Clearspan® Web Interface Getting Started Guide

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December 2016

Mitel®

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Clearspan Web Interface Getting Started Guide
Release #21
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1   REVISION HISTORY

The following represents the revision history of this publication.

REVISION NUMBER	DATE COMPLETED	POINT OF CONTACT	DESCRIPTION
2770-004	12/2016	Velvet Moore	R21.0
2770-003	09/2014	Velvet Moore	R20.0
2770-002	08/26/13	Bev Marsh	R18.0
2770-001	11/18/08	Deb Bechtloff	Initial release of this publication.

2 SUMMARY OF CHANGES

This section describes the changes to this document since the R14 release.

2.1 CHANGES FOR RELEASE 21

The following changes were made to this version of the document:

- Updated document for Release 21.

2.2 CHANGES FOR RELEASE 20.0

The following changes were made to this version of the document:

- Updated document for Release 20.0.

- Updated sections 2 About This Guide, 5.1 Log In, 5.7 Navigate Lists, 5.8 Search List Pages, and 5.9 Move Items from One Column to Another.

2.3 CHANGES FOR RELEASE 18.0

- Replaced references to the Conferencing service with references to Meet-Me Conferencing service.

- Updated the list of supported web browsers.

- Updated the list of additional resources.

- Updated figures throughout the document to match the user interface.

2.4 CHANGES FOR RELEASE 17.0, DOCUMENT VERSION 1

The following changes were made to this version of the document:

- Updated figures throughout the document to match the user interface.

2.5 CHANGES FOR RELEASE 16.0, DOCUMENT VERSION 1

The following changes were made to this document for Release 16.0:

- Updated sections 2.1 Clearspan Overview and 4.1 Page Conventions for the Web-based/Web-Services-based Receptionist and Call Center Client Applications Functional Specification.

- Updated figures throughout the document to match the interface.

3   ABOUT THIS GUIDE

The *Clearspan Getting Started Web Interface Administration Guide* is designed to introduce users to Clearspan. It includes the following:

- An overview of the servers and services that comprise the software, with lists of the guides where you find detailed information on each of them.

- Procedures on starting the Clearspan CommPilot web portal, logging in, changing your password, and so on.

- Navigation and customization tips.

- How to use the search functionality.

- Important notes on browser requirements and settings, and on integrating Microsoft Outlook with Clearspan.

3.1   ADDITIONAL GUIDES

For Application Server procedures for system providers, enterprise administrators, group administrators, and department administrators refer to the following Clearspan guides:

- Clearspan Application Server Enterprise Web Interface Administration Guide

- Clearspan Application Server Group Web Interface Administration Guide (Part 1 and Part 2)

Other quick reference guides include the following:

- Clearspan Auto Attendant Quick Reference Guide

- Clearspan Web Portal Login Functions Quick Reference Guide

- Clearspan Personal Voice Portal Quick Reference Guide

- Clearspan Group Voice Portal Quick Reference Guide

4 CLEARSPAN OVERVIEW

4.1 CLEARSPAN WEB PORTALS

Clearspan provides flexibility in managing service configuration using web portals and user levels for the Application Server and Network Server. The web portals (called CommPilot portals) and service management permissions provide secure access to the information for each user type or role: system provider, service provider, Application Server enterprise administrator, Network Server enterprise administrator, group administrator, department administrator, and user. Clearspan provides a different CommPilot web portal or interface for each user role.

- The Application Server *system provider* uses the CommPilot web portal to establish system-wide settings, such as setting messages callers hear when they interact with Clearspan services.

- The Application Server *service provider* uses the service provider version of the CommPilot web portal to authorize specific services and resources for groups to use. Service providers only have access to groups for their service provider ID account.

- The Application Server *enterprise administrator* is an employee of the system provider. Enterprises on the Application Server are used for multiple locations within the same company. An enterprise administrator on the Application Server uses the enterprise version of the CommPilot web portal to authorize specific services and resources for groups to use. Enterprises have access only to groups for their enterprise ID account.

- The Network Server *enterprise administrator* uses the enterprise version of the CommPilot web portal to perform routing and network functions for one or more groups.

- The Application Server *group administrator* is a company employee, such as an office manager or technology representative, who uses the group administrator version of the CommPilot web portal to provision services for users and manages group-related activities.

- The Application Server *department administrators* use the department administrator version of the CommPilot web portal to perform a limited number of functions related to their department.

- The Application Server *end users* use the user version of the CommPilot web portal to configure their services.

4.2 COMMPILOT PERSONAL

CommPilot Personal lets you configure and manage your call management services specifically for your needs. Most significantly, services such as call forwarding and call notification are simple and intuitive with CommPilot Personal.

5   MANUAL AND SYSTEM CONVENTIONS

5.1   PAGE CONVENTIONS

All CommPilot web interface pages contain a logo pane, which displays the group or company logo, the user's name, and the links that display on every page: **Help**, **Home**, and **Logout**.

In addition, when you log in as an administrator, the Role Location Path on the left of the logo pane identifies your role (for example, <u>System)</u>, and your location in the system.

Figure 1 CommPilot Logo Pane for System Provider

In this example, the role location path identifies the current user role (System) and the current location of the system (top level).

If you log in as a regular user and have at least one client application assigned to you by you, the logo pane displays a Launch box on every page.

Figure 2 CommPilot Logo Pane for a User with Client Applications Assigned.

In this example, the user has at least one client application assigned and the logo pane displays the Launch box.

5.1.1   ROLE LOCATION PATH

Clearspan provides a cascading system of user types or roles, in which the top role (system provider) can perform any system function, followed by roles that in turn can perform a smaller number of functions of the preceding role: system provider, service provider/ enterprise administrator, group administrator, department administrator, and, finally, user. One person can perform more than one role.

Figure 3 CommPilot Logo Pane (Group Administrator Modifying a User's Profile)

In this example, the current user role is a group administrator who is accessing the profile of a specific user.

> **Note**: Use the role location path to identify your location in the CommPilot interface and to display different options and menu pages.
>
> In this example, to display the options and *Profile* menu page for the group administrator, click **Group** in the role location path.

5.1.2   HELP, HOME, AND LOGOUT LINKS

The **Help**, **Home**, and **Logout** links appear on every page.

The **Help** link displays the *Help* page associated with the current function or page. The *Help* page opens in its own browser window, separate from the Clearspan application. To exit the *Help* page, click **X** in the upper right corner of the browser window.

The **Home** link displays the *Home* page associated with the role of the current user.

The **Logout** link displays the *Logout* page.

5.1.3   CLIENT APPLICATION LAUNCH BOX

If you have been assigned one or more client applications and you are logged in as a regular user (not as an administrator), a *Launch* box appears at the top-right corner of every page, allowing you to launch your client applications directly from the web portal.

Figure 4 CommPilot Logo Pane (Regular User) – Client Launch Drop-down List

Depending on your configuration, the *Launch* box may include links to the following client applications:

- Call Manager/Attendant Console

- Call Center Agent

- Call Center Supervisor

- Receptionist

To launch a client application, select its link from the *Launch* drop-down list. The client application opens in a separate window from the Clearspan application. To exit the client application, click **X** in the upper right corner of its window.

5.1.4   NAVIGATION PANE AND CONTENT PANE

On a CommPilot web page, the navigation pane and content pane appear below the logo pane.
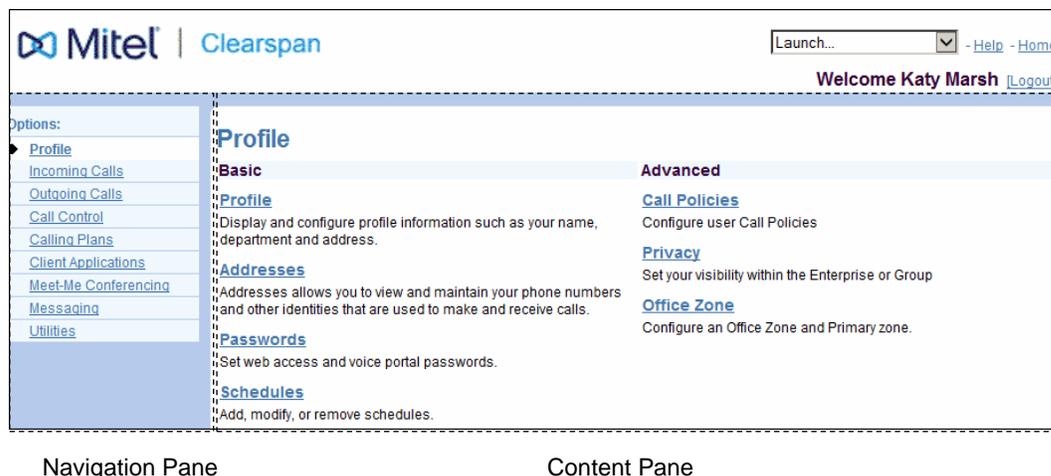

Navigation Pane   Content Pane

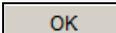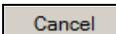**Figure 5 Navigation Pane (Left) and Content Pane (Right)**

The navigation pane displays options, each of which has a menu associated with it. Clicking an option, for example, **Profile**, highlights the option and displays its associated menu (Profile) on the content pane. Menu items appear as links to related pages. There are some options that only appear if you have purchased the corresponding feature, for example, the Meet-Me Conferencing feature.

Note: The options displayed on the navigation pane change depending on the role of the user (system provider, service provider, group administrator, department administrator, and user), their location in the system, and the function being performed.

5.1.5   ACTION BUTTONS

These buttons display on most content panes and are used to add, modify, and save data, or to display the previous page.
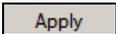
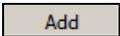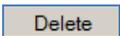|	
Apply	Click **Apply** to save any changed information on the current page.
OK	Click **OK** to save any changed information on the current page and display the previous page.
Cancel	Click **Cancel** to cancel the last operation. This changes the display back to the information last-saved on the page and displays the previous page.

Add	Click **Add** to display another page, which allows you to add an item to the system, for example, a user.
Delete	Click **Delete** to remove the selected item from the system. **NOTE:** Deletes cannot be undone. Once you click **Delete**, the item is permanently deleted.

**Figure 6 Buttons**

5.1.6   TEXT ALIGNMENT

The CommPilot web interface aligns text to the left or right side of the screen according to the language set in your user or administrator profile. However, for the purposes of this manual, all screen images and references to screen locations use the default English layout of left-side alignment.

Languages that use right-side alignment by default currently include Hebrew and Arabic.

6   GETTING STARTED

6.1   LOG IN

You open the Clearspan application from your web browser. When Clearspan opens, the *Login* page appears. The user ID and password you require to log in are assigned to you by your system administrator.
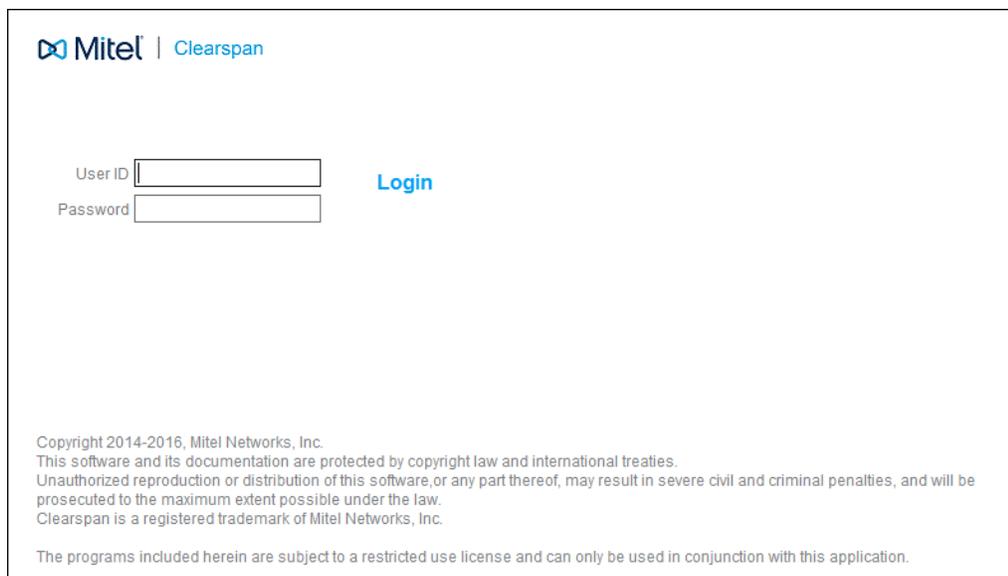
Figure 7 Clearspan Login Page

Take the following steps to open Clearspan:

1. Launch Microsoft Internet Explorer or Mozilla Firefox.

2. Enter the Clearspan web address or URL. The Clearspan *Login* page opens.

3. Enter your user ID.

Example: `user2`

4. To go to the *Password* text box, press the TAB key on the keyboard or click your mouse in the *Password* text box.

5. Enter your assigned password. Your password does not appear as you type; asterisks appear for each character you type.

Example: ******

6. Click **Login** or press ENTER. If this is your first time logging in or if your password has expired, the *Password Change* page appears.

Figure 8 Password Change

7. Type your current password.

8. Type your new password. Your password does not appear as you type; asterisks appear for each character you type.

9. Re-type your password.

10. To save your changed password and display the *Home* page for your role, click **OK**.

11. Click **Cancel** to display the previous page.

The *Home* page appears once you log in.

6.2   REMEMBER PASSWORD

Checking the *Remember Password* box on the *Login* page allows subsequent auto-login.

> **Note**: This feature is optional. If you do not see it, the system provider may have removed the *Remember Password* box from the *Login* page.

1. Log in with your user ID and new password.

2. Check the Remember Password box on the Login page. The system "remembers" the new password you have just reset.

On subsequent logins, the *Login* page is not displayed. The system enters your user ID and password automatically, and your *Home* page appears.

For more information about remembering passwords, see the *Clearspan Login Functions Quick Reference Guide*.

> **Note**: Each time you change your password or when a new version of Clearspan is installed on your machine, you must re-check the *Remember Password* box.

6.3   ADD CLEARSPAN TO "FAVORITES"

You can quickly open Clearspan from the *Favorites* menu item in Microsoft Internet Explorer (6.0 or 7.0) or from the *Bookmarks* menu item in Mozilla Firefox (2.0). To add Clearspan to your *Favorites* or *Bookmarks*, take the following steps:

1. At the Clearspan *Login* page:

    In Internet Explorer, click **Favorites** and then **Add to Favorites**. The *Add Favorite* dialog box appears.

    In Firefox, click **Bookmarks** and then **Bookmark this page**. The **Add Bookmark** dialog box appears.

2. The name "Clearspan Login Page" appears in the Name field. You can change this name.

3. Click Create in to navigate to an existing folder directory or click New Directory to place this favorite in a new Favorites directory in Internet Explorer.

4. Click OK to complete the procedure.

    You can now easily select the Clearspan application from your Internet Explorer menu. If you have saved your password, you are automatically taken to your *Home* page. If you have not saved your password, you have to log in to the system.

6.4   AUTO START-UP OF CLEARSPAN

You can configure Clearspan to start automatically when you log in to your PC. This is a multi-step process that can be specified for all user types. For more information, see the *Clearspan Login Functions Quick Reference Guide*.

> **Note**: Specific instructions for making Clearspan start when logging in to your PC may be dependent on your operating system. See the specific instructions for adding processes to the startup process for your operating system. The instructions below apply to Windows 2000.

1. Add Clearspan to your Favorites (or Bookmarks) folder. For instructions, see section *6.3 Add Clearspan to "Favorites"*.

2. Locate the startup menu path in your file structure. For Windows XP, it should be: `C:\Documents and Settings\NAME\Start Menu\Programs\Startup`, where NAME is your account name on your PC.

3. In an Internet Explorer window, click **Favorites** (or in a Firefox window click **Bookmarks**) and expose the Clearspan bookmark; then right-click the bookmark and hold down the mouse button as you drag the menu item into the Startup folder. You are prompted to make a selection from a menu. Click **Copy here**.

4. Your Clearspan application will start up automatically the next time you log in to your PC. If you have saved your password, you are automatically taken to your *Home*

page. Remember there is a timeout function on the Clearspan system, where 30 minutes of inactivity logs you out of the system.

5. To display the *Login* page, select the bookmark from the *Favorites* (or *Bookmarks*) menu.

6.5   CLEARSPAN QUICK LAUNCH

Checking the **Remember Password** box on the *Login* page allows subsequent auto-login. However since this feature is optional, the system provider may have removed this box from the *Login* page.

1. Check the Remember Password box on the Login page. For instructions, see section *6.2 Remember Password*.

2. Right-click anywhere on the desktop, click **New**, and then **Shortcut**.

3. In the *Location* text box, enter the URL of Clearspan. Click **Next**.

4. Enter a name for the shortcut, such as "Launch Clearspan"'. Click **Finish**.

5. Select the shortcut icon and drag it to the Quick Launch area of the task bar (typically to the right of the **Start** menu button).

6. To change the icon, right-click the icon and select **Properties**.

7. To launch Clearspan, click the **Quick Launch** icon.

6.6   NAVIGATE LISTS

This section describes how to search for specific information on a CommPilot page that contains a list, for example, the *User – Meet-Me Conferences* page.

Figure 9 User – Meet-Me Conferences

- You can use the following procedures to organize items in CommPilot list pages:

- Change sort order of data

- Display another page

- Search for specific items on list pages by using the search function

6.6.1 CHANGE SORT ORDER OF DATA

Data on list pages appear in ascending or descending alphanumeric order sorted by a selected column. Column headings are underlined to indicate that the sort order of the items in the column can be reversed. An arrowhead beside an underlined column heading indicates the column that was last sorted on the page and the current sort order of the items in that column. The direction of the arrowhead ▼ indicates the sort order of the items. The following figure shows the column headings and sort order.

Title	Bridge Name	Host	Status	Type	Start Time ▲

Figure 10 Sortable Column Headings

To change the sort order of the items in a column, you click the column heading.

6.6.2 DISPLAY ANOTHER PAGE

A page that contains more list data than can be displayed on one page displays links that shows the first and last pages of data (**First** and **Last** links) and the previous and next pages (**Previous** and **Next** links) as shown in the following figure. The links that appear depend on the number of pages for the list and which page is currently displayed. For example, when the last page of a list appears, the **Last** link is not displayed.

First Previous	[Page 2 of 11]	Next Last

Figure 11 Links for Scrolling Through Lists

To scroll through the pages of a list, click a link.

6.7 SEARCH LIST PAGES

This section describes how to search for specific information on a CommPilot page that contains a search function.

There are two types of CommPilot list pages that contain a search function:

- For shorter lists, the list page displays the data by default. The user can restrict the list to specific items by performing a simple search.

- For longer lists, no data is displayed on the page by default. The user has to use an advanced search to display a list.

6.7.1 PERFORM SIMPLE SEARCH

Specify search criteria to display specific information on a list page that contains a simple search.

To define your search criteria, use the input boxes that appear below the columns of data as shown in the following figure. The first drop-down list from the left displays the column headings in the list. The second drop-down list provides options for how you want to use the data you enter in the text box on the right. The contents of these three input boxes comprise your search criteria.
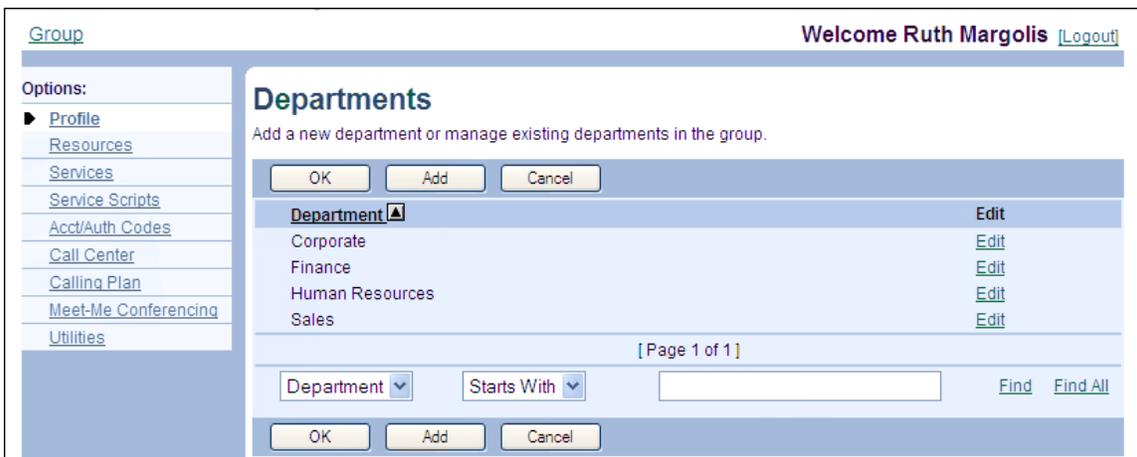

Figure 12 Departments – List Page that Contains Simple Search

1. Select a keyword to search by from the first drop-down list on the left.

2. Select a search condition from the second drop-down list.

3. Type the text for the search condition in the text box.

4. To display only items that meet your search criteria, click Find.

5. To return to the complete list, click **Find All**.

6.7.2 PERFORM ADVANCED SEARCH

Specify search criteria to produce a list on a page that contains the advanced search.

An advanced search allows you to search for information based on more than one keyword. For example, you can search for users who are not in a trunk group and whose last name starts with the letter "B".

To define your search criteria, use the input boxes that appear next to the *Search* button at the bottom of the page as shown in the following figure. You can add additional search rows to refine your search.

The first drop-down list from the left in a search row displays the keywords to search by (which often represent headings in the list). The second drop-down list provides options for how you want to use the data you enter in the text box on the right. The contents of these three input boxes comprise one set of advanced search criteria.

Figure 13 Users – List Page that Contains Advanced Search

1. Select a keyword to search by from the first drop-down list on the left.

2. Select a search condition from the second drop-down list.

3. Type the text for the search condition in the text box.

4. To add an additional set of search criteria, click + and repeat steps 1 to 3.

5. Repeat the previous step as necessary. Note that you can use the same search keyword more than once. However, the number of search rows you can add depends on the number of search keywords available on that list page.

6. Click **Search**.

Figure 14 Users – List Page with Advanced Search Results

Note: If the search produces a list that exceeds 1,000 entries, a warning appears. If this warning appears, or if you want to obtain more specific results, narrow the search by entering more specific search criteria or by adding additional search criteria. Click ‐ to remove the last search row.

6.7.3   MOVE ITEMS FROM ONE COLUMN TO ANOTHER

You can move items from one column to another, for example, to add or remove users from a Push to Talk availability list. In the following procedure, the task of selecting users is accomplished by moving items from one column to another.
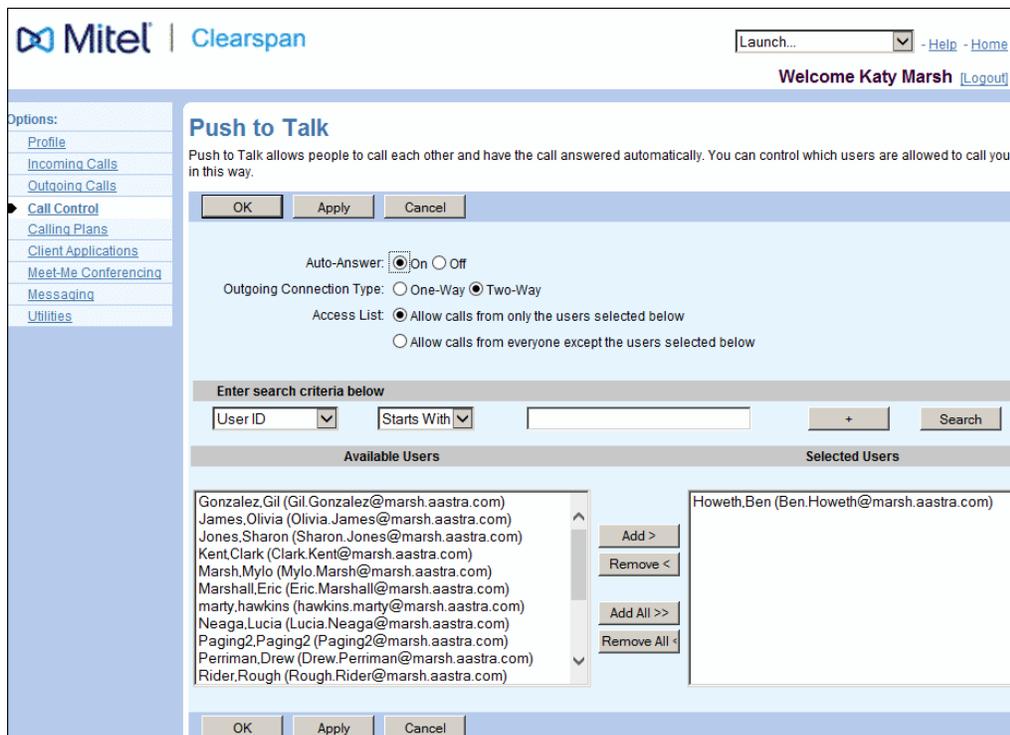

Figure 15 User – Push To Talk – Selecting Users Allowed to Call You

1.   Use the Search function to find available users.

2.   To select users, move users from the *Available Users* column to the *Selected Users* column.

In the *Available Users* column, select the users. You can select some or all of the items in a column. Item names are listed in alphabetical order. To select several items in sequential order, click the first name, hold down the SHIFT key on the keyboard, and click the last name. To select several items, but not in a particular order, click the names while holding down the CTRL key on the keyboard.

To select the selected users, click **Add >**. To select all users (unselected) at once, click **Add All >>**.

2.   To de-select users, move users from the *Selected Users* column to the *Available Users* column.

In the *Selected Users* column, select the users.

To de-select the selected users, click **Remove <**. To de-select all users (unselected) at once, click **Remove All <<**.

> **Note**: The **Add >** and **Add All >>** buttons always move items from a column on the left to a column on the right. The **Remove <** and **Remove All <<** buttons always move items from a column on the right to a column on the left.

7 IMPORTANT NOTES

The following are important reminders about using Clearspan.

7.1 INTERNET BROWSER

- Supported browsers on the web portal include Internet Explorer, Safari, and Chrome. Contact your customer service representative for information about specific versions.

- Supported Java Virtual Machines (JVM): Sun Java Virtual Machine 6 Update 19 or later, or Microsoft Java Virtual Machine.

- Internet Explorer security options must be set as follows:

  Download signed ActiveX controls – "Prompt"

  Run ActiveX controls and plug-in – "Enable"

  Script ActiveX controls marked safe for scripting – "Enable"

- The user machine may be configured properly with the correct versions of the operating system, browser, and Microsoft Outlook, yet error messages are seen when running the Call Manager as shown in the following example:

  "An ActiveX control on this page is unsafe and has been disabled due to your security settings. As a result, the page might not display as expected." Or "VBScript Error: Scripting Dictionary object not found."

  The reason for the error messages may be a corrupt system library file (dll). The procedure to recover is as follows:

  Uninstall and reinstall the corresponding operating system service pack from the Microsoft website.

  Uninstall and reinstall the corresponding Internet Explorer service pack from the Microsoft website. If any errors are encountered while executing these steps, the process should be performed again. A later-released version and service pack for the operating system or browser may be used if the exact one on the user machine is not found.

7.2 SECURITY

For the optional Secure Sockets Layer (SSL) security function to perform properly, Microsoft Internet Explorer must be configured with at least 56-bit encryption. Full 128-bit encryption is recommended.

8   INDEX