	Modifying a Phone Device	146

	Deleting a Phone Device	147
	Replacing a Phone Device	148
	Assigning, Removing, or Reordering Users on a Phone Device	149
	Assigning New Users to a Phone Device	150
	Removing or Reordering Users on a Phone Device	154
User Pro	ofiles	155
	Adding a User Profile	
	Editing a User Profile	
	Copying a User Profile	
lleore	Creating a Trunk User Profile	
03613	User Licenses	
	Adding or Editing a User	
	Users Tab	
	Optional Tab	
	Phones Tab	
	Announcements Tab	
	Failure Error Messages Configuring Advanced User Features	
	Alternate Numbers	
	Authorization Codes	
	Busy Lamp Field (BLF)	
	Call Center Agent	
	Call Center Supervisor	
	Call Forward	
	Call Forward Selective	191
	Call Pickup	193
	Call Recording	194
	Clearspan Anywhere	195
	Fax Messaging	199
	Flexible Seating Guest	201
	Hoteling Guest	
	Hoteling Host	
	Hunt Group	

Integrated IM&P	
Music On Hold	
Priority Alert	
Privacy	211
Sequential Ring	
Simultaneous Ring	
Speed Dial 8	
Speed Dial 100	
Voice Mail	219
Voice Mail Distribution Lists	
Voice Mail Greetings	
User Settings	
New User E-mail Notification	
Deleting a User	
Special Instructions when Deleting a PING Client User	
Polycom Phone Users	
User Device Settings for Polycom Phones	
User General Settings for Polycom Phones	
Virtual Users	
Auto Attendants	
Planning and Testing Auto Attendants	233
Adding a New Auto Attendant	
Call Centers (Limited Provisioning)	237
Add a New Call Center	
Flexible Seating Hosts	241
Group Paging	244
Adding a new Group Paging	244
Hunt Groups	
Virtual User Inventory	
Import	
· Opening a Worksheet	
Editing the Worksheet	
Importing the Worksheet	
Viewing Import Results	
Importing the Worksheet with Multiple Enterprises	
Viewing Import Results with Multiple Enterprises	
Export	

	Exporting User Defined Fields	263
	Selecting Data to Export	266
	Viewing the Export Results	267
	Sample Spreadsheets for Export	267
	Selecting Data to Export with Multiple Enterprises	269
	Viewing the Export Results with Multiple Enterprises	270
Scheduling	an Import or Export	271
	Viewing Scheduled Imports and Exports	276
	Restarting a Scheduled Import or Export	279
	Deleting a Scheduled Import	279
Enterprise	Settings	280
	Adding Enterprise Departments	
	Modifying or Deleting Enterprise Departments	
	Selecting the Available Device Types for an Enterprise	
	Configuring Custom Device Type Tags for an Enterprise	282
	Adding Emergency Call Notification for selected Enterprise	
	Adding Enterprise Music on Hold Profiles	
	Modifying or Deleting Enterprise MOH Profiles	
	Configuring Custom Device Type Tags	
	Adding Phone Numbers to an Enterprise	
	Viewing or Modifying the Enterprise Phone Numbers	
	Adding a Service Pack	
	Modifying or Deleting a Service Pack	
	Authorizing Groups to Use a Service Pack	
	Configuring the Voice VPN	
	Viewing and Searching Voice VPN Entries	
	Configuring Voice VPN Settings	
	Adding Voice VPN Entries	
	Editing Voice VPN Entries	290
	Deleting Voice VPN Entries	291
Group Setti	ings	293
	Adding or Deleting Group Announcements	293
	Adding or Deleting Group Authorization Codes	293
	Configuring Call Pickup Groups	295
	Configuring Group Departments	295
	Configuring Custom Device Type Tags for a Group	295
	Configuring Emergency Call Notification for a Group	
	Configuring Target capacity for a paging group	296
	Configuring Music On Hold (MOH) for a Group	296
	Configuring Night Forwarding	297
	Configuring Phone Directory Management	297

Adding a Phone Directory Server	
Testing LDAP	
Editing a Phone Directory Server	
Deleting a Phone Directory Server	
Viewing or Assigning Group Phone Numbers	298
Assigning Phone Numbers to a Group	299
Configuring a Predefined Speed Dial 8 List	
Configuring a Predefined Speed Dial 100 List	
Assigning Predefined Speed Dial Lists to Users	
Configuring Virtual Extensions	
911 Services	
ERS ERL Management	
Viewing and Searching ERS ERL Records	
Adding an ERS ERL Record	
Editing or Deleting an ERS ERL Record	
Administrative Tools	
Managing OpEasy Licenses	
Licensing Allocation for Users and Third-party Phones	
Configuring License Allocations	
Managing Unique IDs	
Login Management	310
Adding or Modifying an Administrator Account	
Modifying Administrator Login Rules	
Common Tasks	315
Set Up a New Phone for a New User	
Setting Up a New Mitel Phone	
Setting Up a New Polycom Phone	
Replace a Physical Phone with a Different Type of Phone	316
Disassociate a Clearspan Device from a Physical Phone	
Disassociate a Clearspan Device from a Physical Phone Reuse a Clearspan User / Device and Reset Voicemail	
Reuse a Clearspan User / Device and Reset Voicemail	317 317
Reuse a Clearspan User / Device and Reset Voicemail	317 317 317
Reuse a Clearspan User / Device and Reset Voicemail Close User Accounts Re-open User Accounts	
Reuse a Clearspan User / Device and Reset Voicemail Close User Accounts Re-open User Accounts Appendix A: Microsoft™ Teams Sync	
Reuse a Clearspan User / Device and Reset Voicemail Close User Accounts Re-open User Accounts Appendix A: Microsoft™ Teams Sync Appendix B: OpEasy Setup for Panasonic Phones	
Reuse a Clearspan User / Device and Reset Voicemail Close User Accounts Re-open User Accounts Appendix A: Microsoft™ Teams Sync Appendix B: OpEasy Setup for Panasonic Phones User Profiles for Panasonic Phones	

Phone Templates: Definitions for Panasonic Phones	
Panasonic Phone Users	
User Device Settings for Panasonic Phones	334
User General Settings for Panasonic Phones Installing Panasonic Phones	
Appendix C: OpEasyand Clearspan Setup for Cisco Phones	
Cisco Phone Support	
User Profiles for Cisco Phones	339
Clearspan Setup for Cisco Phones	339
Creating the System Device Management Tag Set	339
Modifying Firmware Version for a Group	339
Configuration 1-Minute Delay	340
BLF Configuration	340
Installation Instructions	340
Installer Setup	
Resetting a Password	341
Phone Templates for Cisco Phones	342
Key Definitions for Cisco Phones	
System, Enterprise, and Group Global Settings for Cisco Phones	344
System, Enterprise, and Group Extra Settings for Cisco Phones	
System, Enterprise, and Group System Configuration File Extension Settings for Cisco Phones	348
System, Enterprise, and Group Dial Plans for Cisco Phones	349
Phone Templates: Definitions for Cisco Phones	349
Cisco Phone Users	357
User Device Settings for Cisco Phones	357
User General Settings for Cisco Phones	357
Phone Management for Cisco Phones	
Installing Cisco Phones	
Appendix D: Mitel Key Definitions	
ACD (Auto Call Distribution)	
ACD Audio Prompts	
User Guide	
Call Mark	
User Guide	
CLID Block	361

User Guide	
Directory Lookup	
LDAP Servers and Credentials	
Directory Search	
Call Logs	
User Guide	
Mobile	
RSS Feeds	
User Guide	
Speed Dial 8/100	
User Guide	
Appendix E: Polycom Key Definitions	
Call Fwd Off	
Call Fwd On	
Call Pickup	
Call-Park	
CallMRtrv	
Direct Pickup	
Empty	
Favorites Line	
Retrieve	
Appendix F: Panasonic Key Definitions	
Blind TransferCall Park	
Conference	
Flash/Recall	
Incoming Call Log	
Intercom Intercom Call	
MenuMute	
Noise ReductionOriginal	
Page	
Park RtrvPause	
Private HoldRedial	

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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:

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• 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.

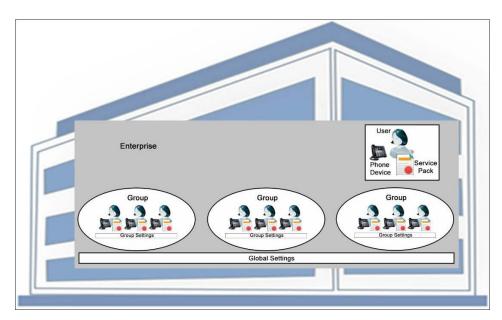


Figure 1 - Provisioning Hierarchy

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:

 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 <u>Phone</u> <u>Templates</u> section.

Clearspan OPCOSy	System -> JAZZ	
SKIP NAV MAIN MENU ABOU	T HELP LOGOUT PROVISIONING REPORTING ADMIN TOOLS DO NOT SELL MY PE	ER SONAL INFORMATION
Provisioning		
Users	Provisioning Choose a Provisioning function.	
 Virtual Users Auto Attendants Call Centers 	Users Add a new user or search for a list of users to edit or delete.	Virtual Users Add a new virtual user or search for a list of virtual users to edit or delete.
Flex Seating Hosts Group Paging Hunt Groups Virtual User Inventory	Import Import or modify a list of users or other information from a worksheet.	Export Export a list of users and other information into a worksheet.
Import	Scheduling Setup imports and exports to run now or on a pre-defined schedule.	Phone Management Add a new phone or search for a list of phones to edit or delete.
Export	Phone Templates	User Profiles
Scheduling	Build or display phone templates.	Add or change the profiles used when creating users.
Phone Management Phone Templates Definitions Key Definitions	Enterprise Settings Modify or display the settings for an Enterprise.	Group Settings Modify or display the settings for a Group.
Key Definitions Global Settings * Server Addresses EMS Conference		

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.

opeasu			
Internet Construction Constru-	a set a send a second with the second s	A 2012 BEACE AND AN PERSONAL ADDRESS OF	
Provisioning	Provisioning Chical & Provisioning function Overs	16	ortual Osers
Autor Addresses Call Consens First Strateg Finants Consp. Fingma Hast Consept What Laser Issuedian	Add a two pair to said the a still of annu to other prevailer have a set	Global Extra Settings Global Settings	
inget Expot Intenting Proce Hanagement	Scheduling Senar republicant equals to can now or on a pre-defined with Phane Templates Sould of Edging (Prove templates	Template Extra Settings Template Definitions	
Press Templany Orbitalism Orbitalism Orbitalism Orbitalism Orbitalism Orbitalism Orbitalism Orbitalism Orbitalism	Enterprise Enterprise startly of Dayter the settings for an Enterprise	User Profiles User Information Service Packs	Configurat File

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:

EZ

- 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.

Template Definitions Display and configure phone template definitions. ок
Template Level: Enterprise and Group
Enterprise: (Select Enterprise)
Group: (Select Group)
Device Type: (Select Device Type) -
Phone Model:

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.

Template Definit	ions					
Display and configure ph		ns.				
ОК						
Template Level: Enterpr	rise and Group					
Enterprise: Canine Cent	ter Training and Pet	Store -				
Group: Shop						
Device Type: Mitel 6920	(DMS)					
Phone Model:Mitel (Aas						
Rebuild Status: Refres	h Group: None pen	ding. Enterprise: Non	e pending.			
New Template Level: (S	elect Level)					
New Template Name:						
New Template Name:						
Add Template						
Add Template Templates						
Add Template	Level ¢	Description	٥	E	dit Copy	Delete
Add Template Templates Name	Level ⇔ Group	Description	٥		dit Copy <u>dit Copy</u>	Delete

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.

)isplay and configure sy	stem and per enterprise keys.							
OK Cancel	Apply Add							
Enterprise: (System Ke	iys)							
hone Manufacturer:	litel (Aastra)							
Rebuild Status: Refre	sh System: None pending.							
ey Definitions								
Туре	Label \diamond	Value o	Idle	Connect	Incoming	Outgoing	Busy	Delete
BLF/List	BLF List		Ø		Ø	Ø	Ø	Delete
Call Forward	Call Fwd		\bigcirc	\checkmark	\checkmark	\bigcirc	\bigcirc	Delete
Callers	Call Log		\checkmark	Ø	\checkmark	\checkmark	\checkmark	Delete
XML	Call Mark	http://%CS_SOFT_KEY_URI	\bigcirc	Ø			\bigcirc	<u>Delete</u>
Speeddial	Call Park	%BWFAC-CALL-PARK-1%	0	Ø	0	0	0	Delete
Speeddial	Call Pull	%BWFAC-CALL-RETRIEVE-1	\bigcirc	\checkmark	\bigcirc	\checkmark	\bigcirc	Delete
Speeddial	Call Rtm	%BWFAC-CALL-RETURN-1%	Ø	Ø	Ø	Ø	Ø	Delete
XML	Callers	http://%CS_SOFT_KEY_URI	\bigcirc	\bigcirc	\bigcirc	\odot	Ø	Delete
Speeddial	CLID Block	%BWFAC-CLID-DELIVERY-B	Ø	Ø	Ø	Ø	Ø	Delete
	COT	%BWFAC-COT-1%	Ø	Ø	Ø	Ø	Ø	Delete
Speeddial			-	-	Ø	0	Ø	Delate
Speeddial Speeddial	Dir Pickup	%BWFAC-DIRECTED-CALL-F	\bigcirc	\checkmark		\checkmark		Delete

Figure 5 - Kev Definitions Page - Kevs

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

Key Definitions									
			(1-24 of 24)	· · · 1 ·· · 25 ··)				
Туре	Label	Valu	JC	Idie	Connect	Incoming	Outgoing	Busy	Delete
None				0	0	0	0	0	Delete
Empty				0	0	0	0	0	Delete
BLF/List ~	BLF List			Ø	Ø	Ø	0	Ø	Delete

Figure 6 - Key Definition Row Added

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

Туре	Label \diamond	Value	¢ Idie	Connect	Incoming	Outgoing
Speeddial	AutoDial		Ø	0	Ø	Ø
BL F/L ist	BLF List		Ø	Ø	Ø	Ø
None Auto Call Distribution	Call Fwd		Ø	Ø	Ø	Ø
BLF	Call Log		Ø	Ø	Ø	Ø
BLF/List BLF/Xfer	Call Mark	http://%CS_SOFT_KEY_UF	Ø	Ø	Ø	Ø
Call Forward	Call Park	#68	0	Ø	0	0
Callers Conference	Call Pull	%BWFAC-CALL-RETRIEVI	Ø	Ø	Ø	Ø
Directed Call Pickup	Call Rtm	%BWFAC-CALL-RETURN-	Ø	Ø	Ø	Ø
Directory	Calls	http://%CS_SOFT_KEY_UF	Ø	Ø	Ø	Ø
Do Not Disturb Empty	CLID Block	%BWFAC-CLID-DELIVERY	Ø	\odot	0	Ø
Flash	СОТ	%BWFAC-COT-1%	Ø	Ø	0	Ø
Line Mobile	Dir Pickup	%BWFAC-DIRECTED-CAL	Ø	Ø	Ø	Ø
Park	DND		Ø	0	0	Ø
Phone Lock	LDAP Dir	http://%CS_SOFT_KEY_UF	Ø	Ø	Ø	Ø
Pickup Services	Line		Ø	Ø	Ø	Ø
Speeddial	Park Rtrv	%BWFAC-CALL-PARK-RE	Ø	0	Ø	Ø
Speeddial/Conf Speeddial	Pickup	%BWFAC-CALL-PICKUP-1	Ø	Ø	Ø	Ø

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.





- 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.





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

Creating a 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.

Template Definitions Display and configure phone template definiti OK Template Level: Enterprise and Group	ons.				
Enterprise: Bulk Provisioning Lab Val, Inc Group: Group_G - Group, Gewel Device Type: Mitel 6930 (DMS) Phone Model: Mitel (Aastra) 6930 Rebuild Status: Refresh Group: None New Template Level: Enterprise New Template Name: Executive 6930	_	terprise: None pending.			
Templates Name \$	Level	Description ◇	Edit	Сору	Delete
<default></default>	Group		<u>Edit</u>	<u>Cop</u> y	
Mitel_6930_Ent	Enterprise	Test Screen Saver	Edit	Copy	Delete
Mitel_6930_Grp	Group	Test Screen Saver	Edit	Copy	<u>Delete</u>
Mitel_6930_HardKeys	Enterprise	Hard Keys Configures	<u>Edit</u>	Copy	Delete

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.

Template Add Create a new phone template. CW: Center in webpione template. CW: Center in webpione template. Creater in webpione. Restart Phones Not:: Restart Phones Not:: Creater in webpione. Creater in webpione. Restart Phones Not:: Creater in webpione. Creater in webpione. <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>							
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Port (No Encryption):	Use DNS SRV Look	up					
Port (Encryption):		up					
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required. Encryption Certificate File: Charle Wff: Applies to W phone models only. Wif Region: USA Display Settings Background Image URL: I dide Screen Mode: Primary Screen Mode Screen Saver Image: Charles Configure Primary Screen Mode Charles Configure Primary Prim							
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Background Image URL:	Wifi Region: USA						
Background Image URL:		_					
Idle Screen Mode: Primary Screen Mode General Screen Font Color: Ellue General Screen Saver Image: Control Screen							
Idle Screen Font Color. Blue Screen Font Color. Screen Saver Image:							
Screen Saver Image:	Idle Screen Mode: Pri	mary Screen Mode					
	Idle Screen Font Color:	Blue					
Screen Saver Walt Time: 0							
	Screen Saver Wait Time	: 0					

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.

- 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.
- Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
- 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.

	ate Add					
ОК	Cancel Apply					
Template Lev Enterprise: E Device Type: Rebuild Statu		rise: None pending.				
General	hones NOTE: If Re	Soft Keys	cked, the template wi	II not take effect until Hard Keys	a resync or when th Features	e phone is rebooted. Extra Settings
-	ult or Line Label text: {Ext}, {N o Clearspan Line Position		(LastName}			
Phone Line	Clearspan Line Position	Phone Key	Line Label			Ring
1	Position 1	(Unassigned)	Extension)		Default
2	Position 1	(Unassigned)	Extension			Default
3	Position 2	(Unassigned)	Extension			Default
4	Position 2	(Unassigned)	Extension			Default
5	(Unassigned) 🔻	(Unassigned)				
6	(Unassigned)	(Unassigned)				

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}".

Template Ac Create a new phone ter OK Cancel		
	ioning Lab Val, Inc up, Gewel T 112 (DMS) esh Group: None pending.	
C Restart Phones	NOTE: If Restart Phones is unchecke phone is rebooted.	d, the template will not take effect until a resync or when the Extra Settings
Line Label: Extension	el text: {Ext}, {Number}, {FirstName}, {L	
Handset	Clearspan Line Position	
1 2	Position 1	

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.

Z

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.

Template Ac	bb					
Create a new phor						
OK Canc						
Template Name:E	xecutive 6930					
Template Level:G	roup					
Enterprise:Canine	Center Training and F	Pet Store				
Group:Shop						
Device Type:Mitel	6930 (DMS)					
Rebuild Status:	Refresh Group: None	pendina.				
ORestart Phones			emplate will not take effect	t until a resync or wher	n the phone is rebooted	
General	Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings
Soft Keys						
Key		Lat	bel		Ĩ	Phone Line
1	Call Fwd (System)				Line 1	
					Line	

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.

Create a new ph	.dd one template.					
OK Can	cel Apply					
Template Name:	Executive 6930					
Template Level:0	Group					
Enterprise:Canin	e Center Training	and Pet Store				
Group:Shop						
Device Type:Mite	el 6930 (DMS)					
Second Researcher Frank	and the second					
Rebuild Status: ORestart Phone		None pending. start Phones is unched	ked, the template will r	not take effect until	a resync or when the	he phone is rebooted
and a street			ked, the template will r	not take effect until Hard Keys	a resync or when the Features	he phone is rebooted Extra Setting
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Restart Phone	s NOTE: If Res	start Phones is unchec			and the state of the	
Restart Phone	s NOTE: If Ret	start Phones is unchec	Top Soft Keys		and the state of the	Extra Setting
⊖Restart Phone General Hard Keys	s NOTE: If Rea	start Phones is unchec	Top Soft Keys Label er Default>		and the state of the	Extra Setting
⊖Restart Phone General Hard Keys Hold (hardkey1)	s NOTE: If Res	Soft Keys	Top Soft Keys Label er Default>		and the state of the	Extra Setting
Restart Phone General Hard Keys Hold (hardkey1) Redial (hardkey2)	xey y5)	Soft Keys Annufactur	Top Soft Keys Label er Default> er Default>		and the state of the	Extra Setting

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.

Create a new phone template. OK Cancel Apply Template Name: Executive 6930 Template Level: Enterprise Enterprise: Bulk Provisioning - Lab Val, Inc Device Type: Mitel 6930 (DMS) Rebuild Status: Referent Enterprise: NORE pending. O Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until General Lines Soft Keys Features Disable Missed Calls Msg Conference Server: Conference Server: (Use Global Settings) T			
OK Cancel Apply Template Name: Executive 6930 Template Level: Enterprise Enterprise: Bulk Provisioning – Lab Val, Inc Device Type: Mitel 6930 (DMS) Rebuild Status: Refresh Enterprise: Ince pending. Restart Phones NOTE: If Restart Phones NOTE: General Lines Soft Keys Top Soft Keys Features Disable Missed Calls Msg			
Template Name: Executive 6930 Template Level: Enterprise Enterprise: Bulk Provisioning – Lab Val, Inc Device Type: Mitel 6930 (DMS) Rebuild Status: Refresh Enterprise: None pending. Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until General Lines Soft Keys Top Soft Keys Features Disable Missed Calls Msg			
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Device Type: Mitel 6930 (DMS) Rebuild Status: Refresh Enterprise: NoTE: If Restart Phones NOTE: General Lines Soft Keys Top Soft Keys Features Disable Missed Calls Msg			
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Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until General General Lines Soft Keys Top Soft Keys Features Disable Missed Callis Msg			
General Lines Soft Keys Top Soft Keys Features Disable Missed Calls Msg			
Disable Missed Calls Msg	a resync or when the phone	e is rebooted.	
Disable Missed Calls Msg	Hard Keys	Features	Extra Settings
Conference Server: (Use Global Settings)			
Clearspan Directory Type			
C Enterprise			
C Enterprise Common			
Group			
Group Common			
O Personal			
Static Call Park/Pickup: (Use Global Setting)			
Enable Mobile Link Directory			
Name for Directory:			

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.

EZ |



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.

Template A	dd					
Create a new phone t	emplate.					
OK Cancel	Apply					
Template Name: Exe	ecutive 6930					
Template Level: Ente						
Enterprise: Bulk Prov Device Type: Mitel 69	visioning Lab Val, Inc 120 (DMS)	c				
_		: None pending.				
] Restart Phones		t Phones is unchecke	d, the template will no	t take effect until a res	ync or when the phon	e is rebooted.
General	Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings
						///
Choose File to Uplo	ad Extra Settings Con	tent				
Upload File						

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.

Template Definitions: Extra Settings Audit Results

Display of the results of an audit of the Extra Settings to determine if any content configured in Extra Settings is in conflict with settings configured in the Template Settings:

ок

Enterprise: SystemValidation

Template Name: Logistics 6930

Template Level: Enterprise

Device Type: Mitel 6930 (DMS)

The following Template Extra Settings content is OVERRIDING the Template configuration settings. The specified content should be removed from the Template Extra Settings:

Extra Settings Audit Conflicts idle screen mode: 1

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.
- 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.

Template Modify: Rebuild Configuration Files All devices in the Group that use this Template are affected by modifying the template. Click "Save and Rebuild" to save the Template changes and rebuild all configuration files using this template. Click "Cancel" to return without saving or rebuilding.				
Cancel Save and Rebuild				
The following areas may require Phone Device configuration files to be rebuilt as a result of this change:				
Template Name: Jazz 6865i				
Template Level: Group				
Device Type: Aastra 6865i (DMS)				
Enterprise: SystemValidation System Validation				
Group: JazzTest JazzTest				

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.

Template Modi Change an existing ph								
OK Gancel Apply								
Template Name:Jazz 6867i								
Template Level:Group								
Enterprise:SystemValidation System Validation								
Group:JazzTest JazzTest								
Device Type:Aastra 6867i (DMS)								
ORestart Phones	NOTE: If Restart Phon	es is unchecked, the temp	plate will not take effect unti	I a resync or when the p	phone is rebooted.			
General	Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings	Template Users	
Usage Displayed By:								
O User								
Oevice								
Enter Search Criteria:								
(All Template Assignments) Contains: - + Search								
Template Devices								
-								
Device		Device	Level	MA	MAC Address			
6867i x5007			Group	a a	000	085D4341FE		
_	Aastra6867iDMS-5015site1			Group		00000005015		
Aastra6867iDMS-5017site1			Group			00000005017		
Aastra6867iDMS-5019si	ite1		Group		000	00000005019		

Figure 20: Searching for Template Users

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

	Notes:				
đ	 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.

Template N Change an existing pr OK Cancel							
Template Name: Mite Template Level: Grou Enterprise: Bulk Prov Group: Group_G - G Device Type: Mitel 69: Rebuild Status: R	p sioning Lab Val, Inc oup, Gewel	pending.					
Restart Phones	NOTE: If Restart Pr	iones is unchecked, th	ne template will not take	effect until a resync or	when the phone is rebo	oted.	
General	Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings	Template Users
Name: Mitel_6930_	Grp						
Description: Test So	reen Saver						
General Settings							
Type of Expansion Mo	dule: None						
Expansion Modules:	0 🔻						

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.

Templates					
		(1-2 of 2) 🔤 🔤 🚺 🔤 🔤 😰			
Name ¢	Level	Description	Edit	Сору	Delete
<default></default>	Group		<u>Edit</u>	<u>Copy</u>	
Jazz 6867i(Rename Failed <u>:</u> <u>Template In-Use</u>)	Group		<u>Edit</u>	<u>Copy</u>	<u>Delete</u>

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.
- Choose the **Device Type** from the drop-down list. A list of Templates that were created for this device type is displayed.
- 7. For the template you want to copy, click the **Copy** link. The Template Copy page opens.

Template Copy
Copy an existing phone template.
OK Cancel
Copied Template
Template Name: Jazz-Mitel6930-W
Template Level: Group
Enterprise: SystemValidation System Validation
Group: JazzTest JazzTest
Device Type: Mitel 6930 (DMS)
Phone Model: Mitel (Aastra) 6930
Description:
New Template
Template Name:
Jazz-Mitel6930-W
Template Level Group
Enterprise: PlanoLab
Group: Legacy 💌
Device Type: Mitel 6930 (DMS)
Phone Model: Mitel (Aastra) 6930
Description:
Mitel 6930W SIP desk phone with 4 AutoDial keys
Replace Existing Template:

Figure 23: Template Copy Page – New Template Section

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

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



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

Deleting a Phone Template

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

Templates

Name ¢	Level ¢	Description \diamond	Edit	Сору	Delete
<default></default>	Group		Edit	Copy	
Ent_67i	Enterprise	Test	Edit	Copy	Delete
Grp_67i	Group	Test	Edit	Copy	Delete

End of Templates



- 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.

Templates

Name ≎	Level ¢	Description \diamond	Edit	Сору	Delete
<default></default>	Group		Edit	Сору	
2901 example	Enterprise		Edit	Copy	Delete
Operations - Mobile(Delete Pending)	Group				
polyd230_2	Group	st2	<u>Edit</u>	Copy	Delete

End of Templates

Figure 25 - Template - Delete Pending

Template Definitions						
Display and configure phone ter	mplate definitio	ins.				
ок						
Femplate Level: Enterprise and	d Group					
Enterprise: Canine Center Tr	aining and Pet	Store				
Group: Shop						
Device Type: Aastra 6867i (DM	IS)					
Phone Model:Mitel (Aastra) 680						
Rebuild Status: Refresh Gr	oup: None per	iding. Enterprise: N	lone pending.			
New Template Level: (Select L	evel)					
New Template Name:						
ton remplate Hane.						
Add Template						
Templates						
	Level	Description				
Name				T-AA		
Name ¢				Edit	Сору	Delete
	¢ Group		Ŷ	Edit <u>Edit</u>	Copy Copy	Delete
• • • • • • • • • • • • • • • • • • •	0	Test		200120		Delete Delete

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).

Template Mo Change an existing	and the second se						
OK Cancel	Apply						
Template Name:Jaz	z 6867i						
Template Level:Gro	up						
Enterprise:SystemV	alidation - System Vali	dation					
Group:JazzTest Ja	azzTest						
Device Type:Aastra	6867i (DMS)						
Rebuild Status:	Refresh Group: None p	ending					
ORestart Phones	NOTE: If Restart Ph	ones is unchecked, the temp	plate will not take effect unt	il a resync or when the p	phone is rebooted.		
General	Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings	Template Users
Usage Displayed By O User Device	r.						
Enter Search Criteri	a:						
(All Template As	signments) Co	ntains:					+ Search
Template Devices							
Device		¢	Device	: Level o	M	AC Address	
6867i_x5007			Group	1	00	085D4341FE	
Aastra6867iDMS-501			Group			0000005015	
Aastra6867/DMS-501			Group			0000005017	
Aastra6867iDMS-501	9site1		Group		00	0000005019	

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.

Template Add			
Create a new phone temp	plate.		
OK Cancel	Apply		
Template Name:Elevator	MP112		
Template Level:Enterprise	e		
Enterprise:SystemValidat	tion System Validation		
Device Type:AudioCodes	MP112FXS (DMS)		
Rebuild Status: Refresh	Enterprise: None pending.		
ORestart Phones NC	TE: If Restart Phones is unchech	ked, the template will not take effect u	until a resync or when the phone is rebooted.
General	Ports	Groups	Extra Settings
Name:			
Elevator MP112			
Description:			
Encryption Certificate File	3.		
AudioCodes Settings			
OSurvivable Mode:			
	Global Settings)		
⊘3-Way Conference: Conference Server: (Use			
⊘3-Way Conference: Conference Server: (Use ⊘Message Waiting Indica			
⊘3-Way Conference: Conference Server:〔(Use ⊘Message Waiting Indica ⊖FAX Support:	ator:		
Conference Server: (Use OMessage Waiting Indica DFAX Support:	ator:		
 3-Way Conference: Conference Server: (Use Message Waiting Indica FAX Support: Voice Quality Monitorin External Proxy: External Proxy Use Glo 	ator:		
 3-Way Conference: Onference Server: (Use Message Waiting Indica FAX Support: Voice Quality Monitorin External Proxy: External Proxy Use Glo Use Global Settings 	ator:		
 3-Way Conference: Onference Server: (Use Message Waiting Indica FAX Support: Voice Quality Monitorin External Proxy: External Proxy Use Glo Use Global Settings 	ator:		
 ⊘3-Way Conference: Conference Server: (Use ⊘Message Waiting Indica ○FAX Support: ○Voice Quality Monitorin External Proxy: ⊘External Proxy Use Glo Use Global Settings Proxy Address 	ator:		

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.

Template Add Create a new phone t OK Cancel	emplate. Apply			
Template Name:Eleva	ator MP112			
Template Level:Enter	prise			
Enterprise:SystemVal	idation System Validat	tion		
Device Type:AudioCo	des MP112FXS (DMS)			
Rebuild Status: Ref	fresh Enterprise: None	pending.		
	IOTE: If Restart Phones hone is rebooted.	is unchecked, the templa	te will not take effe	ct until a resync or when the
General	Ports	Groups		Extra Settings
Port Definitions				
Port	Туре	Group Number	Call Waiting	Caller ID
1	FXS	1 -		
2	FXS	1 -	\bigcirc	\bigcirc
End of Ports				

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

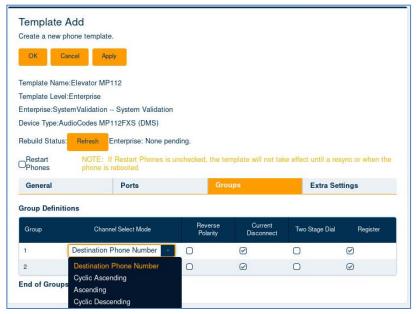


Figure 30: Template Add – Groups for AudioCodes 43

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.

Template Add		
Create a new phone template. OK Cancel Apply		
Template Name: M500Li-8 Small Office Template Level: Enterprise Enterprise: SystemValidation System Validation Device Type: AudioCodes M500Li-8FXS (DMS) Rebuild Status: Refrest Enterprise: None pending.		
Restart Phones NOTE: If Restart Phones is unche	cked, the template will not take effect until a resync or when the	phone is rebooted.
General	Ports	Extra Settings
Name: M500Li-8 Small Office		
Description:		
General Settings		
Time Zone: (Use Global Settings)		
Outbound Proxy:		
✓ Use Global Settings		
Outbound Proxy 1		
Outbound Proxy 2		
Outbound Proxy 3		
Outbound Proxy 4		
Outbound Proxy 5		
Port (No Encryption):		
Port (Encryption):		
Encryption (TLS/SRTP): (Use Global Settings)	WARNING: Configure encryption in the network before setting	Encryption to Required.
Encryption Certificate File:		
AudioCodes M500Li Settings		
Admin Access on LAN Port: Enabled		
Voice Quality Monitoring		
Conference Server: (Use Global Settings)		
Firmware Update: (Use Global Setting)		
Firmware Update Time:		
Firmware Version:		
✓ Use Global Settings		

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.

Create a new p	hone template.			
ОК Са	ncel Apply			
Template Name	e:M500Li-8 Small Office			
Template Level	:Enterprise			
Enterprise:Syst	emValidation System Va	alidation		
Device Type:Au	dioCodes M500Li-8FXS (DMS)		
Rebuild Status:	Refresh Enterprise: N	None pending.		
OPhones	phone is rebooted.			
General		Ports	Extra Setti	ngs
Port Definition				
Port Definition	Port	TEL Profile	Call Waiting	Caller ID
Port Definition				
Port Definition	Port	TEL Profile	Call Waiting	Caller ID
Port Definition Port	Port FXS	TEL Profile	Call Waiting	Caller ID
Port Definition Port 1 2	Port FXS FXS	TEL Profile Voice	Call Waiting	Caller ID I
Port Definition Port 1 2 3	Port FXS FXS FXS	TEL Profile Voice - Voice - Voice -	Call Waiting	Caller ID C C C C C C C C C C C C C
Port Definition Port 2 3 4	Port FXS FXS FXS FXS	TEL Profile Voice - Voice - Voice -	Call Waiting C C C C C C C C C C C C C	Caller ID V V V V V
Port Port 2 3 4 5	Port FXS FXS FXS FXS FXS	TEL Profile Voice - Voice - Voice - Voice - Voice -	Call Waiting	Caller ID C C C C C C C C C C C C C

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.

Template Add					
Create a new phone template.					
OK Cancel Apply					
Template Name: Lab M800C					
Template Level: Enterprise					
Enterprise: SystemValidation System					
Device Type: AudioCodes M800C-MSBF Rebuild Status: Refresh Enterpris	-4FXS-1PRFLIE(DMS) e: None pending.				
		he template will not tak	e effect until a resync or when th	e nhone is rehooted	
_		to tomplate with not tak			
General	Ports		PRI and Trunk Pilot Settings	Extra Set	lings
Name: Lab M800C					
Description:					
General Settings					
Time Zone: (Use Global Settings)					
Outbound Proxy:					
 Use Global Settings 					
Outbound Proxy 1					
Outbound Proxy 2					
Outbound Proxy 3					
Outbound Proxy 4					
Outbound Proxy 5					
Port (No Encryption):					
Port (Encryption):					
Encryption (TLS/SRTP): (Use Global S	ettings) WAR	NING: Configure encry	ption in the network before settin	g Encryption to Required	
Encryption Certificate File:					
AudioCodes M800C Settings					
Admin Access on LAN Port 1: Enabled					
Admin Acess on LAN Port 2: Enabled					
Admin Access on LAN Port 3: Enabled					
Admin Access on LAN Port 4: Enabled					
O Voice Quality Monitoring					
Conference Server: (Use Global Settir	gs) 👻				
Firmware Update: (Use Global Setting)					
Firmware Update Time:)				
Firmware Version:					
Ø Use Global Settings					
Tones File:					
Use Global Settings					

Figure 33 - M800C Template Add

On the Ports tab,

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

Template Ad			
OK Cance			
Template Name:La	ab M800C		
Template Level:En	terprise		
Enterprise:System	Validation System Validation		
Device Type:Audio	Codes M800C-MSBR-4FXS-1PF	RI-LTE(DMS)	
Rebuild Status:	Refresh Enterprise: None pendi	ng.	
O ^{Restart} Phones	NOTE: If Restart Phones is und when the phone is rebooted.	shecked, the template will not take e	effect until a resync or
General	Ports	PRI and Trunk Pilot Settings	Extra Settings
Port Definitions			
Port	TEL Profile	Call Waiting	Caller ID
1	Voice	\bigcirc	Ø
2	Voice	Ø	\oslash
3	Voice	Ø	Ø
4	Voice	Ø	\bigcirc
End of Ports			

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 <u>opposite</u> 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.

General	Ports	PRI and Trunk Pilot Settings	Extra Settings
PRI and Trunk Pilo	ot Settings		
PRI Settings			
Channel Select Mod	le: channel-cyclic-ascendin	g Y	
First B-channel: Ch	annel 1		
Last B-channel: Ch	annel 23 🕞		
Framing Type: t1-fr	aming-esf-crc6		
Line Code: b8zs	÷.		
NW User Side: net	work-side		
Protocol Type: T1 N	NI2 ISDN		
Clock Mode: recove	ered 💌		
Tel Profile: Voice	÷		
Clock Source: netw	rork 👻		
Trunk Pilot Setting	<u>js</u>		
Line/Port's User:			
SIP Auth ID:			
SIP Auth Password			

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.

Template Add			
Create a new phone template.			
OK Cancel Apply			
Template Name:CSEngage Standard	d with TLS		
Template Level:Group			
Enterprise:SystemValidation Syster	m Validation		
Group:JazzTest JazzTest			
Device Type:Business Communicator	- PC		
Rebuild Status: Refresh Group: N	None pending.		
General	Features	Extra Settings	
Name:			
CSEngage Standard with TLS			
Description:			
General Settings Outbound Proxy: Outbound Proxy Use Global Setting Use Global Settings Outbound Proxy Address	js		
Use DNS SRV Lookup			
Use DNS SRV LookupPort (No Encr Non Encryption Port	yption):		
Port (Encryption):			
Encryption (TLS/SRTP): Required	14 C		
WARNING: Configure encryption in t	the network before setting End	cryption to Required.	
Desktop Type Desktop Type: © Clearspan Engage Desktop ()	Clearspan Communicator De	esktop	

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

2

- Call Center
- Call Pickup
 - o Call Pickup Blind
 - o Call Pickup Directed
- Call Pull
- Call Recording
- Call Transfer
- Conference
 - o Max Parties; 4 15
 - Show Participant List
- Message Waiting Indicator
- Voicemail
 - o 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.

Template Add			
Create a new phone template.			
OK Cancel Apply			
Template Name:CSEngage Mobile Star	ndard		
Template Level:Group			
Enterprise:SystemValidation System	Validation		
Group:JazzTest JazzTest			
Device Type:Connect - Mobile			
Rebuild Status: Refresh Group: No	ne pending.		
General	Features	Extra Settings	
Name:			
CS Mobile Standard			
Description:			
General Settings Outbound Proxy: @Use Global Settings			
Outbound Proxy Address			
OUse DNS SRV Lookup			
Port (No Encryption):			
Port (Encryption):			
Encryption (TLS/SRTP): (Use Global S WARNING: Configure encryption in the	the second second second second	ncryption to Required.	
Mobile Type Mobile Type: OUC-ONE Connect	Clearspan Engage		
Clearspan Settings Functionality: Audio			

Figure 37: Template Add – General for Clearspan Mobile

- 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.

Template Add			
Create a new phone te	mplate.		
OK Cancel	Apply		
Template Name:Nurse	Stations		
Template Level:Group			
Enterprise:SystemValid	ation System Validation		
Group:JazzTest Jazz	Test		
Device Type:Grandstre	am WP820 (DMS)		
Rebuild Status: Refre	Group: None pending.		
	DTE: II Restart Phones is un one is rebooted.	checked, the template will not tai	ke effect until a resync or when the
General	Lines	Features	Extra Settings
Southern			
Name:			
Transmission (A	
Name:			
Name: Nurse Stations Description:		1	
Name: Nurse Stations Description: General Settings	al Settings)	1	
Name: Nurse Stations Description: General Settings Time Zone: (Use Glob	al Settings)	1	
Name: Nurse Stations Description: General Settings Time Zone: Use Glob OUse VLAN:	and a sector of the sector of	es to stop operating,	
Name: Nurse Stations Description: General Settings Time Zone: Use Glob OUse VLAN:	/LAN may cause some phon	es to stop operating.	
Name: Nurse Stations Description: General Settings Time Zone: Use Glob OUse VLAN: WARNING: Enabling V Outbound Proxy:	/LAN may cause some phon	es to stop operating.	

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.

Template A	dd		
Create a new ph	one template.		
OK Can	cel Apply		
Template Name:	HotLine Phones		
Template Level:G	iroup		
Enterprise:Syster	nValidation System Validat	ion	
Group:JazzTest -	- JazzTest		
Device Type:Med	ia5 4102 (DMS)		
Rebuild Status:	Refresh Group: None per	nding.	
Ophones	NOTE: If Restart Phones phone is rebooted.	s is unchecked, the template will not	take effect until a resync or when the
General	Po	orts	Extra Settings
Name:			
HotLine Phones			
Description:			
General Setting	S		
Time Zone: (Use	: Global Settings)		
Outbound Proxy:			
Outbound Proxy	Address		
Port (No Encrypt	on):		
Port (Encryption)			
	: SRTP): (Use Global Setting:	s) -	
Encryption (TLS/	SRTP): (Use Global Setting:	s)	uired.
Encryption (TLS/	SRTP): (Use Global Setting: ligure encryption in the netwo		uired.
Encryption (TLS/ WARNING: Con Media5 Settings	SRTP): (Use Global Setting: ligure encryption in the netwo		uired.

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.

EX

Creating or Editing a Mitel DECT 112 Template

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

Template Add	
Create a new phone template.	
OK Cancel Apply	
Template Name: Nurse Stations DECT	
Template Level: Enterprise	
Enterprise: SystemValidation System Validation Device Type: Mitel DECT 112 (DMS)	
Rebuild Status: Refresh Enterprise: None pending.	
O Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or w	hen the phone is rebooted.
General Lines	Extra Settings
Name: Nurse Stations DECT	
Description:	
General Settings	
Time Zone: (Use Global Settings)	
O Use VLAN: Warning: Enabling VLAN may cause some phones to stop operating.	
Outbound Proxy:	
Use Global Settings	
Use DNS SRV Lookup	
Port:	
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before sett	ng Encryption to Required.
DECT 112 Settings	
Hotel Mode (Phone Lock): (Use Global Setting)	
Repeater 1: (Use Global Setting)	
Repeater 2: (Use Global Setting)	
Repeater 3: (Use Global Setting)	
O Use LDAP	

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:

2

- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(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.

OK Cancel Ap									
	ply Add								
nterprise: (System Keys)	-								
hone Manufacturer: Polyco	m Polycom Prompts Pol	ycom Macros							
ebuild Status: Refresh	System: None pending.								
ebuild Status. Herresh	System: None pending.								
ey Definitions									
Label o	Value	ldle	Connect	Incoming	Outgoing	Dial Tone	Setup	Hold	Delete
BLF List									
Call Park	Call Park	0	\odot	Ο	0	0	0	0	Delete
Call Pickup	\$Changup\$*98\$Tinvite\$	Ø		Ø	Ø	Ø	\odot	Ø	Delete
Conf	\$FConference\$	0		0	0	0	0	0	Delete
Dirct Pickup	\$Changup\$*97\$Tinvite\$			Ø	Ø			Ø	Delete
Favorites									
Line									
	%PAGING_EXT%\$Tinvite\$	Ø	0	0	0		\odot	Ø	Delete
Paging	\$Chold\$*68\$Tinvite\$	0		0	0	0	0	0	Delete
Paging Park	\$C10/d\$ 68\$110/1/6\$			\bigcirc	Ø	Ø	\odot	Ø	Delete
	\$Changup\$*88\$Tinvite\$	Ø	0						
Park		0	0	0	0		0	0	Delete

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*

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.

splay and configure user input p here "PromptName" is from the	prompts for Polycom key actions. The prompts bel below "Prompt Name" column (and "2" means co	ow may be included in a key defini blect 2 characters).	ition by using syntax "\$P	P(PromptName)N2
OK Cancel Apply	Add			
alvcom Promot Definitions				
Diycom Prompt Definitions	Prompt Text	Input Type ≎	Visible	Delete

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 Se	ttings	
	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. 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.

Templat	te Add							
Create a ne	w phone template	h.						
OK	Gancel App	xky						
Template N	ame:Agent VVX 4	00						
Template Le	evel:Group							
Enterprise:	SystemValidation	- System Validation						
Group:Jazz	Test JazzTest							
Device Type	e:Polycom VVX 40	0 (DMS)						
Rebuild Sta	tus: Refresh G	Group: None pending] .					
ORestart P	hones NOTE:	If Restart Phones is	s unchecked, the tem	plate will not take effect	until a resync	or when the phor	ne is reboote	ed.
General	Li	nes	Phone Keys	Soft Keys	Featu	ires	Extra Set	tings
BLF Line / I	Jser:							
1								
Useful tags	for Line Label text	: (Ext), (Number), (I	FirstName}, {LastNar	ne}				
Ring: Defa	and the second second							
Max Calls P	er Line: 1							
Phone Lin	e to Clearspan L	ine Position Mapp	ing					
Phone	Clearspan Line	Phone Key		Line Label		Ring	Missed Call	Call Forward
Line	Position						Tracking	Ring Count
1	Position 1	(Unassigned)	Extension -			Default	Ø	4 -
2	Position 1	(Unassigned)	Extension			Default	Ø	4 -
3	Position 2	(Unassigned)	Extension			Default	0	4 -
4	Position 2	(Unassigned)	Extension			Default	0	4 -

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.

	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, o a Line.
blate Add		
a new phone template.		
Cancel Apply		
te Name:Agent VVX 400		

Key Reassignment: O Enabled Phone Keys and Expansion Module Keys are configurable

Group: None pending.

Template Level:Group

Rebuild Status:

ORestart Phones

General

Group:JazzTest -- JazzTest

Device Type:Polycom VVX 400 (DMS)

Refresh

Lines

Enterprise:SystemValidation -- System Validation

Disabled ... Phone Keys and Expansion Module Keys are automatically assigned by the Polycom phone

Figure 44 - Poly Template Add - Phone Keys

NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.

Soft Keys

Features

Extra Settings

Tab / Section	Field	Setting
Paging Group (E	dge 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 (Sound	dPoint 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 .
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.

Template Ad	dd					
Create a new pho	one template.					
OK	el Apply					
Template Name:A	gent VVX 400					
Template Level:Gi	roup					
Enterprise:System	Validation System Validat	ion				
Group:JazzTest	JazzTest					
Device Type:Polyc	com VVX 400 (DMS)					
Rebuild Status:	Refresh Group: None per	nding.				
ORestart Phones	NOTE: If Restart Phor	nes is unchecked, the template	will not take effect until	a resync or when the ph	ione is rel	pooted.
General	Lines	Phone Keys	Soft Keys	Features	Extra	Settings
Standard Soft K Basic Call Mana Split Forward Soft Keys		conference soft keys redundan	t to hard keys)	(O) (O)	End Call Ioin	⊘New Call
	Soft Key Position		Labe	46	Insert	Delete
Floating - after	standard keys 👻		(Select Key)	Ins	<u>sert</u>	Delete
Floating - after	standard keys		(Select Key)	Ins	sert	Delete
Floating - after						
	standard keys		(Select Key)	Ins	sert	Delete

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® IF 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 or 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: volpProt.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.

	Field	d	Setting			
	Pictu	re Frame	450, VVX Trio 8500 the displa images a	VX 250, VVX 350 (500, VVX 501, V), Trio 8800 and T ay of images on th re contained in file e via a USB conne	VX 600, VVX 60 ⁷ rio C60 phones o e phone when idles from a device o	1, Trio 830 only, enable le. The
	Queu	ue Status Notificatior	queue sta Clearspa assigned Available	Clearspan Call Ce atus for a call cen in Premium Call C I to user accounts on SoundPoint® O desktop phones	ter. To use this f enter service mu assigned to the p IP 450, 550, 560	eature, the st be phone.
	URL	Dialing		dialing of calls usi st using digits.	ng a URL, in add	ition to
	Video	C	8500, Tri	VX 500/501, VVX o 8800 and Trio C ables video calls.		
Template Name:Agent V Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe	ion System Valida	ation				
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh	ion System Valida est X 400 (DMS) Group: None pe		te will not take effect unt	il a resync or when the ph	one is rebooled.	
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh	ion System Valida est X 400 (DMS) Group: None pe	anding.	te will not take effect unt Soft Keys	il a resync or when the ph Features	one is rebooled. Extra Settings	
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent	ion System Valida est X 400 (DMS) Group: None pe DTE: I <mark>I Restart Pho</mark>	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features:	ion System Valida est X 400 (DMS) Group: None pe DTE: I <mark>I Restart Pho</mark>	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) OFeature Sync ACD	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreah ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) OFeature Sync ACD OAgent Unavailable with OCall List	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD ORest Unavailable with OCall List OCall Recording	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreah ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording OCorporate (LDAP) Dire	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording @Corporate (LDAP) Dire @Local Directory	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD Organt Unavailable with OCall List OCall Recording OCorporate (LDAP) Dire OLocal Directory OEnterprise Directory	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD Ogent Unavailable with OCall Recording OCorporate (LDAP) Dire OLocal Directory OEnterprise Directory	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreah ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall Recording OCall Recording OCall Recording OCorporate (LDAP) Dire OLocal Directory OFensonal Directory OPersonal Directory	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreah ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording OCall List OCall Recording OCorporate (LDAP) Dire OLocal Directory OEnterprise Directory OPersonal Directory OPersonal Directory	ion System Valida est X 400 (DMS) Group: None pe DTE: II Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreat ORESTART Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording @Corporate (LDAP) Dire @Local Directory @Enterprise Directory @Den Not Disturb OLocal to phone	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refresh ORestart Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording @Corporate (LDAP) Dire @Local Directory @Enterprise Directory @Do Not Disturb OLocal to phone OEnhanced Call Display	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			
Template Level:Group Enterprise:SystemValidat Group:JazzTest JazzTe Device Type:Polycom VV Rebuild Status: Refreat ORESTART Phones NC General Feature Enable Enabled Features: OACD Agent ACD Line: (Select Line) Feature Sync ACD OAgent Unavailable with OCall List OCall Recording @Corporate (LDAP) Dire @Local Directory @Enterprise Directory @Den Not Disturb OLocal to phone	ion System Valida est X 400 (DMS) Group: None pe DTE: If Restart Pho Lines	ending. Ines is unchecked, the templa	Contract Contract of the			



Template Ad	d				
Create a new phon	e template.				
OK Cancel	Apply				
Template Name:Ag					
Template Level:Gro					
	Validation System Valio	dation			
Group:JazzTest					
Device Type:Polyco	om VVX 400 (DMS)				
Rebuild Status: F	Refresh Group: None p	pending.			
ORestart Phones	NOTE: If Restart Pr	nones is unchecked, the tem	plate will not take effect (until a resync or when th	e phone is rebooted.
-	A STREET STATE STREET STREET		Nelson a	Contract of the second s	
General	Lines	Phone Keys	Soft Keys	Features	Extra Settings
Choose File to Up					

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.

Template Add				
Create a new phone template.				
OK Cancel Apply				
Template Name: Admin Offices B20				
Template Level: Enterprise Enterprise: SystemValidation System Validation				
Device Type: Poly Edge B20 (DMS)				
Rebuild Status: Refresh Enterprise: None pendi	ng.			
O Restart Phones NOTE: If Restart Phones is u	nchecked, the template will not take	e effect until a resync or v	when the phone is rebooted.	
General Lines	Left Line Key Functions	Paging Group	Features	Extra Settings
Name: Admin Offices B20	ר			
Description:				
General Settings				
Time Zone: (Use Global Settings)				
URI for Soft Keys: (Select EMS Address)				
Use VLAN: WARNING: Enabling VLAN may cause	e some phones to stop operating.			
Outbound Proxy:				
Use Global Settings				
Use DNS SRV Lookup				
Keep-alive				
Port (No Encryption):				
Port (Encryption):				
Encryption (TLS/SRTP): (Use Global Settings)	WARNING: Configure encryption	In the network before set	ting Encryption to Required.	
Poly EdgeB Settings				
Voice Quality Monitoring				
Conference Server: (Use Global Settings)				
Firmware Update: (Use Global Setting)				
Firmware Update Timing:				
Firmware Version:				
⊘ Use Global Settings				
Syslog Host:				
Use Global Settings				

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 Globa 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. <i>This field is not applicable when the</i> <i>'Use DNS SRV Lookup' box is checked.</i>
	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. <i>This field is not applicable when the</i> <i>'Use DNS SRV Lookup' box is checked.</i>
	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.

reate a new ph	ione template.				
OK Can	cel Apply				
emplate Name:	Admin Offices B20				
Template Level:0	Group				
Enterprise:Syster	mValidation System Validati	ion			
Group:JazzTest -	JazzTest				
Device Type:Poly	y Edge B20 (DMS)				
Rebuild Status:	Refresh Group: None pen	nding.			
Destart Phone	 NOTE: If Restart Phon 	as is unchecked, the template	will not take effect unt	i a resume or when	the phone is reported.
ORestart Phone	s NOTE: If Restart Phon	ies is unchecked, the template	will not take effect unt	I a resync or when	the phone is repooted.
ORestart Phone General	NOTE: If Restart Phon	Left Line Key Functions	Paging Group	Features	Extra Settings
General	Lines	Left Line Key Functions		l stati	
General		Left Line Key Functions		l stati	
General	Lines	Left Line Key Functions	Paging Group	l stati	
General Phone Line to (Lines Clearspan Line Position Ma	Left Line Key Functions	Paging Group	Features	
General Phone Line to (Phone Line	Lines Clearspan Line Position Ma Clearspan Line Position	Left Line Key Functions	Paging Group	Features	
General Phone Line to (Phone Line 1	Lines Clearspan Line Position M: Clearspan Line Position	Left Line Key Functions apping Extension	Paging Group	Features	
General Phone Line to C Phone Line 1 2	Lines Clearspan Line Position Ma Clearspan Line Position Position 1	Left Line Key Functions apping Extension	Paging Group	Features	
General Phone Line to (Phone Line 1 2 3	Lines Clearspan Line Position M: Clearspan Line Position Position 1 • Position 2 • Position 3 •	Left Line Key Functions apping Extension • Extension •	Paging Group	Features	

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 5 Page Group 5 Page Group 7 Page Group 8 Page Group 9 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.

Template Mo	-					
Change an existing	phone template.					
OK Cancel	Apply					
Template Name: po	olyd230_2					
Template Level: Gr	oup					
Enterprise: System	Validation Syste	m Validation				
Group: JazzTest	JazzTest					
Device Type: Polyc	om VVX D230 (DN	/IS)				
Rebuild Status:	Refresh Group:	None pending.				
O Restart Phones	NOTE: If Res rebooted.	start Phones is unche	ecked, the template w	ill not take effect un	itil a resync or when	the phone is
General	Lines	Incoming Calls	Outgoing Calls	Features	Extra Settings	Template Users
Name:						
polyd230_2						
Description:						
st2						
General Settings						
Time Zone: (Use (Global Settings)	v .				
Use VLAN:						
WARNING: Enablin	ng VLAN may caus	se some phones to st	op operating.			
Outbound Proxy:	ing for Outbound P	roxy				
Use Global Setting Outbound Proxy	IS					
Use DNS SRV L	ookup					
 Keep-alive 						
Port (No Encryption):					
Port (Encryption):						
Encryption (TLS/SR	TP): (Use Globa	l Settings)				
WARNING: Configu	ure encryption in th	ne network before set	tting Encryption to Re	quired.		

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. <i>This field is not applicable when the</i> <i>'Use DNS SRV Lookup' box is checked.</i>
	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. <i>This field is not applicable when the</i> <i>'Use DNS SRV Lookup' box is checked.</i>
	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.

Create a new	phone template.				
	Cancel Apply				
Template Leve Enterprise: S	e: Mfg-D230 DECT el: Enterprise systemValidation System Valid Polycom VVX D230 (DMS)	ation			
Rebuild Status	s: Refresh Enterprise: N	one pending.			
O Restart Phones	NOTE: If Restart P rebooted.	hones is unchecked, the te	emplate will not take eff	ect until a resync or w	hen the phone is
General	Lines	Incoming Calls	Outgoing Calls	Features	Extra Settings
Phone	to Clearspan Line Position N Clearspan Line Position	Line Label			
	Clearspan Line Position				
Phone	-				
Phone Line	Clearspan Line Position	Line Label			
Phone Line 1	Clearspan Line Position	Line Label			
Phone Line 1 2	Clearspan Line Position Position 1 Position 2	Line Label Extension			
Phone Line 1 2 3	Clearspan Line Position Position 1 Position 2 (Unassigned)	Line Label Extension V Text V Main Extension V			
Phone Line 1 2 3 4	Clearspan Line Position Position 1 Position 2 (Unassigned) (Unassigned)	Line Label Extension			
Phone Line 1 2 3 4 5	Clearspan Line Position Position 1 Position 2 (Unassigned) (Unassigned) (Unassigned) (Unassigned)	Line Label Extension V Text V Main Extension V Extension V			

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}"

T										
•	Template Add Create a new phone template.									
sreate a new phone template.										
OK	Cancel	Apply								
Template Name:Operations - Mobile										
Templat	te Level:Gro	up								
Enterpri	ise:SystemV	alidation S	system Valid	ation						
Group:J	JazzTest Ja	azzTest								
Device	Type:Polycor	m VVX D230) (DMS)							
Debuild	Chatura D		un Mana a	anding						
Rebuild Status: Refresh Group: None pending.										
Decto	art	NOTECHE	Postart Dhou	nas is uncha	okad tha tr	molate will a	ot take offer	t until a ree	une or when	the phone
OPhone	art es	NOTE: If F is rebooted		nes is unche	cked, the te	emplate will n	ot take effe	ct until a res	ync or when	the phone
OResta Phone Gene	es			nes is unche Incoming		emplate will n Outgoing Ca		ct until a res atures		the phone Settings
O _{Phone} Gene	es	is rebooted								
O _{Phone} Gene	es eral	is rebooted								Settings
Gene Handse	es eral et select for Handset	Lines	call Handset	Incoming Handset	Calls Handset	Outgoing Ca Handset	alls Fea Handset	atures Handset	Extra Handset	Settings Handset
Gene Handse	es eral et select for Handset 0	is rebooted Lines receiving of Handset 2 O	call Handset 0	Handset 4	Calls Handset 0	Outgoing Ca Handset	alls Fea Handset 7	Handset	Extra Handset 9	Settings Handset 10
Gene Handse Line 1 2 3	es eral et select for Handset 1 	Lines receiving of Handset 2 0 0 0	Call Handset 3 0 0	Handset 4	Handset	Handset	Handset 7	Handset 0 0	Extra 9 0 0	Settings Handset 10 0
Gene Handse Line 1 2 3 4	es eral et select for Handset 1 	Lines receiving of Handset 2 0 0 0 0 0 0 0 0 0 0 0 0 0	Call Handset 3 0 0 0	Handset 4	Handset	Handset 6 0 0	Handset 7 0 0	Handset 8 0 0 0	Extra 9 0 0 0	Settings Handset 10
Gene Handse Line 1 2 3 4 5	es eral et select for Handset 1 C C C C C C C C C C C C C	Lines receiving of Handset 2 0 0 0 0	Handset 3 0 0 0 0 0 0	Handset 4	Handset 5	Handset 6	Handset 7 0 0 0	Handset 8 0 0 0 0 0 0	Handset 9	Handset 10
Gene Handse Line 1 2 3 4	es eral et select for Handset 1 	Lines receiving of Handset 2 0 0 0 0 0 0 0 0 0 0 0 0 0	Call Handset 3 0 0 0	Handset 4	Handset	Handset 6 0 0	Handset 7 0 0	Handset 8 0 0 0	Extra 9 0 0 0	Settings Handset 10

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.

Template Add	b				
Create a new phone					
OK Cancel	Apply				
Template Name:Op	erations - Mobile				
Template Level:Gro	up				
Enterprise:SystemV	alidation System	Validation			
Group:JazzTest J	azzTest				
Device Type:Polyco	m VVX D230 (DMS)			
Rebuild Status:	efresh Group: No	ne pending.			
ORestart	NOTE: If Restart is rebooted.	Phones is unchecked, th	e template will not tak	e effect until a resy	nc or when the phone
General	Lines	Incoming Calls	Outgoing Calls	Features	Extra Settings
Feature Enable					
Enabled Features	:				
OIntercom					
ODo Not Disturb					
OCall Forward					
OCorporate (LDAP) Directory				

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 Select the check box to allow Call Forwarding enable/disable and administration from the handsets.		
	Call Forward			
	Corporate (LDAP) Directory	Select the check box to enable LDAP director lookups. Use of this feature also requires custom setup in Extra Settings.		
Extra Settings				
		Enter extra settings that are to be applied to a 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.

Template Add		
Create a new phone template.		
OK Cancel Apply		
Template Name: Mobile Std Template Level: Enterprise Enterprise: SystemValidation System Validation Device Type: Connect - Mobile		
Rebuild Status: Refresh Enterprise: None pe	nding.	
General	Features	Extra Settings
Name: Mobile Std		
Description:		
General Settings Outbound Proxy: Use Global Settings Outbound Proxy Address		
Use DNS SRV Lookup		
Port (No Encryption):		
Port (Encryption):		
Encryption (TLS/SRTP): (Use Global Settings)	WARNING: Configure encryption in	the network before setting Encryption to Required.
Mobile Type		
O UC-ONE Connect 💿 Clearspan Engage		

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.

E2

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
 - o 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.



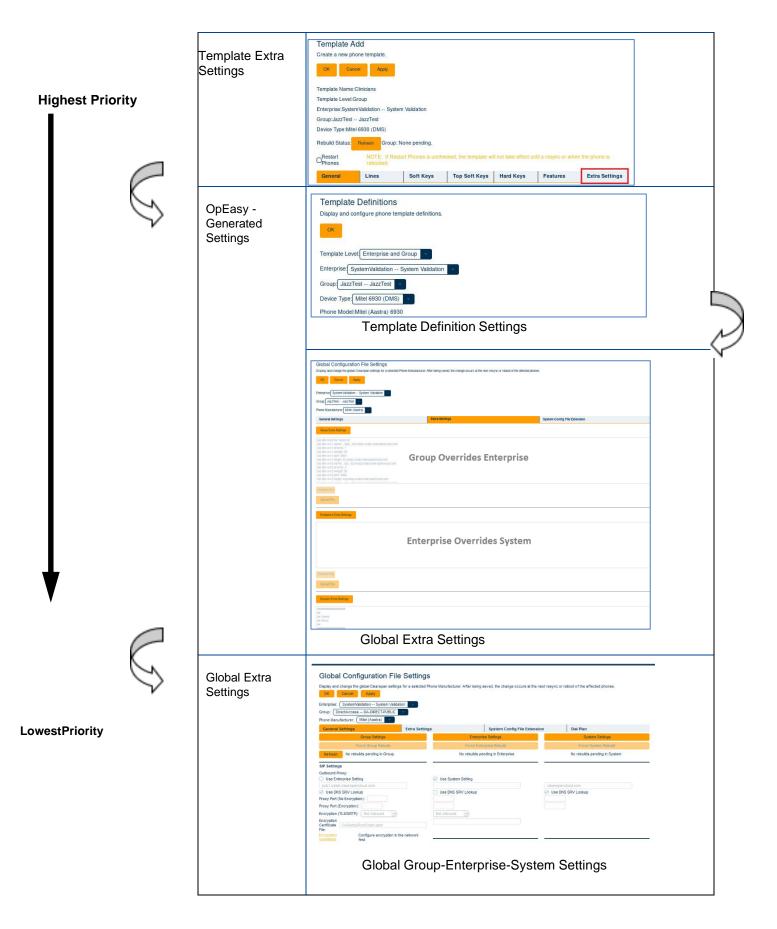
Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings 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.





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 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

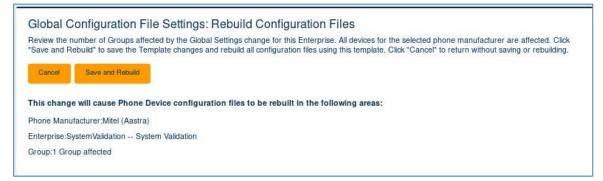


Figure 56 - Global Configuration File Settings: Rebuild Configuration Files Page

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:

EZ/

- 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.
- 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.

Global Configuration I			
Display and change the global Cl affected phones.	earspan settings for a selected Phon	e Manufacturer. After being saved, the change of	ccurs at the next resync or reboot of the
OK Cancel Apply			
-			
Enterprise: SystemValidation \$	System Validation		
Group: JazzTest JazzTest			
Phone Manufacturer: Mitel (Aas	tra)		
General Settings	Extra Settings	System Config File Extension	Dial Plan
-			1
Group Extra Settings			
sip dns host file: hosts.txt			1
sip dns srv1 name: _sips,_top.hc sip dns srv1 priority: 1	isp.csiab.ciearspancioud.com		
sip dns srv1 weight: 50 sip dns srv1 port: 5061			
sip dns srv1 target: tis.hosp.cslai			
sip dns srv2 name: _siptop.hos sip dns srv2 priority: 2	sp.cslab.clearspancloud.com		
sip dns srv2 weight: 50			
sip dns srv2 port: 5060 sip dns srv2 target: top.hosp.csla	in alage an an alauri an m		
alp una ai ve narger, rep.noap.eae	uniceal aparicipation		
Upload File			
			<u></u>
Enterprise Extra Settings			

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.

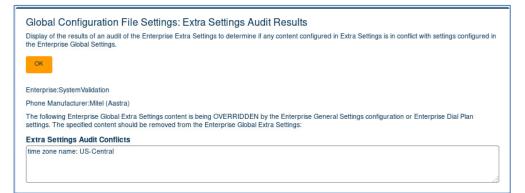


Figure 58 - Global Configuration File Settings: Extra Settings Audit results page

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:

Global Configuration File Settings	ected Phone Manufacturer. After	r being saved, the change occurs at the next resv	mc or reboot of t	the afflected phones.	
OK Cancel Apply					
interprise System Validation System Validation					
Group JazzTest JazzTest					
Phone Manufacturer Mitel (Aastra)					
General Settings	tra Settings	System Contig File Extension	n	Dial Plan	
Group Settings		Enterprise Settings	System Settings		
Force Group Rebuild		Force Enterprise Rebuild	Force System Rebuild		
Refresh No rebuilds pending in Group.	No ret	No rebuilds pending in Enterprise.		No rebuilds pending in System.	
SIP Settings			-		
Outbound Praxy:					
Use Enterprise Setting	OUse System Setting	ng			
hosp.oslab.cleanspanciout.com					
Use DNS SRV Lookup	Use DNS SRV Lo	okup	Use DNS SRV Lookup		
Proxy Part (No Encryption):					
Proxy Part (Encryption):					
Encryption (TLS/SRTP)	Not Allowed				
Encryption Certificate File:					
GoDaddyRoorCham pirm					
Encryption WARNING: Contigure encryption in the network Subscription Time: (as-feature-event) @Use Enterprise Setting	k tirst. ⊡Use System Setti	ng			
			380		
Time Settings					
Use Enterprise Setting	OUse System Settin	ng			
Time Server 1:					
0.us.pool.ntp.org					
Time Server 2:					
1 us pool ntp.org					
Time Server 3:					
2 us.pox.mp.org					
Time Zone: (GMT-05:00) (US) Central Time	(Use System Sette		Unit as an	(US) Eastern Time	

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
 - o Time Server 1 are text fields that contain the FQDN/IP address of the Time Server.
 - o Time Server 2 are text fields that contain the FQDN/IP address of the Time Server.
 - o Time Server 3 are text fields that contain the FQDN/IP address of the Time Server.

- $\circ \quad \text{Time Zone} \quad$
- 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).
 - o Confirm Admin Password
 - User Password. Valid password characters are a-z, A-Z, 0-9, or special characters (dash), _ (underscore), (period), or @ (at symbol).
 - o Confirm User Password
 - o Web Interface enables/disables the web interface for the phone
 - \circ $\;$ Phone Lock enables/disables the ability to lock the phone
- Voice Codecs
 - Voice Codec #1 (highest priority)
 - \circ Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4 (lowest priority).
- Quality Monitoring
 - Quality Monitoring
 - o 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.
 - o 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)
 - o 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
 - o Enter the Location Information System server URL in the LIS Server URL field
 - o Enter/paste the public certificate for the LIS server in the LIS Public Cert field
 - $\circ~$ 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
 - o 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
 - o Outbound Proxy (enter the Outbound Proxy server address)
 - o Use DNS SRV Lookup
 - o Proxy Port
 - o Encryption Settings
 - o Subscription Time
- Time Settings
 - o Time Server
 - o Time Zone
- Device Settings
 - o 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
 - o Base Station/Handset Firmware Version
 - o 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
 - o 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
 - o Local SIP TLS Port
 - o 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
 - o SAS Default Gateway
 - o SAS Default Gateway Port
- DNS Servers
 - o DNS Server Settings
 - o Primary DNS Server
 - Secondary DNS Server
- Time Settings
 - Time Server Settings
 - o Time Server
 - o Backup Time Server
 - o Time Zone
- Device Settings
 - o 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
 - o SNMP Server 1
 - o SNMP Server 2
 - o SNMP Server 3
 - o SNMP Server 4
 - o SNMP Server 5
- Quality Monitoring
 - o Quality Monitoring (Session Only or Session and Periodic)
- General Settings
 - Conference Server is the conference server to be used for conference calls. The dropdownlist 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)
 - o 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
 - o Time Server Settings
 - o Time Server
 - Backup Time Server
 - o Time Zone
- Device Settings
 - o Admin Password
 - o 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
 - o SNMPV3 User
 - SNMPV3 Auth Protocol
 - SNMPV3 Private Protocol
 - o SNMPV3 Auth Key
 - SNMPV3 Private Key
 - o SNMP Server 1

- o SNMP User 1
- SNMP Server 2
- o SNMP User 2
- o SNMP Server 3
- o SNMP User 3
- $\circ \quad \text{SNMP Server 4}$
- o SNMP User 4
- o SNMP Server 5
- General Settings
 - $\circ~$ 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
 - $\circ \quad \text{Tones File} \\$
 - o License File
 - o Set OOS on Reg Failure
 - o Current Disconnect
 - Polarity Reversal
 - o Syslog
 - o Syslog Host
 - o Syslog Level
 - o 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
 - o DNS Server Settings
 - o DNS Server 1
 - o DNS Server 2
 - o DNS Server 3
 - o DNS Server 4
- Time Settings
 - o Time Server 1
 - Time Server 2
 - o Time Server 3
 - o Time Server 4
 - o 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
 - o SNMP Server 1
 - SNMP Server 2
 - SNMP Server 3
 - o SNMP Server 4
 - SNMP Server5
- Quality Monitoring
 - Quality Monitoring
 - Collector Server Address
- General Settings

- $\circ \quad \text{Conference server}$
- 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
 - o 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
 - \circ $\,$ Collector Server Address. The Collector Server Address is the fully qualified domain name
 - o 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
 - \circ $\,$ Outbound Proxy: Set the target DNS or IP address for outbound SIP message
 - o Use DNS SRV Lookup: Enable/Disable
 - Proxy Port (No Encryption): Set the target IP port for outbound unencrypted SIP messages
 - o Proxy Port (Encryption): Set the target IP port for outbound encrypted SIP messages
 - o 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
 - $\circ \quad \text{Outbound Proxy} \quad$
 - 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
 - \circ 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
 - o 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
 - o Confirm Admin Password
 - o User Password
 - \circ Confirm User Password
- Video Codec Settings
 - Voice Codec Setting
 - Voice Codec #1 (highest priority)
 - \circ 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.

Display and change the global OK Cancel Ap	ply Initialize MAC Address	d Phone Manufacturer. After being saved, the	e change occu	rs at the next resync or reboot of the affected phone
General Settings	Extra Settings	System Config File Extension	Dial Plan	Custom Rings
Group	Settings	Enterprise Settings		System Settings
Force G	roup Rebuild	Force Enterprise Rebuild		Force System Rebuild
Refresh No rebuilds per	nding in Group.	No rebuilds pending in E	Enterprise.	No rebuilds pending in System.
SIP Settings Use Enterprise Setting pub1.cslab.clearspancloud.c Use DNS SRV Lookup	om	Use System Setting		Use DNS SRV Lookup
Proxy Port (No Encryption): Proxy Port (Encryption): Encryption (TLS/SRTP): Encryption WARNING: Configu	uired vire encryption in the network firs	Not Allowed		
Time Settings Use Enterprise Setting Time Server:		Use System Setting		
Time Zone: (GMT-05:00) (US	i) Central Time 👻	(User Time Zone)		(GMT-05:00) (US) Central Time

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 by the 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 within the phone.
	User Password/Reset User Password	Enter a password that is required to access the user settings within the phone. The Reset User Password field will be displayed if the User Password is already set.
Voice Codecs		
	Voice Codec #1 to #4	Identify the voice codecs that the Polycom phone is to use when 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 Settin	gs	

VVX HELD Setting	S	
	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.

played to a SoundPoint IP phone.

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.

Global Configuration	on File Settings			
Display and change the glob phones.	oal Clearspan settings for a select	ted Phone Manufacturer. After being saved,	, the change occurs at	t the next resync or reboot of the affected
OK Cancel A	pply Initialize MAC Address C	lapture		
Enterprise: SystemValidation	on System Validation			
Group: JazzTest JazzTes	st 🛛			
Phone Manufacturer: Polyc	mom			
General Settings	Extra Settings	System Config File Extension	Dial Plan	Custom Rings
Group Extra Settings				
<pre><sec> <sec.tls.protocol 1="" <="" sec="" sec.tls.protocol.dot1x="sec.TLS.protocol.dot1x=" sec.tls.protocol.sip="T sec.TLS.protocol.sip=" sec.tls.protocol.sopi="1 sec.TLS.protocol.sopi=" sec.tls.protocol.webse="" t=""></sec.tls.protocol></sec></pre>	TLSv1_2" TLSv1_2" .Sv1_2" TLSv1_2" TLSv1_2"			
Choose File				
Upload File				
Enterprise Extra Settings				
<sec. <sec.tls.protocol sec.TLS.protocol.dot1x= sec.TLS.protocol.prov="</sec.tls.protocol </sec. 				

Figure 61 - Global Extra Settings for Polycom Phones

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

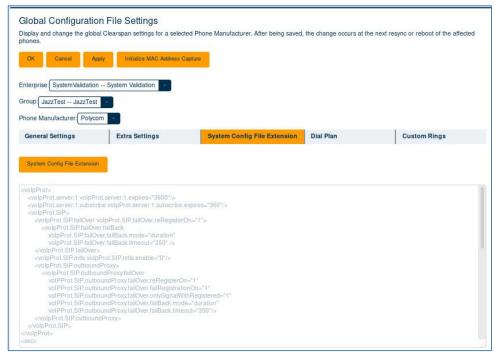


Figure 62 - System Config File Extension Settings for Polycom Phones

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.

	JURATION FILE S	-	e Manufacturer. After being saved, the change	occurs at the next resynd	or reboot of the	affected phones.	
OK Cancel	Apply In	itialize MAC Address Capture					
interprise: System	Validation System	Validation					
aroup: JazzTest	JazzTest						
hone Manufacture	r: Polycom						
General Settings	1/1	Extra Settings	System Config File Extension	Dial Plan		Custom Rings	
Enterprise Custom	Rings						
Emerprise Gustom							
Add Enterprise Cus	tom Ring						
Add Enterprise Cus		Sampled Audio File Name	Time Between Bings	Default Polysom	Ring 0		Edit
		Sampled Audio File Name ©	Time Between Rings	Default Polycom	Ring 0		Edit
Add Enterprise Cus Ring Name ⁽²⁾	tom Rings exist. Custom Rings	Sampled Audio File Name [©]	Time Between Rings ⇔	Default Polycom	Ring ©		Edit
Add Enterprise Can Ring Name = No Enterprise Cus nd of Enterprise System Custom Ri	tom Rings exist. Custom Rings		Tene Between Rings S		Ring ©	Default Polycom Ring	
Add Enterprise Cuis Ring Name 3 No Enterprise Cuis nd of Enterprise System Custom Rit Add System Custo Ring Name 3	tom Rings exist. Custom Rings ng ng ng Rep Sampled Audio F				e Between Rings	Default Polycom Ring Piling 18	
Add Enforprise Cus Ring Name ¹ No Enterprise Cus nd of Enterprise System Custom Ri Add System Custo	tom Rings exist. Custom Rings nat Sampled Audio F https://tb20ksp.c https://b20ksp.c	5% Name -	Palycom_VVX400 Darth wav Palycom_VVX400 Darth wav	Tien ≎	e Between Rings	•	

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.

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.

Enter or change the following fields for the custom ring:

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.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufact OK Cancel Apply Enterprise: SystemValidation - System Validation Group: DirectAccess - DA-DIRECT-PUBLIC Phone Manufacturer: Poly Edge B	urer. After being saved, the change occurs at the next resync or reboot of the af	fected phones.
General Settings	Extra Settings	Dial Plan
Group Settings	Enterprise Settings	System Settings
Force Group Rebuild	Force Enterprise Rebuild	Force System Rebuild
Refresh No rebuilds pending in Group.	No rebuilds pending in Enterprise.	No rebuilds pending in System.
SIP Settings Use Enterprise Setting Ub celabic clearspancioud com Use DNS SRV Lookup Keep-aive Proxy Port (Ne Encryption): Proxy Port (Ro Encryption): Encryption (TLS/SRTP): Not Allowed Encryption WARNING: Configure encryption in the network first.	Use System Setting Use DNS SRV Lookup Keep-alive Not Allowed	Use DNS SRV Lookup
DNS Servers Use Enterprise Setting Primary DNS Server: 8.8.8 Secondary DNS Server: 8.8.4 Time Settings Use Enterprise Setting Time Server 1: [tb20ems1public.cslab.clearspancloud.com Time Server 2: [tb20ems2public.cslab.clearspancloud.com Time Zene: [(GMT-05:00) (US) Central Time [ve]]	Use System Setting Use System S	(User Time Zone)

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 p 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. <i>This field is not applicable</i> <i>when the 'Use DNS SRV Lookup' box is checked.</i>
	Proxy Port (Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an encrypted (TLS) connection. <i>This field is not applicable when the</i> <i>'Use DNS SRV Lookup' box is checked.</i>
	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 physica 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 use 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
	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
	Syslog Host	the actively executing version 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 global settings 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.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufac OK Cancel Apply Enterprise: System/Validation System Validation C Group: DirectAccess - DA-DIRECT-PUBLIC C Phone Manufacturer: Polycom D230 C	cturer. After being saved, the change occurs at the next resync or reboot of the a	ffected phones.
General Settings	Extra Settings	Dial Plan
Group Settings	Enterprise Settings	System Settings
Force Group Rebuild	Force Enterprise Rebuild	Force System Rebuild
Refresh No rebuilds pending in Group.	No rebuilds pending in Enterprise.	No rebuilds pending in System.
SIP Settings Use Enterprise Setting pub2.cslab.clearspancloud.com Gevenalive Proxy Port (No Encryption): Encryption (TLS/SRTP): Not Allowed Encryption warking. Configure encryption in the network first.	Use System Setting Use DNS SRV Lookup Keep-alive Not Allowed	Use DNS SRV Lookup
DNS Servers Use Enterprise Setting Primary DNS Server: Secondary DNS Server: Time Settings Use Enterprise Setting Time Server 1: tb20ems1public.cslab.clearspancloud.com Time Server 2: tb20ems2public.cslab.clearspancloud.com Time Zone: (GINT-05:00) (US) Central Time	 ✓ Use System Setting ✓ Use System Setting (Use System Setting) 	(GMT-05:00) (US) Central Time

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. <i>This field is not applicable</i> <i>when the 'Use DNS SRV Lookup' box is checked.</i>
	Proxy Port (Encryption)	Enter the port number on the outbound proxy to be used by the phones when establishing an encrypted (TLS) connection. <i>This field is not</i> <i>applicable when the 'Use DNS SRV Lookup' box is</i> <i>checked.</i>
	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 <u>System, Enterprise, and Group Extra Settings for Polycom Phones</u> 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.

Global Configuration File Settings Display and change the global Clearspan settings for a selected	Phone Manufacturer. After being saved, the change occurs at the	e next resync or reboot of the affected phones.
OK Cancel Apply		
Enterprise: SystemValidation System Validation		
Group: JazzTest JazzTest		
Phone Manufacturer: AudioCodes - MediaPacks		
General Settings	Extra Settings	Dial Plan
Refresh Block Mode		
Group Dial Plan		
Use Enterprise Setting Digit Timeout: 4 seconds		
50XX 478222800X 911		
933 *XX		
#XX		
		ili.
Enterprise Dial Plan		
⊘Use System Setting		
Digit Timeout: 4 seconds		

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.
- 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.

Global Configuration	n File Settings	
Display and change the global Clearspar next resync or reboot of the affected pho		unufacturer. After being saved, the change occurs at the
OK Cancel Apply		
Enterprise: SystemValidation System	Validation	
Group: JazzTest JazzTest		
Phone Manufacturer: AudioCodes - MP-	5XX / M500Li / M800C	
General Settings	Extra Settings	Dial Plan
Group Dial Plan Use Enterprise Setting Digit Timeout: 4 seconds		
Emergency Call #1:911		
Emergency Call #2: 933		
Emergency Call #3:		
Emergency Call #4:		

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 on the device types configured for the Enterprise.
- 5. Click the **Dial Plan** tab. The Dial Plan page is displayed.

Global Configuration File Setti	nas	
		er being saved, the change occurs at the next
OK Cancel Apply		
Enterprise: SystemValidation System Valid	ation	
Group: JazzTest JazzTest		
Phone Manufacturer: Grandstream		
General Settings	Extra Settings	Dial Plan
Refresh Block Mode		
Group Dial Plan		
Use Enterprise Setting		
50XX 478222800X 911 933 *XX #XX		
Enterprise Dial Plan		
Use System Setting		
System Dial Plan		

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.

Global Configuration F		
Display and change the global Cle resync or reboot of the affected pl		facturer. After being saved, the change occurs at the next
OK Cancel Apply		
Enterprise: SystemValidation S	ystem Validation	
Group: JazzTest JazzTest	10 mm	
Phone Manufacturer: Media5		
General Settings	Extra Settings	Dial Plan
Refresh		
Group Dial Plan		
Use Enterprise Setting		
Dial Plan 1 (Emergency):		
911		
Dial Plan 2:		
933		
Dial Plan 3:		
500x		
Dial Plan 4:		
478222800x		
Dial Plan 5:		
*XX		
Dial Plan 6:		
#xx		
Dial Plan 7:		

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.

resync or reboot of the affec	al Clearspan settings for a select	cted Phone Manufacturer. After being saved	I, the change occurs at the next
Enterprise: System Validation	n System Validation		
Group: JazzTest JazzTest			
Phone Manufacturer: Mitel	(Aastra)		
General Settings	Extra Settings	System Config File Extension	Dial Plan
Refresh Block Mode			
Use Enterprise Setting			
50XX 478222800X 911 933 *XX #XX			
Enterprise Dial Plan			
Digit Timeout: 4 seconds			
[1-2]XXX 3[0-2]XX 33XXXX 3[4-9]XX 4XXX			

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.

Global Configuration File Set Display and change the global Clearspan se resync or reboot of the affected phones. OK Cancel Apply Enterprise: System Validation System Valid Group: JazzTest JazzTest Phone Manufacturer Mitel MiVoice	ttings for a selected Phone Man	ufacturer. After being saved, the change occurs at the next
General Settings	Extra Settings	Dial Plan
Circup Dial Plan Use Enterprise Setting		
911 933 *XX #XX		
Enterprise Dial Plan		
[1-2]XXX 3[0-2]XX 33XXXX 3[4-9]XX 4XX	(bxxx)[6-7]XXX 8[2-9]XXXXX	YYYIRIT-AIYYXXXXXIA11 #YX ,XX

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.

	affected phones.			e change occurs at the nex
OK Cancel	Apply Initialize	MAC Address Capture		
Enterprise: System Valk	dation System Validat	ion		
Group: JazzTest Jaz	zTest			
Phone Manufacturer	Polycom			
General Settings	Extra Settings	System Config File Extension	Dial Plan	Custom Rings
Use Enterprise Settin Digit Timeout: 3 second 50xx 478222800x 911 933 *xx #xx				

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.

isplay or change the list of EMS ddress, which is used by Soft Key	Server addresses (host names / IP addresses). Each Phone Template is as /s.	signed an EMS Server
OK Cancel Add		
ebuild Status: Refresh Syste MS Addresses EMS Address Name [©]	m: None pending. EMS Address (Host Name / IP Address) °	Edit
MS Addresses		Edit <u>Edit</u>
MS Addresses EMS Address Name [©]	EMS Address (Host Name / IP Address) ©	

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.

	e Conference Server addresses (host names / IP address rence Server Address to for its phones to use to reach ar	
	: None pending. Conference Server Address (Host Name / IP Address) ©	Edit
conference Server Addresses		Edit
Conference Server Address Name	Conference Server Address (Host Name / IP Address)	
Conference Server Addresses Conference Server Address Name	Conference Server Address (Host Name / IP Address) conf	Edit
Conference Server Addresses Conference Server Address Name	Conference Server Address (Host Name / IP Address) conf conference	Edit Edit

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:

EZ

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



Figure 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.

Phone Management
Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Cancel Apply Add
Enterprise: SystemValidation System Validation
Group: JazzTest JazzTest
Device Levels: Group
Device Search
(All Devices) Equal To * Search
Phone Restart
Restart Selected Phones
OSelect All Phones
ORestart Phones on Save:
ThirdParty Phone Licenses (Enterprise): Used: 22 Available: Auto

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.

Phone Management Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Gancel Apply Add
Enterprise { System Validation System Validation
Group{ JazzTest JazzTest
Device Levels: Group
Device Search
Device Type Contains C Edge - Contains Search
Phone Restart
Restart Selected Phones
Oseled All Phones
ORestart Phones on Save:
ThirdParty Phone Licenses (Enterprise): Used: 22 Available: Auto
Display Options
ODisplay Template Information ODisplay Registration Status
Phone Devices
(1-25 of 35) 1 2 2 5
Selected Device Name \circ Device Name \circ Device Name \circ Device Name \circ Device Type \circ Device Type \circ Last \circ First \circ Phone Number \circ Type \circ Defaults (Group) Last Device Type \circ De
HOSP-POLY-E100 Group 482567126995 Poly Edge E100 (DMS) E100 x5078 641-329-5078 Primary Jazz-PolyE100 (Group) Vew Edit

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:

Phone Management
Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Gancet Apply Add
Enterprise: System Validation System Validation
Group. JazzTest JazzTest
Device Levels: Group
Device Search
Device Type Contains Edge + Search
Phone Restart
Restart Selected Phones
OSelect All Phones
ORestart Phones on Save:
ThirdParty Phone Licenses (Enterprise): Used: 22 Available: Auto
Display Options
@Display Template Information
ODisplay Registration Status

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.

Phone Restart	
Restart Selected Phones	
OSelect All Phones	
ORestart Phones on Save:	
ThirdParty Phone Licenses (Enterprise): Used: 22	
Available: Auto	
Display Options	
Obisplay Template Information	
Display Registration Status	

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.

Phone Device Add
Add a new Clearspan phone device
OK Cancel Custom Tags
Enterprise:Canine Center Training and Pet Store
NOTE: This is an enterprise-level device. Enterprise-level devices DO NOT use Group-level Global Settings. Instead, they use Enterprise-level Global Settings.
Phone Device
* Device Name:
Device Level: Enterprise
* Device Type: (Select Device Type)
Template: (Select Template)
View Template
Device Billing Type
Device Description
Description:
Serial Number:
Phone Location:
Device Configuration Host Name / IP Address:

Figure 81 - Phone Device Add Page

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

EZ

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*.

Phone Custom Tags Add Add a custom tag for the device. "Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on a subsequent page.
Enterprise:Canine Center Training and Pet Store
Device Name:
Device Level:Enterprise
Custom Tag
Tag Name
Tag Value:

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.

Phone Custom Rings Customize the ring setting for each line on the phone. *Pressing OK does not save entered changes. To	save the changes, press OK or	r Apply on a subsequent page.
OK.		
Enterprise:Canine Center Training and Pet Store		
Device Name:Receptionist 6940		
Device Level:Enterprise		
Phone Template:Ent_6940 (Enterprise)		
Ring Image: Define Custom Ring Settings Customization: Or Use Template Ring Settings		
Device Ring Settings		
Clearspan Line Position \diamond Line User Id \diamond	Template Ring 0	Selected Ring
1	Default	Default
2	Default	Default
End of Lines		Ring 1
		Ring 2
		Ring 3 Ring 4



- 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.

Phone Device Modify: Manage Users			
Display the users assigned to a phone device and details of the associated phone template. Assign, Unassign, or Re-order Users on the phone device. *Pressing OK does not save entered subsequent page.	changes. To save the	changes, pr	ess OK or Apply on a
OK' Cancel			
Enterprise:Canine Center Training and Pet Store			
Group:Training			
Phone Device			
Device Name:Mitel6930DMS-3124481037			
Device Level:Group			
Device Type://titel 6930 (DMS)			
Template Name:Grp_6930			
Template Level:Group			
Template Description:Test			
UserAssignment			
Enterprise:Canine Center Training and Pet Store			
Group:Training			
(All Users) • Equal To + Search			
Update the list of users in Select User below. (* indicates an Alternate User ID)			
Selection Type:			
Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID			
Select User: No Users Found -			
Assigned Users			
Line First Ring Last First Department Phone Number Extension User ID Line/Port	Туре	Enabled	Action
1 TSK1 Default Last37 First37 312-448-1037 1037 3124481037@k9center.clearspancioud.com 3124481037.primary@k9center.clearspan	ncloud.com Primary		(Change User)
2 TSK3 Default			

Figure 84 - Phone Management: Manage Users

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.

Phone Management Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Cancel Apply Add
Enterprise: Canine Center Training and Pet Store
Group: Shop
Device Levels Enterprise and Group
Device Search
Device Name Contains 6930 - + Search
Phone Restart
Restart Selected Phones
OSelect All Phones
ORestart Phones on Save:
ThirdParty Phone Licenses (Enterprise): Used: 39 Available: Auto
Display Options
ODisplay Template Information
ODisplay Registration Status

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

Z

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.

	e Device I existing Clea	and sources	e device.					
ОК	Cancel	Apply	Delete	Manage Users	Custom Tags	Custom Rings	Replace Phone	
Enterprise	e:Canine Cen	ter Trainir	ng and Pet St	ore				
NOTE: T	his is an ente	rprise-level (device. Enter	prise-level devices [OO NOT use Group	-level Global Settings	s. Instead, they use Enterp	rise-level Global Settings
Phone D	evice							
Device Na	ame:grpast1							
Device Le	vel:Enterprise	в						
Device Ty	pe:Aastra 68	69i (DMS)						
Support D	Device:No							
Template	Ent_69i (En	terprise) ·	Test 69i					
View 7	Template							
Device Bi	lling Type: Us	se Org Billing	Туре					
ORestart	Phones on S	ave						

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.

	vice Modify					
OK C.	ancel Apply	Manage Users	Custom Tags	Custom Rings	s Replace Phone	
NOTE: This is	an enterprise-leve	ing and Pet Store el device. Enterprise-l	evel devices DO N	IOT use Group-leve	evel Global Settings. Instead, they use Enterprise-level Global	Settings
Phone Device Device Name:	/itel6920DMS-312	24481014				
Device Level:E	nterprise					
Device Type:M	itel 6920 (DMS)					
Support Device	:No					
Template: Ent	_6920 (Enterprise)) Test				

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.

	e Device I		e device.			
ОК	Cancel	Apply	Manage Users	Custom Tags	Custom Rings	Replace Phone
the production of the second	This is an ente	77.54 S. 1.5 06 C Mar 2017	g and Pet Store levice. Enterprise-le	evel devices DO N	IOT use Group-level	I Global Settings. Instead, they use Enterprise-level Global Setting
CONTRACTOR	ame:Mitel692	0DMS-3124	181014			
Device Le	evel:Enterprise	9				
Device Ty	pe:Mitel 6920	(DMS)				
Support [Device:No					
Template	Ent_6920 (Enterprise)	Test			

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.

Phone Device Modify: Manage Users Display the users assigned to a phone device and details of the associated phone template. Assign, Unassign, or Re-order Users on the phone device. *Pressing OK does not save entered chan a subsequent page. OK Careel	ges. To save	the changes	s, press OK or Apply on
Enterprise:Canine Center - Training and Pet Store			
Phone Device Device Name:Mitel6920DMS-3124481014 Device Level:Enterprise Device Type:Mitel 6920 (DMS) Template Name:Ent_6920 Template Level:Enterprise			
Template Description:Test User Assignment Enterprise:Canine Center – Training and Pet Store Group:{Shop}			
(All Users) Equal To			
Selection Type: Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID Select User[(Select by Name - Last, First)			
Assigned Users			
Line First Ring Last First Department Phone Extension User ID Line/Port	Туре	Enabled	Action
1 TSK1 Default Last14 First14 3124481014 1014 3124481014@k9center.clearspancloud.com 3124481014.primary@k9center.clearspancloud.com	m Primary		(Change User)

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**.

Phone Device Modify: Manage Users
PTIONE DEVICE MODITY. Manage USETS Display the users assigned to a phone device and details of the associated phone template. Assign, Unassign, or Re-order Users on the phone device. *Pressing OK does not save entered changes.
subsequent page.
OK Cancel
Enterprise:0 (Select by Name - Last, First)
Sroup:Train Available Users:
Phone Dev LTest49, FTest49 312-448-1049 3124481049@k9center.clearspancloud.con
Device Nam Last01, First01
Last02, First02 312-448-1002 3124481002@k9center.clearspancloud.com Last03, First03 312-448-1003 3124481003@k9center.clearspancloud.com
Device Type Last04, First04
Template Ne Last05, First05 312-448-1005 3124481005@k9center.clearspancloud.com
Template Le Last06, First06 312-448-1006 3124481006@k9center.clearspancloud.com
Template De Last07, First07 312-448-1007 3124481007@k9center.clearspancloud.com Last08, First08 312-448-1008 3124481008@k9center.clearspancloud.com
Lastly Firston 312-449-1009 312448-1009 312448-1009 Store transpandoud com
Enterprise:C Last10, First10 312-448-1010 3124481010@k9center.clearspancioud.com
Sroup:Train Last100, First100 312-448-1100 3124481100@k9center.clearspancloud.cor
Last101, First101 312-448-1101 3124481101@k9center.clearspancloud.cor
Last102, First102 312-448-1102 3124481102@k9center.clearspancloud.cor
Last104, First104
Jpdate the Last105, First105 312-448-1105 3124481105@k9center.clearspancioud.cor
Selection T Last106, First106 312-448-1106 3124481106@k9center.clearspancloud.cor
Ordered Select Dy Name - Last, First)
Assigned Users
Line First Position Button Ring Last First Name Department Phone Number Extension User ID Line/Port
1 Line 1 Default Last22 First22 Dept_1 312-448-1022 1022 3124481022@k9center.clearspancloud.com 3124481022.primary@k9center.clearspancloud.com
2 PK1 Default

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 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 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:
 - o Alert All Shared Appearances for Click-to-Dial calls
 - o Allow Call Retrieve from another location
 - o Allow Multiple Concurrent Calls on the same shared line
 - Allow Bridging of Users on the same shared line
 - Bridge Warning Tone for Barge-in

Z

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

User Assignment
Enterprise Canine Center Training and Pet Store
Group: Training
(All Users) • Equal To • Search
Update the list of users in Select User below. (* indicates an Alternate User ID)
Selection Type:
Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID
Select User: Last09, First09 312-448-1009 3124481009@k9center.clearspancloud.com
User Last Name:Last09
User First Name; First09
User Phone Number:312-448-1009
User Extension:1009
User ID:3124481009@k9center.elearspancloud.com
User Department:
Endpoint Type: SCA Device +
Endpoint Type
* Line / Port: Line/Port User Name
3124481009.sca01
@
Line/Port Domain Name k9center.clearspanoloud.com
Shared Call Appearance: Enabled
Allow Calls to be Originated
Allow Calls to this Destination
Hide User SCA Options
User SCA Options
(These settings affect all SCAs for this User.) Alerting: Alert All Shared Appearances for Click-to-Dial calls
Call Retrieve: @Allow Call Retrieve from another location
Multiple Call Arrangement: @Allow Multiple Concurrent Calls on the same shared line
Bridaina

Figure 91 - Manage Users: New User Assignment

User Assignment
Enterprise:Canine Center Training and Pet Store
Group:Training
(All Users) Equal To + Search
Update the list of users in Select User below. (* indicates an Alternate User ID)
Selection Type:
Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID
Select User: Last09, FIrst09 312-448-1009 3124481009@k9center.clearspancloud.com
User Last Name:Last09
User First Name:First09
User Phone Number:312-448-1009
User Extension:1009
User ID:3124481009@k9center.clearspancloud.com
User Department:
Endpoint Type: SCA Device -
Endpoint Type
* Line / Port: Line/Port User Name
3124481009.sca01
@ Line/Port Domain Name k9center.clearspancloud.com
Shared Call Appearance: Enabled
Allow Calls to be Originated
Allow Calls to this Destination
Show User SCA Options
Add User Option Insert
Add User Line Position Line Position 2
Add User Line Position 1 Line Position 2

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.

lection Ty			0.04										
	i by Name (Last, First) O Orde	red by Phone	Number / Extensi	on () Ordered	by User ID						
lect User	No User	s Found	*										
signed U	Isers												
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port		Туре	Enabled	Action
1	TSK1	Default	LTest54	FTest54	Dept_2	972-222-1054	1054	9722221054@labval.clearspancloud.com	9722221054.prima	ry@labval.clearspancloud.com	Primary		(Change User
2	TSK3	Default											
							Phone	Configuration Display (for reference only)				
						TSK6 Directory Call History – Voicemail Settings Volume		1 244 314 444 51 684 44 795 814 844	Goodbye Redial Hold Mute Speaker/ Headset				
	Telephone L	ine	Line Po	sition	Line	Label		User Name			Phone !	Number	Extension
No lines	are defined	d.											
5 B	Top Soft Key	rc .	Function		Optio	P 5			Top Soft Keys	Function	Options	2	
		-			- 65				\$\$		options		
	TSK1 TSK2			est54 / 1054 est54 / 1054		os:1, Number:972-2			TSK7 TSK8	Voice Mail			
	TSK2		F lesto4 LI	eston / 1054		os:1, Number:972-2		Default		Speed 100			
	1583					os:2 - Unassigned, os:2 - Unassigned,	and the second second second second		TSK9 TSK10	Call Fwd Speed 8			
	TOWA												
	TSK4				Line P	os.z - onassigneo,	rung. Delaut		Conversion and Party States and Party St	OPEER 0			
	TSK4 TSK5 TSK6				Line P	os.2 - onassigneo,	rung, Delaut		TSK11 TSK12	upted 0			

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.

ssigned	Users									-		
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
1	Line 1	Default	Last03	First03		312-448-1003	1003	3124481003@k9center.clearspancloud.com	3124481003@k9center.clearspancloud.com	Primary		(Change User)
2	Line 2	Default	Last76	First76	Dept_1	312-448-1076	1076	3124481076@k9center.clearspancloud.com	3124481076@k9center.clearspancloud.com	Primary		(Change User)
3	TSK1	Default	Last99	First99		312-448-1099	1099	3124481099@k9center.clearspancloud.com	3124481099.sca01@k9center.clearspancloud.com	SCA	Enabled	(Change User)
4	TSK2	Default	FSH_78	Flexible Seating Guest	Dept_1	312-448-1078	1078	3124481078@k9center.clearspancloud.com	3124481078.primary@k9center.clearspancloud.com	Primary		Edit User Assign Remove User
5	PK1	Default										Move to Position

Figure 94 - Assigned User - Edit User Assignment

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

Save Ed	sit C	Cancel Edit										
ssigned	Users											
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
1	Line 1	Default	Last03	First03		312-448-1003	1003	3124481003@k9center.clearspancloud.com	3124481003@k9center.clearspancloud.com	Primary		(Change User)
2	Line 2	Default	Last76	First76	Dept_1	312-448-1076	1076	3124481076@k9center.clearspancloud.com	3124481076@k9center.clearspancloud.com	Primary	1	(End Edit)
3	TSK1	Default	Last99	First99		312-448-1099	1099	3124481099@k9center.clearspancloud.com	3124481099.sca01@k9center.clearspancloud.com	SCA	Enabled	(End Edit)
4	TSK2	Default	FSH_78	Flexible Seating Guest	Dept_1	312-448-1078	1078	3124481078@k9center.clearspancloud.com	3124481078.primary@k9center.clearspancloud.com	Primary		Save Edit Cancel Edit)
	PK1	Default										ouncer Eulty

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.

Phone Device Modify: Manage Users Display the users assigned to a phone device and details of the associated phone template. Assign, Unassign, or Re-order Users on the phone device. *Pressing OK does not save entered changes. To save the changes, pre subsequent page.	ess OK or Apply on a
CK* Cancel	
Enterprise:Canine Center Training and Pet Store Group:Training	
Phone Device Device Name:Aastra6865iDMS-3124481022 Device Level:Group Device Type:Aastra 6865i (DMS) Template Name:Grp_65i Template Level:Group	
Template Description:Test User Assignment Enterprise:Canine Center Training and Pet Store Group:Training	
(All Users) Equal To F Search	
Update the list of users in Select User below. (* indicates an Alternate User ID)	
Selection Type:	
Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID Select User (Select by Name - Last, First)	
Assigned Users	
Line First Position Button Ring Last Name Department Phone Number Extension User ID Line/Port Type Enabled	Action
Line 1 Default Last22 First22 Dept_1 312-448-1022 1022 3124481022@k9center.clearspancloud.com 3124481022.primary@k9center.clearspancloud.com Primary PK1 Default Phone Configuration Display (for reference only)	(Change User) • (Change User) Edit User Assignment Remove 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.

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.

	e Add
	n rules needed to create a new Clearspan user.
OK Cancel	Apply
	enter Training and Pet Store
Group: Training	
User Profile	
* User Profile Name:	
Description:	
User Type: Normal	×
New User Notification	
O Send E-mail Mess	sage to New User
	sage to OpEasy Administrator
	sage to Phone Procurement
* E-mail Addres	
User Billing Bundle: ((None)
Primary Phone Devi	26
Device Type: ((Sele	ct Device Type)
Device Level: Grou Template: (Select T	emplate)
Device Level: Grou	emplate)
Device Level: Grou Template: (Select T	emplate)
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (p v v v v v v v v v v v v v v v v v v v
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs	p volume to the second
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs	p variable v
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs	p volume to the second
Device Level: Grou Template: (Select T View Phone Confic Device Billing Type: (Service Packs Select all Service Pac	p variable v
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pack Select	p value emplate) value uration Use Org Billing Type value ks required by the User: Service Pack
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pack Select	p value emplate) value uration Use Org Billing Type value ks required by the User: Service Pack Basic Trunk
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select	p value emplate) value uration Use Org Billing Type value ks required by the User: Service Pack Basic Trunk Basic User
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select	p emplate) uration Use Org Billing Type ks required by the User: service Pack Basic Trunk Basic User Basic User Basic User - More Basic Services
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select O O O O	p emplate) uration Use Org Billing Type Ks required by the User: service Pack Basic Trunk Basic User Basic User Basic User Basic User - More Basic Services Business Trunk
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select O O O O O O O	p p emplate) wration Use Org Billing Type Use Org Billing Type Service Pack Basic Trunk Basic User Basic User Basic User - More Basic Services Business Trunk Business Trunk Call Center_Basic
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select O O O O O O O O O	P emplate) use Org Billing Type Use Org Billing Type
Device Level: Grou Template: (Select T View Phone Config Device Billing Type: (Service Packs Select all Service Pac Select O O O O O O O O O O O O O O O O O O O	p p p p p p p p p p p p value val

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.
- 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.

User Information
User Domain (k9center.clearspancloud.com
User Billing Type Default: (Admin)
Clearspan ACD Add-on
OInitialize Ping User Password to random password
MS Teams Settings
OUse MS Teams Voicemail
Voice Route: None (Manually selected by Admin)
PBX Location: None (Manually selected by Admin)
Configuration Rules
Site ID:
(Required to create Extension-only users)
User ID: (Phone Number)@k9center.clearspancloud.com
OInitialize User Password to random password
New Phone Number Activation: Activate Deactivate Do Not Change
Network Server Site DFLT_SITE Default Site
Phone Number Selection Method None (Manually selected by Admin)
Extensions:
Auto Generate Extension from Phone Number Yes O No
Use Prefix Digits Plus the Last 4 Digits of the phone number
Class of Service: Specify the Class of Service: (Group Default)
OVM Transcription (Mutare)
Voice Mail Selectable, with Default: Voice Mail - No E-mail Notification
* Group Mail Server E-mail Address: (Phone Number) @ tb20.aastra.com
Music On Hold Profile (None)
Calling Line ID
Last Name: User's Last Name
First Name: User's First Name
Phone Number User's Phone Number
Authentication
Name (User ID (without Domain)

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

<u>^</u>

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.

Options:	Call Processing Policies
Profile	
Resources	View or modify Call Processing Policies for the enterprise.
Services	OK Apply Cancel
Call Center	
Communication Barring	
Meet-Me Conferencing	Calling Line ID
Utilities	External Calls: Ouse user phone number for Calling Line Identity
	Use configurable CLID for Calling Line Identity
	Enterprise Calls: Use extension Use location code plus extension Use External Calls Policy Group Calls: Use extension Use location code plus extension Use location code plus extension Use External Calls Policy Emergency Calls: Use user phone number for Calling Line Identity © Use configurable CLID for Calling Line Identity

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.
 - o For Desktop, select:
 - CS Engage
 - ClearspanBridge

- MS Teams Client
- Communicator Desktop
- Skype for Business (S4B)
- o For Mobile, select:
 - UC-One Connect Mobile
 - CS Engage Mobile
 - Clearspan Mobile
 - Communicator Mobile
- o 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.

User Profile Copy	
Copy an existing User Profile.	
OK Cancel	
Enterprise:Canine Center Training and Pe	et Store
Group:Training	
Copied User Profile	
Enterprise:Canine Center Training and Pe	et Store
Group:Training	
User Profile Name:00_Add_Polycom	
Description:Add User Profile with Polycom P	Phone
New User Profile Enterprise: Canine Center Training and F	Pet Store
Group: Training	
* User Profile Name:	
00_Add_Polycom	
Description:	
Add User Profile with Polycom Phone	
Copy Options: OReplace Existing User Profile	
NOTE: The copied User Profile will only be s	saved after editing. You may cancel the copy by pressing the Cancel button on this page or on the following User

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.
- 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.

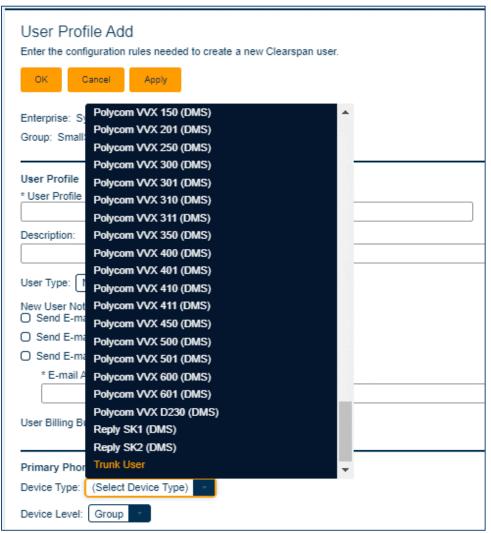


Figure 101 - User Profile Add - Select Trunk User

- 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

Users											
		se and Group. To a users, press the Ge			button. To display a list of users to edit or de	lete, press the	Search bu	tton. To display or modify Ge	neral User se	ttings, c	or
ОК	Cancel Ad	d General Setti	ngs								
Enterprise:	SystemValidation	System Validatio	n 👻								
Group: Jaz	zTest JazzTest										
Used:98 Available:A	uses (Enterprise) uto										
User Searc	h										
(All Use	rs) 👻 Equal	То 👻						Search			
Users											
Gacia				(1-25 of 1	21) 1 2 3 4 5 ++ ++	25	•				
Last Name ≎	First Name 🌣	Department 0	Phone Number 0	Extension ≎	User ID 0	OpEasy Managed User े	Support User ି	Device Name 🗢	Device Level ©	Edit	View
6920W	x5138	Mitel (Group)	641-329-5138	5138	6413295138@hosp.cslab.clearspancloud.com	true	false	Mitel6920DMS-6413295138	Group	Edit	View
6930W	x5139	Mitel (Group)	641-329-5139	5139	6413295139@hosp.cslab.clearspancloud.com	true	false	Mitel6930DMS-6413295139	Group	Edit	View

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.

Advanced: User	Modify			
Modify an existing Clearspan us	er.			
OK Cancel App	ly Delete			
Enterprise: Bulk Provisioning Group: Group_G Group, Gev User: Dog, Gracie (9722221124 Service: (Select Service)	vel			
User	Optional	Phones	Announcements	Voice Mail
Clearspan User		anges, such as adding a device,	to pre-fill fields according to Us	er Profile configuration rules.
Name.		Name:		
E-mail Address: gracie222112	24@gmail.com			
Account ID: 11GDept1 User Billing Bundle: (None) Department: Dept_1 (Group) Phone Number: 972-222-1124		O NOTE: U DeActivated assigned	ser phone number cannot be cha	anged when a Teams device is
Extension: 1124 Network Server Site: DFLT_S View Phone Template	ΠΕ Default Site 📃 👻			

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.
- 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.
- 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 willnot be used. If the user will use the password to access the web portal, this random passwordwould 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.

Advanced: User Add						
Select a User Profile and complete the us	ser inform	nation to add a ne	w Clearspan user.			
OK Cancel						
Enterprise: Bulk Provisioning Lab Val,	Inc					
Group: Group_G Group, Gewel User:						
Service: (Select Service)						
User	Option	hal	Phones	Δr	nouncements	Voice Mail
0301	option		Thomes	~	mouncements	
User Information						(<u>Close Other Tabs</u>)
Class of Service: No Restrictions						
Time Zone: (Group Default)						
Language: English						
Alternate User IDs						
Alternate User ID 1:						
Description:						
Alternate User ID 2:						
Description:						
Alternate User ID 3:						
Description:						
Alternate User ID 4:						
Description:						
User Aliases						
sip:	@ [#	abval.clearspanc	loud com			
sip:	≍ - ≽	labval.clearspanc				
sip:	= = =	labval.clearspand				
sip.		auval cical spario	ioud.com			
User Contact						
Title:						
Mobile:		Pager	: [
Address]
Address						
Line 1						
Address Line 2						
City:			State / Province:	(Select State	e) 🗸	
Zip / Postal Code:		Country	r:			

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.

Advanced: User	Add				
Select a User Profile and complet OK Cancel Enterprise: Bulk Provisioning L		add a new Clears	oan user.		
Group: Group_G Group, Gewe User: Service: (Select Service)					
User	Optional		Phones	Annoi	uncements
Add Shared Call Appearance	SCA Options	(add a line for this	user on another phone)		
Phone Restart Select All Phones					
Restart Selected Phones					
Restart Phones on Save					
Phone Devices					
Restart Device Devic Select ⇔ ◇	e MAC De Address Tyr ⇔ ≎		Type Disabled ⇔ ≎	Template ≎	Edit
No phone devices exist.					
End of Phone Devices					

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.

Llear Drimery Dhane Davies Add
User: Primary Phone Device Add Add a phone device as the primary phone for the user. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply
And a priorie device as the primary priorie for the user. Pressing OK retains but does not save entered changes, to save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: Bulk Provisioning Lab Val, Inc
Group: Group_G Group, Gewel
User:
Phone Device
Phone Device: (New Phone Device)
* Device Name:
* Device Level: Group
Device Type: (Select Device Type)
Template: (Select Template)
View Template
Device Billing Type: Use Org Billing Type
bevice binning type. Use organizing type
User Line
* Line / Port: 0 (labval.clearspancloud.com)
Line Position: 1st Phone Line
Device Description
Description:
Serial Number:
Phone Location:
Device Configuration
Host Name / IP Address:
Port:
Outbound Proxy:
Stun Server:
MAC Address: (Device's MAC Address)
Device Protocol: SIP 2.0
Transport Protocol: Unspecified
Encryption (TLS/SRTP):

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.

Ping Client				
Ping Client Username Option				
O Use an existing Ping accourt	t 🔿 Create a new Ping account			
*Ping Client Username:@	Ping Client Username:@ttest-env.clearspanuc.com			
*Ping User Password:	*Ping User Password of at least 6 characters)			
*Confirm Ping User Password:	'Confirm Ping User Password			
Initialize Ping User Password to random password				
Enabled Ping Featur	a Name			
Call Center				
O SMS				
User Line * Line / Port:				
Contactsip:@ test-env.clearspanuc.com				



- 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.
- 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.

User: Shared Call Appearance (SCA) Add Assign the user as a line on an additional phone device. "Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.		
OK* Cancel		
Enterprise:SystemValidation System Validation Group:JazzTest JazzTest User:Bob, Bob (Bob.Bo@hosp.cslab.clearspancloud.com)		
Phone Device Phone Device: (Search Phone Devices) Phone Device Search: Device Type Contains: poly Search		
Phone Device List (Select Phone Device) Template: (Select Phone Device) HOSP-POLY-E100 (Group) HOSP-POLY-E200 (Group) HOSP-POLY-E300 (Group) HOSP-POLY-E320 (Group) HOSP-POLY-E350 (Group) HOSP-POLY-E400 (Group) * Line / Port: HOSP-POLY-E450 (Group) 5046.sca01.(Site HOSP-POLY-E500 (Group) (@ hosp.cslab.clearspancloud.com		
Line Position:1st P HOSP-POLY-E550 (Group) Jazz_D230_000016 (Group) Jazz_D230_00016 (Group) @Allow Calls to be Jazz_D230_0014 (Group) @Allow Calls to thi Jazz_D230_0114 (Group) Jazz_D230_111116 (Group) Jazz_D230_12 (Group) Host Name / IP Ad Polycom_VVX310_dms-5010bhc (Group Port: Polycom_VVX310_dms-5011bhc (Group) Polyceden_VVX310_dms-5011bhc (Group) Polyceden_VVX310_dms-5011bhc (Group) Polyceden_VVX310_dms-5011bhc (Group) Polyceden_VVX310_dms-5011bhc (Group) Polyceden_VVX310_dms-5011bhc (Group)		
Outbound Proxy:		

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.

Phone Device		
Phone Device: CSBridge-Standard (Enterprise)		
* Device Level: Enterprise		
Device Type: ClearspanBridge		
Ping Client		
Ping Client Username Option		
O Use an existing Ping account O Create a new Ping account		
*Ping Client Username: @) :standard.clearspanuc.com	
*Ping User Password: (create a pass	word of at least 6 characters)	
*Confirm Ping User Password:		

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.

Ping Client			
Ping Client Username: @ [jtiberius.kirk ::test-env.clearspanuc.com			
Ping User Password: Wui2H-cxi_M1t-T_zHMT2-mqEM-9dPXa5852 (create a password of at least 6 characters)			
*Confirm Ping User Password: Wui2H-cxi_M1t-T_zHMT2-mqEM-9dPXa5852			
Ping Feature Name	Enabled		
Call Center	0		
SMS	0		
User Line			
* Line / Port: 6063336773.primary			
Contact: sip: 6063336773 @ test-env.clearspanuc.com			
Hide Details			

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.

User: Shared Call Appearance (SCA) Add
Assign the user as a line on an additional phone device. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK' Cancel Manage Users Custom Tags Custom Rings
Enterprise:SystemValidation System Validation
GroupJazzTest
User:Bob, Bob (Bob.Bo@hosp.cslab.clearspancloud.com)
Phone Device
Phone Device: (Search Phone Devices)
Phone Device Search:
Device Type Contains: poly Search
Phone Device List Polycom_VVX310_dms-5010bhc (Group)
* Device Level:Group
Device Type:Polycom_VVX310_dms
Template Jazz-VVX310 (Group)
View Template
Device Billing Type
User Line
* Line / Port:
5046.sca01.(Site ID Required)
Line Position: 2nd Phone Line
Shared Call Appearance: Enabled
Allow Calls to be Originated
Allow Calls to this Destination

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.

Advanced: User M Modify an existing Clearspa				
Changes made on previou	us pages have NOT been sa	wed! To save the chang	ges, you must press OK or	Apply on this page.
OK Cancel	Apply Delete			
Enterprise:SystemValidatio	n System Validation			
Group:JazzTest JazzTes	t			
User:Bob, Bob (Bob.Bo@h	nosp.cslab.clearspancloud.co	em)		
Service: (Select Service)	ж.			
User	Optional	Phones	SCA Options	Announcements
	· · · · ·			(Close Tab) (Close Other Tabs)
SCA Options				
OAlert All Shared Appeara	inces for Click-to-Dial calls			
Allow Call Retrieve from another location				
Allow Multiple Concurrent Calls on the same shared line				
OAllow Bridging of Users on the same shared line				
Bridge Warning Tone: Nor	ie v			

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.

Advanced: User Modify Modify an existing Clearspan user.						
Enterprise:Canine Center Training and Pet Stor Group:Training User:Last36, First36 (3124481036@k9center.clea Service{ (Select Service)						
User		Optional	Phones		Announcements	
Phone Devices Primary Phone: PolycomVVX411DMS-3124481034 Phone Level:Group Edit View Template Shared Call Appearance (add a line for this user on another phone) Add Shared Call Appearance SGA Option Phone Restart						(Cose Christian
Oselect All Phones Restart Selected Phones ORestart Phones on Save						
Phone Devices Restart Select Device Name ©	Device MAC Level Address ○ ○	Device Type [©]	Line / Port $^{\Diamond}$	Type ≎ Disabled ≎	Template [©]	Edit
PolycomVVX411DMS-3124481036	Group	Polycom VVX 411 (DMS)	3124481036.primary@k9center.clearspancloud.com	Primary false	Grp_VVX411 (Group)	View <u>Edit</u>
PolycomVVX450DMS-3124481036sca01 End of Phone Devices	Group	Polycom VVX 450 (DMS)	3124481036.sca01@k9center.clearspancloud.com	SCA false	Grp_VVX450 (Group)	View <u>Edit</u>

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.

User: Shared Call Appearance (SCA) Modify Modify the assignment of the user as a line on a phone device. "Pressing OK, Unassign, or Delete retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page. OK* Cancel Unassign Device* Delete Device* Manage Users Custom Tage Custom Tage Replace Phone
Enterprise: Bulk Provisioning – Lab Val, Inc
Group: Group_G Group, Gewel
User: LTest82, FTest82 (9722221082@labval.clearspancloud.com)
Phone Device
Phone Device: Smokey_Mitel6940_9722221082 (Group)
* Device Level: Group
Device Type: Mitel 6940 (DMS)
Template: Mitel6940_Grp (Group)
View Template
Device Billing Type: Use Org Billing Type
Restart Phones on Save
User Line
* Line / Port: 9722221082.sca01 @ labval.clearspancloud.com
Line Position: 1st Phone Line
Shared Call Appearance: Enabled
✓ Allow Calls to be Originated
Allow Calls to this Destination
Show Details
Device Configuration

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.

2

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

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

Primary Trunk
Trunk Group: 2TestTrunk2
Line / Port:
SIP Contact
Alternate Trunk Identity:
Enterprise Trunk: (None)

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.

Advanced: Us Modify an existing Clearsp	-					
OK Cancel	Apply Delete					
Enterprise: Bulk Provision Group: Group_G Group User: LTest170, FTest170	-	n)				
Service: (Select Service	e) -					
User	Optional	Phones		Annou	Incemen	ts
Total Size of Repository: Add Announcement	0.0MB used out of 1.0GB allocated				<u>Close Oth</u>	<u>er Tab</u>
Total Size of Repository: Add Announcement Announcement Search Announcement Type: (A	0.0MB used out of 1.0GB allocated					
Add Announcement	0.0MB used out of 1.0GB allocated					er Tab
Total Size of Repository: Add Announcement Announcement Search Announcement Type: (All Announcements)	0.0MB used out of 1.0GB allocated		Type	Size (KB) ⇔		

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.

Select a User Profile and complete the use	and a new order	par ave.	
Last Name is required. First Name is required.			
Phone Number and/or Extension are re User Password and Confirm password a			
[Details] Clearspan User ID is required.	are required.		
OK Cancel			
Enterprise:Canine Center Training and F Group:Training	Pet Store		
Jser:			
Service: (Select Service)			
User	Optional	Phones	Announcements
User	Optional	Phones	
	Optional	Phones	
Jser Classification	Optional	Phones	
Jser Classification	Optional	Phones	
User Classification User Profile: (Select User Profile)	Optional	Phones	
User Classification User Profile: (Select User Profile)	Optional	Phones	Announcements (Close Other Ta
User Classification User Profile: (Select User Profile)	Optional	Phones	
User Classification User Profile: (Select User Profile)	Optional	Phones	
Jser Classification Jser Profile: (Select User Profile)	Optional	Phones	
Jser Classification Jser Profile: (Select User Profile)	Optional	Phones	
Jser Classification Jser Profile: (Select User Profile) Clearspan User Last Name: First Name:	Optional	Phones	

Figure 117 - User Add Error Messages

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

User Add Messages	
While adding a Clearspan user, the user was sucessfully added but a failure occurred while completing configuration.	non-essential
OK.	
Enterprise:Canine Center Training and Pet Store	
Group:Training	
User:Unger, Felix (3124481047@k9center.clearspancloud.com)	
Notification	
User:Unger, Felix (3124481047@k9center.clearspancloud.com)	
Primary Phone Device:PolycomVVX150DMS-3124481047	
Failure:User successfully added However, related configuration failed set up:	
Failure Messages	
Voice Mail: Unable to add Surgemail User Account: A user (5052blg@tb20.aastra.com) already exists	s existing user in database

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:

Advanced: User M Modify an existing Clearspar					
OK Cancel A	pply Delete				
Enterprise:Canine Center Group:Training User:Unger, Felix (3124481 Service: Atternate Numbers	047@k9center.clear		m)		
User	Optior	al	Phones	Announcements	Alternate Numbers
additional numbers and exte	nsions ring your pho	one(s) just like		in addition to your primary nur on, you can specify a distinctive extensions for you.	
ØDistinctive Ring Alternate Numbers					
ID Phone Number	Activated	Extension	Ring Pattern	Description	
1 312-448-1108		1108	Short-Short-Long	Bat phone	
2 (None)			Normal		
3 (None)			Normal		

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.

Advanced: User Mo	odify			
lodify an existing Clearspan	1 user.			
OK Cancel Ap	pply Delete			
nterprise:Canine Center	Training and Pet Store			
roup:Training				
Iser:Unger, Felix (31244810	047@k9center.clearspand	loud.com)		
ervice: Authorization Code	is			
User	Optional	Phones	Announcements	Auth Codes
				(Close Tab)(Pin Tab)(Close Other Ta
ommunication Barring A	uthorization Codes			
reate new Communication	Barring Authorization Cod	des and manage existing o	odes.	
Add Authorization Code				
Add Admonzation Oode	.			
ommunications Barring	Authorization Codes			
ommunications Barring	Authorization Codes	Description ⁰		Delete
	Authorization Codes	Description 0		Delete <u>Delete</u>

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.

Advanced: User Modi Modify an existing Clearspan use OK Cancel Apply				
Enterprise:Canine Center Trai Group:Training User:Unger, Felix (3124481047(Service: Busy Lamp Field (BLF)	@k9center.clearspancloud.com)			
User	Optional	Phones	Announcements	BLF
* BLF List URI:sip:	when the BLF list URI is added of	k9center.clearspancloud.com	•	Search
Available Users			Monitored Users	Startin
		Add > Remove < Add Ali >> Remove All <<		

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:

Enterpris	e:CallCenter CCTes	sting					
Group:Ca	allCenter CallCenter	Group					
User:06P	Percy, Mercy (7175557	006@cctesting.aas	stra.com)				
Service:	Call Center Agent						
	User	Optional	Phon	ies	Announcements	Call Cer	nter Agent
						(Close Tab)(Pin Tab	I) (Close Other Tabs)
Call Cen	ter Agent						
Call Cent	ter Agent provisions the	e user's ACD settin	ngs and all the ACD	s to which the us	er belongs and is cur	rently joined.	
General	Settings						
Call Cent	ter Service Assigned:P	remium					
Guard Ti	imer Setting						
O Use [Default Guard Timer S	etting					
O Use I	User Guard Timer Set	ting					
OEn	hable Guard TimerGua	rd timer duration in	n seconds 5 - s	econds			
ACD Stat	te of the Agent: Sign-(Dut					
Agent Th	reshold Profile: Defau	It Agent Threshold	Profile				
OMake o	outgoing calls as: (Nor	ie) -					
Availabli	ility Settings						
Agent A	vailability Settings						
Use [Default Agent Availabil	ity Settings					
O Use I	User Agent Availability	Settings					
⊡Fo	proe agent to unavailab	e on Do Not Distu	urb activation				
Fo	prce agent to unavailab	e after 3 - con	nsecutive bounced of	calls			
OFe	prce agent to unavailab	le on not reachabl	e				
⊡Fo	orce agent to unavailab	le on personal call	S				
		22					
Select Ca	all Center to Assign to	Agent: (None)	Assign Call Ce	enter			
Agent's	Call Centers						
Join °	Call Center Name		Phone Number	Extension ©	Routing Type ¢	Skill Level	Remove
Ø	CC Classes2@ccte	esting aastra.com	7175557198	7198	Priority Based		Remove

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.

Advanced: User M Modify an existing Clearspa OK Cancel C Enterprise:CallCenter CC Group:CallCenter CallCe User:06Percy, Mercy (7175 Service: Call Center Super	Apply Delete CTesting enterGroup 5557006@cctesting.aastra	.com)		
User	Optional	Phones	Announcements	Call Center Supervisor
Call Center Supervisor Call Center Supervisor allor Available Call Centers		Add > Remove < Add All >> Remove All <<	Assigned Call Centers CC_Classes2@cctesting.aas	stra.com

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

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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.

Advanced: User Moc				
Modify an existing Clearspan u	,			
OK Gancel Appl	Delete			
Enterprise:CallCenter CCTe	sting			
Group:CallCenter CallCente	rGroup			
User:12Snappy, Ginger (71755	57012@cctesting.aastra	i.com)		
Service: Call Forward				
User	Optional	Phones	Announcements	Call Forward
			10	iose Tabl(Pin Tabl(Close Other Tabs)
Call Forward				
the number to which that call is your outgoing calling plan. For you are next to your phone wh service is turned on and you ar	Call Forwarding Always, en the call is forwarded b	you can also make your by using the Ring Remind	primary phone emit a short ri	ng burst to inform you if
Call Forwarding Always				
O On				
Forward-To Number:				
(Phone Number or SIP-URI)				
Play Ring Reminder when a	call is forwarded			
Call Forwarding Busy				
O On ⊚ Off				
* Forward-To Number:				
(Phone Number or SIP-URI)				
Call Forwarding No Answer				
O On Off				
Forward-To Number:				
(Phone Number or SIP-URI)				

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.

User: Call Forwarding Selective Add
Add a new call forwarding selective entry. Specify the time schedule and/or holiday schedule you would like calls forwarded. You can have the call forwarded for only specified numbers or all numbers. If you need more than 12 numbers or more distinct time or holiday periods, you can create multiple call forwarding selective entries. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: Bulk Provisioning Lab Val, Inc
Group: Group_G Group, Gewel
User: Dog, Gewel (9722221123@labval.mitel.com)
Call Forwarding Selective
* Name / Description:
Forward To
Default Forward-To Number: Forward-To Number (Phone Number or SIP-URI):
O Do Not Forward
Time Schedule: Every Day All Day
Holiday Schedule: None -
Forward Calls From
All Calls (from any phone number)
O Calls from the following Phone Numbers:
Private Numbers
Unavailable Numbers
Specific Phone Numbers: (wildcard characters: ? for any digit; trailing * for multiple digits)
Forward Calls To
Available Call To Numbers Selected Call To Numbers
Primary (0722221123 / 1123) Add > Add > Add All >> Remove All

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.

ОК	ancel Apply	Delete				
terprise:Call	Center CCTes	sting				
oup:CallCen	ter CallCenter	Group				
er:12Snapp	y, Ginger (71755	57012@cctesting.aastra	.com)			
ervice: Call F	Pickup					
Use	r	Optional	Phones	An	nouncements	Call Pickup
						Close Tab)(Pin Tab)(Close Other Ta
	ed to Call Picku	up Group 'Test1'				
sers Assign		up Group 'Test1' Department ≎	Phone Number	Extension 0	User ID 🗘	
sers Assign Last Name े	ed to Call Picku		Phone Number ≎ +1-7175557001	Extension 0		testing.aastra.com
sers Assign Last Name ° 11Autumn	ed to Call Picku	Department	٥		7175557001@co	testing.aastra.com
Last Name 11 Autumn 12 Gewel	ed to Call Picku First Name Fall	Department © Classes	≎ +1-7175557001	7001	7175557001@cc	
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Last Name © D1Autumn 1/2Gewel 1/3Poppy 1/4Darling 1/5Now 1/6Percy 1/7Grace	ed to Call Picku First Name © Fall JuJu Popcorn Harlee ASAP Mercy	Department © Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats	• +1-7175557001 +1-7175557002 +1-7175557003 +1-7175557004 +1-7175557005 +1-7175557006	7001 7002 7003 7004 7005 7006	7175557001@ccc 7175557002@ccc popcorn.03popp 7175557004@ccc 7175557005@ccc 7175557006@ccc 7175557006@ccc	desting.aastra.com @cctesting.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com
Last Name C MAutumn 1/2Gewel 13Poppy 14Darling 15Now 16Percy 17Grace 18Rita	ed to Call Picku First Name © Fall JuJu Popcorn Harlee ASAP Mercy Gracie	Department © Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes	• +1.7175557001 +1.7175557002 +1.7175557003 +1.7175557004 +1.7175557005 +1.7175557006 +1.7175557007	7001 7002 7003 7004 7005 7006 7007	7175557001@cc 7175557002@cc popcorn.03popp 7175557004@cc 7175557005@cc 7175557006@cc 7175557007@cc 7175557008@cc	testing.aastra.com v@cctesting.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com
Last Name Di Autumn Di Autumn Qegewel J3Poppy Ma Darling J5Now J6Percy J6Percy J6Percy J8Rita J8Rita	ed to Call Picku First Name © Fall JuJu Popcorn Harlee ASAP Mercy Gracie Cheeta	Department © Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats	• +1-7175557001 +1-7175557002 +1-7175557003 +1-7175557004 +1-7175557005 +1-7175557006 +1-7175557007 +1-7175557008	7001 7002 7003 7004 7005 7006 7006 7007 7008	7175557001@cc 7175557002@cc popcorn.03popp 7175557004@cc 7175557005@cc 7175557005@cc 7175557007@cc 7175557008@cc 7175557009@cc	vesting.aastra.com v@cctesting.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com
Last Name Last Name D1Autumn D2Gewel J3Poppy D4Darling D5Now D6Percy D6Per	ed to Call Picku First Name © Fall JuJu Popcorn Harlee ASAP Mercy Gracie Cheeta Switch	Department © Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes	• +1-7175557001 +1-7175557002 +1-7175557003 +1-7175557004 +1-7175557005 +1-7175557006 +1-7175557007 +1-7175557008 +1-7175557008 +1-7175557009	7001 7002 7003 7004 7005 7006 7007 7008 7009	7175557001@cc 7175557002@cc popcorn.03popp 7175557004@cc 7175557005@cc 7175557007@cc 7175557007@cc 7175557007@cc 7175557009@cc 7175557010@cc 7175557010@cc	v astra.com v@cctesting.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com
	ed to Call Picku First Name • Fall JuJu Popcorn Harlee ASAP Mercy Gracie Cheeta Switch FTest10	Department © Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats Classes Shop, Toys & Treats	• +1-7175557001 +1-7175557002 +1-7175557003 +1-7175557004 +1-7175557005 +1-7175557006 +1-7175557007 +1-7175557008 +1-7175557009 +1-7175557010	7001 7002 7003 7004 7005 7006 7006 7006 7007 7008 7009 7010	7175557001@cc 7175557002@cc popcorn.03popp 7175557004@cc 7175557005@cc 7175557005@cc 7175557007@cc 7175557007@cc 7175557009@cc 7175557019@cc 7175557011@cc	v astra.com v astra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com testing.aastra.com

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

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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.

Advanced: User Modify Modify an existing Clearspan user. Image: CallCenter - CCTesting Group: CallCenter - CCTesting Group: CallCenter - CalCenterGroup User: 12Snappy. Ginger (7175557012@cdcetsing.aastra.com) Service: Call Recording Image: Call Recording Image: CallCenter - CalCenterGroup User: 12Snappy. Ginger (7175557012@cdcetsing.aastra.com) Service: Call Recording Image: Call Recording Image: Call Recording Call Recording allows you to record calls. Record Call: Maways Aways with Pause/Resume On Demand On Demand with User Initiated Start Options Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: Play Announcement Recording Natification: Play Announcement Recording Natification: Play Announcement Recording Natification: Play Announcement Recording Natification: Play Announcement					
CK Garceil Appy Delate Enterprise: CallCenter CCTesting Group:CallCenter CallCenterGroup User: 12Snappy, Ginger (7175557012@octesting.aastra.com) Service: Call Recording Optional Phones Announcements Call Recording User Optional Phones Announcements Call Recording User Optional Phones Announcements Call Recording Call Recording Call Recording Call Recording Call Recording Call Recording Call Recording Call Recording allows you to record calls. Record Call: Concentre Record Call: Concentre Record Call: Concentre Record Call: Concentre Record Call Recording Start/Stop Announcement Concentre Record Voice Messaging Play Call Recording Start/Stop Announcement Record Voice Messaging Record Voice Messaging Play Call Recording Start/Stop Announcement Play Play Announcement Play Announcement @ None Play Announcement Play Announcement Play Announcement					
Group:CallCenter CallCenterGroup User:12Snappy, Ginger (7175557012@ocdesting.aastra.com) Service: Call Recording User Optional Phones Announcements Call Recording Call Recording Call Recording allows you to record calls. Record Call: Never Never Naways Naways with Pause/Resume On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Play Announcement Recording Notification:					
User: 12Snappy, Ginger (7175557012@octesting.aastra.com) Service: Call Recording User Optional Phones Announcements Call Recording Iteration Iterat	Enterprise:CallCenter C	CTesting			
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User Optional Phones Announcements Call Recording Call Recording Call Recording allows you to record calls. Call Record Call: Call Never Always Call Announcement Call Recording allows with Pause/Resume Conternation Conterna	User:12Snappy, Ginger (71	75557012@cctesting.aastra	a.com)		
Close Test (Close Other Test)	Service: Call Recording	-			
Close Test (Close Other Test)					
Call Recording Call Recording allows you to record calls. Record Call: Never Never Always On Demand On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Play Call Record Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification:	User	Optional	Phones	Announcements	Call Recording
Call Recording allows you to record calls. Record Call: Always Aways with Pause/Resume On Demand On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: Play Announcement Recording Notification:				10	Iosa Talii (Pin Tabi (Close Other Tabs)
Record Call: Never Aways On Demand On Demand On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: Play Announcement Recording Notification:	Call Recording				
Never Always Always with Pause/Resume On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification:	Call Recording allows you t	o record calls.			
 Always Always with Pause/Resume On Demand On Demand with User Initiated Start Options: OPlay Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification: 	Record Call:				
Always with Pause/Resume On Demand On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification:	Never				
 On Demand On Demand with User Initiated Start Options: OPlay Call Recording Start/Stop Announcement ORecord Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification: 	•				
On Demand with User Initiated Start Options: Play Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification:	-	sume			
Options: OPlay Call Recording Start/Stop Announcement Record Voice Messaging Pause/Resume Notification: None Play Announcement Recording Notification:	0	Initiated Start			
OPlay Call Recording Start/Stop Announcement ORecord Voice Messaging Pause/Resume Notification: None Beep Play Announcement Recording Notification:					
Pause/Resume Notification: None Beep Play Announcement Recording Notification:	Contraction of the second	/Stop Announcement			
None Beep Play Announcement Recording Notification:	ORecord Voice Messaging				
Beep Play Announcement Recording Notification:	Pause/Resume Notification	2			
Play Announcement Recording Notification:	None				
Recording Notification:	О Веер				
	O Play Announcement				
ORepeat Record Call Warning Tone Every 15 seconds	Recording Notification:	50 (A. 1997)			
	ORepeat Record Call War	ning Tone Every 15 s	econds		

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.

Advanced: User M Modify an existing Clearspa	•				
Enterprise:Canine Center Training and Pet Store Group:Training User:Last05, First05 (3124481005@k9center.clearspancloud.com) Service: Clearspan Anywhere					
User	Optional	Phones	Announcements	Clearspan Anywhere	
Clearspan Anywhere Setup Clearspan Anywhere @Alert all locations for Clici OAlert all locations for Gro Available Portals: <u>Availab</u> Add Phone Number Clearspan Anywhere Pho	up Paging calls le Portal List	nobile phones you would like	e to link to this account.	(Close Tabi)(Pin Tabi)(Close Other Tabi)	
Phone Number 0		Description [©]		Edit	

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.

Enterprise:Canine Cente	er Training and Pet Store		
Group:Training			
Jser:Last05, First05 (31	24481005@k9center.clearspancloud.c	xom)	
		xom)	
Clearspan Anywhere F	Portals Available to the User	and an an	
		xom) Extension ¢	Language \diamond

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.

User: Clearspan Anywhere Phone Number Modify Modify an existing Clearspan Anywhere phone number, including any defined selective criteria for the phone number. "Pressing OK or
Delete retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel Delete*
Enterprise:Canine Center Training and Pet Store
Group:Training
User:Last05, First05 (3124481005@k9center.clearspancloud.com)
Phone Number
* Phone Number:
9728881540
Description:
My Mobile
@Enable this Location
Outbound Alternate Number:
(Phone Number or SIP-URI)
□Enable Diversion Inhibitor
PRequire Answer Confirmation
□Use Clearspan-based Call Control Services
Add Selective Criteria
Selective Criteria
Active \circ Name / Description \circ Clearspan Anywhere \circ Calls From \circ Calls To \circ Edit
No criteria exist.
End of Selective Criteria

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.

User: Clearspan Anywhere Selective Criteria Add						
Add a new selective criteria entry for a Clearspan Anywhere phone number. *Pressing OK retains but does not save entered changes.						
To save the changes, press OK or Apply on the subsequent page.						
OK* Cancel						
Enterprise:Canine Center Training and Pet Store						
Group:Training						
User:Last05, First05 (3124481005@k9center.clearspanoloud.com)						
Selective Criteria						
Phone Number:9728881540						
* Name / Description:						
Block Anonymous Callers						
Use Clearspan Anywhere						
Use Clearspan Anywhere						
O Do not use Clearspan Anywhere						
Time Schedule: Every Day All Day						
Holiday Schedule: None						
Calls From						
All Calls (from any phone number)						
Calls from the following Phone Numbers:						
Private Numbers						
@Unavailable Numbers						
Specific Phone Numbers: (wildcard characters: ? for any digit; trailing * for multiple digits)						
Calls To						
Select called numbers that this criteria applies to. When no numbers are selected, the called number is not used as part of the criteria.						
Available Call To Numbers Selected Call To Numbers						
Primary (3124481005 / 1005) Add > Remove <						

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.

Advanced: User	Modify			
Modify an existing Clearspan us	er.			
OK Cancel App	Delete			
Enterprise:pingWeb-dev Ping Group:bridgeDev Bridge Devel User:Alst, Avan (Avan.alst@csl Service: Do Not Disturb	lopment			
User	Optional	Phones	Announcements	Do Not Disturb
Do Not Disturb			(Close	Tab)(Pin Tab)(Close Other Tabs
	rectly to your voice messaging bo I is being sent to voice messagin ng to receive calls.			
Do Not Disturb:				
🔾 On 💿 Off				
OPlay Ring Reminder when a c	all is blocked			

Figure 132 - Do Not Disturb Modify Page

Fax Messaging

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

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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.

Advanced: User M Modify an existing Clearspa				
OK Cancel A	pply Delete			
Enterprise:Canine Center Group:Training User:Last05, First05 (31244 Service: Fax Messaging	Training and Pet Store	loud.com)		
User	Optional	Phones	Announcements	Fax Messaging
Fax Messaging Fax Messaging allows you t @Enable Fax Messaging: Phone Number: (None) Extension:	o receive faxes over a dedica	ted phone number.		(Close Tab)(Pin Tab)(Close Other Tabs)
Aliases:				
sip:		@ k9center.clear	spancloud.com	
sip:		@ k9center.clear	spancloud.com	
sip:		@ k9center.clear	spancloud.com	

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.

	Advanced: User Modify Modify an existing Clearspan user.							
OK Cancel Apply Delete								
Enterprise:Canine Center Training and Pet Store Group:Training								
	User:Last05, First05 (3124481005@k9center.clearspancloud.com) Service: Flexible Seating Guest							
User	Optional	Phones	Announcements	Flexible Seating Guest				
⊚ On ⊖ Off	ØLimit Association to 12 Hours Unlock Phone PIN Code: Phone Device: (None)							
Associated Host								
Search for and select a Flexible Seating Host. Then press 'Associate Host' to complete the association of the host with this guest. Host Search:								
(All Hosts)	ains:			Search				
Associate Host Available Hosts								

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.
- 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

Advanced: User M Modify an existing Clearspa						
OK Cancel Apply Delete						
Enterprise: Canine Center Group: Training User: Last05, First05 (312 Service: Flexible Seating	4481005@k9center.clearspan	icloud.com)				
User	Optional	Phones	Announcements	Flexible Seating Guest		
Flexible Seating Guest Flexible Seating Guest allows a user to associate their device profile with a flexible seating host. On Off Limit Association to Hours (must be within Host Association Limit of 24 hours) Unlock Phone PIN Code: Phone Device: Polycom/VXD230DMS-3124481005 (Group)						
Line / Port: 3124481005.F Associated Host Name: FSH_1048 Flexible Seating Host ID: 3			clearspancloud.com *			

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.

Advanced: User M Modify an existing Clearspa	-					
OK Cancel A	pply Delete					
Enterprise: Canine Center Group: Training User: Last05, First05 (312/ Service: Hoteling Guest	Training and Pet Store 1481005@k9center.clearspar	ncloud.com)				
User	Optional	Phones	Announcements	Hoteling Guest		
Hoteling Guest allows a usphone device with the gues On Off Limit Association to Associated Host Host Search:	C Limit Association to 12 Hours Associated Host					
(All Users) Cont	(All Users) Contains: Contains: Search					
Associate Host						
Available Hosts				^		

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.

Advanced: User Modify Modify an existing Clearspan user.						
OK Cancel Apply Delete						
Enterprise: Canine Center Training and Pet Store Group: Training User: Last22, First22 (3124481022@k9center.clearspancloud.com) Service: Hoteling Host						
Service. Thoreining host						
User	Optional	Phones	Announcements	Hoteling Host		
Hoteling Host allows a use host user. When associate association limit is not ena On Off Enforce Association Lin Access Level: Enterprise Group 	C Enforce Association Limit of 24 Hours Access Level: C Enterprise					
Associated Guest Name: Last05, First05 Phone Number: 31244810 Location Dialing Code: Extension: 1005 Association Time: 06/28/2 Association Duration: 00:0 Force Release Associa	023 14:16:42 11:01					

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.

Associated Guest	
Name: Last05, First05	
Phone Number: 3124481005	
Location Dialing Code:	
Extension: 1005	
Association Time: 06/28/2023 14:16:42	
Association Duration: 00:01:01	
Force Release 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.
- 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.
- 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.

User: Priority Alert Add						
Add a new priority alert entry. Specify the time schedule and/or holiday schedule you would like a priority alert to occur. You can have the priority alerting occur for all external calls or only for calls from the specified phone numbers. If you need more than 12 numbers or more distinct time or holiday periods, you can create multiple priority alert entries. "Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.						
OK* Cancel						
Enterprise: Canine Center Training and Pet Store						
Group: Training						
User: Last22, First22 (3124481022@k9center.clearspancloud.com)						
Priority Alert						
* Name / Description:						
Priority Alert						
On Off						
Time Schedule: Every Day All Day						
Holiday Schedule: None T						
Calls From						
All External Calls						
O Calls from the following Phone Numbers						
Private Numbers						
O Unavailable Numbers						
Specific Phone Numbers:(wildcard characters: ? for any digit; trailing * for multiple digits)						
Calls To						
Available Call To Numbers Selected Call To Numbers						
Drimony (2424/84022 / 4022)						
Primary (3124481022 / 1022)						

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.
- 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.

Advanced: User M	odifv				
Modify an existing Clearspa					
OK Cancel A	Delete				
Enterprise: Canine Center	Training and Pet Store				
Group: Training					
User: Last22, First22 (3124	481022@k9center.clearspa	ancloud.com)			
Service: Privacy					
User	Optional	Phones	Announcements	Privacy	
			(<u>Close Tab</u>) (<u>Pin Tab</u>) (<u>Close Other Tabs</u>)	
Privacy					
Privacy allows you to exclude yourself 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 your phone status. These selected users can view your phone status even if you enable phone status privacy.					
Enable Directory Privacy	/				
Enable Auto Attendant E	Extension Dialing Privacy				
Enable Auto Attendant Name Dialing Privacy					
Enable Phone Status Pr	ivacy				
Users Authorized to Moni	tor				
Select the users authorized	to monitor the phone statu	s when Phone Status Priva	cy is enabled.		
User Search:					
(All Users) Cont	ains:			Search	
Available Users		_	Users Authorized to Monito	r	
	^			k9center.clearspancloud.com	
	_	Add >	Last02, First02 (3124481002@ Last05, First05 (3124481005@		
	_		Last04, First04 (3124481004@		
	_	Remove <	Last03, First03 (3124481003@	k9center.clearspancloud.com	
	_				
		Add All >>			
	_	Remove All <<			

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:

Advanced: User Modify Modify an existing Clearspan user.							
ок	Cancel A	pply Delete					
Group: Tr	aining	Training and Pet Store 1481022@k9center.clearsp	ancloud.com)				
	User	Optional	Phones	Announcements	Sequential Ring		
Sequentia locations ring calls The criteri specified I and time of Use B Numb Locat	 (Close Tab) (Close Other Tabs) Sequential Ring Sequential Ring allows you to sequentially ring up to 5 locations in addition to the base location for a specified number of rings. The 5 locations can be either a phone number or a SIP-URI. The feature applies to calls matching your pre-defined criteria. Use this service to ring calls from your manager, a family member, or an important customer on your cell phone, alternate business phone, or home phone. The criteria for an each Sequential Ring entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule. All criteria for an entry must be satisfied for the call to enter Sequential Ring (phone number and day of week and time of day). If the criteria do not match, the call continues as if this service was not turned on. Use Base Location first Mumber of rings for Base Chis setting also affects Call Forward Rings Before Forwarding and Voice Mail Greetings Number of Rings) Continue the search process if the base location is busy. Enable caller to skip search process. Assumes forwarding or messaging is enabled. 						
1 2 3 4 5 Add S	Phone Number /		Number of rings Answer 3 3 3 4 5 5 5 5 5 5 5 5 5 5 5 5 5	confirmation required			
Sequenti	al Ring Criteria						
Active ¢	Name / Descri	Rin ption ≎ Sequer ≎			Edit		
Ø	GloryTest	Ye	s Private Numbers	Unavailable Numbers, 972222	21001, <u>Edit</u>		

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.

User: Sequential Ring Add Add a new sequential ring entry. Specify the time schedule and/or holiday schedule you would like calls sequentially rung. Also, you can have the call sequentially rung when only the specified numbers call or all numbers call. If you need more than 12 numbers or more distinct time or holiday periods, you can create multiple sequential ring entries. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
Enterprise: Canine Center Training and Pet Store
Group: Training
User: Last22, First22 (3124481022@k9center.clearspancloud.com)
Sequential Ring * Name / Description:
Sequential Ring
 Use sequential ring
O Do not use sequential ring
Time Schedule: Every Day All Day
Holiday Schedule: None
Calls From
 All Calls (from any phone number) Calls from the following Phone Numbers
Private Numbers
O Unavailable Numbers
Specific Phone Numbers:(wildcard characters: ? for any digit; trailing * for multiple digits)

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:

Advanced: User Modify an existing Clea							
OK Cancel	Apply Delete						
Enterprise: Canine Cer Group: Training User: Last22, First22 (;	, in the second s		om)				
Service: Simultaneou	s Ring	·					
User	Optiona	u l	Phones	Annou	ncements	Simultaneous I	Ring
Simultaneous Ring					(<u>Close Tab</u>) (<u>Pin Tab</u>) (<u>Close C</u>)ther Tabs)
Simultaneous Ring allo phone when you receive get a call. You can also be a list of up to 12 pho must be satisfied for th the call continues as if office voice messaging On O Off	e a call. This feature i o turn off simultaneous one numbers or digit p e call to enter Simulta this service was not t picks up, your voice r	s helpful when you s ring when you are satterns, a specified aneous Ring (phone jurned on. Warning; mails could be on y	are not at your pho at your desk on a I time schedule, an number and day o if your cell phone o our cell phone mes	ne but you w call. The crit d a specified f week and t or other phor	vould like your (eria for each Si d holiday sched ime of day). If the has voice ma	cell phone to ring w imultaneous Ring e ule. All criteria for a he criteria do not m	hen you ntry can an entry atch,
Answer confirmation required	Phone Number / S	IP-URI	Answer confir required	mation F	Phone Number	/ SIP-URI	
	3124485591		0	(3124485592		
\checkmark	3124485593		0	(3124485594		
Ο				ĺ			
Ο) 0	(
Ο				(
Add Simultaneous F Simultaneous Ring C							
Active \diamond Name / De	scription ≎	Ring Simultaneously ⇔	Calls From ≎				Edit
GloryTest		Yes	Private Numbers,	Unavailable	Numbers, 9722	2221001,	<u>Edit</u>

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.

User: Simultaneous Ring Add Add a new simultaneous ring entry. Specify the time schedule and/or holiday schedule you would like calls ring. You can have the calls ring for only specified numbers or all numbers. If you need more than 12 numbers or more distinct time or holiday periods, you can create multiple simultaneous ring entries. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: Canine Center Training and Pet Store
Group: Training
User: Last22, First22 (3124481022@k9center.clearspancloud.com)
Simultaneous Ring
* Name / Description:
Simultaneous Ring
Use simultaneous ring
O Do not use simultaneous ring
Time Schedule: Every Day All Day
Holiday Schedule: None
Calls From
 All Calls (from any phone number) Calls from the following Phone Numbers
Private Numbers
O Unavailable Numbers
Specific Phone Numbers:(wildcard characters: ? for any digit; trailing * for multiple digits)

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.
- 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

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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.
- If you want to assign a predefined Speed Dial 100 List to the user, select it from the Initialize List Using drop-down box, and click Initialize List. Initializing a predefined list overwrites any existing Speed Code entries.
- 7. If you want to assign a specific Speed Code entry, click the **Add Speed Dial 100** button. The User: Speed Dial 100 Add page displays as in the following example.

User: Speed Dial 100 Add
Add a new speed dial. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: Canine Center Training and Pet Store
Group: Training
User: Last22, First22 (3124481022@k9center.clearspancloud.com)
Speed Code 100: 00 -
Name / Description:
* Phone Number / SIP-URI:

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.

Advanced: User N	lodify			
Modify an existing Clearsp	an user.			
OK Cancel A	Apply Delete			
Enterprise: Canine Center	Training and Pet Store			
Group: Training				
User: Last22, First22 (312	4481022@k9center.clearsp	ancloud.com)		
Service: Voice Mail				
User	Optional	Phones	Announcements	Voice Mail
			(<u>Close Tab</u>)	(Pin Tab) (Close Other Tabs)
Voice Mail				
Voice Mail allows you to re	cord messages for calls that	t are not answered within a	specified number of rings or	for busy calls.
Voice Mail: Voice Mail - E	E-mail Notification	Delete Voice Mailbox	Reset Voice Mailbo	c .
Voice Mail Active				
Active O Disabled				
Calls sent to Voice Mail:				
All Calls				
Busy Calls				
No Answer Calls				
Out-of-Zone Calls				
Reset Voice Portal Passco	de:			
(create a numeric passcod	e of 4 to 8 digits)			
Confirm Portal Passcode:]
Voice Mail Server: Clears	pan: Group Server			
Voice Mail Management				
Arriving Voice Mail Action:	Use Unified Messaging	* .		
🕢 Use Phone Message W	/aiting Indicator (MWI)			
Send Notification to E-r	mail Address			
Notification Email Address				
axel@k9center.clearspan	cloud.com]

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

E/

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.

Advanced: User Modify Modify an existing Clearspan user.	
OK Cancel Apply Delete	
Enterprise: Canine Center Training and Pet Store	
Group: Training	
User: Last22, First22 (3124481022@k9center.clearspancloud.com)	
Service: Voice Mail Distribution Lists	
User Optional Phones Announcements Voice M	
(<u>Close Tab</u>) (<u>Pin Tab</u>) (<u>Close</u> Tab) (<u>Pin Tab</u>) (<u>Close</u> Tab)	<u>se Other Tabs</u>)
Voice Mail Distribution Lists allows you to create lists of numbers where you can send voice messages to in bulk.	
Add Distribution List	
Voice Mail Distribution Lists	
Distribution List Description ≎ Number	Edit
1 Glory Test 1	<u>Edit</u>
2 Gewel Test 2	<u>Edit</u>
End of Distribution Lists	

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

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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.

Advanced: User M Modify an existing Clearspa OK Cancel A	-			
Enterprise: Canine Center - Group: Training User: Last22, First22 (3124 Service: Voice Mail Greeti	1481022@k9center.clearspa	ncloud.com)		
User	Optional	Phones	Announcements	Voice Mail Greetings
Personal Audio Greeting: Personal Video Greeting: No Answer Greeting Setti Number of	This setting also affects Call ocation) Use Normal No Answer Gr) (<u>Pin Tab</u>) (<u>Close Other Tab</u>)
Normal No Answer Settin Greeting Source: System Unavailable Greeting Set Audio Greeting: (None) Video Greeting: (None) Alternate No Answer Gree Name:	Greeting ttings			

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**.
- Set the Account ID under Group Settings. It can be Required, Not Required, or Use Enterprise Setting, which uses the enterprise settings on this screen. This setting appears only when a Group is specified. By default, the Voicemail Email is set to Use Enterprise Setting.
- 8. Set the **Integrated IM&P** under Group Settings. Setting this to **Use Enterprise Setting** uses the enterprise settings on this screen, if you set this to **IM&P service domain**, enter the service domain in the text field that appears. This setting appears only when a Group is specified.



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

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

New User E-mail Notification

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

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

User General Settings: New User E-mail Notification Display and modify the E-mail message that is sent to new users based on phone type. The E-mail notification typically provides instructions on phone setup.
OK Cancel Apply Save As System-Wide Default
Enterprise: Canine Center Training and Pet Store
Phone Manufacturer: Mitel (Aastra)
New User E-mail Message Enter or modify the 'From' address, 'Subject' line, and body of the E-mail message that is to be sent to new phone users. The subject line and message body can contain any of the substitution tags (identified by {} braces) listed at the bottom of the page. When the E-mail is sent, these tags are replaced by the appropriate user-specific information.
The text between {CCDesktopStart} and {CCDesktopEnd} is sent only when the new user has a Clearspan Communicator - Desktop device configured. Similarly the text between {CSEngageDesktopStart} and {CSEngageDesktopEnd} is sent for a CS Engage - Desktop device, between {CCS4BStart} and {CCS4BEnd} is sent for a Clearspan Communicator - S4B device, between {CSEngageMobileStart} and {CSEngageMobileStart} and {CCS4BEnd} is sent for a Clearspan Communicator - Mobile device, between {CCMobileEnd} is sent for a Clearspan Communicator - S4B device, between {CSEngageMobileStart} and {CSEngageMobileStart} and {CCMobileStart} and {CCMobileEnd} is sent for a Clearspan Communicator - Mobile device, between {CSEngageTabletStart} and {CSEngageTabletEnd} is sent for a UC-One/CS Engage - Tablet device, and between {CCTabletStart} and {CCTabletEnd} is sent for a Clearspan Communicator - Tablet device.
Similarly, the {DMMACAddressStart} and {DMMACAddressEnd} tags surround text only sent when the user's phone device is configured using the device's MAC Address. The {DMCredentialsStart} and {DMCredentialsEnd} tags surround text only sent when the user's phone device is configured using the device's credentials (access User Name and Password). Reset to System-Wide Default Clear
From:
No-Reply@hospitality.cslab.clearspancloud.com
Subject:
Your New Mitel (Aastra) Phone
Email Message Body
Greetings {UserName}:
Your organization has provided you with a new Mitel (Aastra) {PhoneModel} phone and the latest Unified Communications and messaging features.
The following steps are required to install and activate your new phone:
1) When you receive your phone, unpack the phone and follow the assembly instructions.
2) The following link is to Mitel's online training/tutorials, which includes phone assembly, user training, unified messaging (voice mail) and other optional applications. Please choose the appropriate training which applies to your device. https:// <insert here="" link=""></insert>

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.

User Del Delete a Clea Cancel		any associated Clearspan Communicator/Clearspan Mobile dev	ices only used by this user.
Enterprise: 0	anine Center Training and Pet Store		
Group: Train	ng		
User: Unger,	Felix (3124481047@k9center.clearspancloud.com)		
U .	Felix (3124481047@k9center.clearspancloud.com) elete: User and Associated Phone Devices		
Select All			
Phone Devi			
Selected	Device Type $^{\diamond}$	Device Name	Туре
	Polycom VVX 150 (DMS)	PolycomVVX150DMS-3124481047	Primary
- End of Pho	ne Devices - (Soft Client devices are always remo	oved on user delete)	

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'.

Ping User Deactivate/Retain	
Thig Oser Deactivate/Tretain	
Ping User can be set to deactivate or retain state for future use.	
OK Cancel	
Enterprise: SystemValidation System Validation	
Group: JazzTest JazzTest	
User: Iname, 5175test1 (Iname.5175test1@hosp.cslab.clearspar	icloud.com)
Ping Client Username: @5175test1:test.clearspanuc.com	
Ping User Dispositional State Selection:	
O Deactivate O Retain	
"Deactivate" clears the Ping avatar and display name, sets the Pir be re-used.	ng account to an unusable state and disassociates the phone number. The associated Ping username cannot
"Retain" leaves the Ping account in tact, but without the ability to ousername/account can be re-used.	originate or receive extension and PSTN phone calls until it is re-associated with a Clearspan user. The Ping

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 reassigned.
- '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.

Primary Phone Device			
* Device Name:			
PolycomVVX150DMS-3124481428			
Device Level: Group			
* Line / Port: 3124481428.primary	@	k9center.clearspancloud.com	
VLAN ID: (VLAN is not enabled in the template)	Warning: Modifying	g the VLAN ID may cause the phone to stop operating.	
MAC Address: (Device's MAC Address)			
ERL Record Name: (None)			
ERL Record Name: (None)]	
ERL Record Name: (None) = Device Access: * User Name:			

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

User: Primary Phone Device Add
Add a phone device as the primary phone for the user. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel Manage Users Custom Tags
Enterprise: Canine Center Training and Pet Store
Group: Training
User: Last04, First04 (3124481004@k9center.clearspancloud.com)
Phone Device
Phone Device: (New Phone Device)
* Device Name:
1004.PolyVVX\$00
* Device Level: Group
Device Type: Polycom VVX 500 (DMS)
Template: (Select Template)
View Template
Device Billing Type: Use Org Billing Type
User Line
* Line / Port:
3124481004.primary @ k9center.clearspancloud.com
Line Position: 1st Phone Line
Device Description
Description:
Serial Number:
Phone Location:

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.

User General Settings: New User E-mail Notification
Display and modify the E-mail message that is sent to new users based on phone type. The E-mail notification typically provides instructions on phone setup.
OK Cancel Apply Save As System-Wide Default
Enterprise: Canine Center Training and Pet Store
Phone Manufacturer: Polycom
New User E-mail Message Enter or modify the 'From' address, 'Subject' line, and body of the E-mail message that is to be sent to new phone users. The subject line and message body can contain any of the substitution tags (identified by {} braces) listed at the bottom of the page. When the E-mail is sent, these tags are replaced by the appropriate user-specific information.
The text between {CCDesktopStart} and {CCDesktopEnd} is sent only when the new user has a Clearspan Communicator - Desktop device configured. Similarly the text between {CSEngageDesktopStart} and {CSEngageDesktopEnd} is sent for a CS Engage - Desktop device, between {CCS4BStart} and {CCS4BEnd} is sent for a Clearspan Communicator - S4B device, between {CSEngageMobileStart} and {CSEngageMobileEnd} is sent for a UC-One/CS Engage - Mobile device, between {CCMobileStart} and {CCMobileEnd} is sent for a Clearspan Communicator - Mobile device, between {CSEngageTabletStart} and {CSEngageTabletStart} and {CCS4BEtart} is sent for a UC- One/CS Engage - Tablet device, and between {CCTabletStart} and {CCTabletEnd} is sent for a Clearspan Communicator - Tablet device.
Similarly, the (DMMACAddressStart) and (DMMACAddressEnd) tags surround text only sent when the user's phone device is configured using the device's MAC Address. The (DMCredentialsStart) and (DMCredentialsEnd) tags surround text only sent when the user's phone device is configured using the device's credentials (access User Name and Password).
Reset to System-Wide Default
Clear
From:
No-Reply@hospitality.cslab.clearspancloud.com
Subject:
Your New Polycom Phone
Email Message Body
Greetings {UserName}:
{DMMACAddressStart} Your organization has provided you with a new Polycom {PhoneModel} phone. Setup your phone as described in the installation instructions provided with the phone. {DMMACAddressEnd} {DMCredentialsStart}
Your organization has provided you with a new Polycom {PhoneModel} phone. The following steps are required to install and activate your new phone:
1) When you receive your phone, unpack the phone and follow the assembly instructions as described in the installation instructions provided with the 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.
- 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.

Call Center Add		
Add a new call center.		
OK Cancel		
OK Caliber		
Enterprise: Canine Center Training and Pet St	ore	
Group: Training		
Call Center:		
Call Center	Optional	Routing Policies
Call Center		(<u>Close Other Tabe</u>)
* Name:		
* CallCenter ID:		
@ [k5	Ocenter.clearspancloud.com	
* Call Center Type: (Select Call Center Type)		
O Support User		
Department: (None)		
* Phone Number: (Select Phone Number)	1	
Extension:		
* Call Center Password:		
* Confirm Call Center Password:		
Calling Line ID Settings		
* Last Name:		
* First Name:		
Phone Number:		
Call Center Settings		
Group Policy:		
O Circular	Uniform () Weighted Call Distribution	
Queue Length: 0 calls		

Figure 155 - Call Center Add Page

- 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.

Flexible Seating Host Add Add a new flexible seating host.					
Enterprise: Canine Center Training Group: Training Flexible Seating Host: Service: (Select Service)	and Pet Store				
Host	Optional	Phone	Guest Association		
Host *Name:			(<u>Close Other Tabs</u>)		
* Flexible Seating Host ID:	@ k9center.clearspancloud.com	n			
O Support User: Department: (None)					
Phone Number: (Select Phone Number: Extension:	er) 👻				
Calling Line ID * Last Name:					
* First Name:					
Phone Number:					
Routing Policies Ø Allow Emergency Calls Ø Allow Voice Portal Calls					
Services Select all Services required by the Fil	exible Seating Host:				
Available Services Authentication Basic Call Logs Calling Line ID Blocking Privacy	Ad	d >	^		

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.
- 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

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

Guest Association Tab

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

Privacy Tab

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

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

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

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

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

Group Paging

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

Only Group Administrator and above can configure the Group Paging.

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

Adding a new Group Paging

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

Group Paging Add Add a new paging group.	
OK Cancel	
Enterprise: Canine Center Training and Pet Store	
Group: Training	
Group Paging:	
Service: (Select Service)	
Group Paging	Optional
* Name: * Paging Group ID: @ k9center.clearspancloud.c O Support User	iom s
Department: (None)	
* Phone Number: (Select Phone Number)	
Extension:	
Confirmation Tone Sending Timeout: 1 (Seconds)	

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.

Group Paging Modify						
Modify an existing paging group.						
OK Cancel Apply	Delete					
Enterprise: Canine Center Training	and Pet Store					
Group: Training						
Group Paging: Smokey_159 (312448	1115@k9center.clearspancloud.com)				
Service: (Select Service)						
Group Paging	Optional	Originators	Targets			
			(Close Other Tabs)			
Group Paging						
* Name:						
Smokey_159						
* Paging Group ID:						
3124481115	@ k9center.clearspancloud.com	n 👻				
O Support User						
Department: (None)						
* Phone Number: 312-448-1115 Activated O DeActivated						
Extension:						
1115						
Network Server Site: DFLT_SITE I	Default Site					
Confirmation Tone Sending Timeout: (Seconds)						
Time Zone: (GMT-05:00) (US) Centr	al Time					

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.

Group Paging Choose the desired Enterprise and Group. To add a new pagin OK Cancel Apply Add	ng group, press the Add button	. To display a	a list of group paging to edit or delete, press t	he Search b	utton.	
Enterprise: Canine Center Training and Pet Store						
Group: Training						
Group Paging Search						
(All Group)					Sear	ch
Group Paging						
Active Name [⊕] Department [⊕]	Phone Number	Extension ©	Group Paging ID $^{\diamond}$	Support User [©]	Edit	View
PG_80 Test,TestTestTestTestTestTestTestTestTest(E	Enterprise) 312-448-1080	1080	9722221080@k9center.clearspancloud.com		Edit	View
Smokey_159	312-448-1115	1115	3124481115@k9center.clearspancloud.com		Edit	View
O Smokey_172	312-448-1059	1059	3124481059@k9center.clearspancloud.com		Edit	View
End of Group Paging						

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.

Hunt Group Add				
Add a new hunt group.				
OK Cancel				
Enterprise: Canine Center Trai	ining and Pet Store			
Group: Training				
Hunt Group:				
Service: (Select Service)				
Hunt Group	Optional	Users	User Weights	Announcements
				(Close Other Tabs)
Hunt Group				
* Name:				
* Hunt Group ID:				
	@ k9center.clear	rspancloud.com		
O Support User				
Department: (None)				
Phone Number: (Select Phone N	(humber)			
<u>. </u>	vumber)			
Extension:				
Voice Mail: No Voice Mail				
Voice Portal Passcode:				
(areate a numeric paperado of 4	to 9 diaita)			
(create a numeric passcode of 4 to 8 digits) Confirm Portal Passcode:				
Calling Line ID Settings				
* Last Name:				
* First Name:				
Phone Number:				
]
Handling: O Use the system default CLID	configuration (currently in	cluding the Hunt Group Name	in the CLID)	
 O use the system default CLID Customize the CLID for this H 		country the munt Group Name		
O Include the Hunt Group Name				
C anotado ano mant oroup Name				

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.
- 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.
- 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.
- Set Greeting Source to System Greeting to use the standard voice mail greeting played for callers when the Hunt Group's lines are busy or set it to Personal Greeting if you want to select 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

- 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.

	Choose the c	_		st of virtual users, press the Search button.										
	Enterprise: Canine Center Training and Pet Store													
	/irtual User		Contains: +					Search						
1	/irtual User	s												
	Active Name $^\circ$ Virtual User Type $^\circ$ Department $^\circ$					Extension ¢	User ID \Diamond	Support User [≎]						
	\bigcirc	3124481079	Clearspan Anywhere Portal	Ent_Dept (Enterprise)	312-448-1079	1079	CS_Anywhere@k9center.clearspancloud.com	0						
		3124481086 Collaborate Bridge Test, TestTestTestTestTestTestTestTestTestTest		312-448-1086	1086	CollaborateBridge@k9center.clearspancloud.com	0							
	ø	3124481087	Find-Me/Follow-Me	This_Is_Very_Long_Named_Department_See_A_Long_Name (Enterprise)	312-448-1087	1087	FindFollow@k9center.clearspancloud.com	0						
	\bigcirc	3124481089	Meet-Me Conference Bridge	Dept_1 (Group)	312-448-1089	1089	MeetMe@k9center.clearspancloud.com	0						
	Ø	AA_84	Auto Attendant - Basic		312-448-1084	1084	9722221084@k9center.clearspancloud.com	0						



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	В	С	D	E	F	G	Н	1	J	K
Enterprise:	Moorehouse	Moore Enterprises of Texas	3							
Date:									Opeas	5U)) —
Version	A274								Provisioni	ng 📕
Modify Comm	and:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyDevice	Modify Device
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)	(NULL will delete)	(Enter only if ID set at device level) (NULL will delete)
	General Inform	ation								
							Phone Number			
Status	Command	Group ID	Last Name	First Name	Email Address	Department	(Primary)	Phone Number Activation	Physical Location	VLAN ID
	Done									
		Commands								
		AddUser	Add a new user							
		ModifyUser	Modify user inform	nation (modifiable fie	Ids indicated by ModifyUser)					
		DeleteUser	Delete the user		, , , , ,					
		AddUserDevice	Add a new User a	nd a new Device (an	d assign the device)					
		AddUserAssignDevice	Add a new User a	nd assign to an exist	ing device					
		AddMigDeviceUser	Add a new User a	nd new Device witho	ut assigning the phone number.	A later MigrateTrunkUs	ser can migrate a	Frunk User to this Device User		
		AddDevice	Add a new device		0 0 1					
		ModifyDevice	Modify device info	rmation (modifiable)	fields indicated by ModifyDevice)	í.				
		ReplaceDevice	Prepare database	to replace a physica	al Phone Device with another ph	one of an identical Mod	el and Functionali	ly .		
		DeleteDevice	Delete the device							
		AssignDevice	Assign a device to	the specified user						
		UnassignDevice		from the specified u	iser					
		ModifyUserId	Change the Userl	d to the new one pla	ced in the Extension column					
		AssignSP	Assign one or mor	re Service Packs (se	parate service packs with ALT-E	NTER in the worksheet)			
		ReplaceSP	Replace all user s	ervice packs with the	ose specified (separate service p	acks with ALT-ENTER	in the worksheet)			
		DeleteSP			parate service pack names with					
		DeleteAlISP		Packs for the user						
		AddCBAC	Add the specified	communication barri	ng auth code					
		DeleteCBAC		ed communication ba						



Da	te:						Upeasy
Versio	on: E225.1						Provisioning
Modify Com	mand:			Modify	Modify	Modify	Modify
				Only entered during Modify to change dept name (0-	200-288 A		(1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.
			(1-50) chars	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						
	Done	Commands:	Description:				
		AddEntDept	Add Enterprise Depa	artment			
		ModifyEntDept	Modify Enterprise De				
		DeleteEntDept	Delete Enterprise De				

Figure 163 - Import Enterprise – Get Worksheet – New Worksheet

Da	te:					
Versie	on: G289.4					Provisioning
Applicable C	ommand:			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 Include extension.)
Status	Command	Repository Type	Group ID / Hunt Group ID	Announcement Name	New Announcement Name	Announcement File Name
	Done					
	Done	Commands				
		Add	Add a new announcement	Or add multiple announcements to	the same repository with specification	of only Announcement Name and Announcement
		Modify	Modify an announcement			on of only New Announcement Name and/or Anno
					cify Announcement Name and Announce	
						cement Name and Announcement File Type
		Delete	Delete an announcement		, specify the 'Delete' command on each	

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					
tatus	Command	Group ID	Last Name	First Name	Email Address	Department	(Primary)	Phone Number Activation	Physical Location	VLAN ID	User ERL Record Name	Voice Portal Passcod
	Done											
		Commands										
		AddUser	Add a new user									
		ModifyUser	Modify user informa	tion (modifiable fiel	ds indicated by ModifyUser)							
		DeleteUser	Delete the user									
		AddUserDevice	Add a new User and	a new Device (and	d assign the device)							
		AddUserAssignDevice	Add a new User and	d assign to an existi	ing device							
		AddMigDeviceUser	Add a new User and	d new Device without	ut assigning the phone number.	A later MigrateTrunkU	ser can migrate a Tru	ink User to this Device User.				
		AddDevice	Add a new device									
		ModifyDevice			ields indicated by ModifyDevice							
		ReplaceDevice		o replace a physica	I Phone Device with another ph	one of an identical Mod	el and Functionality					
		DeleteDevice	Delete the device									
		AssignDevice	Assign a device to t	he specified user								
		UnassignDevice	Unassign a device fi									
		ModifyUserId			ed in the Extension column							
		AssignSP			parate service packs with ALT-							
		ReplaceSP			se specified (separate service							
		DeleteSP			arate service pack names with	ALT-ENTER in the world	ksheet)					
		DeleteAlISP	Delete all Service P									
		AddCBAC	Add the specified co									
		DeleteCBAC	Delete the specified									
		AssignCPG	Add the user to the									
		DeleteCPG	Delete the user from									
		AssignHG	Assign the user to the									
		DeleteHG	Delete the user from									
		ReorderUsers			ice (First row contains the Cor	nmand, Group ID, first U	Userid entry, and Dev	nce Name, subsequent rows m	hay contain additional U	serids. Position co	olumn only used by AudioCodes de	wices, which use Static
		Done	Done (end processi	ng)								

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.

Import Import a list of phone devices, users, or features from a spreadsheet. Press 'Start Import' to begin import processing. To schedule an import for later processing, press 'Schedule Import'. Press 'Retrieve Results' to download results of the current import. Press 'E-mail Results' to E-mail results of the current import.
OK Get Worksheet E-mail Worksheet Scheduling
Import
Import Type Import: Advanced
Enterprise: Canine Center Training and Pet Store
Spreadsheet Version:A290
Load Provisioning Spreadsheet
Load Announcement Files
Notification:
OSend E-mail Notification
E-mail To:randy.craig@clearspancloud.com
Attachment:
ØAttach Excel Spreadsheet
Attachment File Name:
ClearspanImportAdvancedResults_{Id}_(Time).xlsx
Retrieve:
Retrieve File Name:
ClearspanImportAdvancedResults_{Id}_{Time}.xlsx
(Useful tags for File Names: (Id), {Enterprise}, {Time}, {StartTime}, {EndTime}, {Admin})
Start Import Schedule Import
User Licenses (Enterprise): Used: 84 Available: Auto
3rd Party Phone Licenses (Enterprise): Used: 39 Available: Auto

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.
- 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

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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.

Enternrice	Bulk Provisioning -	Lob Vol. Inc.					
Date:							
Version:	A282						
Modify Comma	nd:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUse
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will dele
	General Information				(HOLE IIII doloto)	(HOLE IIII GOIOLO)	(11022 1111 001
	General Information						
							Bhone Numb
							Phone Numb
Status	Command	Group ID	Last Name	First Name	Email Address	Department	Phone Numb (Primary)
Status		Group ID	Last Name	First Name	Email Address	Department	
Status	Command Done	Group ID	Last Name	First Name	Email Address	Department	
Status		Group ID Commands	Last Name	First Name	Email Address	Department	
Status			Last Name Add a new user	First Name	Email Address	Department	
Status		Commands	Add a new user		Email Address	Department	

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 Comm	nand:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)
	General Information	n						
							Phone Number	
Status	Command	Group ID	Last Name	First Name	Email Address	Department		Phone Number Activation
	AddUser	BNG_6	BNG_6	x1020			6103331020	Activate
	_							
	Done							
		Commands						
		AddUser	Add a new user					
		ModifyUser	Modify user inform	ation (modifiable field	Is indicated by ModifyUser)			
		DeleteUser	Delete the user					
		Deleteuser	Delete the user					
		AddUserDevice		d a new Device (and	assign the device)			
			Add a new User an	d a new Device (and d assign to an existir				

Figure 168 - Advanced Import Excel Sheet

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

- AINList
- AccountIDs
- Domains

1	A	В	С	D	E	F	G	н
	Date	e: 04/07/2020 06:	38:05					
>	Version	n: \$205						
3							Upeosy)	
4							Provisioning 4	
	Modify Comm	and:			Modify	Modify		
ő	-				(5-15 digits)	(max 80 chars)		
7								
	Status	Command	Enterprise ID	Group ID	AIN List	Description	Error Response	
	Failure	Add	India	BNG_5	11122	2 AddedThroughImportSystem	Error: Could not add AIN - Duplicate All	already exists in the
0								
1								
2		Done						
3			Commands:	Description:				
4			Add	A list of new AINs are a	dded to a group (First row	of each enterprise and group conta	ns the command, subsequent rows may cont	ain additional entries to
5			DeleteEntries	A list of AINs are remov	ed from a group (First row	of each enterprise and group conta	ins the command, subsequent rows may con	tain additional entries t
6			DeleteList	The entire list of AINs a	re removed from a group			
7			ReplaceList	The entire list of AINs for	r a group are replaced wit	h a newly supplied list (First row of	each enterprise and group contains the comm	and, subsequent rows
8								
			Done	Done (end processing)				
9	4							
9								
0								
0								
0 1 2								
10 12 13								
10 12 13								
10 11 12								

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

Date		n System Validation					- OOPASI I
Version	E229.1						riovisioning
Modify Comn	nand:			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
			(1-50) chars	(0-50 chars)	NOLL WII delete.	NOLL WII delete	NOLL WII delete
Status	Command	Group ID	Department Name	New Department Name	Parent Department	Department Calling Line ID Name	Department Calling Line ID Number
Status	Commund	Group ib	Department nume	Hume	r arent Deparanent		
	•						
	Done						
		Commands:	Description:				
		AddEntDept	Add Enterprise Departr	ment			
		ModifyEntDept	Modify Enterprise Depa	artment data			
		DeleteEntDept	Delete Enterprise Depa	artment			
		AddGroupDept	Add Group Department				
		ModifyGroupDept	Modify Group Departme				
		DeleteGroupDept	Delete Group Departme				
· ·	Departments		gencyCallNotification	EnterpriseVoiceVPNPoli	cy ErlRecords PhoneNur	mbers (+) ; (

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:	-									OPE	asy 🔪	
Version:	G302.1									Pro	ovisioning 🗖 🖉 👘	
pplicable Cor	mmand:					Add/Modify/Dele	ete		Modify		Add/Modify	
		(Group for								(If using a zip f	le, include the path within the	zip file if one
		Group Repository Type,									exists.	
		or leave blank)				Do NOT include exte	nsion)	(Do NOT	include extension)		Include extension.)	(WA)
itatus	Command	Repository Type	Group ID / Hunt	Group ID	Announcem	ent Name		New Announceme	nt Name	Announcem	ent File Name	Annou
	1											
	Done											
		Commands										
		Add	Add a new annou	ncement	Or add multip	le announcement	ts to the same rep	ository with specifica	tion of only Announcem	ent Name and Ann	ouncement File Name or	subsequent rows
		Modify	Modify an announ	cement							and/or Announcement Fil	
									ouncement File Name			
									nouncement Name and	Announcement Fil	e Type	
		Delete	Delete an announ	cement				Delete' command on				
		Done	Done (end proces	sina)								
•	DataHelp An	nouncements Aut	horizationCodes	BroadW	/orksSchedule	Call Centers	CallPickupGrou	os Departments	Domains Emer	gencyCallNotif	+ : •	

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.

Import Import a list of phone devices, users, or features from a spreadsheet. Press 'Start Import' to begin import processing. To schedule an import for later processing, press 'Schedule Import'. Press Retrieve Results' to download results of the current import. Press 'E-mail Results' to E-mail results of the current import. CK Get Worksheet E-mail Worksheet Scheduling	
Import Type: Import: Advanced Import Type: Import: Advanced Import Advanced Import: Advanced Impor	
Attachmen B_Test Clearspar BengaluruLab BengaluruLab CalCenter CCTesting Calcenter CCTesting Canine Center Training and Pet Store HawkinsTest Clearspar JazzAutomation_Disabled (Useful tag JazzAutomation_Trial pingWeb-dev Ping Development & QA PlanoLab Start Im PlanoL	

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.

Export Clearspan Dat	a		
	eadsheet. ort processing. To schedule an export for load results of the current export. Press "		
OK Scheduling			
Export			
Export Type: Export: Advanced	1.20		
Enterprise: Canine Center Tr	aining and Pet Store		
Spreadsheet Version:A290			
Exported Worksheets:Select AllC	Clear All		
Users BLF CallForwardingSelective DeviceTypeConversion IntegratedIM&P Privacy SpeedDial Notification: Send E-mail Notification E-mail To:randy.craig@clearspare Attachment: @Attach Excel Spreadsheet Attachment File Name:	 AlternateNumbers CallCenterAgent CallRecording FaxMessaging Media5AndMediaPackReport SCA UserDefinedFields 	 Announcements CallCenterSupervisor ClearspanAnywhere FlexSeatingGuest MusicOnHold SequentialRing VMDistribution 	 AutoAttendant CallForwarding CustomRing Hoteling PriorityAlert SimultaneousRing Voicemail
ClearspanExportAdvanced_{Id	{Time}.xlsx		
Retrieve: Retrieve File Name:			
ClearspanExportAdvanced_{Id	_{Time}.xlsx		
(Useful tags for File Names: {Id}	, {Enterprise}, {Time}, {StartTime}, {EndT	ime}, {Admin})	
Enter Search Criteria:			
(Select Field - Contains	•		- +
Start Export Schedule	Export		



Export Clearspan Data			
Export clearspan data into a spreadsheet. Press 'Start Export' to begin export processing. To sche Press Retrieve Results' to download results of the curre OK Scheduling			
Export			
Export Type: Export: Group			
Enterprise: SystemValidation System Validation			
Group: JazzTest JazzTest			
Spreadsheet Version: G302.1			
Exported Worksheets: Select All Clear All			
 Announcements 	 AuthorizationCodes 	BroadWorksSchedule	Call Centers
CallPickupGroups	 Departments 	O Domains	EmergencyCallNotification
ErlRecords	Flex Seating Hosts	FSH Guest Association	FSH Privacy
Gbl Settings -AudioCodes5XX&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	O PhoneNumbers
SpeedDial8	SpeedDial100	UserDefinedFields	UserProfiles
VirtualOnNetExtensions	VoicePortals		
Notification:			
Send E-mail Notification			
E-mail To: ercraigdos@gmail.com			
Attachment:			
\odot			
Attachment File Name: ClearspanExportGroup_{Id}_{	Time}.xlsx		
Retrieve:			
Retrieve File Name: ClearspanExportGroup_{Id}_{Tim	ie}.xlsx	(Useful tags for File Names: {Id}, {Enterp	rise}, {Group}, {Time}, {StartTime}, {EndTime}, {Admin})
Enter Search Criteria:			
(Select Field)			
Start Export Schedule Export			

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:

Z

- 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.

Results		
Results: Compl	leted	Start Time: 06/29/2023 17:56:29
Scheduling Reg	uest ID: 21530	End Time: 06/29/2023 17:56:30
Scheduling Res	ults ID: 2173845	Results Time: 06/29/2023 17:56:30
Notification:	mail Notification S	ent
Retrieve Res	sults	
E-mail Resul	H-n	
E-mail Resul	its	
Delete		
Details:		
	and Course 111	
Clearspan	Export: Group ***	
Enterprise:	Canine Center	Training and Pet Store
	(All Groups)	······································
Cabadulian		
Scheduling: Request ID:	21530	
	06/29/2023 17:56	:29
	06/29/2023 17:56	
SUCCESSFUL	.: Export: Group o	completed successfully.

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 Comm	nand:		ModifyUser	ModifyUser	ModifyUser	ModifyUser
		(See DataHelp)			(NULL will delete)	(NULL will delete)
Status	Command	Group ID	Last Name	First Name	Email Address	Department
		Group_G	LTest04	FTest04		Dept 1 (Group)
		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	
	ers (+)					

Figure 176 - Advanced Export Results Spreadsheet

Versio	on: S208.1					
Modify Con	nmand:	(System Login Ruk By Enterprise)	es/	(System Login Rules/ Enterprise Rules)	• (1 arm	(1.050)
	General Informa		•	Enterprise Rules)	Password Rules	(1-256)
Status	Command	Login Rules	Enterprise ID	Enterprise Login Rules	Minimum Password Length	Maximum Password Length
		By Enterprise	SystemValidation	System Login Rules	3	256
	Done					

Figure 177 - System Data Export Results

Date	: 05/28/2024 10:	46:35					
Version	:E229.1						
lodify Com	mand:	Modify	Modify		ModifyEvent		ModifyEvent
		(0 - 40) chars	(0 - 40) chars	(Holiday or Time)	(0-40) chars		(mm/dd/yyyy)
itatus	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 fo	r each user contains the comm	and and settings, subsequent	rows contain Event informatio	on.)
		Modify	Modify Schedule (First row	of or each user contains the con	nmand and settings, subsequ	ent rows contain Event informa	ation.)
		Delete	Delete Schedule				
		AddEvent	Add Event to an existing S	Schedule. Multiple Events may I	be added in a single comman	d.	
		ModifyEvent	Modify an existing Event.	Multiple Events may be modifie	d in a single command.		
		DeleteEvent	Delete Event				

Figure 178 - Enterprise Data Export Results

Date:	05/28/2024 10:50:41										
Version:	G302.1										
odify Comr	nand:		Modify			Modify Stangarg,	h	Modify	Modify	Modify	Modify
alid Values:			(True/False)			Premium)	(Ren	ame Only)			
	General Information										
atus	Command	Group ID	Active	Call Center ID	c	all Center Type	New Call Cente	r ID	Call Center Name	Department	Phone Number
		JazzTest	True	HospBasic@hosp.cslal	b.clearspancl [*] B	asic			BasicCC		6413295979
		JazzTest	True	cola.budget@hosp.csla	b.clearspand S	tandard			Budget Review		6413295215
		JazzTest	True	cola.council@hosp.csla	ab.clearspand P	remium			Council-Meeting		6413295214
		JazzTest	True	Jazz.CC@hosp.cslab.c	learspanclour S	tandard			Jazz CallCenter		6413295998
		JazzTest	True	cola.safety@hosp.csla	b.clearspanct S	tandard			Public Safety Forum		6413295216
		JazzTest	True	techSupport@hosp.csl	ab.clearspant S	tandard			Technical Support		6413295230
	Done										
		Commands	Description								
		Add	Add Call Cen	ter.							
		Modify	Modify Call C	enter.							
		Delete	Delete Call C	enter.							

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.

	eet. cessing. To schedule an export for later proce esults of the current export. Press 'E-mail Resu		
French			
Export			
Export Type: Export: Advanced			
Enterprise: (Multiple Enterprises)	1		
AutomationTest Automation Test			
AutomationTrial			
AutoTestEntDisabled AutoTest Ent Licen	se Disabled		
AutoTestEntTrial AutoTest Ent License T	rial		
B_Test			
BengaluruLab Bengaluru Lab			
CallCenter CCTesting			
Canine Center Training and Pet Store			
HawkinsTest			
JazzAutomation_Disabled			
JazzAutomation_Trial			
pingWeb-dev Ping Development & QA			
PlanoLab			
SystemValidation - System Validation			
TB20North Test Bed 20 North			
test-Full Automationtest			
Spreadsheet Version:A290			
Exported Worksheets:Select AllClear A	<u>All</u>		
Users	☐ AlternateNumbers	 Announcements 	 AutoAttendant
O BLF	CallCenterAgent	CallCenterSupervisor	CallForwarding
CallForwardingSelective	CallRecording	ClearspanAnywhere	CustomRing
DeviceTypeConversion	FaxMessaging	FlexSeatingGuest	Hoteling
IntegratedIM&P	Media5AndMediaPackReport	MusicOnHold	PriorityAlert
Privacy	SCA	 SequentialRing 	 SimultaneousRing
SpeedDial	 UserDefinedFields 	O VMDistribution	 Voicemail

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.

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:

- Z
- 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 '::'.

Scheduling Request: Import: Advanced
Setup a request to run an Import: Advanced on a pre-defined schedule.
OK Cancel
Scheduling Request
Scheduled Task:Import: Advanced
Request ID:
Creating OpEasy Admin:ercraig2
Request Creation Time:
Enterprise:PlanoLab
Import Spreadsheet:ClearspanImportAdvanced_PlanoLab.1.xlsx
Start Import
Schedule
Schedule: Run Once
Start Time: 06/30/2023 10:28 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
E-mail Notification
Success: OE-mail notification of successful completion
To:randy.craig@clearspancloud.com
From: No-Reply@hospitality.cslab.clearspancloud.com
Subject:
Clearspan Import: Advanced
⊘Attach Excel Spreadsheet
File Name:
ClearspanImportAdvancedResults_{Id}_{Time}.xlsx
Failure: OE-mail notification of failure

Figure 181 - Scheduling Request: Import: Advanced

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

Schedule			
Schedule	Run Once		
Start Time	Run Once Repeated	0:28	(Date and time, in 'MM/DD/YYYY HH:MM' format, Example: 11/19/2012 21:00)
E-mail No	Hourly		
Success:	Daily		
OE-mail r	Weekly	essful com	pletion
To:randy.o	Monthly	loud.com	

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.

Schedule
Schedule: Repeated
Initial Start Time: 06/30/2023 10:28 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Repeat Run:Every 60 (minutes)
Maximum Number of Runs: (Blank or 0 for 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.

Schedule:	Hourly -	
Start After:	06/30/2023 10:28	(Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Hourly Sch	NY CONTRACTOR C	
00:10,00:2		// format, separated by commas or blanks. Example: 00:15, 00:45)
		// format, separated by commas or blanks. Example: 00:15, 00:45) lank or 0 for 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.

Schedule	
Schedule: Daily	
Start After: 06/30/2023 13:46	(Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Daily Schedule:	
04:00,12:00,16:30	
List of times, in 'HH:MM' format, sep	arated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs: [][Bi	ank or 0 for 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.

Schedule	
Schedule: Weekly	
Start After: 06/30/2023 13:46	(Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
Weekly Schedule:Recurs every 1	weeks on:
Sunday OMonday @Tuesday OW	ednesday @Thursday OFriday OSaturday
at the following times of the day:	
07:00, 19:00	
(List of times, in 'HH:MM' format, sepa	rated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs: (Blar	nk or 0 for 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.

Schedule:	Monthly				
Start After:	06/30/2023 1	3:46	Date and tim	e, in "MM/DD/Y	YYY HH:MM' format. Example: 11/19/2012 21:00)
Months: @January		March	OApril	⊘May	OJune
OJuly	OAugust	ØSeptember	OOctober	November	ODecember
					anks. Use 'Last' for last day of the month. If entered for the max allowed day):
15, Last					
	ing times of th	e day:			
	ing times of th	e day:			

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.

E-mail Notification	
Success:	
DE-mail notification of successful completion	
Fo:randy.craig@clearspancloud.com	
From:	
No-Reply@hospitality.cslab.clearspancloud.com	
Subject:	
Clearspan Import: Advanced	
OAttach Excel Spreadsheet	
File Name:	
ClearspanImportAdvancedResults_{Id}_{Time}.xlsx	
DE-mail notification of failure Fo:randy.craig@clearspancloud.com From:	
No-Reply@hospitality.cslab.clearspancloud.com	
Subject:	
Clearspan Import: Advanced FAILED	
OAttach Excel Spreadsheet:	
File Name:	
ClearspanImportAdvancedResults (Id) (Time).xlsx	

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.

Scheduling Request: Import: Advanced Setup a request to run an Import: Advanced on a pre-defined schedule.	
Saved, Started	
OK Cancel Apply Delete	
Scheduling Request	
Scheduled Task:Import: Advanced	
Request ID:21558	
Creating OpEasy Admin:ercraig2	
Request Creation Time:	
Enterprise:PlanoLab	
Import Spreadsheet:ClearspanImportAdvanced_PlanoLab.1.xlsx	
Status	$\overline{}$
Status:Waiting to start	
Run Count:0	
Last Refresh:06/30/2023 13:58:44	
Stop	
Cancel	
Refresh	
Last Run Results	
Import waiting to start	
	Progress Messages
Schedule	
Schedule:Monthly	
Start After: 06/30/2023 13:46	

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.

Scheo Displays OK	-	d exports that have	been scheduled	i to run now (or on a pre-de	efined sch	edule.			
Enterpris Group: Administ Display () All	ed Task: (A Se: PlanoLa (All Groups) rator: (All A ed Reques Active /	administrators)		O Stopped	O Finishe	юd				
Schedu	ling Reque	ests					(1.05 - (.00)			
							(1-25 of 39)			
Delete	Request	Task 🌣	Enterprise ID ≎	Enterprise Name [≎]	Group ID ්	Group Name ୍	Imported File / Exported Worksheets $^{\Diamond}$	Schedule [¢]	Admin े	Request Status ©
o	21558	Import: Advanced	PlanoLab				ClearspanImportAdvanced_PlanoLab.1.xlsx	Monthly (January, March, May, July, September, November on days: 15, Last at times: 00:01)	ercraig2	Waiting to Start (Next Run: 07/15/2023 00:01:00)
0	21554	Import: System					ClearspanImportSystem_CreateUser.xlsx	Now	JazzAuto_SA	Finished

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.

sched	luling													
isplays i	imports an	d exports that have	e been schedule	d to run now or on a pr	e-defined	schedule	Ð.							
ОК	Cancel	Apply	Refresh											
chedulii	ing													
cheduler	d Task: 🗍	mport: Advanced	*											
		e Center Training	and Dat Otara											
interprise	e. Canine	e Center Training	and Pet Store											
dministra	rator: dru	hosp 🚽												
		-												
isplayed	d Reauest	S												
isplayed			ve 🔿 Waiting	⊖ Stopped ⊖ Fi	nishod									
) All (Active 	Waiting O Activ	ve 🔿 Waiting	○ Stopped ○ Fi	nished									
) All (Active 		ve 🔿 Waiting	○ Stopped ○ Fi	nished									
All (Active 	/ Waiting O Activ 5/2023 12:46:18	ve 🔿 Waiting	○ Stopped ○ Fi	nished									
All (Active	/ Waiting O Activ 5/2023 12:46:18	ve () Waiting Enterprise ID	Stopped O Fi Enterprise Name O	Group	Group Name ≎	Imported File / Exported Worksheets	Schedule	Admin	Request Status ⇔	Last Run Time \diamond	Last Run Results ⁰		Ed
All (ast Refre	 Active / resh: 07/05 Active / resh: 07/05 Request 	/ Waiting O Activ //2023 12:46:18 sts			Group			Schedule \$	Admin ⇔ dru.hosp		Last Run Time [©] 07/05/2023 12:44:48	Last Run Results [©]	 Results	
All (ast Refre	○ Active) resh: 07/05 ing Request Request ID ⁽²⁾	/ Waiting O Activ /2023 12:46:18 sts Task ©	Enterprise ID ≎	Enterprise Name \diamond	Group		Worksheets \diamond	\$	\$	Status ≎				<u>Ed</u>
 All (ast Refree Chedulin Delete 	 Active / esh: 07/05 ing Request ID 21694 	VWaiting O Activ V2023 12:46:18 sts Task O Import: Advanced	Enterprise ID ≎ Canine Center	Enterprise Name \diamond Training and Pet Store	Group		Worksheets A290_AddUser_AssignERL.xlsx	♦ Now	¢ dru.hosp	Status ¢ Finished	07/05/2023 12:44:48	Failed	rs) <u>Results</u>	
All (ast Refre	 Active / esh: 07/05 ing Request Request D ° 21694 21692 	Waiting O Activ (2023 12:46:18 sts Task O Import: Advanced Import: Advanced	Enterprise ID ⇔ Canine Center Canine Center	Enterprise Name [©] Training and Pet Store Training and Pet Store	Group		Worksheets © A290_AddUser_AssignERL.xisx A290_AddUser_AssignERL.xisx	 Now Now 	¢ dru.hosp dru.hosp	Status Finished Finished	07/05/2023 12:44:48 07/05/2023 12:15:23	Failed Completed (with Erro	rs) <u>Results</u> rs) <u>Results</u>	
All (ast Refre	 Active / resh: 07/05 Request ID ° 21694 21692 21664 	Waiting O Activ V2023 12:46:18 sts Task O Import: Advanced Import: Advanced	Enterprise ID Canine Center Canine Center Canine Center	Enterprise Name [©] Training and Pet Store Training and Pet Store Training and Pet Store	Group		Worksheets A290_AddUser_AssignERL xisx A290_AddUser_AssignERL xisx A290_AddUser_AssignERL xisx	 Now Now Now 	 dru.hosp dru.hosp dru.hosp 	Status Finished Finished Finished	07/05/2023 12:44:48 07/05/2023 12:15:23 07/05/2023 11:07:42	Failed Completed (with Error Completed (with Error	rs) <u>Results</u> rs) <u>Results</u>	
All (ast Refre	 Active / esh: 07/05 ing Request D ○ 21694 21694 21664 19779 	Waiting O Activ V2023 12:46:18 sts Task O Import: Advanced Import: Advanced	Enterprise ID Canine Center Canine Center Canine Center Canine Center Canine Center	Enterprise Name ⁵ Training and Pet Store Training and Pet Store Training and Pet Store Training and Pet Store	Group		Worksheets © A290_AddUser_AssignERL_xisx A290_AddUser_AssignERL_xisx A290_AddUser_AssignERL_xisx A290_1_SuspendTeamsUsers.xisx	Now Now Now Now Now	 o dru.hosp dru.hosp dru.hosp dru.hosp 	Status Finished Finished Finished Finished	07/05/2023 12:44:48 07/05/2023 12:15:23 07/05/2023 11:07:42 04/11/2023 14:52:54	Failed Completed (with Erro Completed (with Erro Completed (with Erro	rs) <u>Results</u> rs) <u>Results</u> rs) <u>Results</u>	

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:

Z

- 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.

Results
Results:Completed
Results ID:2180909
Run Count:1
Start Time:06/30/2023 16:40:32
End Time:06/30/2023 16:41:10
Results Time:06/30/2023 16:41:10
E-mail Users Notified:None
E-mail Results: To:randy.craig@clearspancloud.com
Attachment: ØAttach Excel Spreadsheet
Attachment File Name:
ClearspanExportAdvanced_{Id}_(Time).xlsx
Retrieve Results: Retrieve File Name:
ClearspanExportAdvanced_{Id}_{Time}.xlsx
Retrieve Results E-mail Results Delete
Details: Results Details
*** Clearspan Export: Advanced ***
Enterprise: PlanoLab
Scheduling: Request ID: 21564 Started: 06/30/2023 16:40:32 Finished: 06/30/2023 16:41:10
SUCCESSFUL: Export: Advanced completed successfully.

Figure 193 - Scheduling Results – Import

Restarting a Scheduled Import or Export

- 1. From the main menu, select **Provisioning** and then **Scheduling**.
- 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.

Scheduling				
Displays imports and exports that have been scheduled to run now or on a pre-defined sch	hedule.			
OK Cancel Apply Refresh				
Scheduling				
Scheduled Task: (All Scheduled Tasks)				
Enterprise: PlanoLab				
Group: (All Groups)				
Administrator (All Administrators)				
Displayed Requests				
All Active / Waiting Active Waiting Stopped Finished				
Last Refresh:06/30/2023 15:19:18				
Scheduling Requests				
	(1-25 of 39)	1 2 25		
Delete Request Task 0 Enterprise ID Enterprise Group ID Name 0 OR Name 0	Imported File / Exported Worksheets $^\circ$	Schedule ©	Admin [©]	Request Status ©
21558 Import: Advanced PlanoLab	ClearspanImportAdvanced_PlanoLab.1.xlsx	Monthly (January, March, May, July, September, November on days: 15, Last at times: 00:01)	ercraig2	Waiting to Start (Next Run: 07/15/2023 00:01:00)

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.

Enterprise Device Types		
Identify the device types that can be used by an er	nterprise.	
OK Cancel Apply		
Enterprise: PlanoLab		
Enterprise Device Types		
prompts. Likewise, move to the "Åvailable Device appear in Device Type selection prompts. NOTE: Removing a device type from the "Ent	Types" list any device types that are no terprise Device Types" list for an en ne Templates may be in use by exis	erprise. These device types will appearin Device Type selection to longer to be usedby the enterprise. These device types will here therprise prevents access to any existingPhone Templat ting phone devices.It is best to remove any existing pho-
Available Device Types		Enterprise Device Types
		Aastra 6731i (DMS)
		Aastra 6735i (DMS)
		Aastra 6737i (DMS)
		Plastic of off (blind)
		Aastra 6739i (DMS)
		Aastra 6739i (DMS) Aastra 6750i (DMS)
	Add >	Aastra 6739i (DMS) Aastra 6753i (DMS) Aastra 6755i (DMS)
	Add >	Aastra 6739; (DMS) Aastra 6753; (DMS) Aastra 6755; (DMS) Aastra 6757; (DMS)
	Add > Remove <	Aastra 6739i (DMS) Aastra 6753i (DMS) Aastra 6755i (DMS) Aastra 6757i (DMS) Aastra 6863i (DMS)
		Aastra 6739; (DMS) Aastra 6753; (DMS) Aastra 6755; (DMS) Aastra 6803; (DMS) Aastra 6863; (DMS) Aastra 6863; (DMS)
	Remove <	Aastra 6739i (DMS) Aastra 6753 (DMS) Aastra 6757i (DMS) Aastra 6757i (DMS) Aastra 6863i (DMS) Aastra 6865i (DMS) Aastra 6867i (DMS)
		Aastra 6739i (DMS) Aastra 6753 (DMS) Aastra 6757i (DMS) Aastra 6757i (DMS) Aastra 6863i (DMS) Aastra 6863i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6753i (DMS) Aastra 6757i (DMS) Aastra 6757i (DMS) Aastra 6863i (DMS) Aastra 6863i (DMS) Aastra 6865i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS)
	Remove <	Aastra 6739; (DMS) Aastra 6753; (DMS) Aastra 6757; (DMS) Aastra 6857; (DMS) Aastra 6865; (DMS) Aastra 6865; (DMS) Aastra 6865; (DMS) Aastra 6869; (DMS) Aastra 6869; (DMS) Aastra 6869; (DMS) Aastra 6859; (DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6753 (DMS) Aastra 6757 (DMS) Aastra 6863i (DMS) Aastra 6863i (DMS) Aastra 6867i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS) Aastra 6869i (DMS) Audio-Codes M500Li-#FXS (DMS) Audio-Codes M500Li-MSBR-4FXS-LTE (DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6755 (DMS) Aastra 6757 (DMS) Aastra 6757i (DMS) Aastra 6863i (DMS) Aastra 6865i (DMS) Aastra 6867i (DMS) AusioCodes M500Li-#FXS (DMS) AusioCodes M500Li-MSBR-4FXS-LTE (DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6753 (DMS) Aastra 6757 (DMS) Aastra 6857 (DMS) Aastra 6865 (DMS) Aastra 6867 (DMS) Aastra 6869 (DMS) Aastra 6868 (MSOL-MSBR-4FXS-1TE (DMS) Audio-Codes MSOC-MSBR-4FXS-1PRI-1TE(DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6753i (DMS) Aastra 6757i (DMS) Aastra 6803i (DMS) Aastra 6803i (DMS) Aastra 6807i (DMS) Aastra 68007i (MSBR-47XS-LTE (DMS) Aastra 6608i M500Li-MSBR-47XS-LTE (DMS)
	Remove < Add All >>	Aastra 6739i (DMS) Aastra 6753 (DMS) Aastra 6757 (DMS) Aastra 6857 (DMS) Aastra 6865 (DMS) Aastra 6867 (DMS) Aastra 6869 (DMS) Aastra 6868 (MSOL-MSBR-4FXS-1TE (DMS) Audio-Codes MSOC-MSBR-4FXS-1PRI-1TE(DMS)

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.

Enterprise Device Types		
Identify the device types that can be used by an enterprise.		
CK Cancel Apply		
Enterprise: (Multiple Enterprises)		
Enterprise Device Types		
 To add device types for use by the chosen enterprises, select To use a specific set of device types for all of the chosen enter To Add* list. Then, move all of the remaining devices types from the "Availa 	select device types from the "Available device types from the "Available Devic prises, select device types to use from ble Device Types" list to the "Device T prevents access to any existing F	Device Types" list and move them to the "Device Types To Remove" list. be Types" list and move them to the "Device Types To Add" list. the "Available Device Types" list and move them to the "Device Types ypes To Remove" list. Phone Templates for that device type. Furthermore, those Phone
Available Enterprises		Selected Enterprises
A_Test		
AllianceLab UC Alliance Lab		
ATest		
AutomationDisabled	Add >	
AutomationTest Automation Test		
AutomationTrial	Contract of the second s	
AutoTestEntDisabled AutoTest Ent License Disabled	Remove <	
AutoTestEntTrial AutoTest Ent License Trial		
B_Test	Add All >>	
BengaluruLab Bengaluru Lab		
CallCenter CCTesting		
Canine Center Training and Pet Store	Remove All <<	
HawkinsTest		
JazzAutomation_Disabled		
JazzAutomation_Trial		
pingWeb-dev Ping Development & QA		
Device Types To Remove	Available Device Types	Device Types To Add
	Aastra 6731i (DMS)	
	Aastra 6735i (DMS)	
Add >	Aastra 6737i (DMS)	Add >
	Aastra 6739i (DMS)	
Remove	Aastra 6753i (DMS)	Remove
<	Aastra 6755i (DMS)	<
	Aastra 6757i (DMS)	
	Aastra 6863i (DMS)	
Add All	Aastra 6865i (DMS)	Add All
	Aastra 6867i (DMS)	

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.

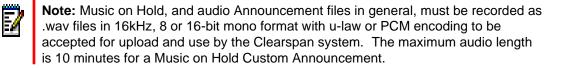
Adding Enterprise Music on Hold Profiles

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.



- If the chosen Audio File Action is Use Existing Announcement, enter the name of the audio file in the <u>announcement file</u> 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 <u>announcement file</u> 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.

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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.
- 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.

Service Pack Add Create a new service pack - set the name and description, add services, and press OK to create service pack.								
UK Ualitie								
Enterprise:PlanoLab								
Service Pack Name:								
Service Pack Description:								
Availability: @Available for Use								
Services								
Select Services to be included in Service Pack:								
Available Services	Services In Pack							
Alternate Numbers								
Anonymous Call Rejection								
Authentication								
Automatic Galiback Automatic Hold/Retrieve								
Basic Call Logs								
Busy Lamp Field Call Center Monitoring Remove <								
Call Center Monitoring								
Call Center User - Premium Add All >>								
Call Center User - Standard								
Coll Formation Alexand								
Call Forwarding Aways Secondary Remove All <<								
Call Forwarding Busy	·							
Call Forwarding No Answer								
Call Forwarding Not Reachable								
Call Forwarding Selective								
Call Intercept User								
Call Me Now								

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.

Service Pack Modify Modify an existing service pack. OK Cancel Apply Delete		
Enterprise:PlanoLab Service Pack Name: basic]
Service Pack Description: basic services Availability;@Available for Use		
Services Select Services to be included in Service Pack: Available Services		Services In Pack
Available Services Alternate Numbers Anonymous Call Rejection Authentication Automatic Callback Automatic Callback Automatic Callback Automatic Hold/Retrieve Barge-in Exempt Basic Call Logs Busy Lamp Field Call Center User - Basic Call Center User - Basic Call Center User - Standard Call Center User - Standard Call Forwarding Selective Call Intercept User Call Notify Call Recording Call Recording Call Recording Call Trace	Add > Remove < Add All >> Remove All <<	Services In Pack Call Forwarding Aways Call Forwarding Dusy Call Forwarding No Anawer Call Forwarding Not Reachable

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:

Voice VPN										
Add or modify voice VPN in an enterprise.										
OK Cancel Apply Add										
Enterprise System Validation System Validation										
Status:										
ON O OFF										
Default selector:										
Public O Private										
Selector for non-matching E164 number	bers:									
Public O Default Selector										
Route using:										
Called numbers only O Called num	nber and phone-context									
Voice VPN Search										
(All) - Contains:				Search						
Voice VPN Entries										
Location Code	Min Extension Length	Max Extension Length	Selector ©	Edit						
211	4	4	Private	Edit						
223	4	4	Private	Edit						
5678	20	80	Private	Edit						
6000	0	0	Private	Edit						
812	9	9	Public	Edit						

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:

Enterprise Voice VPN Add	
Add a new enterprise voice VPN.	
OK. Cancel	
Enterprise:SystemValidation System Validation	
VPN Settings	
* Location Code:	
Min Extension Length:	
0	
Enter a number between 0 - 100	
Max Extension Length:	
0	
Enter a number between 0 - 100	
Description:	
Selector: Private	
Index Operation	Value
20070 274	
1 None	
2 None	
3 None -	

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:

Enterprise Voice VPN Modify Modify an existing enterprise Voice VPN.								
OK Gancel Apply Delete								
Enterprise:SystemValidation System Validation								
VPN Settings * Location Code: 223								
Min Extension Length:								
4								
Enter a number between 0 - 100								
Max Extension Length:								
4								
Enter a number between 0 - 100								
Description:								
CCHQ Location Code Routing								
Selector: Private								
Index Operation	Value							
1 Left Trim	111							
2 Prepend	44207808							
3 None								
4 None -								

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.

Group Communication Barring Authorization Codes Add, modify, or delete communication barring authorization codes in the selected group. OK Cancet Apply Add Enterprise: Canine Center Training and Pet Store Group Training								
Automatic Reset Settings								
Canable automatic reset of selected authorization codes for the group.								
Auth Code Length: 5								
Reset Frequency: 77 Days (1-99).								
Reset Time: 12:00am								
Reset Time Zone: (GMT-05:00) (US) Central Time								
Email Addresses: (Comma separated list of email addresses)								
Send Current Auth Codes								
Auto Reset Description © Delete								
I2345 Test123	Delete							
334455 Test_55	Delete							
334456 Test_56	Delete							

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.
- 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**.

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 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 dropdown 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:

ERL Record Add
Add a new ERL record to the ERS.
OK Cancel
ERS Account: Dru's Test Account
ERS Account. Dru's fest Account
ERL Identification
* ERL Name:
Civic Address
* House #:
* Street/Road:
* City:
* State: (Select State)
* Zip Code:
* Country: US
Location:
Description:
Routing Options
Delivery Method:
PSAP
O Security Desk
O Conference Custom Callback:
Gustom Galiback.
Notification Email:
(Comma-separated list of email addresses)

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 Methods:
 - 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.
- 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.

ERS ERL Records Manage ERL Records for the ERS. To add a new ERL, press the Add button. To display a list of ERL records to edit or delete, press the Search button. OK Add								
ERS Account: Dru's Test Account								
ERL Search								
Search Type State								
Search Comp								
Search Value								
t ERL Description								
Street City State								
ERL Records								
ERL Name ¢	ERL Description	Address ¢						
Black Dog	Black Dog, 3-way	3 BLACK DOG LN, SPRING, TX 77389, Cellar	<u>Edit</u>					
Plano-DA-Bench		5360 LEGACY DR, Plano, TX 75024, 2nd Floor, Rm 2061	<u>Edit</u>					
End of ERL Records								

Figure 205 - ERS ERL Records Page

4. Select an Entry from the search results table, the ERL Record Modify page opens:

ERL Record Modify
Modify an existing ERL record and send update to the ERS.
OK Cancel Apply Delete
ERS Account: Dru's Test Account
ERL Identification * ERL Name:
Collie
ERL ID:90447C07-EC71-49B8-81C6-335553DB2095 Subscriber Count:4
Civic Address * House #:
612
* Street/Road:
Collie Street
* City:
Diavan
* State: Wisconsin
* Zip Code:
53115
* Country: US
Location:
Oz
Description:
Security Desk Collie
Routing Options Delivery Method: O PSAP Security Desk O Conference Custom Callback:
9722221115
Notification Email: (Comma-separated list of email addresses)
glory@wooof.com
Security Desk DID:
9722221005
Notification Display: Original

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.

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.

OpEasy License Allocation											
Manage the allocation of OpEasy licenses to enterprises.											
OK Cancel Apply Refresh											
Total OpEasy User Licenses:1,001To Total OpEasy Third Party Phone Lice (Note: <system level=""> is a special se</system>	tal Available:645Available for Auto:595 nses:1,001Total Available:900Available for Auto:844 et of licenses for System Level ThirdParty devices.)										
OpEasy License Allocation to Each											
Enterprise ID (Multiple Enterprises)	Enteprise Name	Non-Existent Enterprise Remove	Entropise Users	se User Ucerses: Alocation Manual	Allocated 10	10	Isble Third Party Licenses: Allocation	Allocated 10	10	ellable Cicaspon User	er Count C
<system level=""></system>							Auto	0			0
A_Test				Auto	0		Auto	0		0	0
AllianceLab	UC Alliance Lab			Manual	10	10	Manual	10	10	0	0
ATest			Disabled	Auto	0		Auto	0		0	0
AutomationDisabled			Disabled	Auto	0		Auto	0		0	0
AutomationTest	Automation Test			Auto	48		Manual	10	6	48	4
AutomationTrial			Disabled	Auto -	0		Auto	0		0	0
AutoTestEntDisabled	AutoTest Ent License Disabled		Disabled	Manual	10	10	Manual	10	10	0	0
AutoTestEntTrial	AutoTest Ent License Trial		Disabled	Manual	10	10	Manual	10	10	0	0
B_Test				Auto -	0		Auto	0		0	0
BengaluruLab	Bengaluru Lab			Auto	34		Auto	24		34	24
CallCenter	CCTesting			Auto -	1		Auto	2		1	2
Canine Center	Training and Pet Store			Auto	48		Auto	29		48	29
HawkinsTest				Auto -	1		Auto	0		1	0
JazzAutomation_Disabled			Disabled	Auto -	0		Auto -	0		0	0
JazzAutomation_Trial			Disabled	Auto	0		Auto	0		0	0
PlanoLab				Auto	63		Auto	33		63	33
PoppyTest		Remove	Disabled	Auto	0		Auto	0		0	0
SystemValidation	System Validation			Auto 👻	163		Auto -	9		163	9

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** is the number of unused and available licenses that are manually allocated to one or more enterprises. **Available for Auto** is the number of OpEasy licenses that are manually allocated to one or more enterprises.

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 Thirdparty 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.

Unique ID Management			
Set and display Unique IDs at the system	n, enterprise, and group levels.		
OK Cancel Apply			
Unique ID Length: 4 Digits			
Unique ID Position: Before the Extension	n		
System Unique ID: 0000			
Enterprises Enterprise ID	Enterprise Name	Enterprise Unique ID	
\$			Edit
A_Test			Edit
AllianceLab	UC Alliance Lab		<u>Edit</u>
ATest			Edit
AutomationDisabled AutomationTest	Automation Test		Edit
Automation lest AutomationTrial	Automation Test		Edit
Automation I nai AutoTestEntDisabled	AutoTest Ent License Disabled		<u>Edit</u> Edit
AutoTestEntDisabled	AutoTest Ent License Disabled		Edit
B_Test	Autorest Ent License mai		Edit
BengaluruLab	Bengaluru Lab	0111	Edit
CallCenter	CCTesting	0110	Edit
Canicenter	Training and Pet Store	0099	Edit
HawkinsTest	Training and Let Store	0033	Edit
JazzAutomation Disabled			Edit
JazzAutomation_Trial			Edit
PlanoLab		0222	Edit
SystemValidation	System Validation		Edit
TB20North	Test Bed 20 North		Edit
test-Full	Automationtest		<u> </u>

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
 - o All accounts
 - o Support Administrators only
 - o 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.

Login Mana Display, add, or m ок	Igement nodify OpEasy administrators. Add Login Rules	Help Usage									
Administrator Se	earch										
(All Administra	tors) Contains:										•
Search											
Administrator Re	esults										
	(1-25 of 82)		1	2	3	4		 •	25 ~		
Login Name ்	Administrator Name	Level ¢	Enterprise ்	Group ්	Support Admin ¢	Logged In ି	Idle Duration	Current Page	•	Locked O	Disabled ି
ClearspanAdmin	Clearspan Administrator	*** Master Administrator ***									
00Tester	TesterDog	Department Administrator	Canine Center Training and Pet Store	Training							
00Tester5	test	Enterprise Administrator	BengaluruLab Bengaluru Lab CallCenter CCTesting Canine Center Training and								

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.

OpEasy Administrator Add	
Add new OpEasy administrator. Press the Apply button to save the new administrator. Then, press the Customize Privilege	s button to set the privileges for the new administrator.
OK Cancel Apply Customize Privileges	
Administrator	
*Login Name:	
*Administrator Name:	
* Enter Password:	
Eliter Password.	
*Confirm Password:	
C Change Password at Next Login "E-mail Address:	
E-mail Address for Two-Factor Authentication:	
Temporary Account	
	notified of any changes made to the account active dates.)Notify Before: 1 - Days
Disable Account	
Settings *Login Level: Enterprise Administrator	
Two-Factor Authentication	
Support Administrator	
Enterprise Account Administrator	
A_Test	

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.

Login Managem Display, add, or modify (
OK Add	Login Rules	Help Usage		
(Solution Resellers) Contains: 💌			

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.

Login Rules Modify						
Modify the rules used to login to OpEasy, including those rules to validate the password for an OpEasy administrator.						
OK Apply Cancel						
Login Rules						
Use System Login Rules for All Enterprises Use separate Login Rules for each Enterprise						
Password Rules						
Select minimum 3						
Select maximum password length 256						
Cannot contain the login name or administrator name						
Cannot be a repeating pattern						
Checked against the previous Password:						
Cannot be a previous password						
Cannot contain a previous password Cannot contain the reverse of a previous password						
 Cannot be a previous password after ignoring any digits in both passwords 						
O Must contain at least 1 Number						
O Must contain at least 1 Upper Case Alpha Character						
Must contain at least Lower Case Alpha Character						
Must contain at least 1 Non-Alphanumeric (Special) Character						
C mast contain at least (i non-Aphananone (special) onaracter						
Login Rules						
 Two-Factor Authentication. Overrides administrator login setting. (Only affects EAs. GAs. and DAs) 						
Two-Factor Authentication Confirmation Code: Invalid After 3 Incorrect Entries						
Two-Factor Authentication Screen Timeout: After 15 Minutes						
Must change the Initial Password (New Administrators)						
Must change all Reset Passwords (Existing Administrators)						
Return to the Login screen upon Session Timeout						
Minimum Password Lifetime: No Minimum						
Passwords Expire: Never						
Lock OpEasy Account: After 5 Failed Login Attempts						
O When Account is Locked, Send Email Notification to:						
Unlock OpEasy Account: After 15 Minutes						

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.
- 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

OK	desired Ente eneral Setting Cancel	Add	oup. To add a ne General Settine g and Pet Store	_		To display a list of users to edit or delete, press I Teams Users Sync Deleted Teams Users	-	tton. To disp	vlay or modify General User settings, or E-m	nail message	sent to ne	w users
Iser Licens Ised: 113 wailable: A Iser Search All Users	h	i se) Equai To			(1-25 c		Search	~				
Last Name 0	First Name ⊘	Group ¢	Department	Phone Number	Extension	User ID ¢	OpEasy Managed User	Support User	Device Name	Device Level	Edit	Viev
Last01	First01	Training		3124481001	1001	3124481001@k9center.clearspancloud.com	true	false	UCOneMobile-3124481001	Group	Edit	View
Last02	First02	Training		3124481002	1002	3124481002@k9center.clearspancloud.com	true	false	GrandstreamWP820DMS-3124481002	Group	Edit	View
Last03	First03	Training		3124481003	1003	3124481003@k9center.clearspancloud.com	true	false	Poppy_Grp_Trunk		Edit	Viev
Last04	First04	Training		3124481004	1004	3124481004@k9center.clearspancloud.com	true	false	00Smokey_VVX250	Group	Edit	View
Last05	First05	Training		3124481005	1005	3124481005@k9center.clearspancloud.com	true	false	PolycomVVXD230DMS-3124481005	Group	Edit	

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:

E2

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- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used.
- However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.
- Users: Users must be created with a Panasonic phone.
- Phone Management Panasonic phones can be added or modified under the Phone Management page of Provisioning.

Note: For Panasonic phones, OpEasy does not support Auto Install and MAC Address Capture like the Mitel and Polycom phones, respectively. For security reasons and to help in managing the Panasonic phones, the MAC address of the base station must be entered when provisioning the Panasonic device in OpEasy.

In addition, the following phone capabilities and features are not supported: the Panasonic phone's "Import/Export" Phonebook feature, Shared Call Appearances (SCAs), Busy Lamp Field (BLF), ACD, and Multicast paging.

User Profiles for Panasonic Phones

In order to allow administrators to quickly set up users with Panasonic phones, one or more User Profiles should be created. When creating a User Profile, the administrator selects the Panasonic phone as the Device Type. The Panasonic phone will be created as the primary phone device for the new user. "MAC Address" is the device's MAC address and not auto generated.

Phone Templates for Panasonic Phones

Key Definitions for Panasonic Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Panasonic is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Panasonic phones are displayed.

Key Definitions Display and configure syst	em and per enterprise keys.				
OK Cancel	Apply Add				
Enterprise: (System Key	s) -				
Phone Manufacturer: Pa	nasonic				
Rebuild Status: Refresh System: None pending.					
Key Definitions					
(1-25	of 26) 📪 🛶 1 2	» 25 V			
Туре ்	Label 0	Value [©]			
Talking Soft Key	Blind Transfer				
Programmable Soft Key	Call Park	*68			
Talking Soft Key Call Park					

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 the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

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

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

Global Configuration File Settings						
Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.						
OK Cancel Apply						
Enterprise: Canine Center Training and Pet Store						
Group: (Select Group)						
Phone Manufacturer: Panasonic						
General Settings	Extra Settings	System Config File Extension	Dial Plan			
Group Settings		Enterprise Settings	System Settings			
Force Group Rebuild		Force Enterprise Rebuild	Force System Rebuild			
Refresh		No rebuilds pending in Enterprise.	No rebuilds pending in System.			
SIP Settings						
Outbound Proxy: Use Enterprise Setting		Use System Setting				
Use DNS SRV Lookup		Use DNS SRV Lookup	Use DNS SRV Lookup			
Proxy Port (No Encryption):						
Proxy Port (Encryption):						
Encryption (TLS/SRTP): Not Allowed -		Not Allowed -				
Encryption Certificate File:						
Encryption WARNING: Configure encryption in the net Subscription Time:	twork first.					
Use Enterprise Setting		Use System Setting				
			360			
DNS Servers	~					
Enable DNS: (Use Enterprise Setting)	L	(Use System Setting)	Disabled -			
Primary DNS Server:						
Secondary DNS Server:						
Secondary Divis Server.						

Figure 215 - Global Settings - Panasonic Phones

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

	F '' O I ''		
Global Configuration			
Display and change the global resync or reboot of the affecte		Phone Manufacturer. After being save	d, the change occurs at the next
OK Cancel App	ly.		
Enterprise: SystemValidation	System Validation		
Group: JazzTest JazzTest			
Phone Manufacturer: Panaso	nic 👻		
General Settings	Extra Settings	System Config File Extension	Dial Plan
Group Extra Settings			
Choose File			
Upload File			
Enterprise Extra Settings			
Upload File			6

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.

Global Configuration Fil Display and change the global Clea affected phones. CK Cancel Apply Enterprise: SystemValidation Sys Group: JazzTest JazzTest • Phone Manufacturer Panasonic	rspan settings for a selected Pho	one Manufacturer. After being saved, the change oc	curs at the next resync or reboot of the
General Settings	Extra Settings	System Config File Extension	Dial Plan
System Config File Extension REG_EXPIRE_TIME_1?r=*3600* REG_EXPIRE_TIME_2?r=*3600* REG_EXPIRE_TIME_3?r=*3600* REG_EXPIRE_TIME_5?r=*3600* REG_EXPIRE_TIME_6?r=*3600* REG_EXPIRE_TIME_7?r=*3600*			
Upload File			

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.

Global Configuration	File Settings		
		e Manufacturer. After being saved, the change oc	curs at the next resync or reboot of the
OK Cancel Apply			
Enterprise: SystemValidation	System Validation		
Group: JazzTest JazzTest			
Phone Manufacturer: Panasonic	c		
General Settings	Extra Settings	System Config File Extension	Dial Plan
Refresh Block Mode			
Group Dial Plan			
Use Enterprise Setting			
Digit Timeout: 4 seconds +			
50XX 478222800X 911 933 *XX #XX #XX			
International Call Prefix:			
Country Calling Code:			
National Access Code:			
Emergency Call #1:			
911			
Emergency Call #2:			
933			

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.

Phone Templates: Definitions for Panasonic Phones

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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

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.

described in the following table and shown in the following figures.

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	Кеу	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.

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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

Create a new phone template. CM Canooli Template Lavel: Enterprise: Emplate Level: Canoolio Probatic Canoolio Rebuild Status: Rebuild Status: Rebuild Status: Rebuild Status: Rebuild Status: NOTE: H Restart NOTE: Probatic Soft Keys Incoming Calls Outgoing Calls Extra Settings Name: Panasonic1 Description: Operatings Time Zone: (Use Global Settings) Outbound Prox: Point No Encryption): (Use Global Settings) Cancer Concerting Calls Marrie: Proprint Cancer Call Cancer Call <t< th=""><th>Template Add</th><th></th><th></th><th></th><th></th><th></th></t<>	Template Add					
Template Name: Panasonic1 Template Level: Enterprise Enterprise: Canine Center - Training and Pet Store Device Type: Panasonic KX-TGP600 (DMS) Rebuild Status: Totlean Phones: NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is reprise. Phones: Name: Panasonic1 Description:	Create a new phone to	emplate.				
Template Level: Enterprise Enterprise: Canine Center - Training and Pet Store Device Type: Panasonic KX-TGP600 (DMS) Rebuild Status: Reheat Enterprise: None pending. Restart NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Name: Panasonic1 Description: Ceneral Settings Time Zone: (Use Global Settings) URI for Soft Keys: (Select EMS Address) USe VLAN Warning: Enabling VLAN may cause some phones to stop operating. Outbound Proxy: Outbound Proxy: WARNING: Configure encryption in the network before setting Encryption to Required.	OK Cancel	Apply				
Enterprise: Canine Center - Training and Pet Store Device Type: Panasonic KX-TGP600 (DMS) Rebuild Status: testenth Enterprise: None pending. Peners NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Name: Panasonic1 Description: General Settings Time Zone: (Use Global Settings) URI for Soft Keys: (Select EMS Address) USe VLAN Warning: Enabling VLAN may cause some phones to stop operating. Outbound Proxy: O Use ONS SRV Lookup Port (No Encryption): Port (Encryption): Encryption): WARNING: Configure encryption in the network before setting Encryption to Recyption in the network before in	Template Name: Pana	asonic1				
Device Type: Panasonic KX-TGP600 (DMS) Rebuild Status: Refersh Enterprise: None pending. Restart NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Name: Panasonic1 Description: General Settings URI for Soft Keys: [Celect EMS Address] URI for Soft Keys: [Celect EMS Address] USE VLAN Warning: Enabling VLAN may cause some phones to stop operating. Outbound Proxy: Use DNS SRV Lookup Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	Template Level: Enter	prise				
Rebuild Status: Reterms Enterprise: None pending. Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is response or response or when the phone is response or when the phone is response or respo	Enterprise: Canine Ce	enter Training and Pet	Store			
Restart Phones NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Name:	Device Type: Panaso	nic KX-TGP600 (DMS)				
Phones rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Name: Panasonic1	Rebuild Status:	fresh Enterprise: Nor	ne pending.			
Name: Panasonic1 Description:			nes is unchecked, the t	emplate will not take effe	ect until a resync or whe	en the phone is
Panasonic1 Description: General Settings Time Zone: (Use Global Settings) URI for Soft Keys: (Select EMS Address) (Use VLAN Warning: Enabling VLAN may cause some phones to stop operating. Outbound Proxy: Outbound Proxy: (Use Global Settings) Outbound Proxy: (Use DNS SRV Lookup Port (No Encryption): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to (TLS/SRTP):	General	Lines	Soft Keys	Incoming Calls	Outgoing Calls	Extra Settings
Description: Desc	Name:					
General Settings Time Zone: [Use Global Settings] URI for Soft Keys: [(Select EMS Address)] USE VLAN Warning: Enabling VLAN may cause some phones to stop operating. Use VLAN Warning: Enabling VLAN may cause some phones to stop operating. Use Global Settings Use Global Settings Port (Encryption): Encryption (Use Global Settings)] WARNING: Configure encryption in the network before setting Encryption to Required.	Panasonic1					
General Settings Time Zone: [Use Global Settings] URI for Soft Keys: [(Select EMS Address)] USE VLAN Warning: Enabling VLAN may cause some phones to stop operating. Use VLAN Warning: Enabling VLAN may cause some phones to stop operating. Use Global Settings Use Global Settings Port (Encryption): Encryption (Use Global Settings)] WARNING: Configure encryption in the network before setting Encryption to Required.	Description:					
Time Zone: Use Global Settings						
Time Zone: Use Global Settings						
Time Zone: Use Global Settings						
URI for Soft Keys: (Select EMS Address) URI for Soft Keys: (Select EMS Address) USE VLAN Warning: Enabling VLAN may cause some phones to stop operating. Use VLAN Varing: Use Global Settings Port (No Encryption): Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.		_				
Use VLAN Warning: Enabling VLAN may cause some phones to stop operating. Outbound Proxy:	Time Zone: Use Glo	obal Settings)				
Outbound Proxy: Outbound Proxy: Use Global Settings Use DNS SRV Lookup Port (No Encryption): Port (Encryption): Encryption): Encryption: (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	URI for Soft Keys: (S	Select EMS Address)				
Use Global Settings Use Global Settings Use DNS SRV Lookup Port (No Encryption): Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	O Use VLAN W	arning: Enabling VLAN n	nay cause some phones	to stop operating.		
Use DNS SRV Lookup Port (No Encryption): Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.						
Port (No Encryption): Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	 Use Global Setting 	S				
Port (No Encryption): Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.						
Port (Encryption): Encryption (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	Use DNS SRV Loc	kup				
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.	Port (No Encryption):					
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.						
(TLS/SRTP): Required.	Port (Encryption):					
(TLS/SRTP): Required.						
Encryption Certificate File:		(Use Global Settings		Configure encryption in	the network before set	ting Encryption to
	Encryption Certificate	File:				

Figure 219 - Template Add General Tab- Panasonic

ate a new phone	e template.				
OK Cancel	Apply				
nplate Name: Pa	nasonic1				
nplate Level: Ent	terprise				
terprise: Canine	Center Training and Pet	Store			
vice Type: Panas	sonic KX-TGP600 (DMS)				
build Status:	Refresh Enterprise: Non	e pendina.			
Restart Phones	NOTE: If Restart Pho rebooted.	nes is unchecked, the	e template will not take ef	ffect until a resync or w	ten the phone is
				1	I man and a second second
eful tags for Line	Lines Label text: {Ext}, {Number} urspan Line Position Map		Incoming Calls	Outgoing Calls	Extra Settings
eful tags for Line	Label text: {Ext}, {Number}	, {FirstName}, {LastN	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea	Label text: {Ext}, {Number}	, {FirstName}, {LastN ping	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea Phone Line	Label text: {Ext}, {Number} Irspan Line Position Map Clearspan Line Position	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea Phone Line 1	Label text: {Ext}, {Number} rspan Line Position Map Clearspan Line Position Position 1	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea Phone Line 1 2	Label text: {Ext}, {Number} urspan Line Position Map Clearspan Line Position Position 1 - (Unassigned)	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea Phone Line 1 2 3	Label text: {Ext}, {Number} rspan Line Position Map Clearspan Line Position Position 1 (Unassigned)	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings
eful tags for Line one Line to Clea Phone Line 1 2 3 4	Label text: {Ext}, {Number} rspan Line Position Map Clearspan Line Position Position 1 (Unassigned) (Unassigned) (Unassigned)	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings
Phone Line to Clear Phone Line 1 2 3 4 5	Label text: {Ext}, {Number} rspan Line Position Map Clearspan Line Position Position 1 (Unassigned) (Unassigned) (Unassigned)	, {FirstName}, {LastN ping Line Label	lame}	Outgoing Calls	Extra Settings



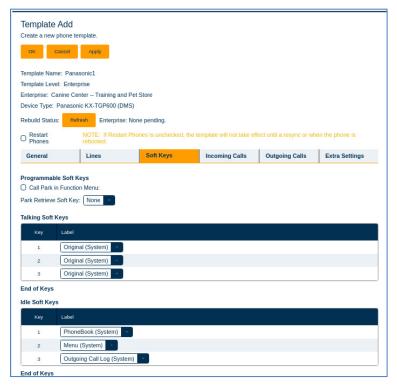


Figure 221 - Template Add - Soft Keys Tab - Panasonic

	a new phone ter	nplate.						
ок	Cancel	Apply						
mpla	te Name: Panas	onic1						
empla	te Level: Enterp	rise						
nterpr	ise: Canine Cen	ter Training an	d Pet Store					
evice	Type: Panasoni	c KX-TGP600 (D	MS)					
ebuild	Status: Refr	esh Enterprise	e: None pending					
Res			rt Phones is und	hecked, the temp	olate will not take	effect until a res	ync or when t	he phone is
Pho	nes	rebooted.						
C	und I	Lines	Cattle		nooming Calle	Outraina	Calle	Future Cattinger
Gene	eral	Lines	Soft Ke	eys I	ncoming Calls	Outgoing	Calls	Extra Settings
		Lines set Select for Re		eys I	ncoming Calls	Outgoing	Calls	Extra Settings
roup				Ring Handset	Ring Handset	Outgoing Ring Handset 6	Calls Ring Handse 7	
roup	Handset / Hand Ring Handset	set Select for R	eceiving Calls Ring Handset	Ring Handset	Ring Handset	Ring Handset	Ring Handse	et Ring Handset
roup Line	Handset / Hand Ring Handset 1	set Select for R Ring Handset 2	eceiving Calls Ring Handset 3	Ring Handset	Ring Handset	Ring Handset	Ring Handse	et Ring Handset
roup Line 1	Handset / Hand Ring Handset 1 Ring 1 -	set Select for R Ring Handset 2 Ring 2	eceiving Calls Ring Handset 3 Ring 3 -	Ring Handset 4 Ring 4 -	Ring Handset 5 Ring 5	Ring Handset 6 Ring 6	Ring Handse 7 Ring 7	et Ring Handset 8 Ring 8 -
roup Line 1 2	Handset / Hand Ring Handset 1 Ring 1 - Ring 1 -	set Select for R Ring Handset 2 Ring 2 Ring 2	ecceiving Calls Ring Handset 3 Ring 3 - Ring 3 -	Ring Handset 4 Ring 4 - Ring 4 -	Ring Handset 5 Ring 5 Ring 5	Ring Handset 6 Ring 6 - Ring 6 -	Ring Handse 7 Ring 7 Ring 7	et Ring Handset 8 Ring 8 Ring 8
roup Line 1 2 3	Handset / Hand Ring Handset I Ring 1 - Ring 1 - Ring 1 -	set Select for R Ring Handset 2 Ring 2 Ring 2 Ring 2	eceiving Calls Ring Handset 3 Ring 3 Ring 3 Ring 3	Ring Handset 4 Ring 4 - Ring 4 - Ring 4 -	Ring Handset 5 Ring 5 Ring 5 Ring 5	Ring Handset 6 Ring 6 Ring 6 Ring 6	Ring Handse 7 Ring 7 Ring 7 Ring 7	et Ring Handset 8 Ring 8 Ring 8 Ring 8
roup Line 1 2 3 4	Handset / Hand Ring Handset 1 Ring 1 Ring 1 Ring 1 Ring 1	set Select for R Ring Handset 2 Ring 2 Ring 2 Ring 2 Ring 2	eceiving Calls Ring Handset 3 Ring 3 Ring 3 Ring 3 Ring 3 Ring 3	Ring Handset 4 Ring 4 - Ring 4 - Ring 4 - Ring 4 -	Ring Handset 5 Ring 5 Ring 5 Ring 5 Ring 5	Ring Handset 6 Ring 6 Ring 6 Ring 6 Ring 6	Ring Handse 7 Ring 7 Ring 7 Ring 7 Ring 7	et Ring Handset 8 Ring 8 Ring 8 Ring 8 Ring 8 Ring 8
roup Line 1 2 3 4 5	Handset / Hand Ring Handset 1 Ring 1 Ring 1 Ring 1 Ring 1 Ring 1 Ring 1	set Select for R Ring Handset 2 Ring 2 Ring 2 Ring 2 Ring 2 Ring 2 Ring 2	eceiving Calls Ring Handset 3 Ring 3 Ring 3 Ring 3 Ring 3 Ring 3 Ring 3	Ring Handset 4 Ring 4 Ring 4 Ring 4 Ring 4 Ring 4 Ring 4	Ring Handset 5 Ring 5 Ring 5 Ring 5 Ring 5 Ring 5	Ring Handset 6 Ring 6 Ring 6 Ring 6 Ring 6 Ring 6	Ring Handsa 7 Ring 7 Ring 7 Ring 7 Ring 7	et Ring Handset 8 Ring 8 Ring 8 Ring 8 Ring 8 Ring 8 Ring 8

Figure 222 - Template Add - Incoming Calls Tab - Panasonic

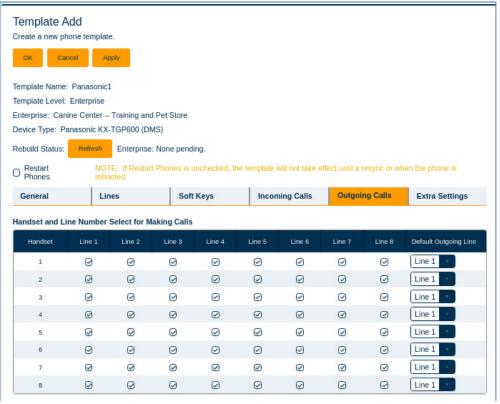


Figure 223 - Template Add - Outgoing Calls Tab - Panasonic

Template Ad					
OK Cance					
	nterprise c Center Training an asonic KX-TGP600 (Di Refresh Enterprise	MS) :: None pending.	ne template will not take ef	fect until a resync or w	nen the phone is
General	Lines	Soft Keys	Incoming Calls	Outgoing Calls	Extra Settings
Choose File to Up	load Extra Settings Co	ontent			
Upload File					

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.

Authentication
Name:
Password:
1uJ71-rtl1_3_6X918Yn9UoX-cw1iWK3XSgnoX-QmRZ_vehW-P13_
(create a password of at least 6 characters)
Confirm Password:
1uJ71-rtl1_3_6X918Yn9UoX-cw1iWK3XSgnoX-QmRZ_v_ehW-P13_
Initialize Authentication Password to random password
Primary Phone Device
* Device Name:
Device Level: Group
* Line / Port: @ m4k.clearspan.mitel.com -
VLAN ID: (VLAN is not enabled in the template) Warning: Modifying the VLAN ID may cause the phone to stop operating.
MAC Address:
(Device's MAC Address)
ERL Record Name: (None)
Device Access: * User Name:
* Password:

Figure 225 - Bottom Section of User Add Page when Panasonic User Profile is Selected

User: Primary Phone Device Add Add a phone device as the primary phone for the user. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel Manage Users Custom Tags Custom Rings
Enterprise: Canine Center Training and Pet Store
Group: Training
User: Last111, First111 (3124481111@k9center.clearspancloud.com)
Phone Device
Phone Device: (New Phone Device)
* Device Name:
Panasonic_1111
* Device Level: Group
Device Type: Panasonic KX-TGP600 (DMS)
Template: Panasonic_Grp (Group)
View Template
Device Billing Type: Use Org Billing Type
User Line
* Line / Port:
3124481111.primary @ k9center.clearspancloud.com
Line Position: 1st Phone Line

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.

User General Settings: New User E-mail Notification Display and modify the E-mail message that is sent to new users based on phone type. The E-mail notification typically provides instructions on phone setup.
OK Cancel Apply Save As System-Wide Default
Enterprise: Canine Center Training and Pet Store
Phone Manufacturer: Panasonic
New User E-mail Message Enter or modify the 'From' address, 'Subject' line, and body of the E-mail message that is to be sent to new phone users. The subject line and message body can contain any of the substitution tags (identified by {} braces) listed at the bottom of the page. When the E-mail is sent, these tags are replaced by the appropriate user-specific information.
The text between {CCDesktopStart} and {CCDesktopEnd} is sent only when the new user has a Clearspan Communicator - Desktop device configured. Similarly the text between {CSEngageDesktopStart} and {CSEngageDesktopEnd} is sent for a CS Engage - Desktop device, between {CCS4BStart} and {CCS4BEnd} is sent for a Clearspan Communicator - S4B device, between {CSEngageMobileStart} and {CSEngageMobileEnd} is sent for a UC-One/CS Engage - Mobile device, between {CCMobileStart} and {CCMobileEnd} is sent for a Clearspan Communicator - Mobile device, between {CSEngageTabletStart} and {CCSEngageTabletEnd} is sent for a UC-One/CS Engage - Tablet device, and between {CCTabletStart} and {CCTabletEnd} is sent for a Clearspan Communicator - Tablet device.
Similarly, the {DMMACAddressStart} and {DMMACAddressEnd} tags surround text only sent when the user's phone device is configured using the device's MAC Address. The {DMCredentialsStart} and {DMCredentialsEnd} tags surround text only sent when the user's phone device is configured using the device's credentials (access User Name and Password).
Reset to System-Wide Default
Clear
From:
Subject:
Email Message Body

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.

Device Description
Description:
Serial Number:
Phone Location:
Plano 5th Floor
Device Configuration
Host Name / IP Address:
Port:
Outbound Proxy:
MAC Address:
BCC3420CEDD0
Device Access: User Name:
4693653322
Reset Password:
Confirm Password:
Device Protocol: SIP 2.0
Transport Protocol: Unspecified
VLAN ID: (VLAN is not enabled in the template)
WARNING: Modifying the VLAN ID may cause the phone to stop operating.
ERL Record Name: https://www.enlightub.com
Encryption (TLS/SRTP): None Lines/Ports: 8
Assigned Lines/Ports: 3 Unassigned Lines/Ports: 5

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. <u>This link</u> 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_68X X%	Sip68xx.11.1.2MPP-351.loads	For model 6851 and 6871
%FIRMWARE_VERSION_78X X%	sip78xx.11.1.2MPP-351.loads	For models 7821, 7841, and 7861
%FIRMWARE_VERSION_88X X%	sip88xx.11.1.2MPP-351.loads	For models 8811, 8841, 8845, 8851, 8861 and 8865

Modifying Firmware Version for a Group

The firmware version can be changed for a specific group or device.

To modify the firmware version for a group:

- 1. Launch the Clearspan Provisioning Portal.
- 2. Navigate to the Group > Utilities > Device Configuration.

3. Click Edit on the appropriate Device Type in the list, for example Cisco 7841 (DMS).

Note: At least one of the devices must exist in the Group.

- 4. Select the **Custom Tags** tab.
- 5. Click **Add** and enter the required version for the tag. For example, Tag Name: "%FIRMWARE_VERSION_78XX%".

Configuration 1-Minute Delay

When the phones download a modified configuration file, it will reboot and then wait for up to 1 minute before processing and applying any latest updates.

BLF Configuration

2

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.

HeadQuarter: Identity/Device Profile Custom Tag Modify Modify or delete a custom device management tag for the Identity/Device Profile.						
OK Delete	Cancel					
Identity/Device Profile Name: Identity/Device Profile Type: Tag Name:						
Tag Value:	0					
OK Delete	Cancel					



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.

splay and confidur	1S re system and per enterprise I	keys.															
OK Cancel		Copy System Keys															
OK Cancer	Арруу Абб	Copy System Reys															
nterprise: Canine	e Center Training and Pet S	tore															
mplate Keys: Br	oth System and Enterprise Ke	ys (Keys available to use in	templates of the	selected	enterprise)												
hone Manufacturer	r: Cisco																
_	Refresh Enterprise: None p	anding															
Duild Status.	Enterprise. None p	chung.															
ey Definitions																	
			(1-25 of 56)		🖂 1 <mark>2</mark>	2 3 .	· · 2	.5	~								
Туре	Label ©	Value ©	Idle	Dialing	Connected	Ringing	Progressing	Off- Hook	Hold	Start Xfer	Start Conf	Releasing	Conferencing	Shared Active	Shared Held	Missed	De
		Value ©	Idle	Dialing	Connected	Ringing	Progressing		Hold			Releasing	Conferencing			Missed	
Input Star Code		Value °						Hook	Hold	xfer	Conf			Active	Held	Activity (De
Input Star Code	*code	Value ©		Ø	0	0	0	Hook	0	xfer	Conf	0	0	Active	Held	0	De
Input Star Code Right Arrow	*code ->	Value ©		0	0	0	0	Hook	0	Xfer O	Conf	0	0	Active	Held	0	
Input Star Code Right Arrow	 *code -> <- 			0 0	0	0	0	Hook		xfer O O	Conf O O			Active	Held	0	De De De
Type Input Star Code Right Arrow • Left Arrow • ACD Login • ACD Logout • Agent Status •	 *code -> <- Agt SignIn 	Value ©		0 0				Hook O O O		xfer O O O	Conf O O O			Active	Held		
Input Star Code Right Arrow	 *code -> Agt SignOut 	Value ©		000000000000000000000000000000000000000				Hook		xter	Conf 0			Active			
Input Star Code Right Arrow • Left Arrow • ACD Login • ACD Logout •	 *code -> Agt SignOut Agt Status 	Value ©		0 0 0						xfer 0 0 0 0 0	Conf 0 0 0 0 0 0 0 0			Active			De De De De De De

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,

Field	Setting
Туре	Select the type of key or feature that is being defined.
	ACD Login
	ACD Logout
	Agent Status
	Answer
	Available
	Barge In
	Barge Silent
	Blind Xfer
	• Call
	Call Forward
	Call Info
	Cancel
	Conference
	Conference Line
	Decline
	Delete Char
	Directory
	Disposition Code
	• DND
	 Extension Mobility Sign In
	 Extension Mobility sign Out
	Emergency
	End Call
	Favorites
	Function
	Group Pickup
	Hold
	Input Star Code
	• Join
	Last Call Rtn
	Left arrow icon
	Line
	Messages
	• Miss
	New Call
	Option
	Park

Enter or Select the following in the Key Definition fields.

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.

Global Configuration File Settings Display and change the global Clearspan settings for a selected for Cancel Apply Enterprise: Canine Center Training and Pet Store Group: Training Phone Manufacturer: Cisco	Phone Manufacturer. After being saved, the change occurs at the r	next resync or reboot of the affected phones.
General Settings Extra Setting	gs System Config File Extensi	on Dial Plan
Group Settings	Enterprise Settings	System Settings
Force Group Rebuild	Force Enterprise Rebuild	Force System Rebuild
Refresh No rebuilds pending in Group.	No rebuilds pending in Enterprise.	No rebuilds pending in System.
SIP Settings Outbound Proxy:	✓ Use System Setting	
 Use DNS SRV Lookup Proxy Port (No Encryption): 	Use DNS SRV Lookup	Use DNS SRV Lookup
Proxy Port (Encryption):		
Encryption (TLS/SRTP): (Use Enterprise Setting)	Not Allowed	
Encryption Configure encryption in the network WARNING: first.		
Subscription Time: Use Enterprise Setting	 Use System Setting 	
		360
BLF Subscription Time: Use Enterprise Setting	✓ Use System Setting	
		360
Hoteling Subscription Time:	✓ Use System Setting	
		3600

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 serve 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 serve 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

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.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being OK Cancel Apply Enterprise: Canine Center Training and Pet Store • Group: Training •	saved, the change occurs at the next resync or ret	oot of the affected phones.
Phone Manufacturer: Cisco		
General Settings Extra Settings	System Config File Extension	Dial Plan
Group Extra Settings		
Upload File		
Enterprise Extra Settings		
Uplond File		
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.

Global Configuration File Setting Display and change the global Clearspan setting: OK Cancel Apply Enterprise: Canine Center Training and Pet S Group: Training • Phone Manufacturer: Cisco •	s for a selected Phone Manufacturer. After being s	aved, the change occurs at the next resync or ret	poot of the affected phones.
General Settings	Extra Settings	System Config File Extension	Dial Plan
System Config File Extension			
Choose File Upload File			

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.

Template Add					
Create a new phone temp	plate.				
OK Cancel	Apply				
Template Name: Finance	8841				
Template Level: Group					
Enterprise: Mitel Corpo					
Group: Plano 5th Floor		port			
Device Type: Cisco 8841	(DMS)				
Rebuild Status: Refres	h Group: None pend	ling.			
Restart Phones	NOTE: If Restart Phone	s is unchecked, the templat	e will not take effect until	a resync or when the pho	one is rebooted.
General	Lines	Programmable Keys	Soft Keys	Features	Extra Settings
Name:					
Finance 8841					
Description:					
General Settings					
Type of Expansion Modul	e None +				
Expansion Modules: 0					
URI for Soft Keys: (Sele	ect EMS Address)				
Time Zone: (Use Globa	I Settings)				
O Use VLAN:					
WARNING: Enabling VL/	AN may cause some ph	ones to stop operating.			
Outbound Proxy:	Outbound Proxy				
Use Global Settings Outbound Proxy					
Use DNS SRV Looku	p				
Port (No Encryption):					
Port (Encryption):					
Encryption (TLS/SRTP):	(Use Global Settings)	-			
1976) 03 000		before setting Encryption to	Description		

Figure 234 - Template Add - General for Cisco Phones

create a	ate Add new phone template.						
ок	Cancel Apply						
emplate	Name: Finance 8841						
emplate	Level: Group						
Interprise	e: Mitel Corporate Users	Č.					
Group: P	'lano 5th Floor Engineerir	ng Cloud Support					
evice Ty	/pe: Cisco 8841 (DMS)						
Rebuild S	Status: Refresh Grou	p: None pending.					
) Resta	rt Phones NOTE: If R	estart Phones is un	checked, the templat	te will not take effect	until a resync or when t	the phone is reboote	ed.
Genera	al Lines	Pro	grammable Keys	Soft Keys	Features	Extra Sett	tings
lax Calis	s Per Line: 2	, {Number}, {FirstNa	me}, {LastName}				
Max Calls Iseful tag Phone Li Phone	s Per Line: 2 - gs for Line Label text: {Ext}, ine to Clearspan Line Pos Clearspan Line Position					Ring	
lax Calls Iseful tag hone Li Phone Line	gs for Line Label text: {Ext}, ine to Clearspan Line Pos Clearspan Line Position	sition Mapping Programmable Key	Line Label	1			MW
lax Calls Iseful tag Phone Li Phone Line	gs for Line Label text: {Ext}, ine to Clearspan Line Pos Clearspan Line Position (Unassigned)	Programmable Key (Unassigned)	Line Label			Sunrise	MV ⊘
lax Calls Iseful tag Ihone Li Phone Line 1	gs for Line Label text: {Ext}, ine to Clearspan Line Pos Clearspan Line Position	sition Mapping Programmable Key	Line Label Extension				ми ©
Max Calls Jseful tag Phone Li Phone Line 1 2 3	gs for Line Label text: {Ext}, ine to Clearspan Line Pos Clearspan Line Position (Unassigned)	Programmable Key (Unassigned) (Unassigned)	Line Label			Sunrise Sunrise	MW Ø Ø
lax Calls Iseful tay Phone Line 1 2 3 4	gs for Line Label text: {Ext}, ine to Clearspan Line Position (Unassigned) (Unassigned)	Programmable Key (Unassigned) (Unassigned) (Unassigned)	Line Label Extension Extension Extension			Sunrise Sunrise Sunrise	9 9 9 9 9
lax Calls Iseful ta hone Li Phone Line 1 2 3 4 5	gs for Line Label text: {Ext}, ine to Clearspan Line Post Clearspan Line Posttion (Unassigned) (Unassigned) (Unassigned)	Curassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned)	Line Label Extension • Extension • Extension •			Sunrise Sunrise Sunrise Sunrise	9 9 9 9 9 9 9
lax Calls Iseful tag hone Li Phone Line 1 2 3 4 5 5 6	gs for Line Label text: {Ext}, ine to Clearspan Line Position (Unassigned) • (Unassigned) • (Unassigned) • (Unassigned) •	Curassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned)	Line Label Extension Extension Extension Extension Extension Extension			Sunrise Sunrise Sunrise Sunrise	
lax Calls Iseful ta hone Li Phone Line 1 2 3 4 5 5 6 7	gs for Line Label text: {Ext}, ine to Clearspan Line Position (Unassigned) • (Unassigned) • (Unassigned) • (Unassigned) • (Unassigned) •	Harping Programmable Key (Unassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned)	Line Label Extension = Extension = Extension = Extension = Extension =			Sunrise Sunrise Sunrise Sunrise Sunrise	
Jseful ta Phone Li Phone Line 1	gs for Line Label text: {Ext}, ine to Clearspan Line Position (Unassigned) (Unassigned) (Unassig	Hition Mapping Programmable Key (Unassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned) (Unassigned)	Line Label Extension • Extension • Extension • Extension • Extension •			Sunrise Sunrise Sunrise Sunrise Sunrise Sunrise Sunrise	SC. ₩₩ Ø Ø Ø Ø Ø Ø Ø

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, 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 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	Кеу	Static text indicating the programmable line key number.
	Label	Select the valid feature keys as defined in the Template Key Definitions for Cisco. The valid key types are: • Line
		 Any key that is a 'Function' type defined on 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

	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:

Maximum Number of Expansion Modules Supported
1
2
3
3
-

The **Expansion Keys** Tab contains the **Expansion Keys** table to configure the keys for an expansion module assigned to the phone.

The **Expansion Keys** table contains the following columns:

- Key static text displaying the expansion key number
- Label drop-down list that contains the valid feature keys as defined in the Template Key Definitions for Cisco.
- Phone Line drop-down list that contains the valid lines keys. A line selection may be required depending on the type of key selected in the label column.

General	Lines	Programmable Keys	Soft Keys	Exp 1 Keys	Features	Extra Settings
xpansion K	eys					
		(1-25 of 28)	12 📂	r (25 🗸		
Кеу	Label			Phone Lir	1e	
1	(Select Key)					
2	(Select Key)					
3	(Select Key)					
4	(Select Key)					
5	(Select Key)					
6	(Select Key)					
7	(Select Key)					
8	(Select Key)					
9	(Select Key)					

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

2

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.

Phone Device Modify Modify an existing Clearspan phone device.					
OK Cancel Apply	Delete	Manage Users	Custom Tags	Custom Rings	Replace Phone
Enterprise: Mitel Corporate Users Group: Plano 5th Floor Engineering Cloud Support					
Phone Device Device Name: test_Cisco8841 Device Level: Group Device Type: Cisco 8841 (DMS) Support Device: No Template: test_kirana (Group) • View Template Device Billing Type: Use Org Billing	g Туре				
Device Description Description:					
Serial Number:					
Phone Location:					
Device Configuration Host Name / IP Address:					
Port:					

Figure 237 - Phone Device Modify Page - Cisco

Installing Cisco Phones

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

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.

nterprise: (System Keys)	m and per enterprise keys. pply Add (Aastra)							
Enterprise: (System Keys) Phone Manufacturer: Mitel								
hone Manufacturer: Mitel	(Aastra)							
	(Aastra)							
Rebuild Status: Refresh								
	System: None pending.							
Turbar	oyotom. Hone ponding.							
Cey Definitions								
	(1-25 of 53)	1 2 3 ** **	25	~				
Туре	Label 🌣	Value 🌣	Idle	Connect	Incoming	Outgoing	Busy	
Empty			0	Ø	Ø	9	Ø	1
None	ACD	http://%CS_SOFT_KEY_UR	Ø	Ø	0	Ø	Ø	
Auto Call Distribution BLF	ACD SYS		\odot	\oslash	0	\odot	\odot	Q.
BLF/List	ACD-Avail	http://%CS_SOFT_KEY_UR	Ø	\oslash	9	Ø	Ø	1
BLF/Xfer Call Forward	ACD-IN	http://%CS_SOFT_KEY_UR	0	0	0	0	0	
Callers	ACD-Out	http://%CS_SOFT_KEY_UR	Ø	Ø	Ø	Ø	\oslash	1
CONTRACTOR AND A CONTRACTOR	ACD-Unav	http://%CS_SOFT_KEY_UR	Ø	Ø	0	0	\bigcirc	1
Conference				\odot	Ø	Ø	Ø	1
Directed Call Pickup	ACD-Wrap	http://%CS_SOFT_KEY_UR	0					
Directed Call Pickup Directory Do Not Disturb	ACD-Wrap ACDWrpxaud	http://%CS_SOFT_KEY_UR	0	0	0	0	0	1
Directed Call Pickup Directory Do Not Disturb Empty				0	0	0	0	
Directed Call Pickup Directory Do Not Disturb	ACDWrpxaud		0	-	1.000	1.000		
Directed Call Pickup Directory Do Not Disturb Empty Flash Line Mobile	ACDWrpxaud	http://%CS_SOFT_KEY_UR	0	Ø	0	Ø	0	1
Directed Call Pickup Directory Do Not Disturb Empty Flash Line	ACDWrpxaud ACD_PHONE AVST	http://%CS_SOFT_KEY_UR	0	9 9 9	0 0 0	0	0	
Directed Call Pickup Directory Do Not Disturb Empty Flash Line Mobile Park	ACDWrpxaud ACD_PHONE AVST BLF List	http://%CS_SOFT_KEY_UR	0	9	0	0	0	1 1 1 1 1

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_S OFT_KEY_URI%

Where:

- The function parameter <type> must be one of the following: "signin", "signout", "available", "unavailable", or "wrap"
- The playaudio parameter may be 1 or 0, and if omitted it defaults to 0 (disabled)
- The featureuri parameter is the URI for the location to play the audio files (usually the same as the main URI).

ACD Audio Prompts

The following prompts are installed to be played on the phone if the "playaudio" parameter is enabled:

SignIn.wav	"ACD agent is signed in"
SignOut.wav	"ACD agent is signed out"
Available.wav	"ACD agent is available"
Unavailable.wav	"ACD agent is not available"
Wrap.wav	"ACD agent is in wrap"
Error.wav	"Unable to process request, if the problem persists contact your administrator"

User Guide

When each button is pressed, the associated function is executed and, if enabled, the audio is played indicating the agent's state. For ADA compliance there are no menus to navigate to perform these functions.

Call Mark

The Call Mark application provides a convenient mechanism to log user issues so the Clearspan technical support team can troubleshoot the cause.

The support organization normally determines when this button should be used (generally for issues that may be intermittent, and information needs to be collected). In those cases, a button may be added to a user phone using the following key definition:

http://%CS_SOFT_KEY_URI%/callmark.php

This function logs the event in the phone_app_log table of the OpEasy database, logs the event in the CSInterface log and also sends an SNMP trap to notify support that the event has occurred. Log information includes the time that it occurred, the MAC address of the phone, the phone's device name and the currently active or last active line/port.

User Guide

The support team communicates to users when they should press this button. Typically, when the issue occurs, the user simply presses the button, allowing the support team to receive notification of the problem.

CLID Block

You can add the CLID Block key to support Calling Line ID Delivery Blocking per Call. Hides the user's calling line ID for the next call. A CLID Block softkey can be added with the following definition:

%BWFAC-CLID-DELIVERY-BLOCKINGPER-CALL-1%

User Guide

Before placing a call, the user presses the **CLID Block** key; and then places the call as usual.

Directory Lookup

The directory application provides functions to search from an LDAP directory and then display the list on the user's phone for dialing.

LDAP Lookup: Servers are provisioned in OpEasy (for an enterprise or for groups), allowing the phone to display the appropriate directory for each user.

Important: One of the available functions within directory lookup is the ability to add a number to the user's Speed Dial list. If this feature must be available, then the application must know which Speed Dial type the user has provisioned, which is done by adding the parameter "speedtype" with one of the following values:

- Speedtype=0 Indicates directory uses Speed Dial 8
- Speedtype=1 Indicates directory uses Speed Dial 100

If this function is not required, this parameter may be omitted, otherwise you will likely need 2 separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides LDAP lookup using Speed Dial 100:

http://%CS_SOFT_KEY_URI%/ad.php?speedtype=1

LDAP Servers and Credentials

LDAP servers and credentials can be set up for an entire enterprise or a separate one for each group as needed. This is provisioned with OpEasy via Provisioning | Group Settings | Phone Directory Management.

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

Secure vs. Non-Secure Access

Note that the URI field for the directory uses the format of Idap://</br>

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 Idaps:////security available.

To convert from non-secure to secure LDAP access, edit the Phone Directory entry and update the Server URI field to insert the 's' as shown in the following figure.

Phone Directory Modify Modify the selected Directory server.
OK Cancel Apply
Enterprise:SystemValidation System Validation
Group:(All Groups)
Server Information
Server Enabled
* Server URI:
ldaps://Cslabdc01.cslab.clearspancloud.com
* Server Root DN:
DC=cslab,DC=clearspancloud,DC=com
* Server User ID:
CN=Hospitality,CN=Users,DN=cslab,DN=clearspancloud,DN=com
* Reset Password
* Confirm Password:
Query
Remove Extensions from Results
Disable Workphone Search
Field Mapping
Last Name Field:
sn
First Name Field:
givenName
Work Phone Field:
telephoneNumber
Home Phone Field:
homePhone

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 \rightarrow 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 \rightarrow Lookup \rightarrow Dial

Pressing "Dial", dials the selected entry from the list using the first number in the list (default number).

Directory Search \rightarrow Lookup \rightarrow 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:

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 \rightarrow Navigate to Number \rightarrow Dial

Pressing "Dial" dials the phone number for the selected entry.

Select Missed \rightarrow Navigate to Number \rightarrow 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 \rightarrow Navigate to Number \rightarrow Display \rightarrow 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 \rightarrow Received \rightarrow Dialed

Or

Select Missed \rightarrow 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 \rightarrow Dialed \rightarrow 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

 $RSS \rightarrow Select$

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	KEV	I IPI%/cc r	bn2ic100-1
mp.// %CS	_30г1_		_URI%/05.µ	np ns 100=1

User Guide

The Speed Dial 8 and 100 applications are available for assignment to any program key, soft key or hard key on a Mitel phone. However, the application's capabilities on phones that have no soft keys are significantly reduced in that no adds, edits, moves or deletes are allowed. This section is divided to describe functionality for phones that have no soft keys vs. phones that have soft keys.

Speed Dial 8/100 Functionality for Phones with no Soft Keys

When the Speed Dial application is launched on a phone that has no soft keys, the user is presented a screen similar to the following that identifies the number of Speed Dial entries.

Speed Dial 1 / 10

Use It to view

The list of Speed Dial entries may be scrolled through via the navigation keys. The user navigates to the required entry and presses the Line key to initiate a call to the selected speed dial number.

The speed dial entries are managed by editing the user on OpEasy and selecting the 'Speed Dial 8' or 'Speed Dial 100' service. There is no ability to add, delete or modify entries via the phone.

Speed Dial 8/100 Functionality for Phones with Soft Keys

When the Speed Dial application is launched on a phone that has soft keys, the user is prompted with the "Speed Dial" menu to select the entry to dial or modify. The list is displayed as a menu (the

user may move Up or Down the list to select an entry). If multiple pages exist the Page Up or Page Down buttons are visible (also, the page number and total pages are displayed, for example, 1/5). From this display the user has the following options:

Speed Dial

Dial:	Dial the selected name from the list.
Display:	Display phone number and name for the 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 \rightarrow 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 \rightarrow Display \rightarrow Dial

Pressing "Dial", of course, dials the phone number for the selected entry.

Speed Dial \rightarrow Display \rightarrow 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 \rightarrow Display \rightarrow 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 \rightarrow Options \rightarrow 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:

Back space entered characters to correct the entry.
Save changes and return the previous screen.
Return to the previous page.
Exit the application.

Speed Dial \rightarrow Options \rightarrow Add \rightarrow Done

Pressing "Done" saves the change and continues. After the name has been entered it returns to the previous screen.

Speed Dial \rightarrow Options \rightarrow 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 \rightarrow Options \rightarrow Edit \rightarrow Done

Pressing the "Done" button saves the change and return to the previous screen.

Speed Dial \rightarrow Options \rightarrow 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 \rightarrow Options \rightarrow 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 \rightarrow Options \rightarrow Move \rightarrow 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