Clearspan® Assistant Enterprise

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April 2015

Mitel®

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INTRODUCTION

ABOUT CLEARSPAN ASSISTANT–ENTERPRISE

Clearspan Assistant–Enterprise is a carrier-class, lightweight desktop communications management product for everyday users of Microsoft Outlook, Microsoft Internet Explorer, or Mozilla Firefox with the Clearspan telephony softswitch platform.

With this product you can manage your incoming and outgoing messages, maintain up-to-date connection information, and configure controls on your calls and voice mail.

ABOUT THIS GUIDE

This guide provides step-by-step procedures and reference information for Clearspan Assistant–Enterprise Release 20.0.26.

In this document, Clearspan Assistant–Enterprise is interchangeably referred to as Clearspan Assistant and Assistant–Enterprise.

ACCESSING ASSISTANT–ENTERPRISE

Clearspan Assistant is an add-in to Microsoft Internet Explorer, Outlook, and Mozilla Firefox, and provides new toolbars to access Clearspan Service and Call Management features within your web browser and mail client.

When you open Internet Explorer, Outlook, or Firefox with Assistant you see the following toolbar. Most buttons are disabled until you log in.

Note: Only Clearspan Assistant–Enterprise is available for use with Microsoft Outlook.

Figure 1 Assistant–Enterprise in Internet Explorer

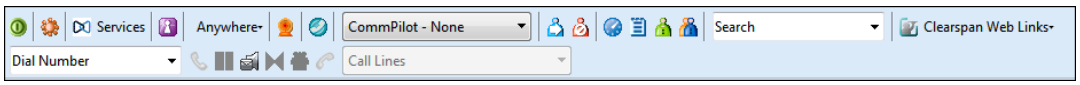

Figure 2 Assistant–Enterprise in Mozilla Firefox

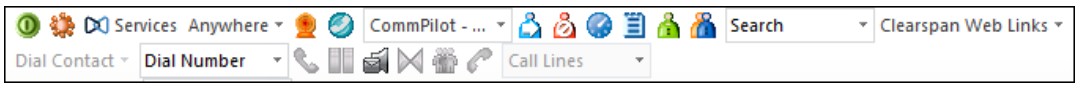

Figure 3 Assistant–Enterprise in Outlook

FIRST TIME LOGIN

Logging in to Assistant identifies you to the servers that manage your phone services. This is so you can receive, initiate, and control calls directly from your computer.

When you log in for the first time, you need to configure your connection settings as described in the following steps. Once these settings are configured, you do not need to provide them again.

You can log in directly from the toolbar by clicking Login.

1. Click **Login** on the toolbar.

   Assistant opens the *Options* dialog.

2. Click **Account**.
3. To configure your account settings, enter, in the provided fields, the user name and password provided by your administrator for your Assistant account.
4. Check the *Save Username* and *Save Password* options if you want to avoid being prompted for this information next time you log in. Your password is encrypted for greater security.
5. Click **Apply**.

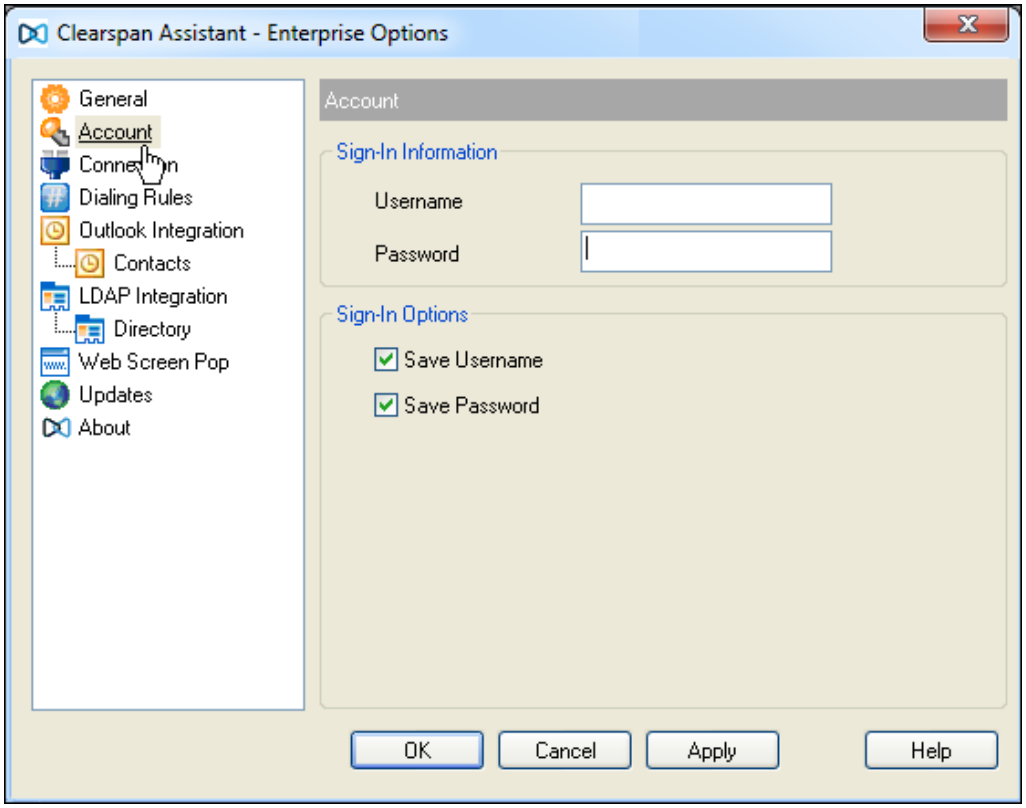

Figure 4 Options Dialog – Accounts Page

6. Configure your server connection by clicking **Connection**.
7. Enter the server URL and port number in the fields provided. Consult your system administrator for the necessary values.
8. Click **Apply**.

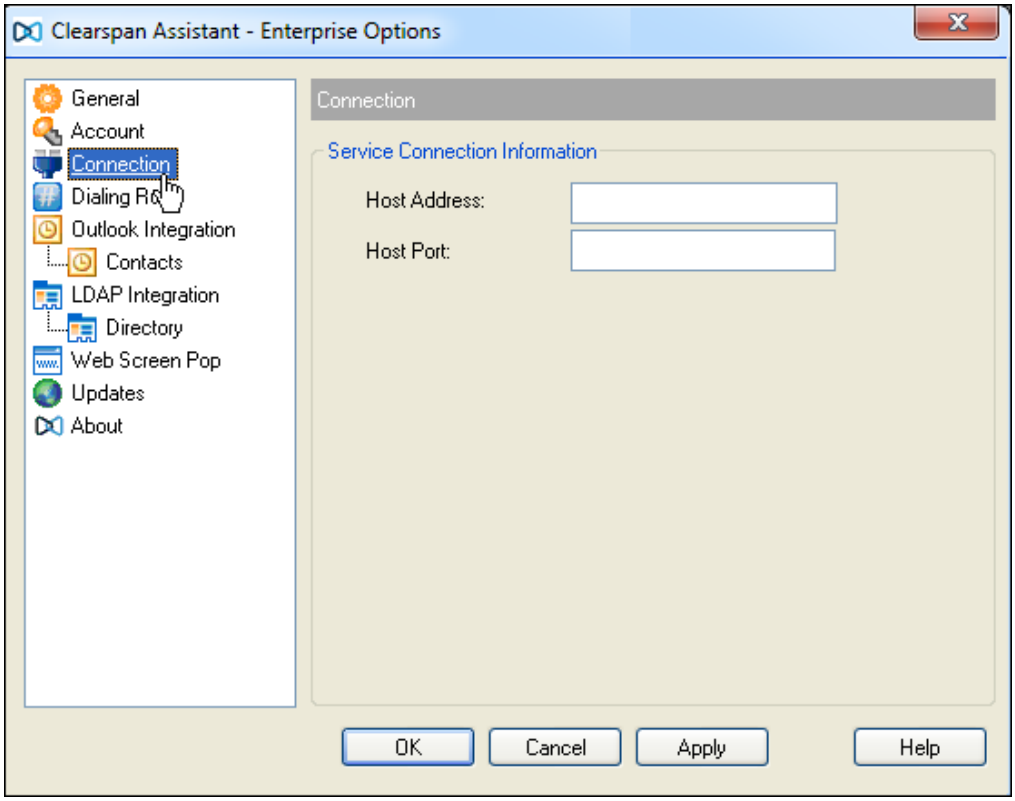

Figure 5 Options Dialog – Connection Page

9. If you use a proxy server to access the internet, click **Updates**.

10. Enter the proxy server information in the fields provided. Consult your system administrator for the necessary values.

11. Click **Apply**.

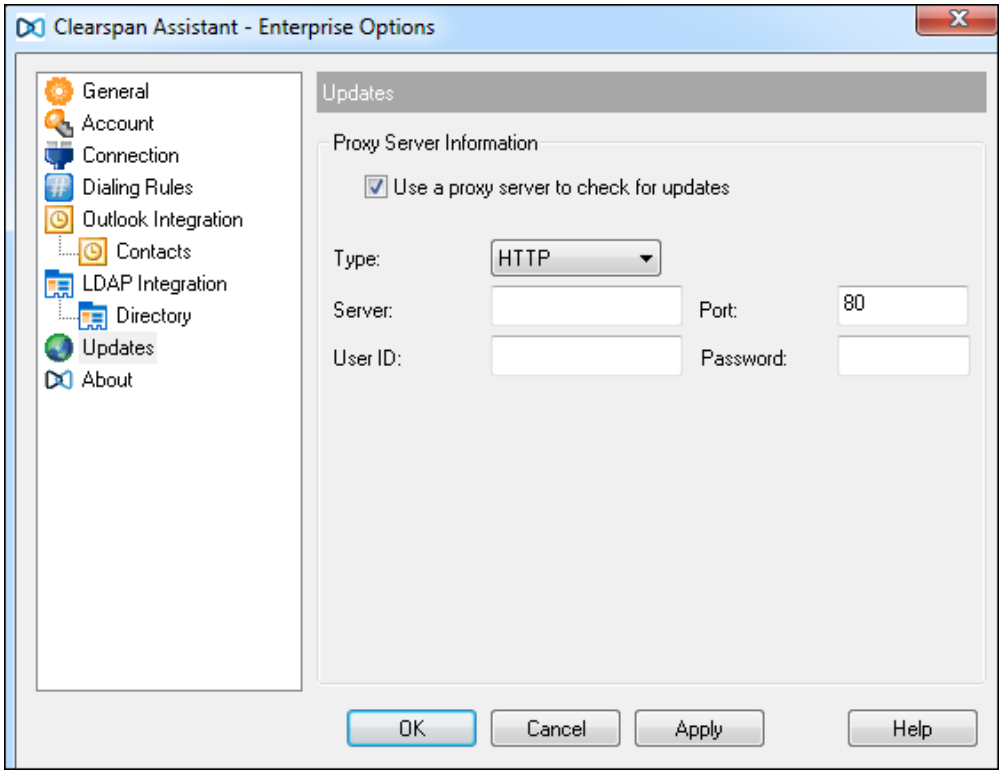

Figure 6 Options Dialog – Update Page

Note: The proxy server is not used to connect to Clearspan for telephony services; it is used only to silently check for available Assistant upgrades.

12. To configure your general settings, click **General**.
13. Check Auto login on start-up to have Assistant connect automatically to the Clearspan server when you start Internet Explorer, Firefox, or Outlook.
14. Check the Auto login when connected to network to have Assistant connect automatically to the Clearspan server when a network connection is available.
15. Click **OK**.

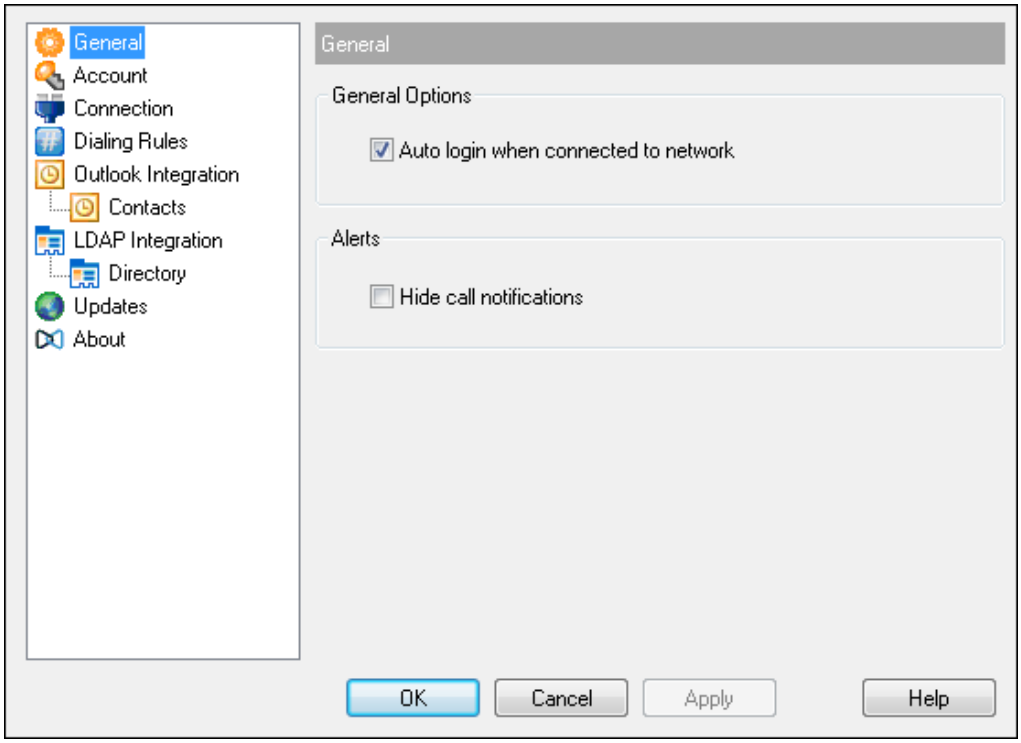

Figure 7 Options Dialog – General Page

16. Click **Login** again. If Assistant is configured with password expiry option, you are presented with the Change Password dialog box.

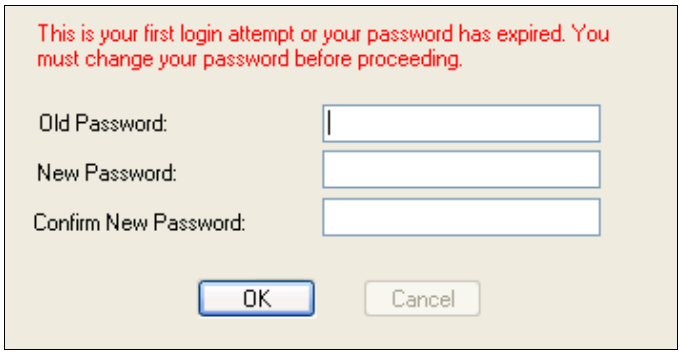

Figure 8 Change Password on First Login Dialog Box

17. Enter your old password, and your new password twice in the spaces provided.

If your configuration and credentials are correct, you are connected to the Clearspan server and the buttons on your toolbar are enabled.

Note: The buttons are enabled if their respective services are assigned.

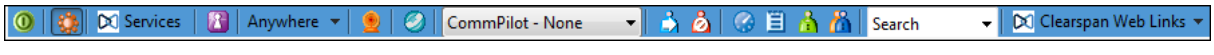

Figure 9 Enabled Toolbar

SUBSEQUENT ACCESS

Once you have configured Clearspan Assistant with the settings it needs to connect to your service provider, you can be automatically logged in when you start Internet Explorer, Firefox, or Outlook without having to provide that information again. However if Assistant is configured with the Password Expiry option, you may be prompted to change your password upon log in. You can also access the Password Change dialog from the Options dialog. For more information, see section 4.2.1 Password Change Dialog.

If your password has expired, the following dialog box appears, after you click **Login**.

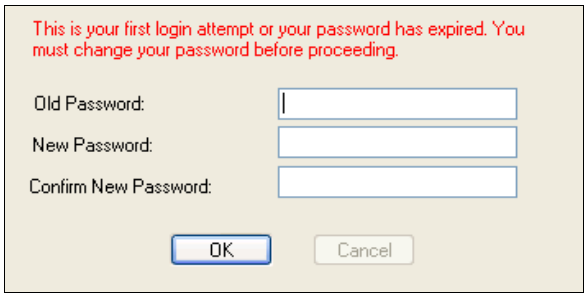

Figure 10 Login – Change Expired Password

If your password has not expired yet but will expire soon, the following dialog box appears:

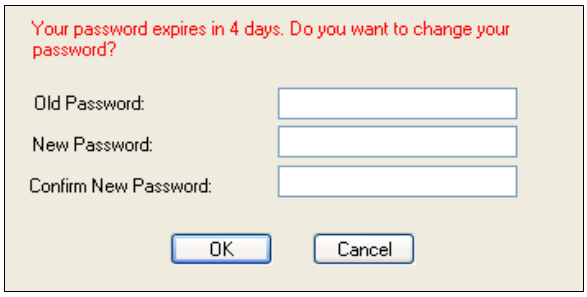

Figure 11 Login – Your Password Will Expire Soon

1. Enter your old password.
2. Enter your new password twice, to confirm it.
3. Click **OK**.
4. Or, if your password has not expired yet, click **Cancel** to cancel password change.

In both cases, you are logged into Assistant. If you have not changed your password, you are prompted to do so when you log in again.

Note: If your password has expired, the **Cancel** button is disabled forcing you to change your password before you are logged in to Assistant.

All fields in the *Password Change* dialog box are mandatory.

USING ASSISTANT

When you have successfully logged in to Assistant, most of the buttons on your toolbar are enabled.

THE TOOLBAR

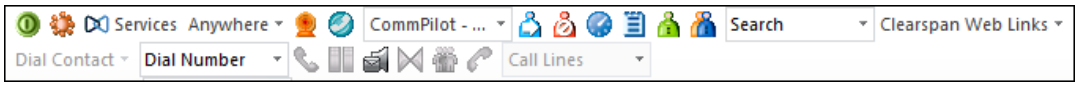

Figure 12 Assistant–Enterprise Toolbar (Outlook)

Detailed Description of Buttons

Login: Logs in and out of Assistant. The color of this icon indicates your login status.

A grey icon indicates that you are not logged in. A green icon shows that you are currently logged in. A disabled button shows that Assistant is attempting to log in. A red button indicates that your last login attempt failed.

Figure 13 Login Button

Options: You can configure your Clearspan account, connection settings, and dialing rules through this dialog. This icon is highlighted when open.

Figure 14 Options Button

Services: You can configure the Call Management services provided by Assistant. This icon is highlighted when in use.

Figure 15 Services Button

Portal Auto-Login: Logs you in to your web portal (from Microsoft Internet Explorer or Mozilla Firefox only).

Figure 16 Portal Auto-Login Button

Anywhere: Displays the list of all available Clearspan Anywhere locations configured in the system and allows you to enable or disable Clearspan Anywhere locations by clicking to the left of the location entries. An enabled location has a check mark beside it.

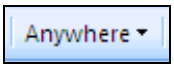

Figure 17 Anywhere Drop-down List

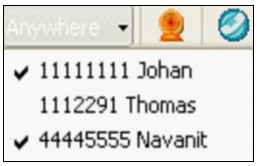

Figure 18 Anywhere Drop-down List Expanded Listing Available Locations

Remote Office: When activated, this service allows you to use an alternate phone, such as a mobile, home, or hotel phone, as your main business phone. When this service is enabled, the icon is highlighted.

If Remote Office is not yet configured when you use this icon, Assistant opens the *Services* dialog to the *Remote Office* page so you can configure the service.

Figure 19 Remote Office Button

Simultaneous Ringing: This allows you to set up a list of up to ten additional phone numbers that ring each time you receive a call. While the service is enabled, the icon remains highlighted.

If Simultaneous Ringing is not yet configured when you use this icon to activate the service, Assistant opens the *Service* dialog to the *Simultaneous Ringing* page for you to configure the service.

Figure 20 Simultaneous Ringing Button

Current CommPilot Profile sets the current CommPilot Express profile, which determines the way the system handles incoming calls. You can configure the settings for your CommPilot Express profiles in the *Services* dialog.

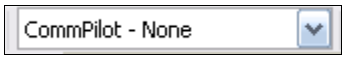

Figure 21 CommPilot Profile Drop-down List

Call Forward Always service automatically forwards all incoming calls to a specified phone number. When this service is enabled, this icon remains highlighted.

If Call Forward Always is not yet configured when you use this icon to activate the service, Assistant opens the *Service* dialog to the *Call Forwarding Always* page for you to configure the service.

Figure 22 Call Forwarding Always Service Button

Call Forward No Answer service automatically forwards all incoming calls to a specified phone number when you do not answer within a specified number of rings. While the service is enabled, the icon remains highlighted.

Figure 23 Call Forwarding No Answer Service Button

Call Forward Busy service forwards all incoming calls to a specified phone number when you are busy on other calls. While the service is enabled, this icon remains highlighted.

If Call Forward Busy is not yet configured when you use this icon to activate the service, Assistant opens the *Services* dialog to the *Call Forwarding Busy* page for you to configure the service.

Figure 24 Call Forwarding Busy Service Button

Do Not Disturb service automatically forwards all incoming calls to your Voice Messaging service, or plays callers a busy tone if you do not have a Voice Messaging service configured. While the service is enabled, this icon remains highlighted.

Figure 25 Do Not Disturb Service Button

Speed Dial Directory allows you to dial phone numbers saved in your speed dial list by clicking them with your mouse.

Figure 26 Speed Dial Directory Button

Call History lists your most recent received, missed, and dialed calls.

Figure 27 Call History Button

Personal Directory allows you to dial phone numbers saved in your personal directory by clicking them.

Figure 28 Personal Directory Button

Group Directory permits you to dial phone numbers in your group directory by clicking them.

Figure 29 Group Directory Button

Search hunts in the group, personal, Outlook Express, and Lightweight Directory Access Protocol (LDAP) directories for the text you enter. Note that the e-mail address is not returned for Outlook contacts.

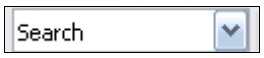

Figure 30 Search Button

Clearspan Web Links drop-down list contains URLs preconfigured by your service provider administrator. Select an item from the list to navigate to that page in your web browser. Depending on how your administrator has configured it, it might look something like the following.

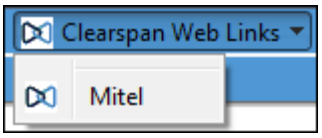

Figure 31 Clearspan Web Links Customized Drop-down List

Dial Contact dials the business, home, or mobile number of a selected contact within Microsoft Outlook.

Figure 32 Dial Contact Drop-down List

Dial Number dials a specified number.

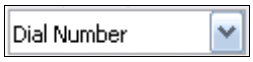

Figure 33 Dial Number Combo Box

Answer answers an incoming call.

Figure 34 Answer Button

Hold puts the current call on hold.

Figure 35 Hold Button

Transfer to Voice Mail transfers the current call to your *Voice Messaging* service. If the color of the envelope icon on the *Transfer to Voice Mail* button changes, as illustrated in *Figure 37*, then a new voice mail is available.

Figure 36 Transfer to Voice Mail Button

Figure 37 Transfer to Voice Mail Button with Voice Mail Waiting Indication

Blind Transfer transfers the current call to another phone number.

Figure 38 Blind Transfer Button

Conference Call starts a conference call that can include 3 to 32 callers. This button only becomes enabled when you are connected to two other parties at the same time.

Figure 39 Conference Call Button

End Call ends the current call.

Figure 40 End Call Button

Call Lines lists your phone numbers you are currently connected to.

Figure 41 Call Lines Drop-down List

MAKE A CALL

DIAL NUMBER

To dial a new number:

1. Type the number in the Dial Number box.
2. To place the call, press ENTER.
3. To end the call, click End.

Figure 42 Dial Number Box

To redial a previously dialed number:

1. Select a number by clicking on the arrow at the right-hand side of the *Dial Number* box.

   A list of up to 10 previously dialed numbers is displayed.
2. Click on a number in the Dial Number list.
3. To place the call, press ENTER.
4. To end the call, click End.

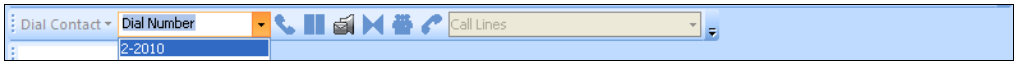

Figure 43 Redial Previous Number

DIAL FROM WEB PAGE

To dial from a web page:

1. Select the phone number displayed on a web page.
2. Highlight the number with your mouse.

3. Right-click the highlighted phone number and select *Dial* from the pop-up window.

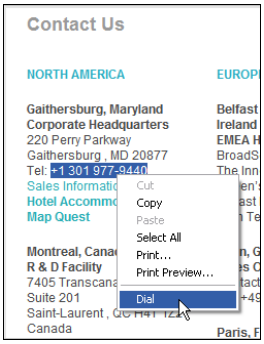

Figure 44 Dialing from Web Page

DIAL FROM CONTACT LIST

With Assistant–Enterprise you can dial the home, business, or mobile number of any contact directly within Outlook.

1. Click *Contact* in the folder list.
2. Select the contact you wish to call from the contact list.
3. Click the arrow at the right-hand side of the *Dial Contact* drop-down list, on the Assistant toolbar within Outlook.
4. Select the type of number to call.

Figure 45 Dialing from Contact List

DIAL FROM VCARD

To dial from a vCard in Outlook 2010/2013:

1. Click Contacts in the folder list.
2. Double-click the contact you want to call. Outlook opens the contact's vCard.
3. Click the arrow at the right-hand side of the Dial Contact drop-down list, on the Assistant toolbar within Outlook.

4. Select the type of number to call.

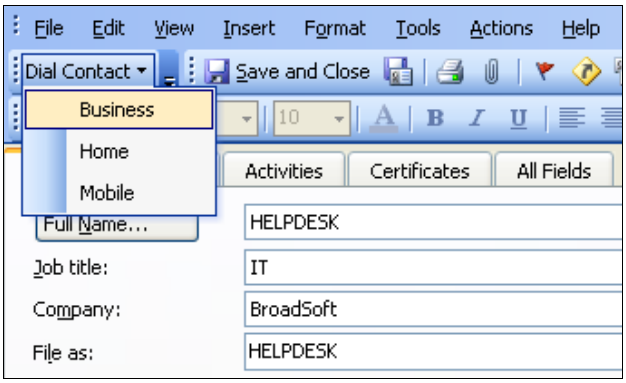

Figure 46 Dialing from vCard

To dial from a vCard in Outlook 2007:

1. Click *Contacts* in the folder list.
2. Double-click the contact you want to call. Outlook opens the contact's vCard.
3. Click the **Telephony Toolbar** tab.
4. Select the type of number to call.

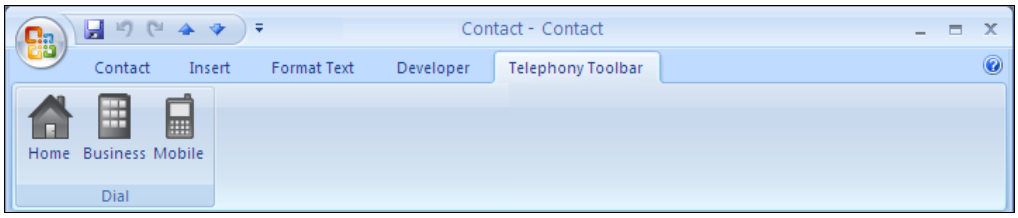

Figure 47 Dialing from Outlook 2007 vCard

Note: If there is no number specified for a contact, but you click on the Home, Business, or Mobile buttons in your vCard ribbon, a message appears stating "No number is specified for this contact". This is, by design, a limitation of Microsoft Outlook 2007 API.

DIAL FROM PERSONAL DIRECTORY

You can directly dial any number stored in your personal directory as it is integrated with the contacts in Assistant.

1. To open the personal directory, click **Personal Directory** on the Assistant toolbar.

This page can be printed using the host application. Users with Microsoft Windows XP Service Pack 2 installed may encounter a warning when opening the Personal Directory. For more information, see Troubleshooting.

2. To sort the personal directory, click on a *column* header. The table is sorted, in descending order, according to the information in the column you selected.
3. To change the sort order between descending and ascending, click on the same *column* header again.
4. To dial a number from the personal directory, click on the desired phone number. Assistant places the call.

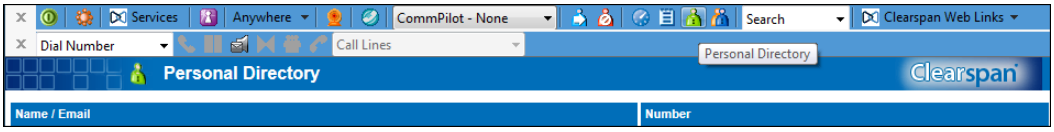

Figure 48 Personal Directory

DIAL FROM GROUP DIRECTORY

You can directly dial any number stored in your group directory that integrates the group contacts, provided by your service provider, with Assistant.

1. Click **Group** Directory on the Assistant toolbar.

This list can be printed using the host application. Users with Microsoft Windows XP Service Pack 2 installed may encounter a warning when opening the Group Directory. For more information, see section 6 Troubleshooting.

2. To sort the group directory, click on a *column* header. The table is sorted, in descending order, according to the information in the column you selected.
3. To change the sort order between descending and ascending, click on the same column header again.
4. To dial a number from the group directory, click on the desired phone number. Assistant places the call.

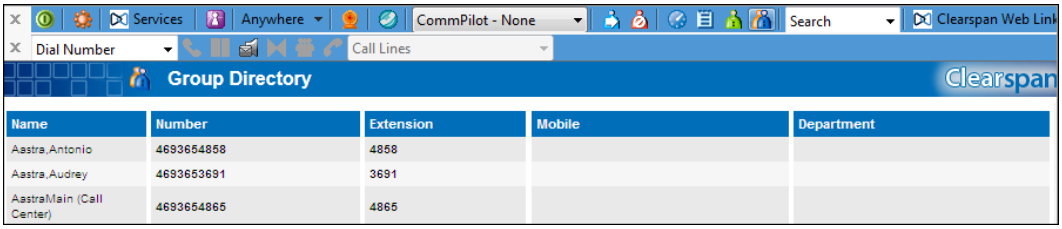

Figure 49 Group Directory

DIAL FROM CALL HISTORY

Call History allows users to view their missed calls, received calls, and dialed calls. These are listed in reverse chronological order.

1. To open the Call History, click **Call History** on the toolbar.
2. To dial from the call history, click on the desired phone number. Assistant automatically places the call.

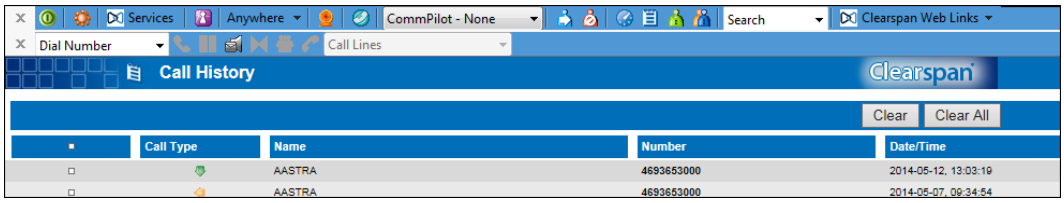

Figure 50 Call History

DIAL FROM SPEED DIAL DIRECTORY

You can dial from the speed dial directory.

1. To open the Speed Dial Directory, click **Speed Dial Directory** on the Assistant toolbar.
2. To dial from the speed dial directory, click the desired phone number and Assistant places the call.

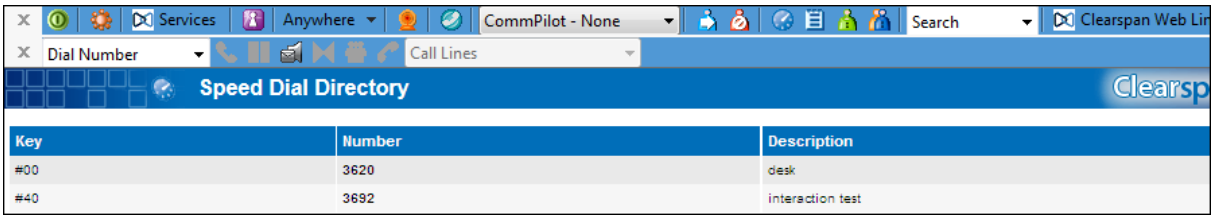

Figure 51 Speed Dial Directory

DIAL FROM SEARCH

Use the *Search* drop-down list to search for a user or contact. The search results include all users in the Group, Personal, Outlook Express, and LDAP directories, if configured to do this. Your search returns all users that match your criteria in any field. For example, if you enter “sa” as your criteria, your search might return users with the first name “Sally” or with the last name “Sanders” as well as users in the department “sales”.

You can also search for users by phone number.

To search for a user:

1. Type your criteria in the *Search* box.

2. Press ENTER to execute the search.

   Assistant displays the results of your search.

3. Click the phone number you want to dial.
4. To end the call, click **End**.

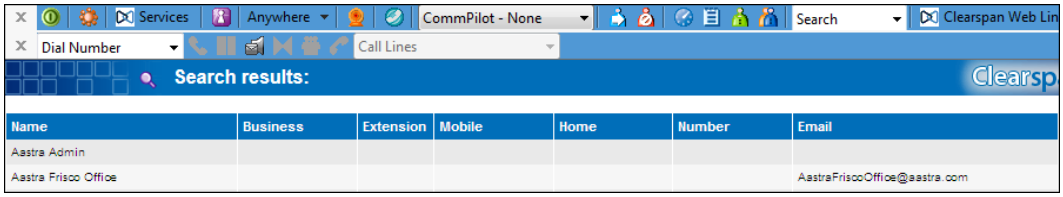

Figure 52 Search Bar

To re-execute a previous search:

1. Select a previous search criteria by clicking on the arrow at the right-hand side of the Search box.

   A list of previous search criteria is displayed.

2. Select an item in the list.

   Assistant displays the results of your search.

3. Click the phone number you want to dial.
4. To end the call, click **End**.

Figure 53 Search Bar History

RECEIVE CALL

ANSWER CALL

Note: You can only answer a call via Assistant if you have an Advanced Call Control (ACC) compliant phone.

When you receive a call, Assistant displays a call notification window on top of the system tray. You can answer this call by picking up your handset from the Assistant toolbar or by clicking the call notification (only if you have an Advanced Call Control [ACC] compliant phone).

- To answer a call from Assistant toolbar, click **Answer**.

- To answer a call from the call notification, click on it.

When using Assistant–Enterprise with Outlook, if the incoming call does not provide a name for the calling party, Assistant checks the number against your Outlook contacts and displays the corresponding name if it finds a match.

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

Call Notification

When you initiate or receive a call, Assistant displays a notification window above the system tray, which includes the other party's phone number and other information about the call. Clicking the hyperlinked text in the call notification automatically answers the call.

The call notification stays open for the duration of the alerting call.

If you initiate or receive another call while the first notification is open, the call notifications stack on top of one another.

Figure 54 Call Notification

BLIND TRANSFER

Use this method to transfer a call to another specified number without providing an introduction to the destination party.

Calls may be transferred this way while active, held, or ringing on your phone. In the latter case, the system redirects the call before it is answered.

1. If the first party is not already on the line, dial a number on your phone or select a number using any of the methods described in section 3.2 Make a Call.
2. Call the second number. This automatically puts the first party on hold if the first party is not already on hold.
3. Initiate the transfer by clicking Transfer on the toolbar. The parties are now connected.

Figure 55 Transfer Button

CONSULTED TRANSFER

Use this method to transfer a call to another specified number and (optionally) provide an introduction to the destination party. Calls may be transferred this way while active, held, or ringing on your phone.

When a supervised transfer is initiated, the primary call is placed on hold and a call is made to the party intended to receive the call. The receiving party may be consulted prior to accepting the call.

1. If the first party is not already on the line, dial a number on your phone or select a number using any of the methods described in section 3.2 Make a Call.
2. Call the second number. This puts the first party on hold.

   If you are using a Polycom phone, *Auto Answer on local alerting* must be set to true to put the first party on hold and automatically answer the second call. Otherwise, you have to answer the second call from the device or client.

3. Wait until the called party accepts your call, and then click **Transfer** to connect the parties.

OPEN URL

When you receive a call, Assistant displays a call notification window on top of the system tray.

To open a URL in your browser, click **Web Pop URL** in the call notification.

This opens a page in your browser window that contains information about the calling party encoded in its URL.

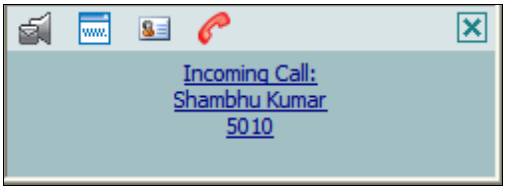

Figure 56 Opening URL through Call Notification

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

SAVE VCARD

When you receive a call, Assistant displays a call notification window on top of the system tray.

You can click a button in this notification to save the caller's phone number and personal information as a vCard in Outlook. To do this, click **Add vCard** in the call notification.

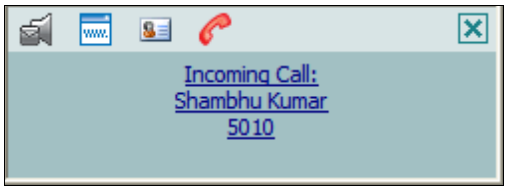

Figure 57 Saving vCard through Call Notification

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

DURING A CALL

HOLD CALL

1. To hold a call, click **Hold** on the toolbar. The Hold button is grayed out to indicate the held status of the call.
2. To resume a held call, click **Answer** (highlighted) on the toolbar. The hold returns to its normal state to indicate the active status of the call.

Figure 58 Hold Button

INITIATE THREE-WAY CONFERENCE

Note: You must have the Three-Way Call service assigned to you to use this feature.

You can initiate a conference with two other parties directly from the toolbar. To establish two simultaneous active calls, you must have only two phone numbers listed in the *Call Lines* drop-down list. These calls may have been initiated either by you or by the other parties.

1. To start the conference, click **Three-Way Conference** on the toolbar.
2. To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

INITIATE N-WAY CONFERENCE

Note: You must have the N-Way Call service assigned to you to use this feature.

You can initiate a conference with two or more parties. The maximum number of parties allowed in the conference call is controlled by your service provider for which the range is 4 through 15 participants. You must have at least two phone numbers listed in the *Call Lines* drop-down list. All calls on the list are added to the conference. These calls can be initiated either by you or by the other parties.

1. To start the conference, click **N-Way Conference** on the toolbar.
2. To add new incoming or outgoing calls to the conference, click **N-Way Conference** on the toolbar.
3. To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

END A CALL

You can end both incoming and outgoing calls directly from the toolbar and from the call notification window.

- To end a call from the toolbar, click **End** on the toolbar.
- To end a call from the call notification, click **End Call**.

Figure 59 Ending Call through Call Notification

Note: When you end an incoming call before the call has been answered, the caller continues to hear the ringing tone until the caller hangs up.

VOICE MAIL

TRANSFER TO VOICE MAIL

You can transfer calls to your Voice Mail from the toolbar and from the call notification window.

To transfer a call to Voice Mail from the Assistant toolbar, click **Transfer to Voice Mail** on the toolbar.

Figure 60 Transfer to Voice Mail Button

To transfer a call to Voice Mail from the call notification, click the **Transfer to Voice Mail** icon in the notification window.

CHECK FOR NEW VOICE MAIL

If the color of the envelope icon on the **Transfer to Voice Mail** button changes, then a new voice mail is available. Otherwise the envelope is grayed out.

Figure 61 Transfer to Voice Mail Button Indicating New Voice Mail

RETRIEVE VOICE MAIL

Make sure that you are not currently engaged in a call. No entries must be present on the *Call Lines* drop-down list.

Transfer yourself to your Voice Mail by clicking the **Transfer to Voice Mail** button on the toolbar.

USE CALL HISTORY

You can view and delete old call logs using the Call History feature. You can also make calls from Call History. Viewing and deleting call logs is described in the remainder of this section. For more information about making calls, see section 3.2.8 Dial from Call History.

VIEW CALL LOGS

To view call logs, click **Call History** on the toolbar.

Figure 62 Call History Button

The *Call History* window appears where you can view your dialed, received, and missed calls.

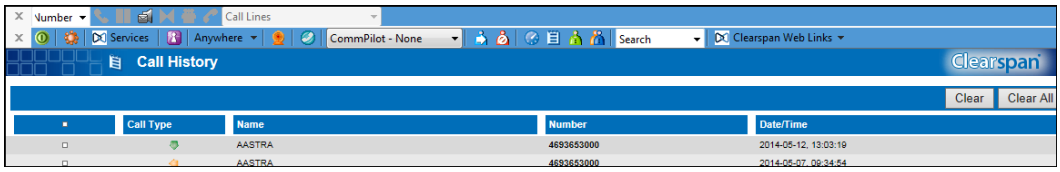

Figure 63 Viewing Call History

DELETE CALL LOGS

To delete selected call logs:

1. Select the calls you want to clear, by checking the corresponding check-boxes. Alternatively, to select all calls in a specific call log (Dialed Call, Received Calls, or Missed Calls), click the corresponding **Select All** button.
2. Click the corresponding **Clear** button.

To clear all call logs in all log categories:

Click **Clear All**, at the top-right of the *Call History* window.

If an error occurs when deleting a call log, perform the following steps:

1. Start Internet Explorer.
2. From the menu bar, select *Tools* and then *Internet Options*. The *Internet Options* dialog box appears.
3. Click the **Security** tab and then click the **Custom level** button.
4. In the *Security Settings – Internet Zone* dialog box, scroll down to *ActiveX controls and plug-ins* and check *Enable*.
5. Click **OK** to save your change.

Note: When you select Clear or Clear All, a warning message appears. When you click OK, the delete request is executed. When you click Cancel, it ignores the request. (This warning message may differ depending on how it was configured by your system administrator.)

You need to refresh the *Call Log History* to view the changes.

ENABLE AND DISABLE ANYWHERE LOCATIONS

You use the *Anywhere* menu item on the Telephony toolbar to enable or disable Anywhere locations.

This drop-down menu shows the list of all available locations configured in the system.

An item in the menu shows the phone number, the description, and the enabled/disabled state of that location. If the location is enabled, it is checked.

1. To enable a location, click to the left of that location. A check mark appears next to the location.
2. To disable a location, click the check mark next to it.

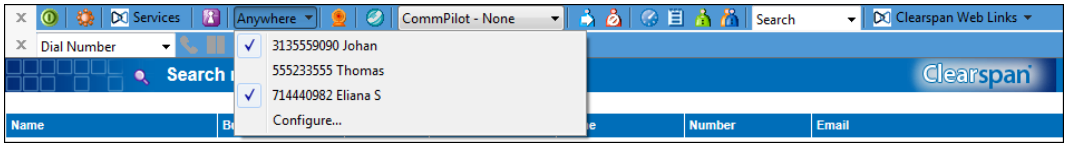

Figure 64 Assistant–Enterprise Toolbar – Anywhere Locations

SET COMMPILOT EXPRESS PROFILE

Note: When using CommPilot Express, you should not enable other services such as Call Notify, Call Forwarding, or Simultaneous Ringing.

Your CommPilot Express profile allows you to manage your personal services using four configurable profiles. These profiles control your incoming calls automatically. Even when offsite, you can still manage your active profile on the web or over the phone.

With CommPilot Express, you can manage your calls based on your schedule. This allows you to work efficiently without unnecessary interruption.

You can quickly set your CommPilot Express profile using the CommPilot button on the Telephony toolbar.

1. To set the active CommPilot Express profile, select a profile from the CommPilot drop-down list on the toolbar.
2. To disable all profiles, select *CommPilot – None.*

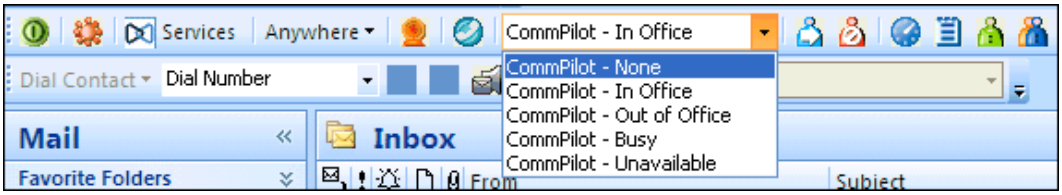

Figure 65 CommPilot Profiles

You can also set the active CommPilot Express profile on the *CommPilot Express* page of the *Services* dialog. The *Services* dialog for Assistant–Enterprise allows you to configure the settings that apply to each of your CommPilot profiles.

OPTIONS DIALOG

The *Options* dialog allows you to configure the connection and account settings that Assistant uses to communicate with your service provider. The left-hand side of the dialog contains a tree view, listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

1. Click **OK** to save all changes and close the dialog.
2. Click **Apply** to save all changes without closing the dialog. Cancel closes the dialog without saving your changes.

GENERAL PAGE

The *General* page allows you to configure the automatic login behavior of Assistant.

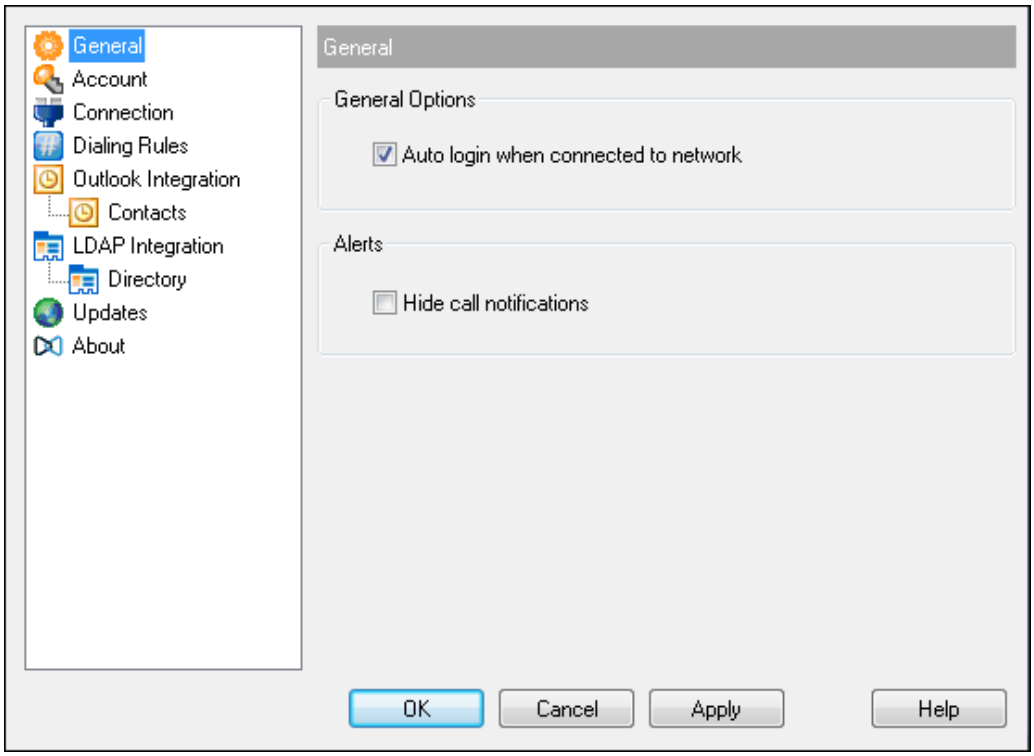

Figure 66 Options Dialog – General Page

- *Auto login when connected to network* automatically logs in to your service provider when it detects an active network connecting on your computer.
- *Hide Call Notification* disables the call notification window. When this box is checked, the call notification does not appear when Assistant detects an incoming or outgoing call.

ACCOUNT PAGE

The *Account* page allows you to specify your Clearspan user name and password. You can also change your password, if permitted to do so by your system administrator.

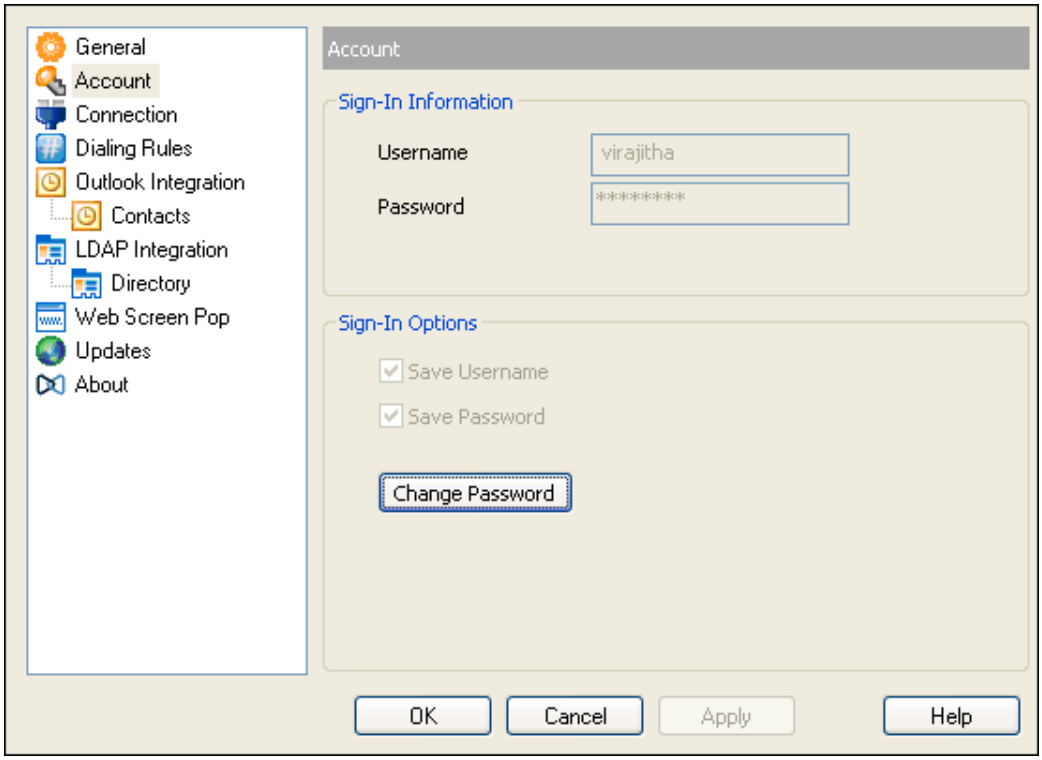

Figure 67 Options Dialog – Account Page

Contact your service provider or system administrator if you do not know the appropriate settings. Once you successfully log in, the controls on this page become inactive.

- *Save Username* determines whether Assistant saves the user name you provide. Check this box to avoid having to specify your user name each time you log in to the program.
- *Save Password* determines whether Assistant saves the password you provide above. Check this box to avoid having to specify your password each time you log in to Assistant.

Assistant encrypts your password for greater security.

PASSWORD CHANGE DIALOG

Click **Change Password** on the *Options Dialog – Account* page to display the *Password Change* dialog.

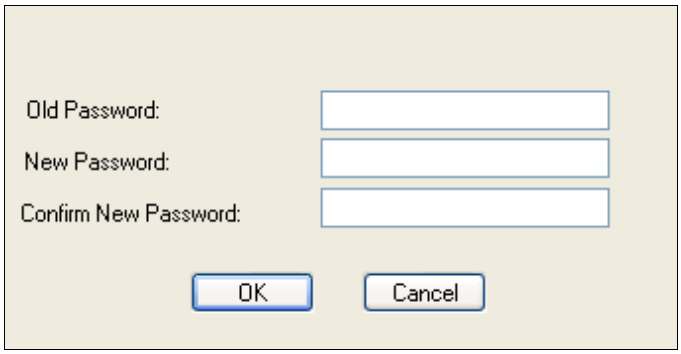

Figure 68 Options Dialog – Password Change

To change your password:

1. On the toolbar, click **Options**.

   Assistant opens the *Options* dialog.

2. Click **Accounts**.
3. On the Account page, click Change Password.

   The *Password Change* dialog box appears.

4. In the text boxes, enter your old password and then your new password twice.
5. Click **OK**.

   To cancel you changes, click **Cancel**.

Note: All fields in the *Password Change* dialog box are mandatory.

CONNECTION PAGE

The *Connection* page allows you to specify the network address of the Clearspan server that Assistant connects to.

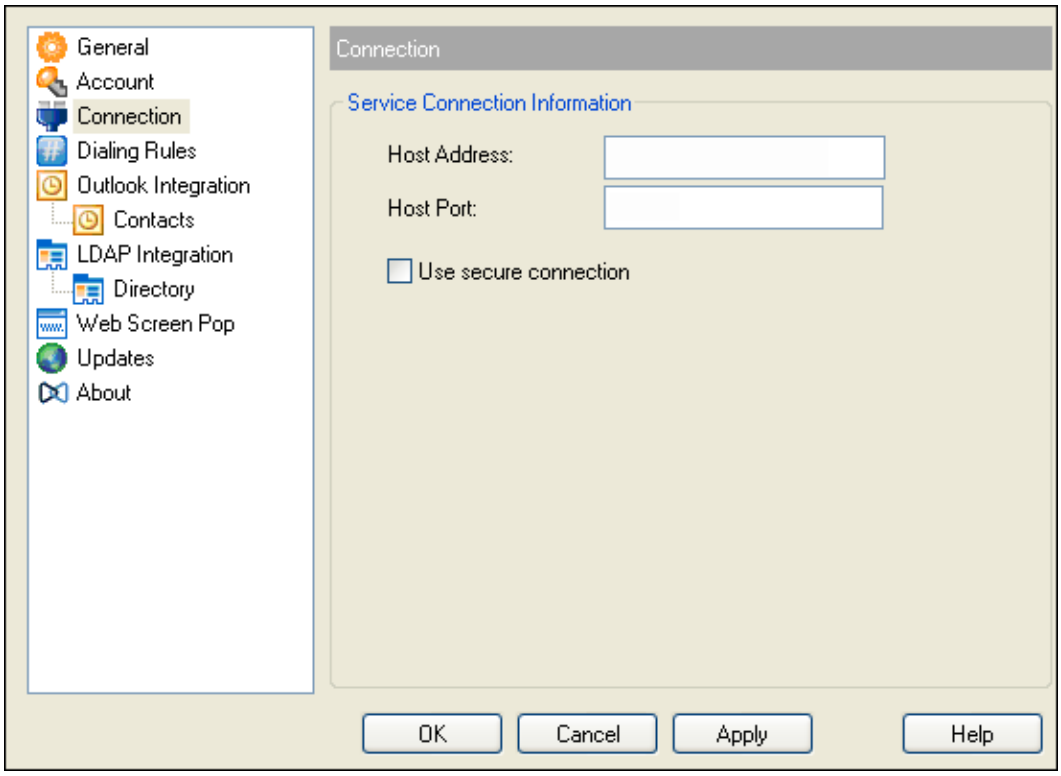

Figure 69 Options Dialog – Connections Page

Contact your service provider or system administrator if you do not know the appropriate settings. Once you successfully log in, the controls on this page become inactive.

- *Host Address* specifies the URL or IP address which Assistant attempts to connect to when logging in.
- *Host Port* is the port number used by the Clearspan server on the host specified above.
- *Use secure connection* determines whether a secure connection should be used to communicate with the server.

DIALING RULES PAGE

The *Dialing Rules* page allows you to configure special dialing rules for Assistant.

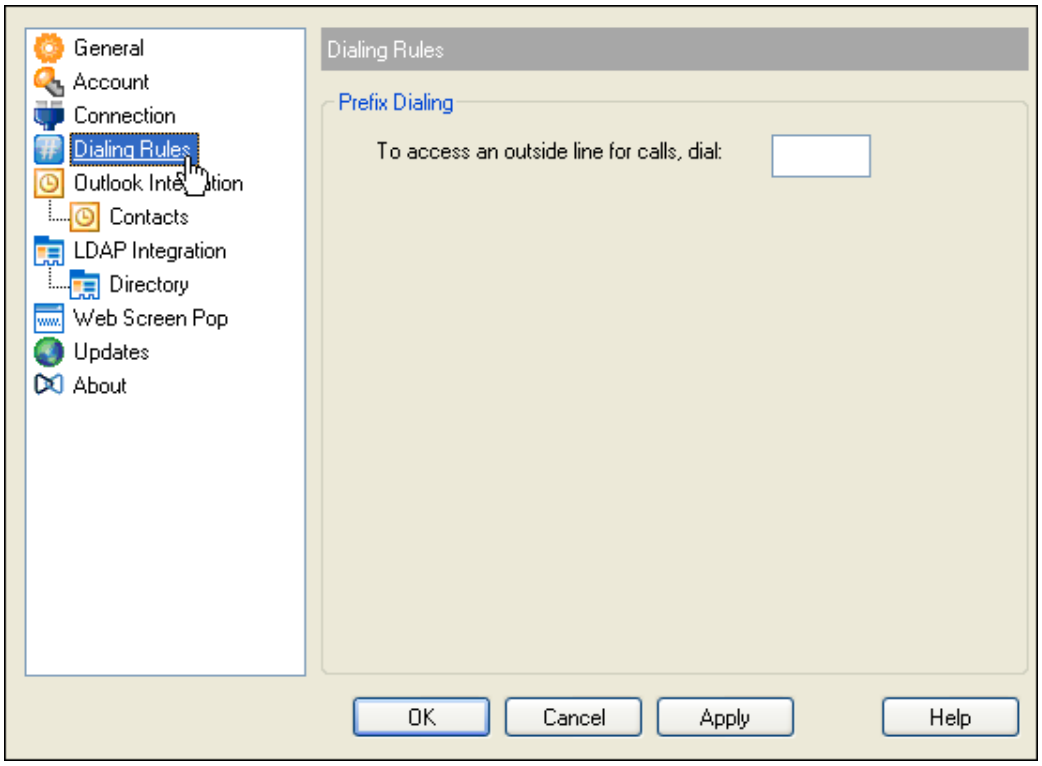

Figure 70 Options Dialog – Dialing Rules Page

To access an outside line for calls, dial specifies a prefix number that Assistant includes automatically when dialing external numbers.

If entered, this number is pre-pended only to dialed numbers that contain more than six digits. Up to five digits may be entered in this field.

Valid characters are the numbers 0 to 9 and the symbol "+". If you include the "+" character, it must be the first character in the field.

OUTLOOK INTEGRATION PAGE

The *Outlook Integration* page enables and disables the use of Assistant–Enterprise with Microsoft Outlook. As of Outlook 2007 you are unable to dial a contact in your in box using the right click-to-dial function.

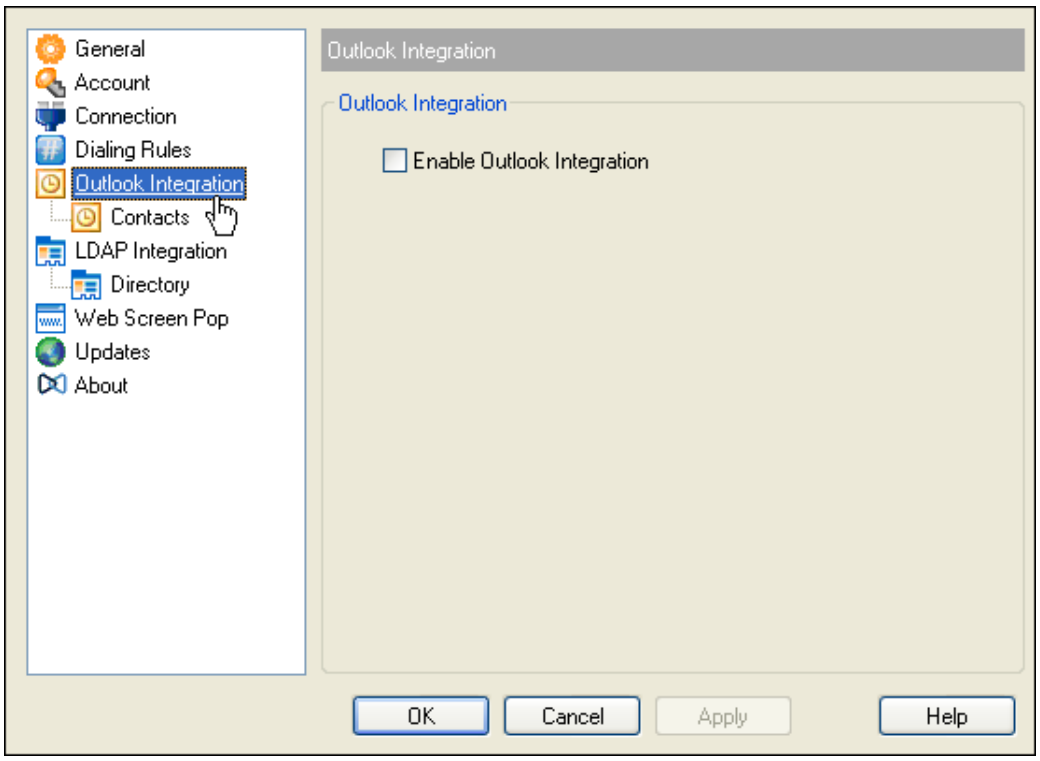

Figure 71 Options Dialog – Outlook Integration Page

The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated.

CONTACTS PAGE

The *Contacts* page allows you to configure the way Assistant integrates with your Outlook contact list.

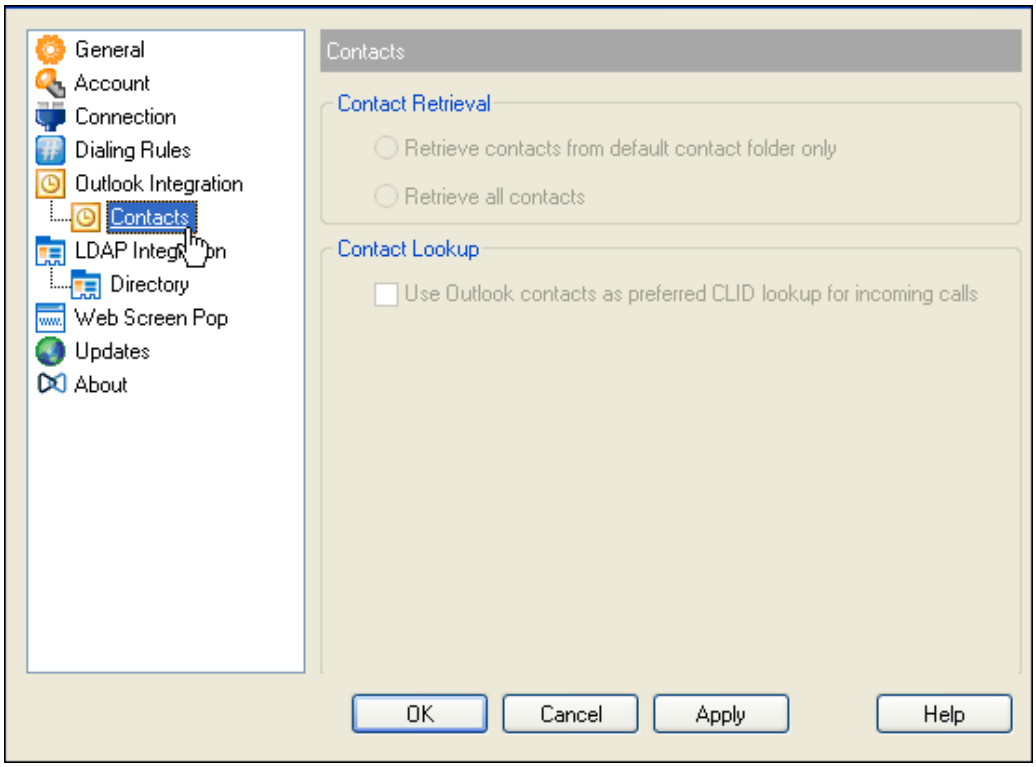

Figure 72 Options Dialog – Contacts Page

- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup for incoming calls* determines whether Assistant uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

UPDATES PAGE

The *Updates* page allows you to configure a web proxy server for Assistant to use when connecting to the Internet.

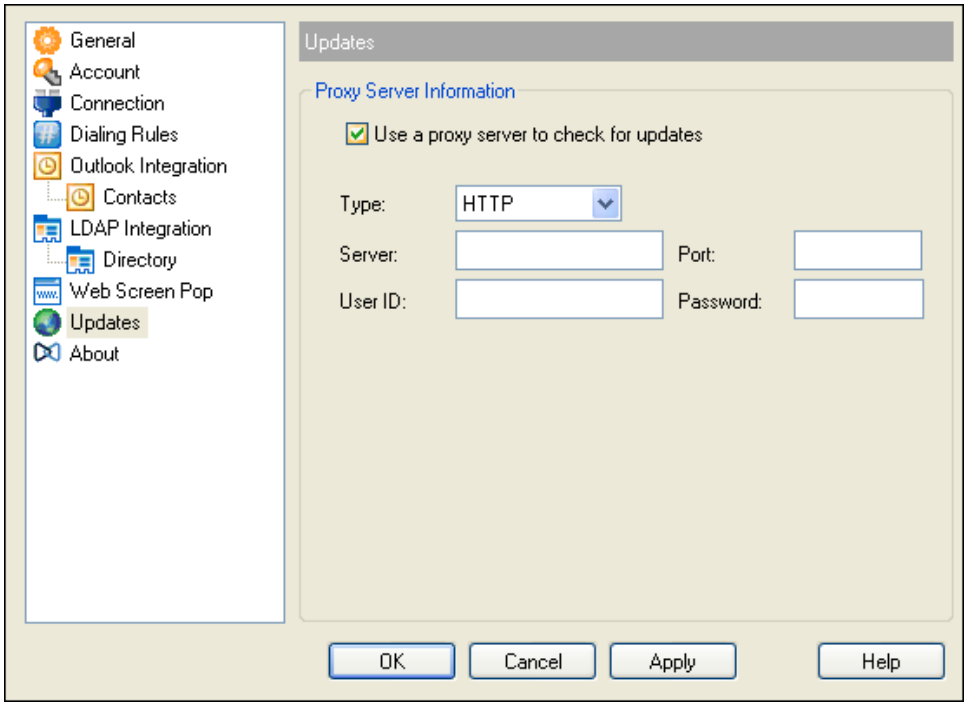

Figure 73 Options Dialog – Update Page

Assistant uses this proxy only when checking for product updates, not when connecting to the Clearspan server to provide Call Management features.

Contact your service provider or system administrator if you do not know the appropriate settings.

Use a proxy server to check for updates specifies whether a proxy server is required for Assistant to access the internet. When this box is checked, the other settings on this page become enabled.

- *Type* specifies the connection protocol used by the proxy server. The valid option is HTTP.
- *Server* specifies the URL of the proxy server.
- *Port* specifies the port number used by the proxy server. The default port of the HTTP protocol is 80.
- *User ID* specifies a user ID authorized to use the proxy.
- *Password* corresponds with the user ID mentioned above.

LDAP INTEGRATION PAGE

The *LDAP Integration* page allows you to configure the settings Assistant uses to connect to the LDAP directory server.

Note: Make sure you have correctly installed a valid certificate in both the Current User and Local Machine Window certificate stores before attempting to connect with SSL option.

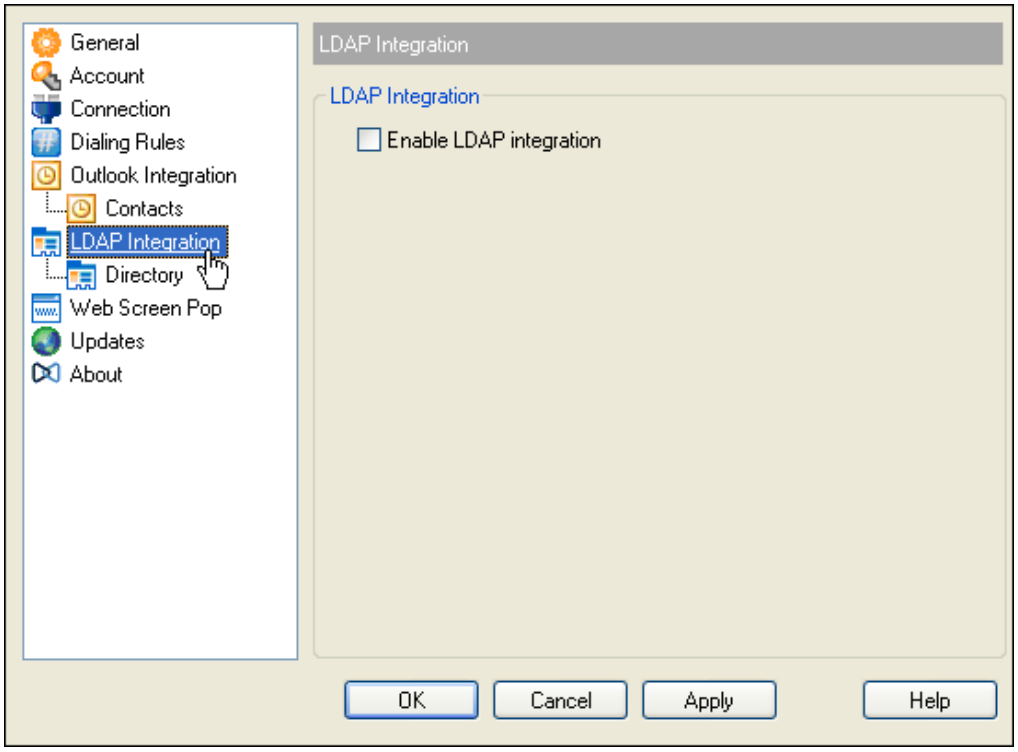

Figure 74 Options Dialog – LDAP Integration Page

Contact your service provider or system administrator if you do not know the appropriate settings.

Enable LDAP Integration determines whether Assistant provides LDAP directory lookup services. Checking this box enables the controls on the *Directory* page.

DIRECTORY PAGE

The *Directory* page allows you to provide the configuration settings required for Assistant to connect to your directory server.

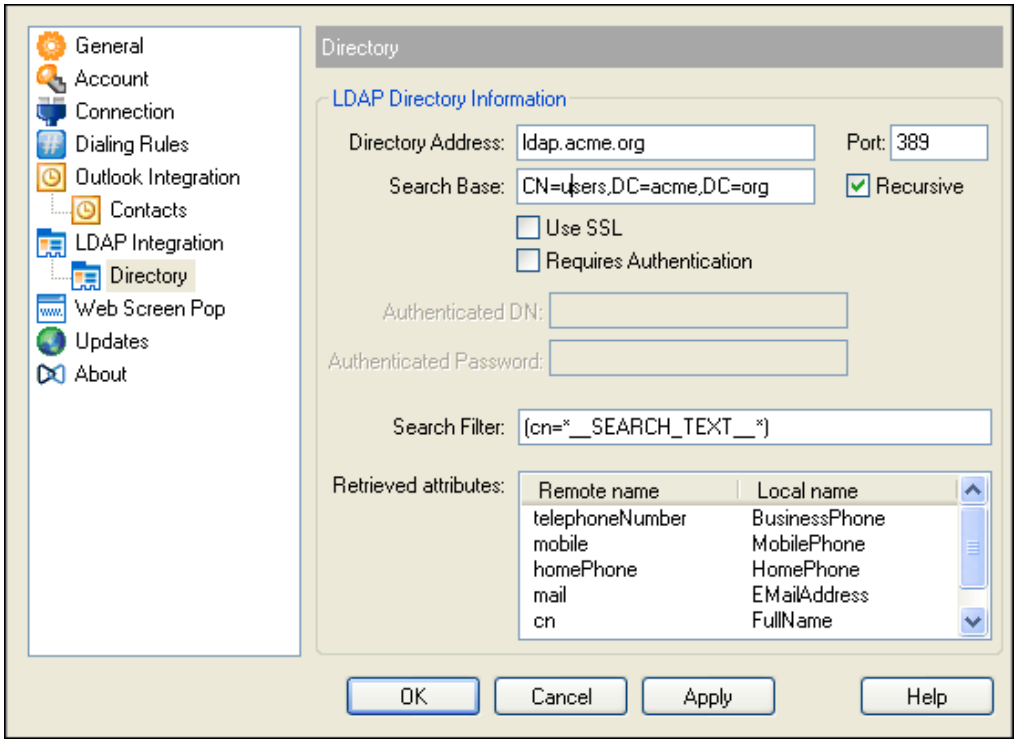

Figure 75 Options Dialog – LDAP Integration – Directory Page

Once you successfully log in, the controls on this page become inactive.

- *Directory Address* specifies the network address of the LDAP directory server.
- *Port* the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* determines the location in the directory server tree that Assistant looks in when executing a search.
- *Recursive*, when checked, searches all sub-trees within the search base until the specifications are found.
- *Use SSL* (Secure Sockets Layer) determines whether Assistant uses SSL to connect to the directory server. Note that enabling SSL may require the use of a different port.
- *Requires Authentication* indicates whether Assistant must provide a user name and password to the directory server to conduct searches.
- *Authenticated DN* is the user name Assistant uses when connecting to the directory server when *Requires Authentication* is checked.

- *Authenticated Password* corresponds to the *Authentication DN*.
- *Search Filter* specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Retrieved attributes* is a table that controls the way that Assistant maps attributes returned from the directory server to columns displayed in the list of search results.

  In each row of the table, enter an *LDAP* attribute in the *Remote Name* column. In the *Local Name* column, enter a corresponding local attribute. Typical Remote Name values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".

WEB SCREEN POP PAGE

The *Web Screen Pop* page allows you to configure a web page that you can open from the call notification window.

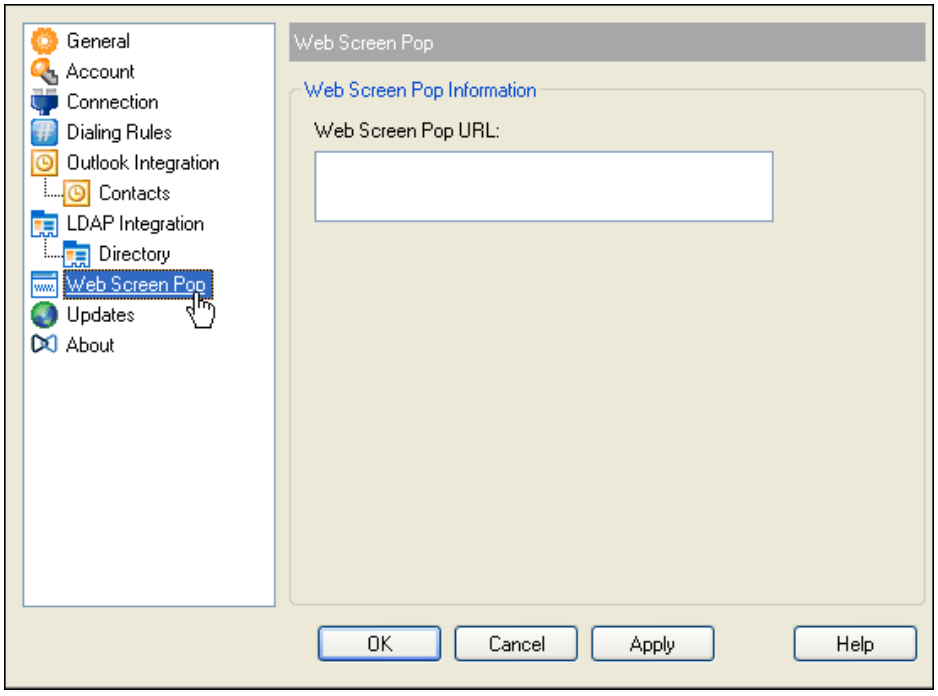

Figure 76 Options Dialog – Web Screen Pop Page

The *Web Screen Pop URL* determines the URL that Assistant opens using the default browser when you click **Web Screen Pop** in the Call Notification pop-up window. In addition to the URL, there are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- __**USER**__: The user's Clearspan ID. (Note that in this case the "user" is the Clearspan subscriber.)
- __**FIRST**__: The first name of the user.
- __**LAST**__: The last name of the user.
- __**EMAIL**__: The e-mail address of the user.
- __**GROUP**__: The name of the Clearspan group the user belongs to.
- __**SERVICE_PROVIDER**__: The name of the Clearspan service provider the user belongs to.
- __**PHONE**__: The phone number of the user.
- __**REMOTE_PHONE**__: The phone number of the remote party.
- __**REMOTE_NAME**__: The name of the remote party (when available).
- __**CALL_TYPE**__: "Incoming" or "Outgoing".

ABOUT PAGE

The *About* page displays the version, copyright notices, and product disclaimers associated with Assistant. It can be useful when providing information to support representatives for your service provider.

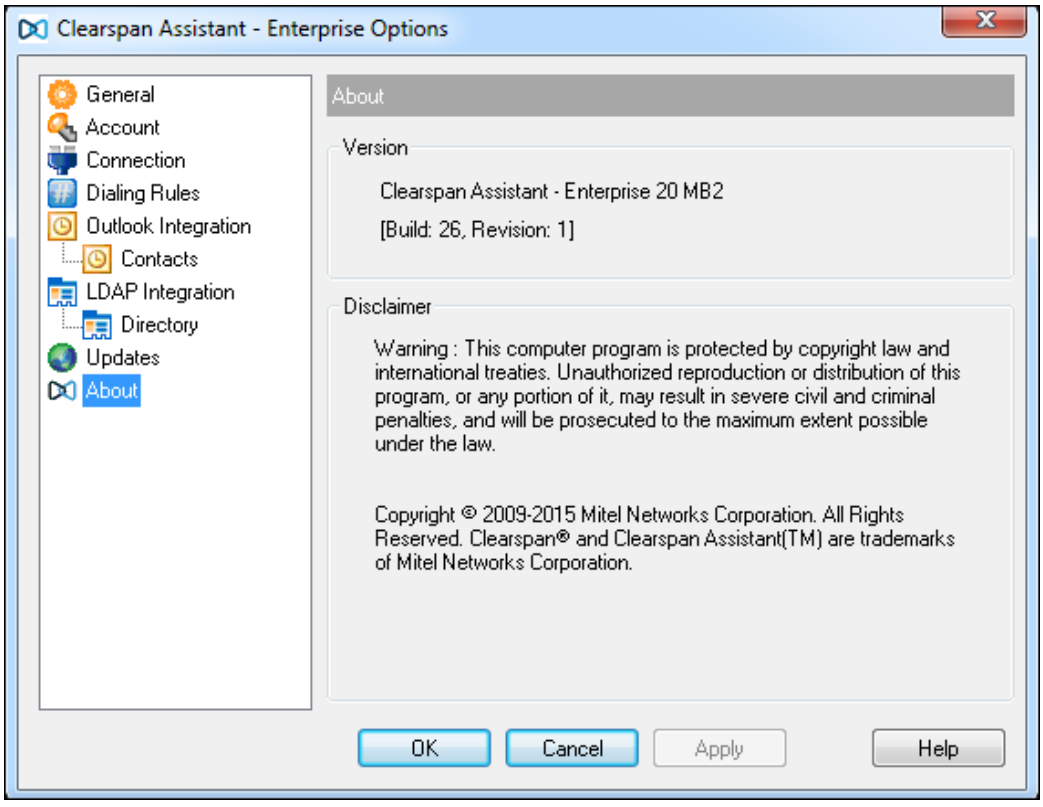

Figure 77 Options Dialog – About Page

The information displayed is as follows:

- Clearspan Assistant Version
- Clearspan Assistant Disclaimer

The About information is important in providing information for the purpose of technical support.

SERVICES DIALOG

The *Services* dialog allows you to configure the calling features provided by Assistant, such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting. The left hand side of the dialog contains a tree view listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- Click **OK** to save all changes and close the dialog.
- Click **Apply** to save all changes without closing the dialog.
- Click **Cancel** to close the dialog without saving your changes.

Note: When the *Services* dialog is open, service buttons on the toolbar for the services that can be configured via the *Services* dialog do nothing when clicked. Once the *Services* dialog is closed, those buttons become operable again.

INCOMING CALLS

The *Incoming Calls* pages in the *Options* dialog configure the services that apply to calls that you receive.

Note: The Call Forwarding Always, Do Not Disturb, and CommPilot Express services are immediately updated in Assistant when changes are made to them from the web portal. In addition, turning on or off Remote Office or Simultaneous Ringing from the web portal is also immediately updated in Assistant. Other changes to Remote Office and Simultaneous Ringing, as well as changes to other services are reflected in Assistant on your next login.

ANONYMOUS CALL REJECTION

The Anonymous Call Rejection service blocks all incoming calls from people who have restricted their phone numbers from being shown to their call recipients.

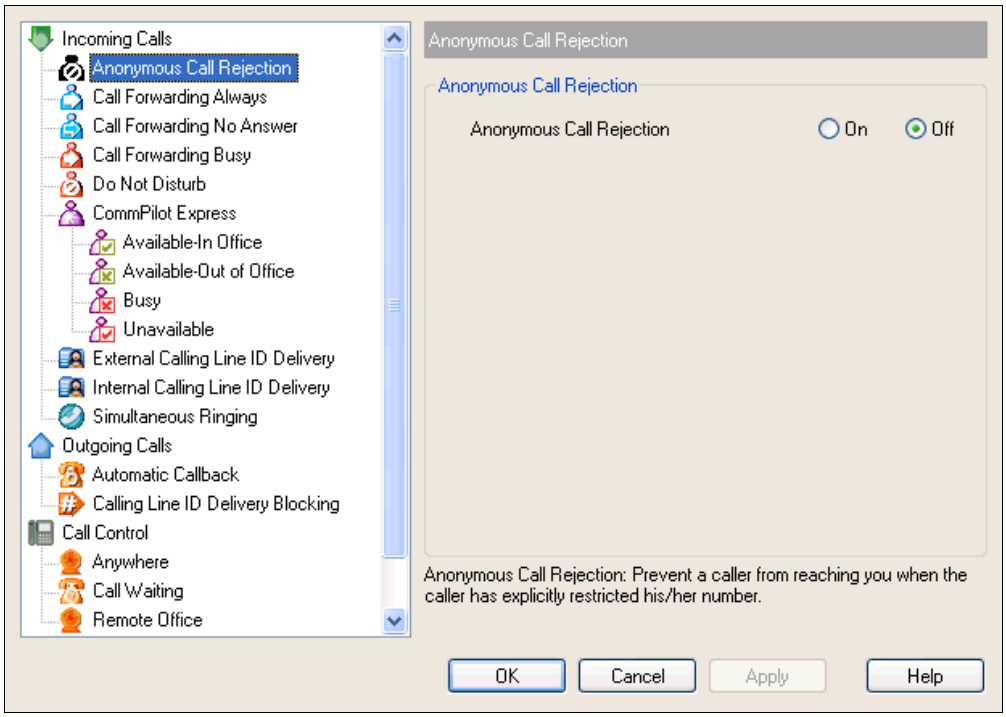

Figure 78 Services Dialog – Anonymous Call Rejection Page

CALL FORWARDING ALWAYS

The Call Forwarding Always service forwards all incoming calls to a specified phone number.

To activate this service, click **Call Forwarding Always** on the toolbar. This highlights the button.

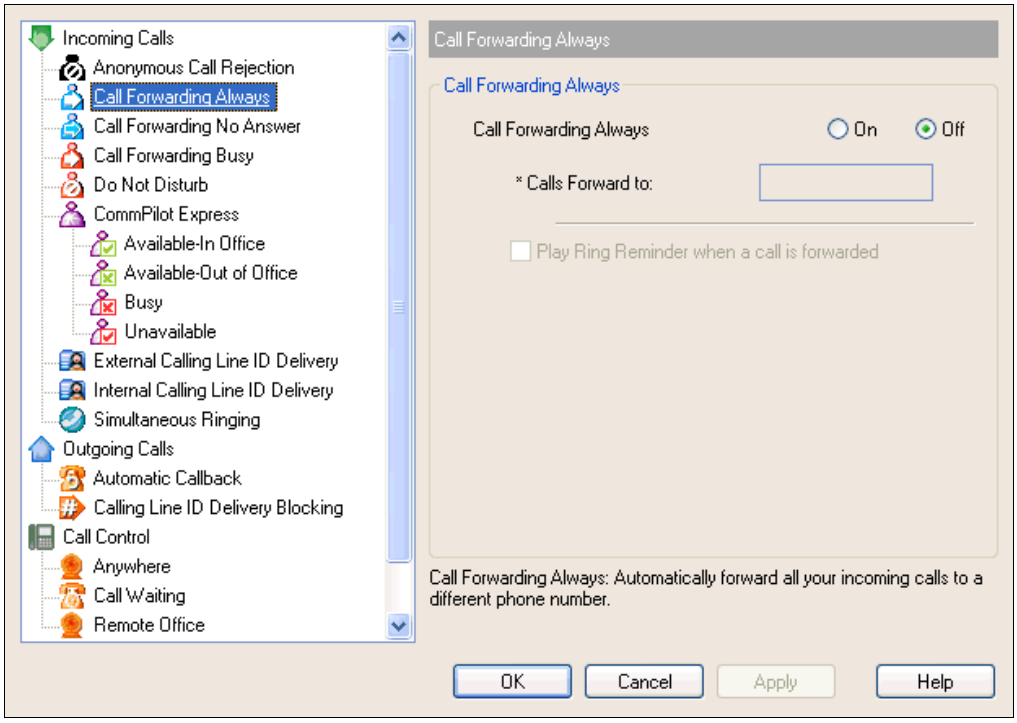

Figure 79 Services Dialog – Call Forwarding Always Page

CALL FORWARDING NO ANSWER

The Call Forwarding No Answer service forwards all incoming calls to a specified phone number if you do not answer within a specified number of rings.

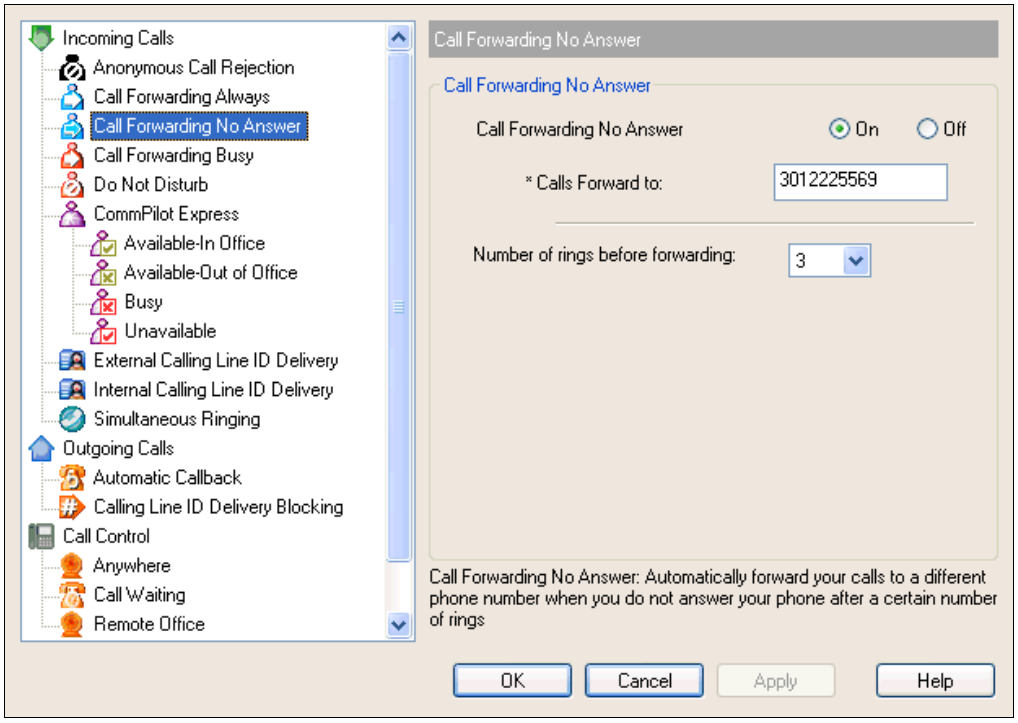

Figure 80 Services Dialog – Call Forwarding No Answer Page

To activate this service, click **Call Forwarding No Answer** on the toolbar. This is highlighted when turned on.

Calls Forward to specifies the phone number to which Assistant redirects all calls forwarded using this service.

Numbers of rings before forwarding is the number of times your phone must ring before Assistant forwards an incoming call.

CALL FORWARDING BUSY

The Call Forwarding Busy service forwards all incoming calls to a specified phone number when all available lines are in use.

To activate this service, click **Call Forwarding** on the toolbar. This button becomes depressed when on.

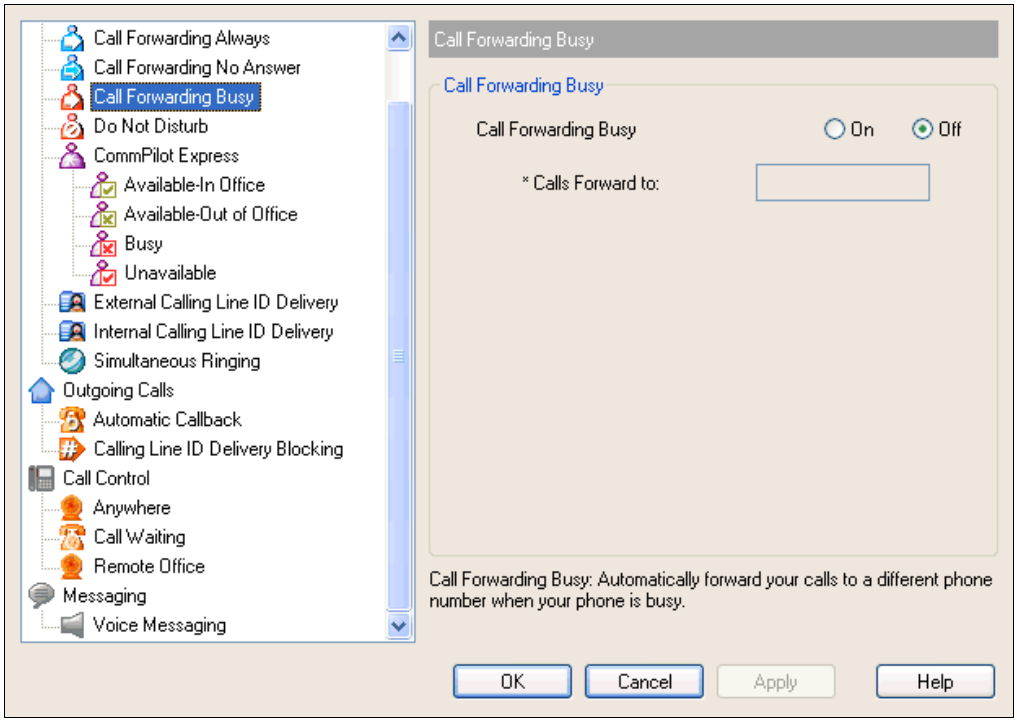

Figure 81 Services Dialog – Call Forwarding Busy Page

DO NOT DISTURB

The Do Not Disturb service forwards all incoming calls to your Voice Messaging service. If you do not have a Voice Messaging service configured, callers hear a busy tone.

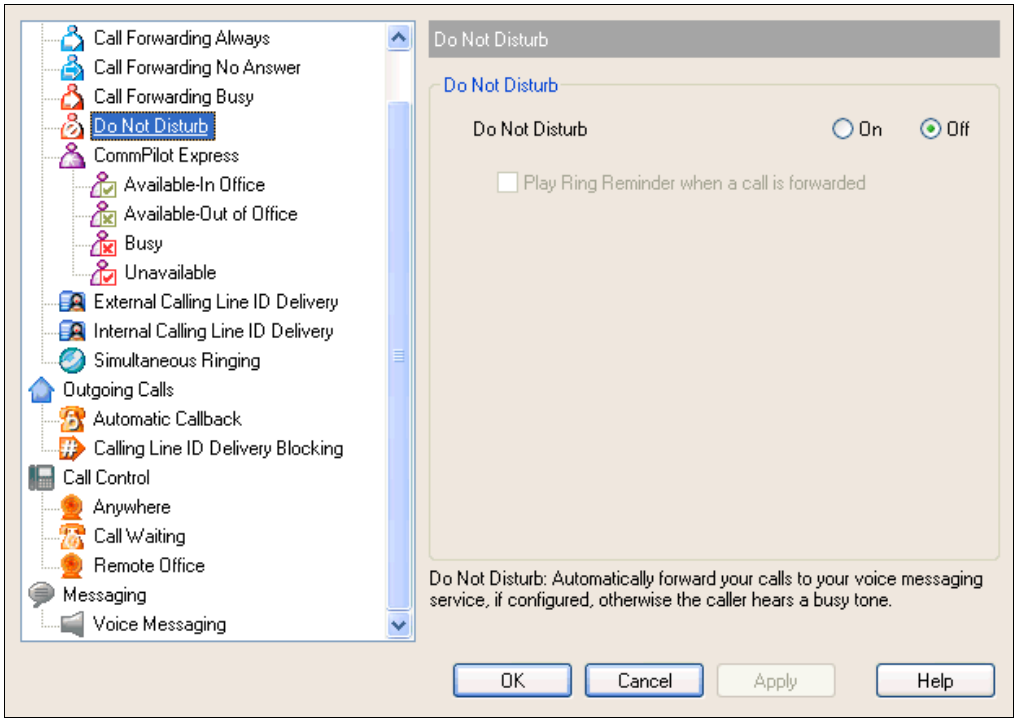

Figure 82 Services Dialog – Do Not Disturb Page

To activate this service, click **Do Not Disturb** on the toolbar. This is highlighted when in service.

Play Ring Reminder when a call is forwarded determines whether Assistant notifies you each time the *Do Not Disturb* service forwards a call to your Voice Messaging service.

EXTERNAL CALLING LINE ID DELIVERY

The External Calling Line ID Delivery service allows you to view the calling line information for incoming calls from external phone numbers.

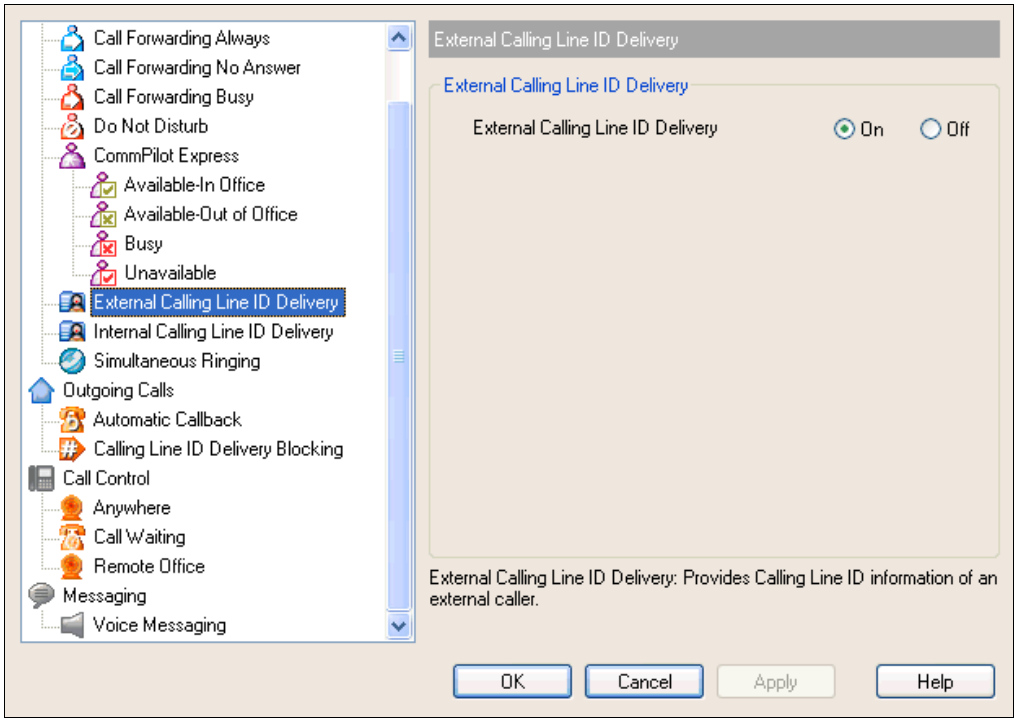

Figure 83 Services Dialog – External Calling Line ID Delivery Page

INTERNAL CALLING LINE ID DELIVERY

The Internal Calling Line ID Delivery service allows you to view the calling line information for incoming calls from members of your group.

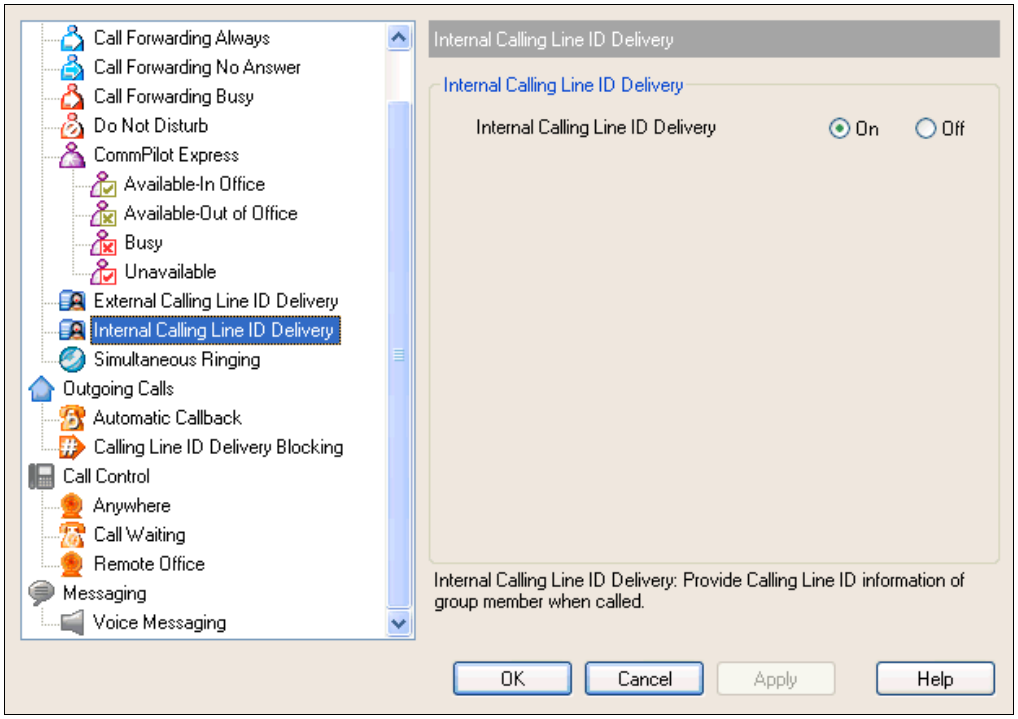

Figure 84 Services Dialog – Internal Calling Line ID Delivery Page

SIMULTANEOUS RINGING

The Simultaneous Ringing service rings multiple phone numbers for each incoming call. Any of the phone numbers specified for this service may be used to answer those calls.

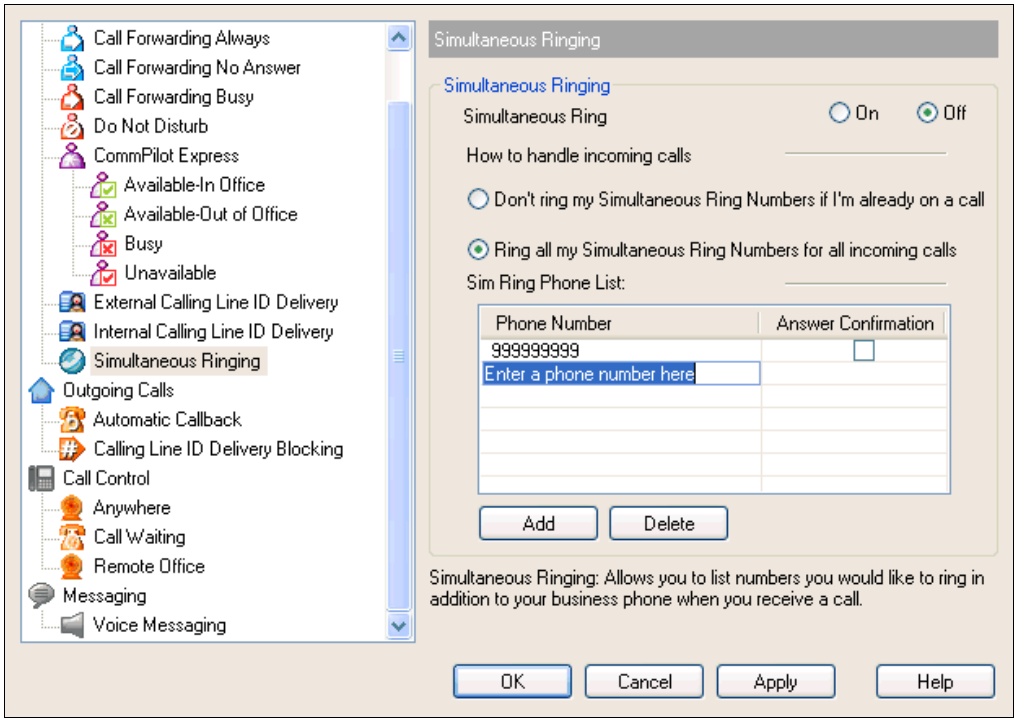

Figure 85 Services Dialog – Simultaneous Ringing Page

To open this page, click **Simultaneous Ringing** on the toolbar. This becomes highlighted when activated.

When the *Don't ring my Simultaneous Ring Numbers if I'm already on a call* option is selected, the Simultaneous Ringing service is temporarily deactivated whenever you are engaged in an active call.

When the *Ring all my Simultaneous Ring Numbers for all incoming calls* option is selected, the Simultaneous Ringing service rings all numbers specified in the list that follows for each incoming call, regardless of whether you currently are engaged in an active call.

Sim Ring Phone List specifies the list of additional phone numbers that ring for each incoming call. The *Answer Confirmation* column allows you to specify, for each number separately, whether answer confirmation is required.

You can perform the following on the *Sim Ring Phone List*:

- View the Sim Ring phone list and the current status of Answer Confirmation option for each number in the List
- Add a new number to the Sim Ring Phone List and set its Answer Confirmation option “On” or “Off
- Modify an existing number in the Sim Ring Phone List by double-clicking on the number
- Set the Answer Confirmation option “On’ or ‘Off’ for any phone number listed on the Sim Ring Phone List

Note: The Answer Confirmation capability is available only if this feature is activated.

- Delete an existing number from the Sim Ring Phone List.

1. To add a new phone number, click **Add**. A new item with the text, *Double click to add number here* prompt is inserted into the list control, allowing you to enter the required information.
2. To modify an existing phone number, double-click the number and then modify the information, as required.
3. To set the Answer Confirmation status of a phone number, “On” or “Off”, check or uncheck the corresponding *Answer Confirmation* check box.
4. To delete a phone number, select the number and click the **Delete** button.

COMMPILOT EXPRESS

CommPilot Express allows you to manage your personal services using four configurable profiles. These profiles control your incoming calls automatically. Even when off-site, you can still manage your active profile on the web or over the phone.

With CommPilot Express, you can manage your calls based on your schedule. This allows you to work efficiently without unnecessary interruption.

Note: When configuring your profiles, you have to enter telephone numbers either in E.164 format or in national format – with or without the prefix, depending on whether the prefix is enabled for the Country Code in the Application Server.

Available - In Office

The Available – In Office profile determines how incoming calls are handled when you are working at your desk.

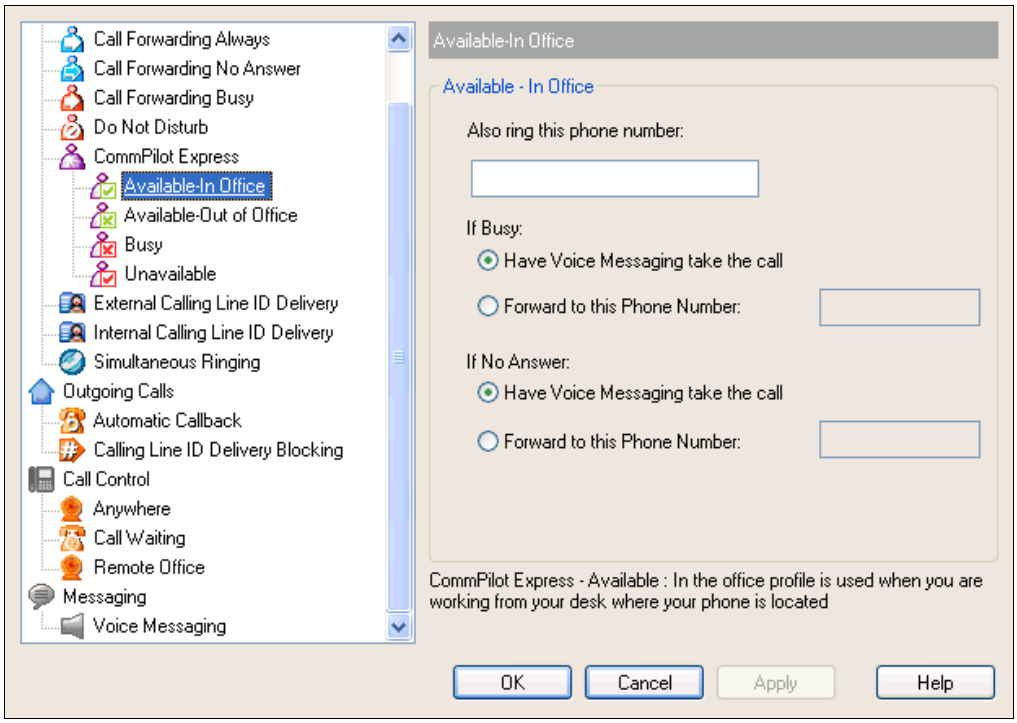

Figure 86 Services Dialog – CommPilot Express: Available – In Office Page

Also ring this phone number specifies an additional number for Assistant to ring for each incoming call. Calls may be answered from either this number or your main number.

If you select:

- *If Busy: Have Voice Messaging take the call*, Assistant forwards all incoming calls to your Voice Messaging service if you have no available open lines.
- *If Busy: Forward to this Phone Number,* then all incoming calls are forwarded to the specified phone number if you have no available lines.
- *If No Answer: Have Voice Messaging take the call,* Assistant forwards all incoming calls to your Voice Messaging service if you do not answer after a set number of rings.
- *No Answer: Forward to this Phone Number*, Assistant forwards all incoming calls to the specified phone number if you do not answer after a set number of rings.

Available – Out of Office

The Available – Out of Office profile determines how incoming calls are handled when you are not working at your desk, but are still able to receive calls.

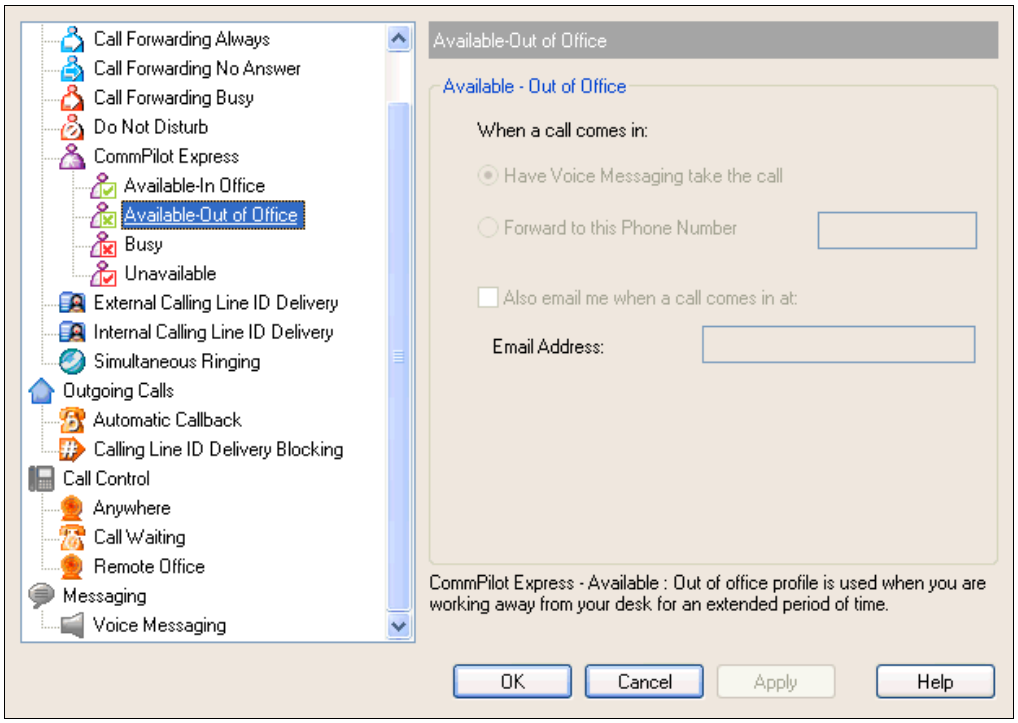

Figure 87 Services Dialog – CommPilot Express: Available – Out of Office

If you select:

- *Have Voice Messaging take the call,* all incoming calls are forwarded to your Voice Messaging service.
- *Forward to this Phone Number*, Assistant forwards all incoming calls to a specified number.

Also e-mail me when a call comes in at determines whether Assistant also sends an e-mail notification to the address you specify below it each time you receive an incoming call.

The *E-mail address* specifies the e-mail address Assistant notifies when you receive an incoming call.

Busy

The Busy profile determines how incoming calls are handled when you are busy.

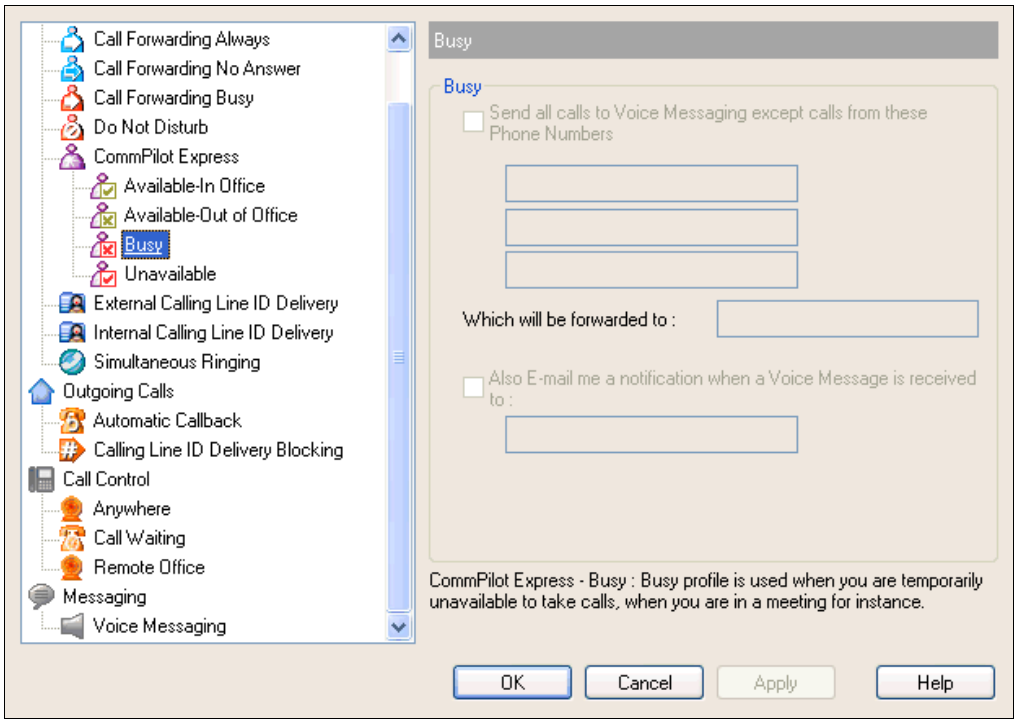

Figure 88 Services Dialog – CommPilot Express: Busy Page

- *Send all calls to Voice Messaging except calls from these Phone Numbers* forwards all incoming calls to your Voice Messaging service, when selected. You can configure up to three numbers to be excluded from this service in the blank fields provided. Calls to these numbers are instead forwarded to the phone number you specify below it.
- *Which will be forwarded to* determines the phone number to which Assistant forwards the excluded callers specified above.
- *Also E-mail me a notification when a Voice Message is received* should be selected to receive an e-mail notification each time you receive a Voice Mail message.

Unavailable

The Unavailable profile determines how incoming calls are handled when you are not free to take calls, such as during outside business hours or when on holidays.

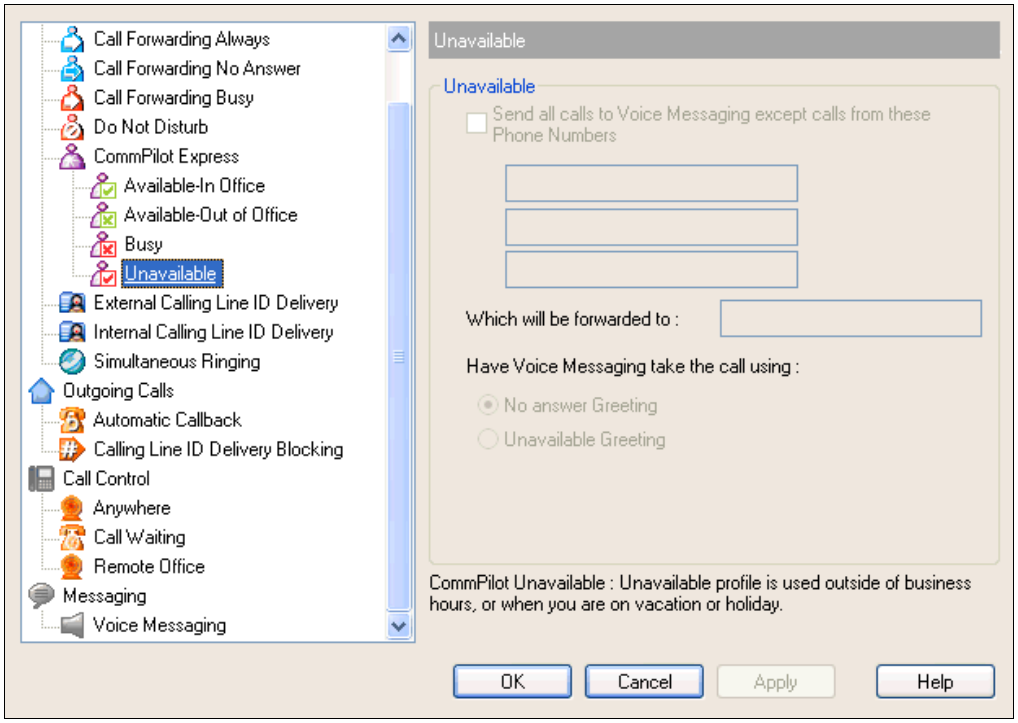

Figure 89 Services Dialog – CommPilot Express: Unavailable Page

If you select:

- *Send all calls to Voice Messaging except calls from these Phone Numbers*, all incoming calls are forwarded to your Voice Messaging service. You can configure up to three numbers to be excluded from this service in the blank fields provided. Calls to these numbers are instead forwarded to the phone number you specify. To determine which phone number Assistant forwards the excluded callers to, select *Which will be forwarded to*.
- *No answer Greeting*, its standard “no answer” greeting message plays to incoming calls.
- *Unavailable Greeting,* your Voice Messaging service is enabled to play its standard “unavailable” greeting message to incoming calls.

OUTGOING CALLS

The *Outgoing Calls* pages in the *Options* dialog configure the services that apply to calls that you initiate.

AUTOMATIC CALLBACK

The Automatic Callback service allows you to have Assistant monitor a busy party in your group and to automatically establish a call on your behalf when the busy party becomes available.

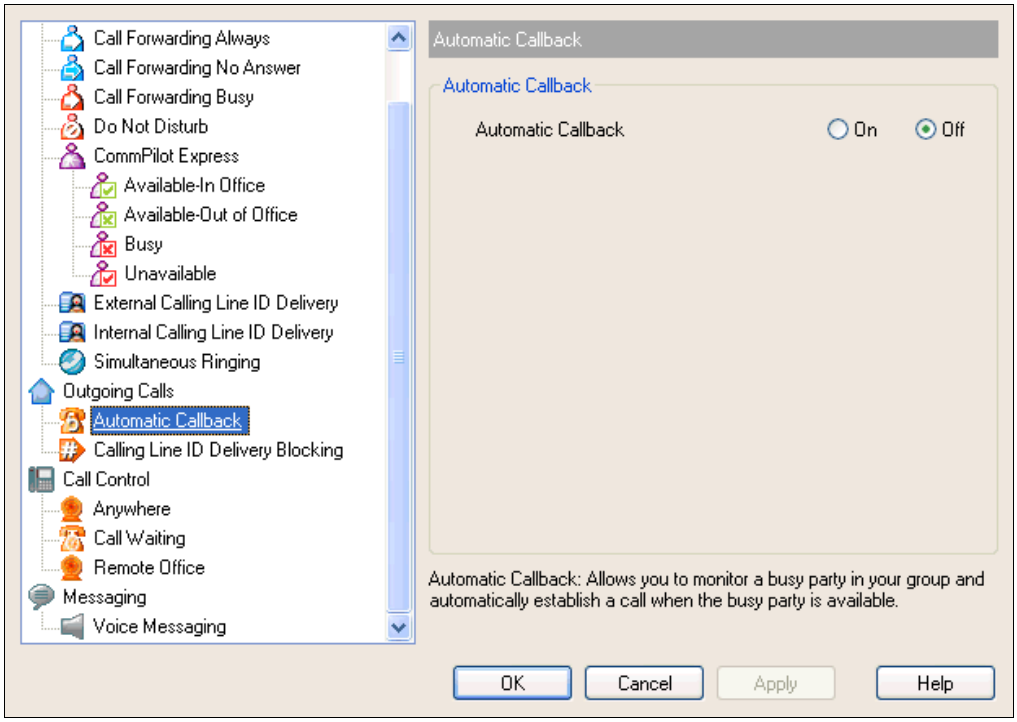

Figure 90 Services Dialog – Automatic Callback

CALLING LINE ID DELIVERY BLOCKING

The Calling Line ID Delivery Blocking service prevents other parties from seeing your phone number or calling line information when engaged in calls with you.

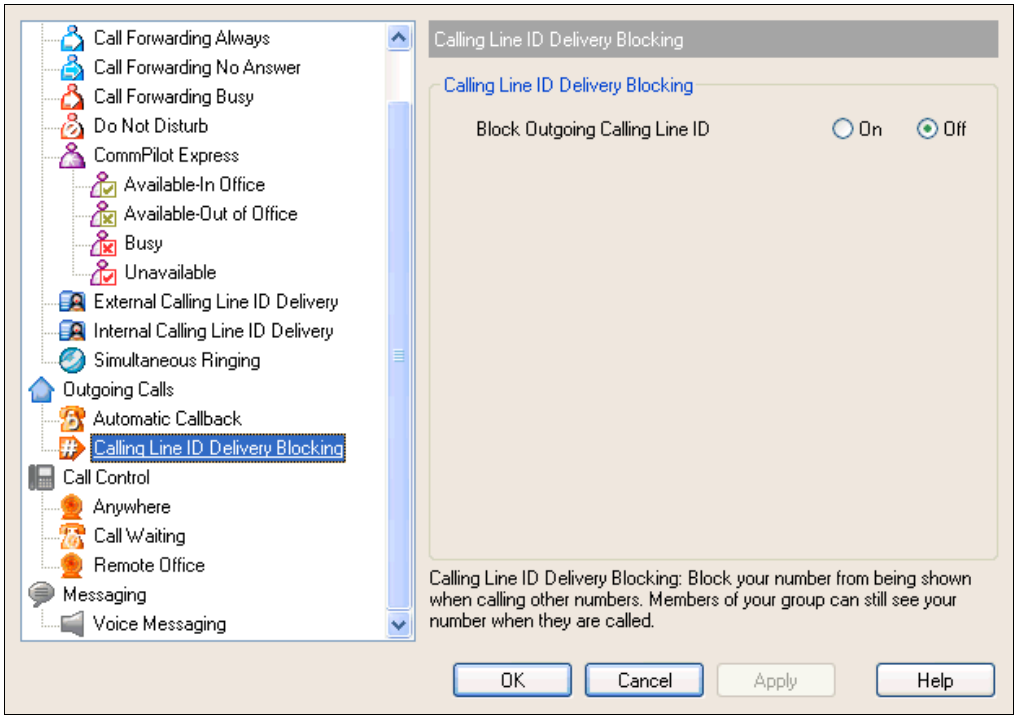

Figure 91 Services Dialog – Outgoing Calls: Calling Line ID Delivery Blocking

CALL CONTROL

The *Call Control* pages in the *Options* dialog allow you to configure your Call Control services.

ANYWHERE

The Clearspan Anywhere service allows you to define one or more network locations (also referred as Clearspan Anywhere locations) that can be used as extensions to your profile.

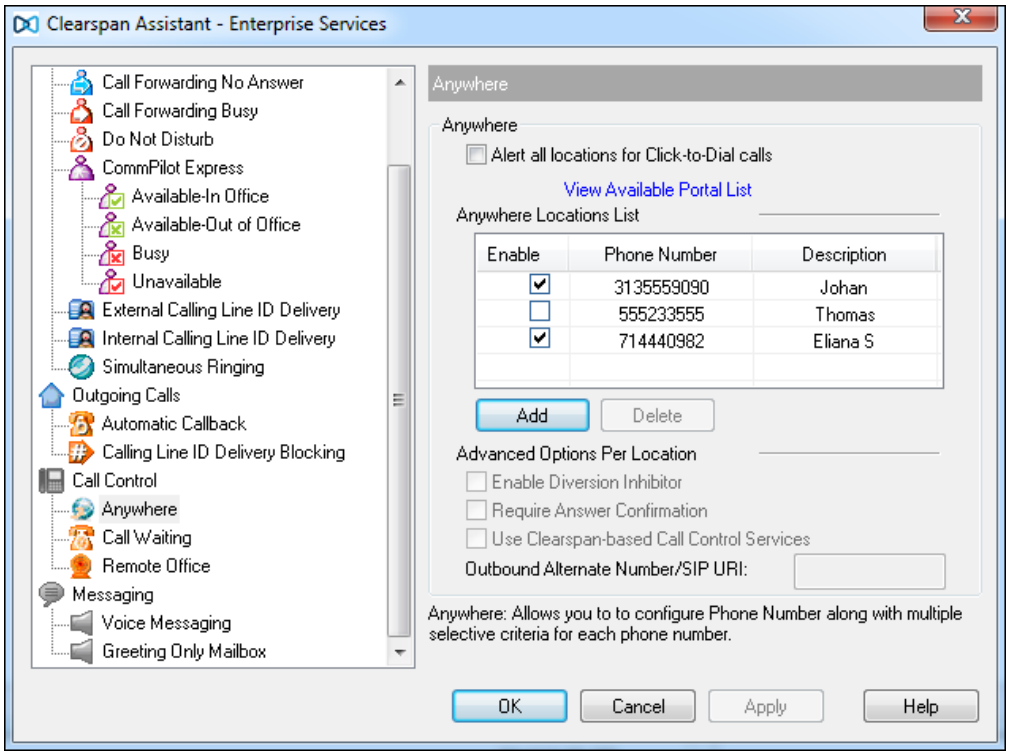

Figure 92 Services Dialog – Call Control: Clearspan Anywhere

Alert all locations for Click-to-Dial calls check box specifies whether Clearspan Anywhere locations should be alerted for the Click-to-Dial service.

Anywhere Locations List allows you to add, delete, or modify *Anywhere Location* phone numbers.

Advanced Options per Location contains a list of advanced options that can be enabled or disabled separately for each Anywhere Location:

- Enable Diversion Inhibitor
- Require Answer Confirmation
- Use Clearspan-based Call Control Services

Outbound Alternate Number/SIP URI text box allows you to add an alternate number or SIP URI.

View Available Portal List link displays the following page, which lists Clearspan Anywhere portals available to you.

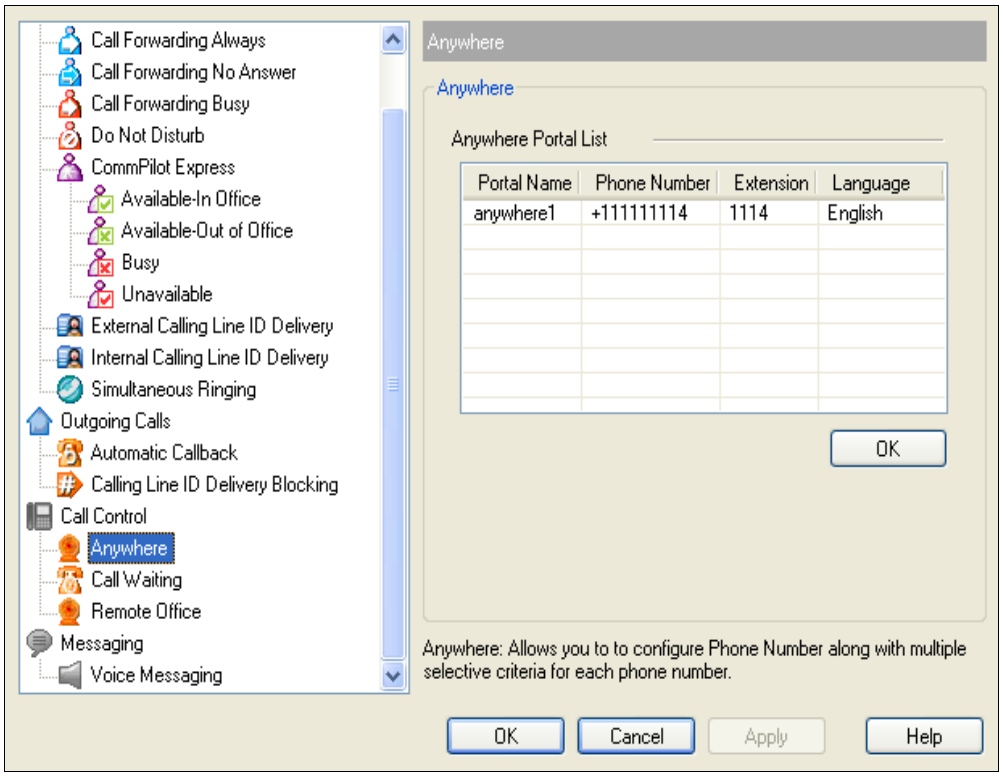

Figure 93 Clearspan Anywhere Available Portals List

The page is read only.

To return to the previous page, click **OK**.

REMOTE OFFICE

The Remote Office service allows you to substitute a different phone number for your office phone number. You can open this page by clicking Remote Office on the toolbar. The button is highlighted when turned on.

Remote Office Number specifies the alternate phone number to substitute for your office number.

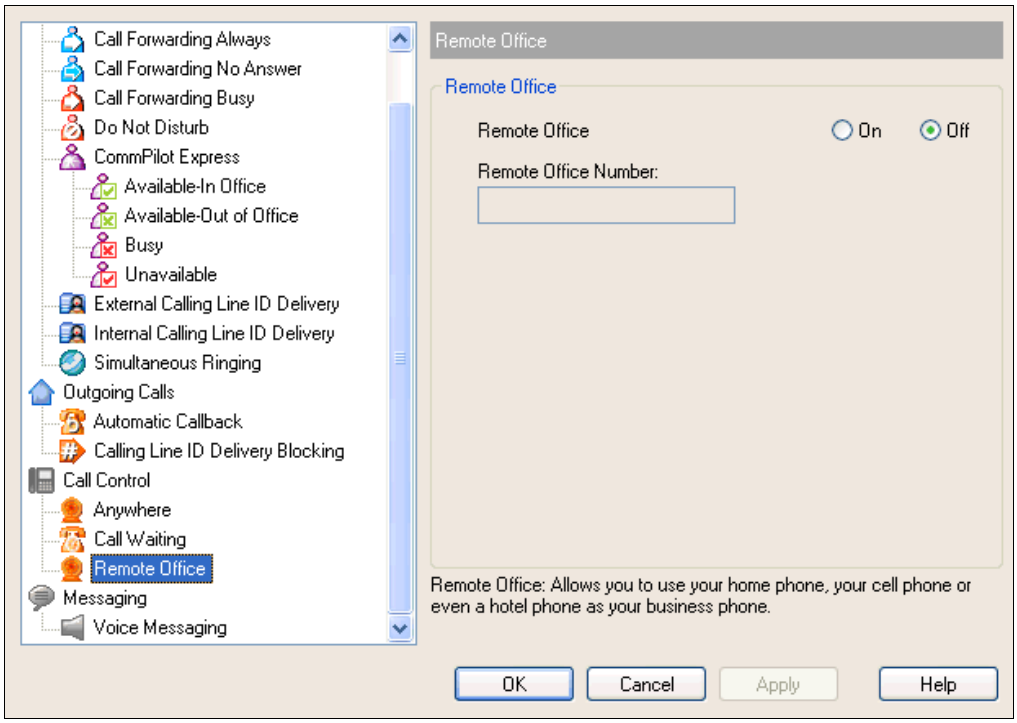

Figure 94 Services Dialog – Call Control: Remote Office

CALL WAITING

The Call Waiting service allows you to answer incoming calls while engaged in another active call.

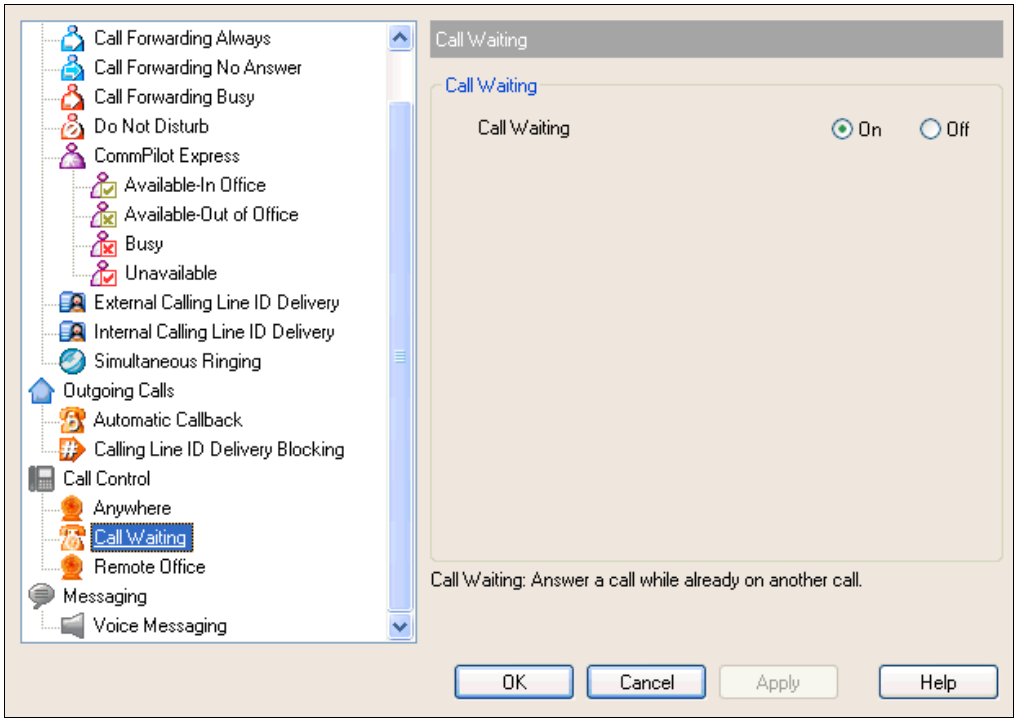

Figure 95 Services Dialog – Call Control: Call Waiting

MESSAGING

The *Messaging* pages in the *Options* dialog allow you to configure your Voice Messaging settings.

VOICE MESSAGING

The *Voice Management* page specifies how the system handles your voice messages.

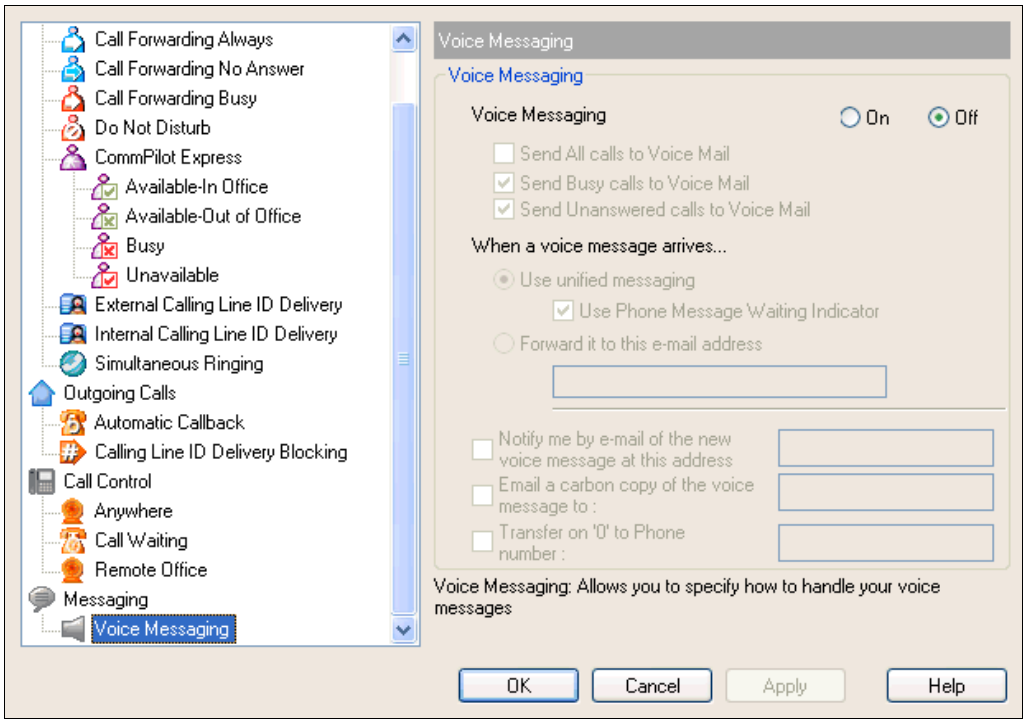

Figure 96 Services Dialog – Messaging: Voice Messaging

You can select how you want the calls to be treated by selecting from the following: *Send All Calls to Voice Mail*, *Send Busy Calls to Voice Mail*, and *Send Unanswered Calls to Voice Mail*. Changes made via the web portal are not reflected in real time for Assistant–Enterprise. You must log in again to see the new values.

When the *Use unified messaging* option is selected, you can access your voice messages via e-mail and phone. Messages are sent as mail attachments to the e-mail address configured for your account.

"Use Phone Message Waiting Indicator" determines whether your phone provides an alternate dial tone and a visual indicator on some phone models to indicate that you have a message waiting.

If the *"Forward it to this e-mail address"* option is selected you will be able to access your voice messages only by e-mail. Messages are sent as mail attachments to the specified e-mail address, and are not available for retrieval by phone.

"Notify me by e-mail of the new voice message at this address" determines whether the system sends a notification e-mail to the specified address each time it records a voice mail. This notification will contain the date and time the voice message was recorded, but does not contain the content of the voice message itself as an attachment.

GREETING ONLY MAILBOX

The *Greeting Only Mailbox* page allows you to configure a greeting-only mailbox. When calls are directed to your voice mail, the caller hears your greeting but cannot leave a message.

Note: The *Greeting Only Mailbox* service page is disabled if you do not have the Voice Messaging service assigned.

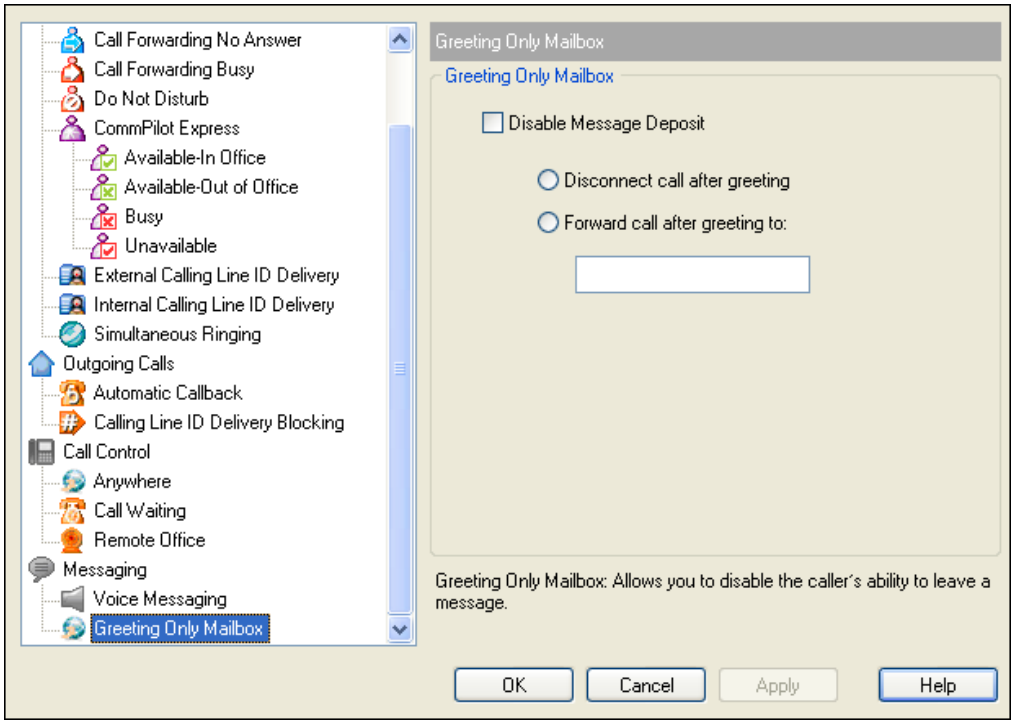

Figure 97 Services Dialog – Messaging: Greeting Only Mailbox

You can enable or disable message deposit by checking or unchecking the *Disable Message Deposit* check box.

Select one of the following options to specify how incoming calls should be handled when message deposit is disabled:

- Select Disconnect call after greeting.
- Select *Forward call after greeting* to and enter the number to forward calls to.

TROUBLESHOOTING

This section contains information that may aid those having difficulty using Assistant. If your problem is not listed in the index, contact your service provider for assistance.

ASSISTANT NOT VISIBLE IN OUTLOOK

If the Assistant toolbar is not visible in Outlook, follow these steps. If the problem is not solved, contact your service provider. The following steps and figures may vary depending on your version of Outlook.

To confirm that Assistant–Enterprise is installed:

1. Open Internet Explorer.
2. Click the Options icon in the Assistant toolbar.
3. Click **General** in the tree view on the left of the Options dialog.
4. Verify that the "version" area of the page lists *Clearspan Assistant–Enterprise*. If it lists only *Clearspan Assistant*, contact your service provider to upgrade to Assistant–Enterprise. If it lists *Clearspan Assistant–Enterprise* follow the next step.

Make the Assistant–Enterprise Toolbar visible:

1. Right-click an empty area of the toolbar region in Outlook. In Outlook 2010, select **File** and then **Options** and **Add-Ins**.

   A menu appears listing all the toolbars currently registered.

2. Make sure that the Assistant entries (*Telephony Toolbar Call Control* and *Telephony Toolbar Services*) are checked, as shown in *Figure 98 Outlook Toolbar Options*.

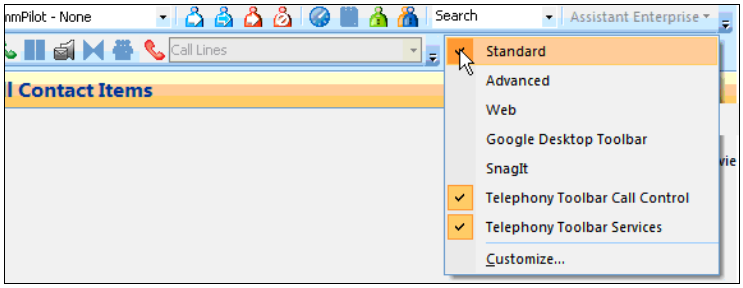

Figure 98 Outlook Toolbar Options

If the Telephony Toolbar entries are not listed, continue with the next step.

REGISTER ASSISTANT WITHIN OUTLOOK

1. Click on Help or About Microsoft Office Outlook. In Outlook 2010, select **File** > **Options** > **Add-Ins**, and then select **Disabled Items** from the **Manage** drop-down and click **Go**.

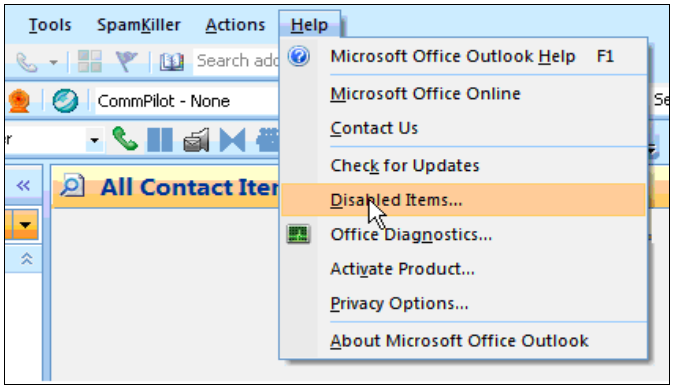

Figure 99 Help Dialog, Disabled Items

2. In the dialog box select *Disabled Items*. If the *Telephony Toolbar* is visible on the list, click **Enable** and restart Outlook.

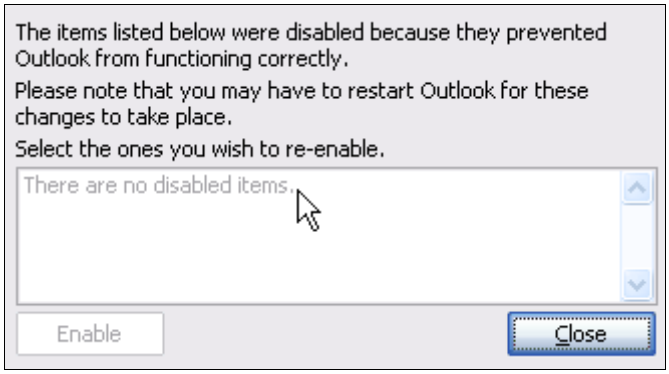

Figure 100 Disabled Items Dialog

I HAVE NOT BEEN LICENSED TO USE ASSISTANT

This error indicates that your service provider has not added the Assistant Client License to your list of services.

Contact your service provider to activate Assistant for your account.

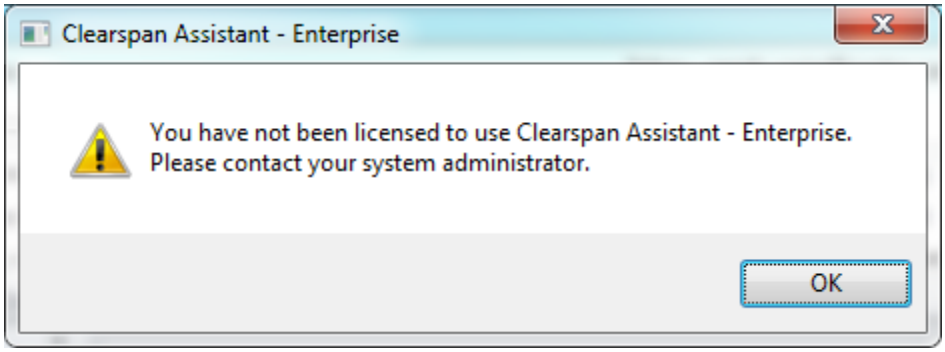

Figure 101 License Notification

ASSISTANT NOT VISIBLE IN INTERNET EXPLORER

If the Assistant toolbar is not visible in Microsoft Internet Explorer, follow these steps:

1. Right-click an empty area of the toolbar region in Explorer.

   A menu appears listing all the toolbars currently registered.

2. Make sure that the Assistant entries (*Telephony Toolbar Call Control, Telephony Toolbar Services* for Assistant–Enterprise) are checked, shown in *Figure 102 Internet Explorer Toolbar Options*.

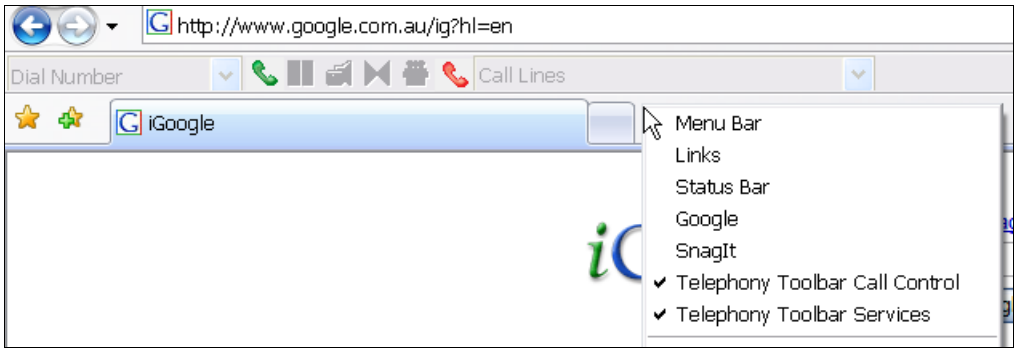

Figure 102 Internet Explorer Toolbar Options

If your problem is still not solved, contact your service provider.

KNOWN ISSUES

This section specifies the known issues of Assistant–Enterprise.

OUTLOOK 2007 LIMITATION

When the user performs a search, or opens a directory (such as the group directory) using the Toolbar in Outlook 2007, Outlook 2007 creates multiple "Telephony Toolbar" listings under "My Contacts". Only one of the entries is correct. Clicking on a duplicate entry displays an error message that says "The Operation Failed" and Outlook 2007 removes the entry. This is a side effect of Outlook 2007 shortcut folders and the error message can be ignored."

NO E-MAIL ADDRESS IN SEARCH RESULTS FOR OUTLOOK CONTACTS

When the user performs a search using the toolbar, search results do not include the e-mail address of Outlook-based contacts.

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