

## Mitel Assistant Application User Guide

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## Mitel Assistant Application

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## Mitel Assistant User Guide

**This chapter contains the following sections:**

- What is Mitel Assistant
- Pre-requisites
- Limitations
- Permissions
- System Requirements
- Adding Mitel Assistant
- Using Mitel Assistant
- Presence Status in Microsoft Teams and Mitel Assistant
- Removing Mitel Assistant

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

### 1.1 What is Mitel Assistant

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

### 1.2 Pre-requisites

- A Microsoft Teams account.
- Mitel recommends that you set any supported Mitel telephony application (see Supported Mitel Telephony Applications) as the default calling app in your device. The option to change the default app for calling is specific to the operating system in which you have deployed the extension. Click the following links for instructions on changing the default calling app specific to your operating system.
- Windows
- Mac OS
- If the default calling app of your device is Mitel One, you must configure certain settings (including configuration of Tel-URI) in your device's OS and the browser to be able to cross-launch Mitel One and place the call. For more information, see the Prerequisites section in Click to Dial Using Mitel One Web Application .
- Mi Collab users must ensure that Mi Collab Client 9.1 or later is installed. Mitel recommends that you install Mi Collab 9.1 or later for a seamless dialing experience. When Mi Collab Client (PC, Mac, or Android) is installed, it will register itself as the default handler for Tel-URI if no other application is selected. If any other application is already selected, then perform the following steps to configure Tel-URI manually for Mi Collab:
  1. From the System Settings, choose Default Apps.
  2. Under Default Apps, select the option, Choose default apps by protocol.
  3. From the list of default apps, click the Choose a default option to select the desired application.
  4. Select Mi Collab. The Tel-URI protocol is configured.
- If you want to use Mitel Assistant with your softphone, for example, a Mi Collab Client softphone, ensure that the softphone is enabled for your client application.

### 1.3 Limitations

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

### 1.4 Permissions

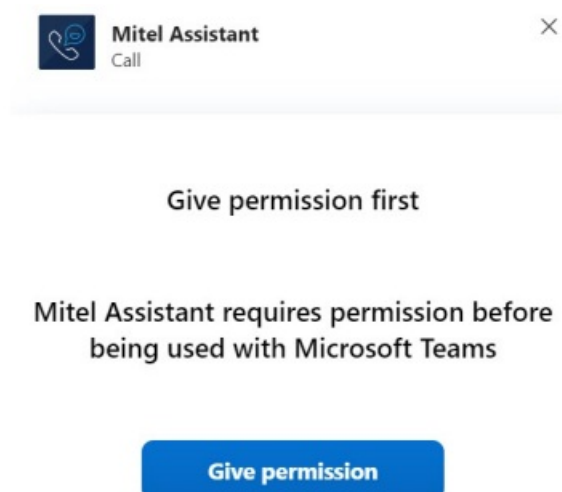
IT Administrator permissions to add Mitel Assistant to your Microsoft Teams

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

#### End-User permission to use Mitel Assistant with Microsoft Teams

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

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



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

### 1.5 System Requirements

Following are the minimum system requirements for deploying Mitel Assistant. Supported Operating System(Mi Collab Client)

Operating System	Version
Windows	10
macOS	10.14 or later

### Supported Browsers (Mitel Assistant)

Browser	Version
Google Chrome	102.0.5005.115 (64 bit)
Microsoft Edge	102.0.1245.41 (64 bit)
Mozilla Firefox	101

### Supported Mitel Telephony Applications

Application	Version
Mi Collab desktop Client	9.1 or later
Mi Collab PC Client Telephony-only mode	9.6 or later
Mitel One Web	1.13.1 or later
Mitel Dialer	2.2 or later

## 1.6 Adding Mitel Assistant



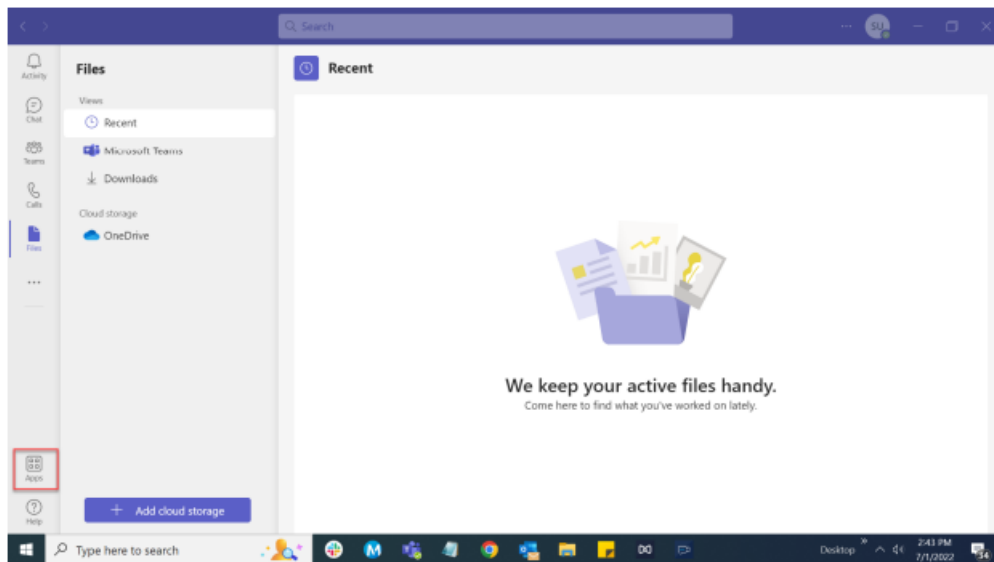
#### Note:

Mitel Assistant can be added to the MS Teams mobile application although it is not formally supported. When you add Mitel Assistant to the MS Teams mobile application, you will experience the following:

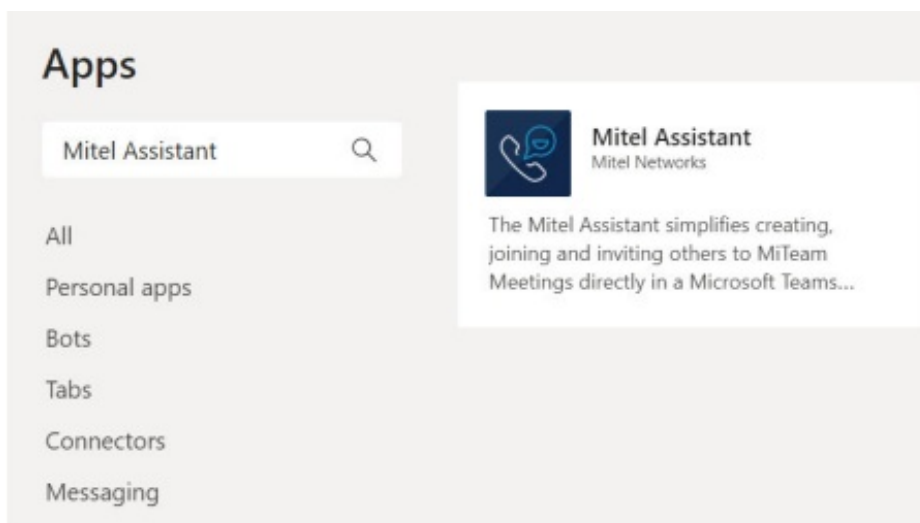
- On Android devices, if a call is initiated from the Mitel Assistant application, you are prompted to select an application if none are selected in the settings. Otherwise, the MS Teams native dialer is launched.
- On iOS devices, if a call is initiated from the Mitel Assistant application, the native dialer is cross-launched.

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

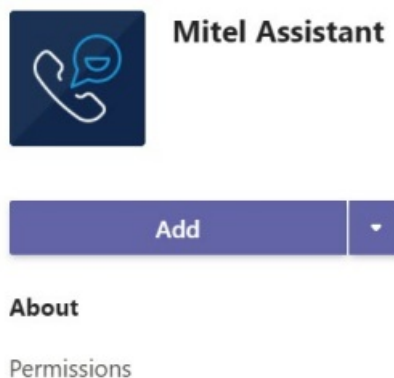
1. Click Apps in the lower left corner of your Microsoft Teams application. The Apps page within Microsoft Teams opens.



2. Type Mitel Assistant in the Search field.



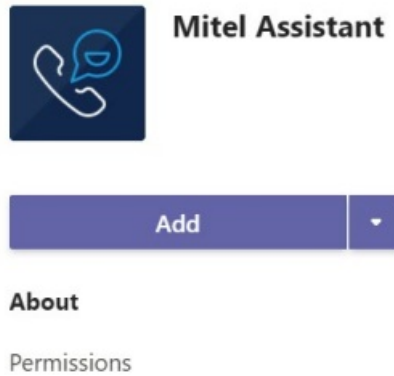
3. Click Mitel Assistant from the results panel. The app information panel opens.



### **Initiate phone calls and Mi Team Meetings seamlessly from Microsoft Teams.**

The Mitel Assistant simplifies placing calls with a Mitel call manager using the Mitel desk or softphone as the telephony endpoint, as well as creating, joining and inviting others to Mi Team Meetings, directly in a Microsoft Teams conversation. Mitel call managers feature advanced telephony for an exceptional user experience. With the Mitel Assistant, Microsoft Teams users will have access to all the call functionality and features they love. Mi Team Meetings is a multi-party video solution designed for those who want to work more efficiently and enhance workplace communications with seamless transitions between voice, video and chat capabilities to offer a true collaboration experience. With the Mitel Assistant for Microsoft Teams, users can quickly and easily create Mi Team Meetings directly in Microsoft Teams.

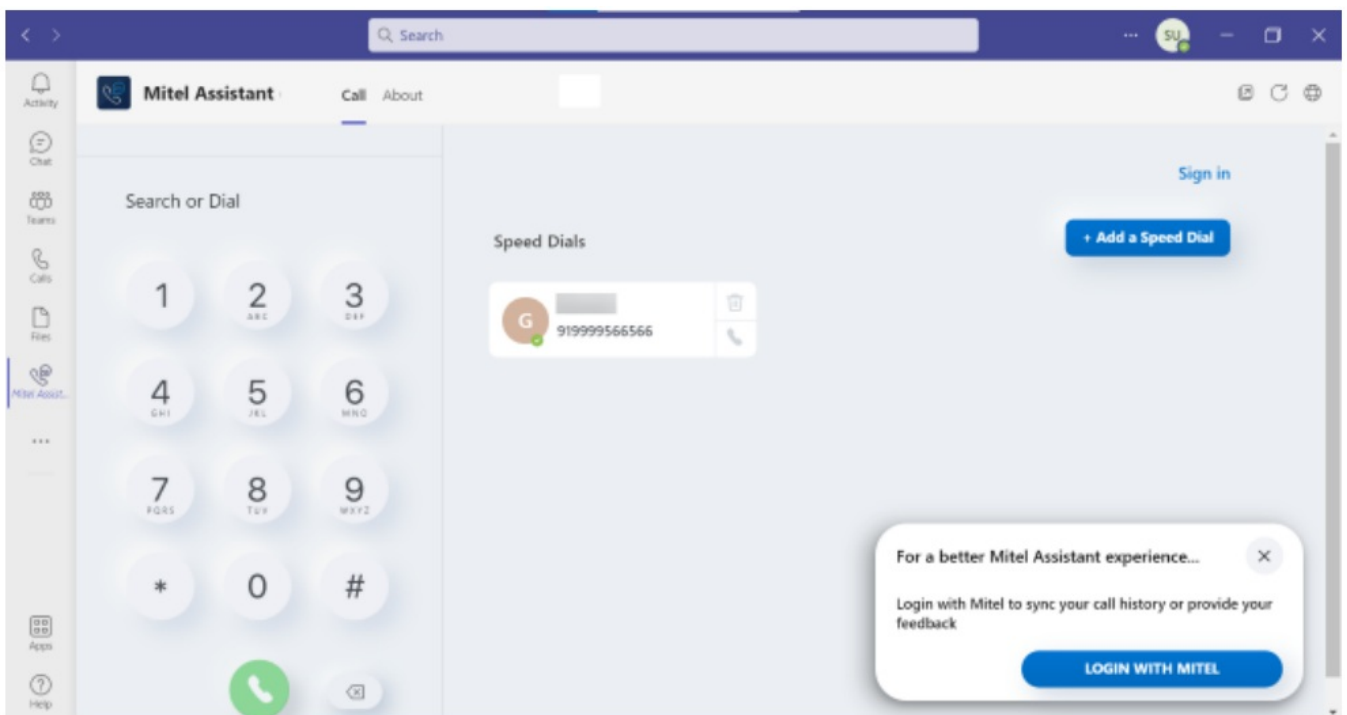
#### 4. Click Add.



#### **Initiate phone calls and Mi Team Meetings seamlessly from Microsoft Teams.**


The Mitel Assistant simplifies placing calls with a Mitel call manager using the Mitel desk or softphone as the telephony endpoint, as well as creating, joining and inviting others to Mi Team Meetings, directly in a Microsoft Teams conversation. Mitel call managers feature advanced telephony for an exceptional user experience. With the Mitel Assistant, Microsoft Teams users will have access to all the call functionality and features they love. Mi Team Meetings is a multi-party video solution designed for those who want to work more efficiently and enhance workplace communications with seamless transitions between voice, video and chat capabilities to offer a true collaboration experience. With the Mitel Assistant for Microsoft Teams, users can quickly and easily create Mi Team Meetings directly in Microsoft Teams.

Mitel Assistant will be added to your Microsoft Teams application, and you will be redirected to the Mitel Assistant Call screen. After adding Mitel Assistant, you can place a call to a contact using the dial pad, or by using the Speed Dials menu.



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

1. Click the icon\*\*\* in the sidebar menu. A dialog box opens displaying all the apps you have installed in your Microsoft Teams application.

2. Right-click the Mitel Assistant icon and click  . Mitel Assistant will be pinned to the sidebar menu of your MS Teams application.

## 1.7 Using Mitel Assistant

### Note:

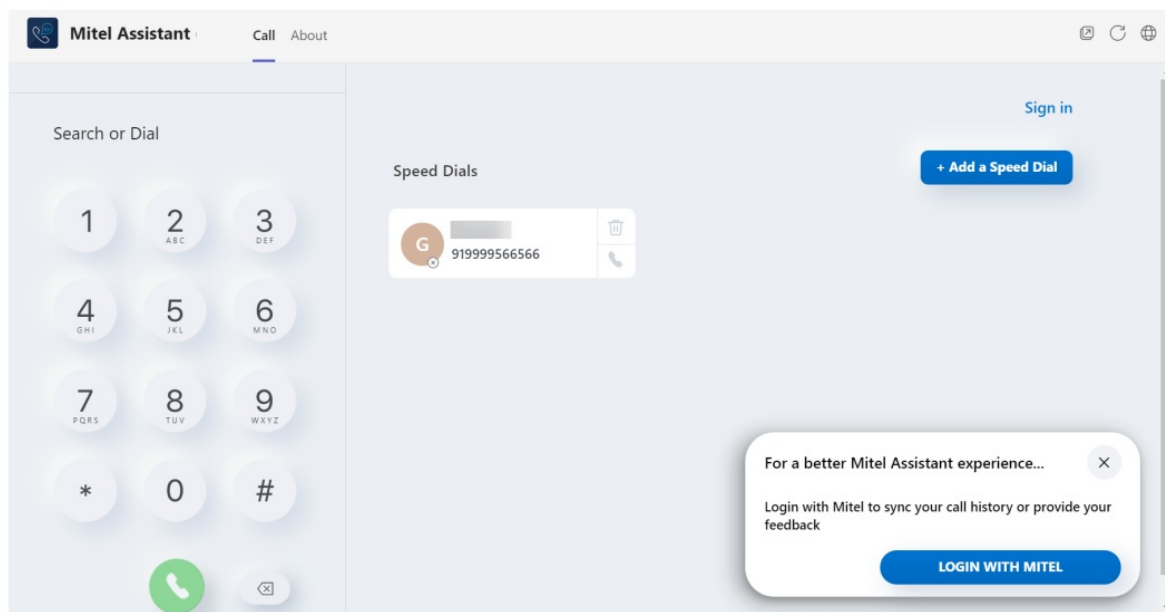
- This section describes how to place a call using Mitel Assistant if Mi Collab is set as the default calling app of your device. You can use the same steps to place a call if the default calling app of your device is any supported Mitel calling apps.
- If the default calling app of your device is Mitel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

### Note:

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

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

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### Note:

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

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

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

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

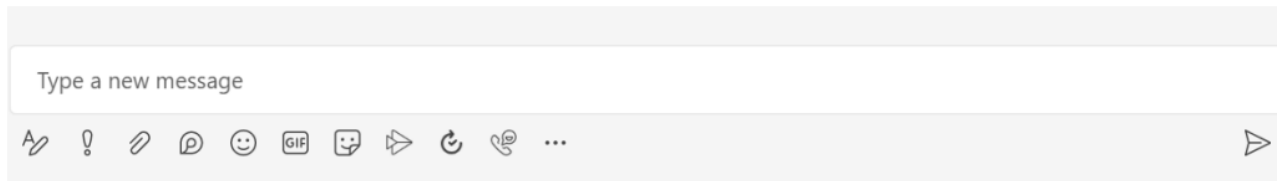
### Place a Call during a Chat

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

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

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

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




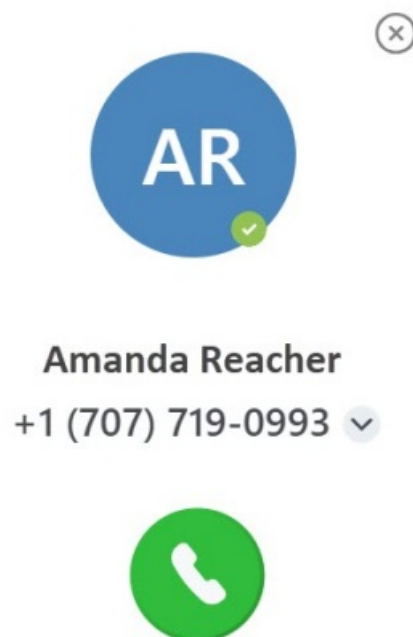
- If the Mitel Assistant app is not pinned to your chat window

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

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

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

3. Click the  icon to dial the default number




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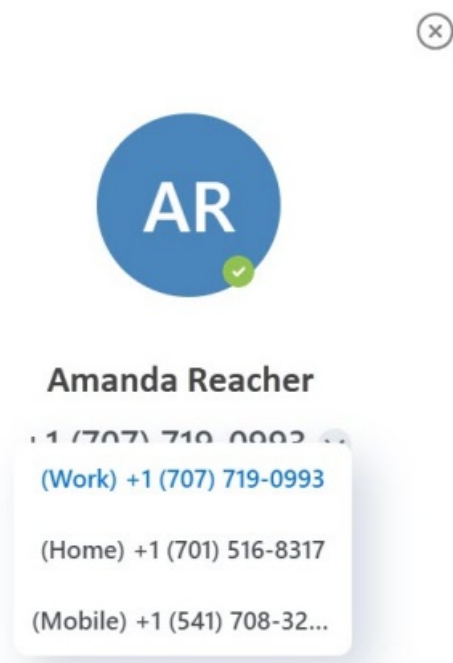
#### Note:

- By default, the telephone numbers of a contact displayed in the Mitel Assistant directory are synchronized from the Office phone, Home phone, and Mobile phone fields in the Azure Active Directory. However, the Azure Administrator of your organization can choose which fields can be synced with Mitel Assistant.

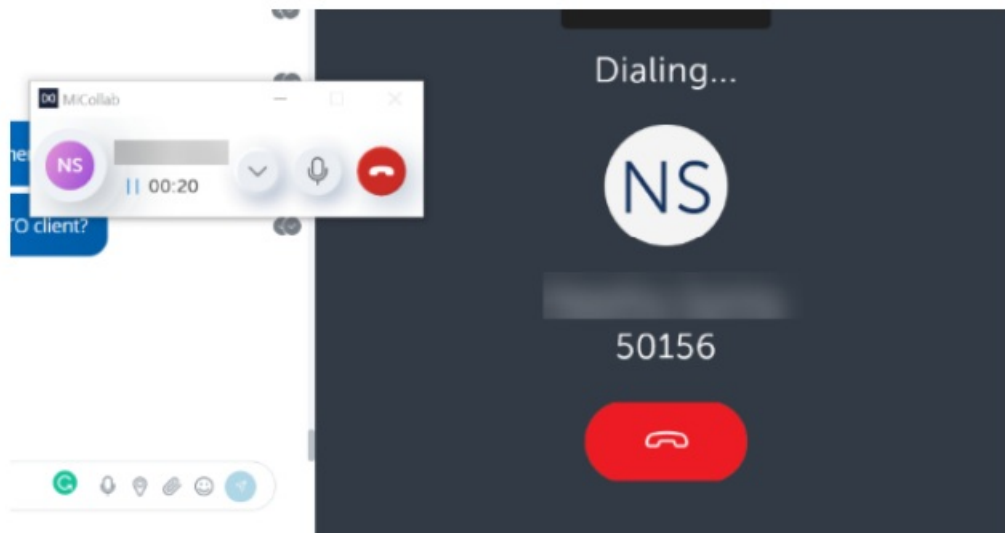
- If there is more than one telephone number for a contact, click the icon beside the default number, select the

number you want to dial from the drop- down menu, and click the  icon to dial that number.





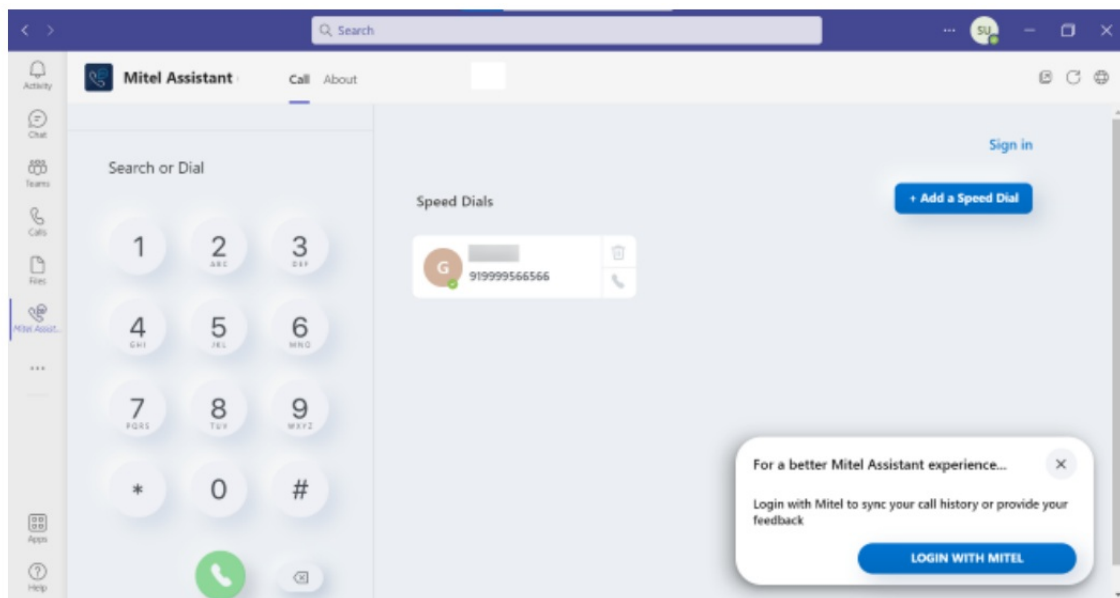
4. This will cross-launch the Mi Collab application and the call will be placed. An in call window is displayed with the caller's name, telephone number, and picture (if available).



## Place a Call using the Dial Pad

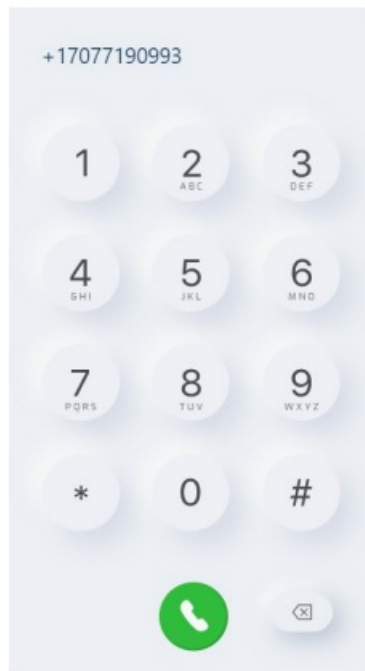
You can place a call to a number, or a contact in the Microsoft Teams or Outlook by using the dial pad in Mitel Assistant. To do this:


1. Select Mitel Assistant from the left navigation pane of your Microsoft Teams application. The Call page opens.



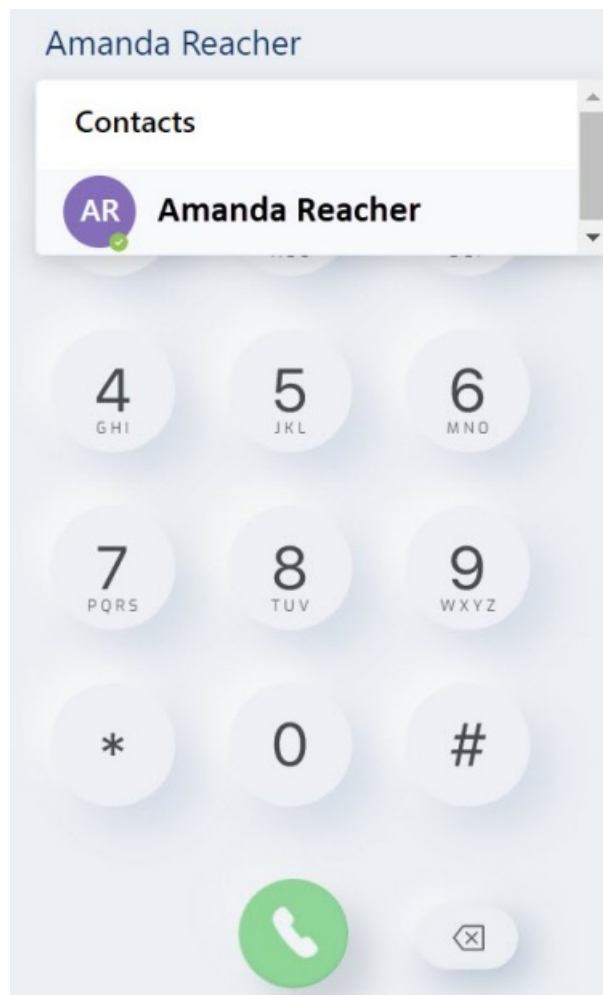
2. Do either of the following:


- Enter the phone number of the contact using the dial pad displayed in the Call screen and click the icon to dial the telephone number for this contact.



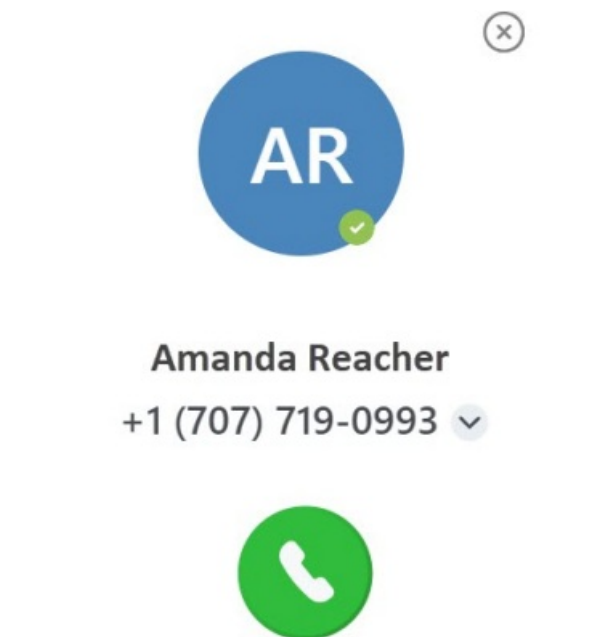
**Note:** You can do a free dial by pasting a contact number in the Search or Dial field and then clicking the  icon.

- Type the name of the contact in the Search or Dial field displayed above the dial pad. The Search field displays a list of contacts whose names match the letters that you type. Click the name to select that contact.

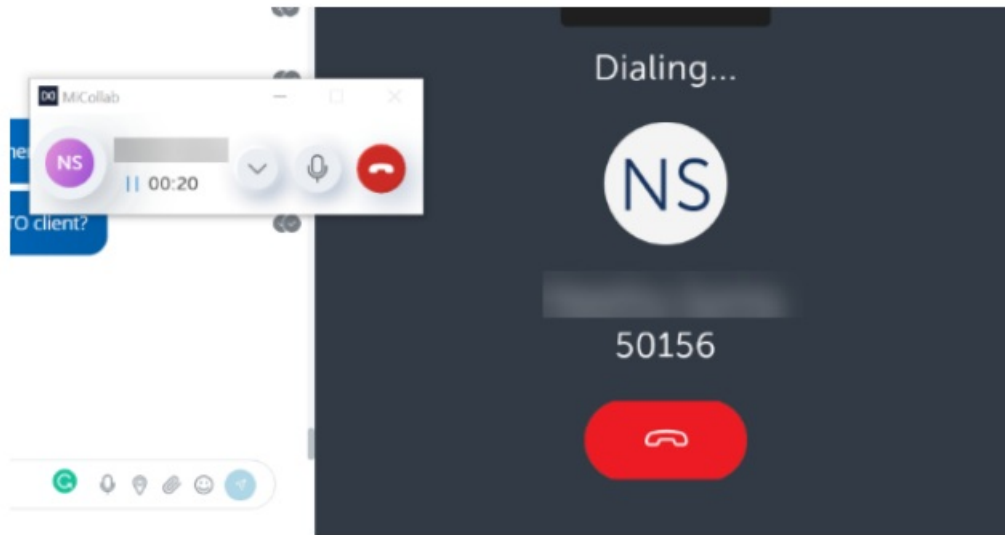


A window opens displaying the name, default number, and avatar of the contact. Click the  icon to dial the default number of the contact.

#### **Mitel Assistant User Guide**

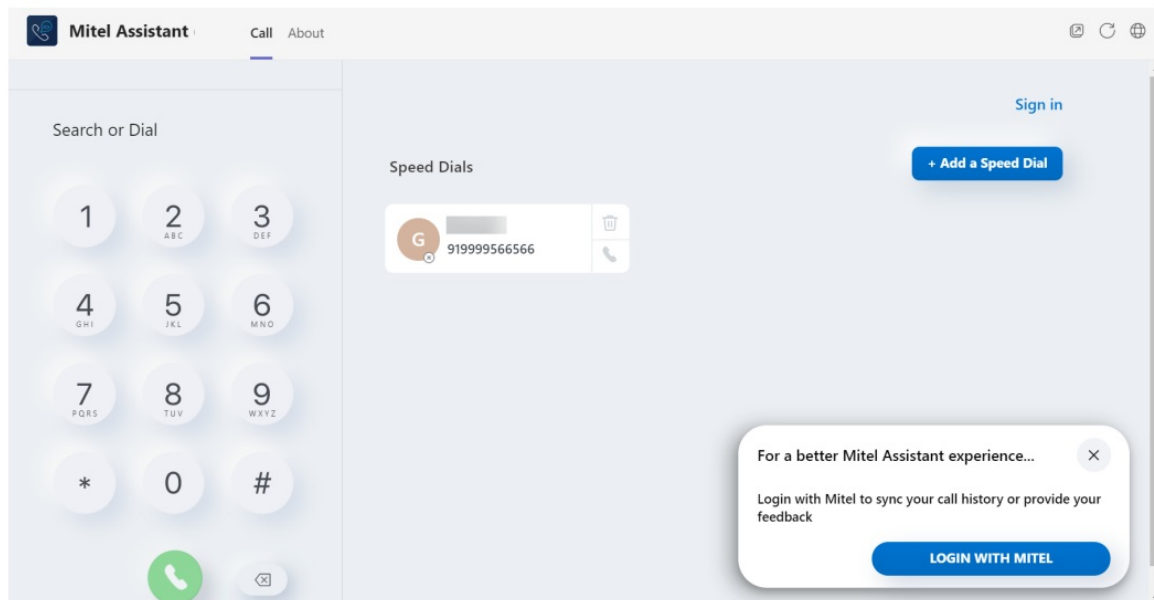


3. This will cross-launch the Mi Collab application and the call will be placed. An incall window is displayed with the caller's name, telephone number, and picture (if available).



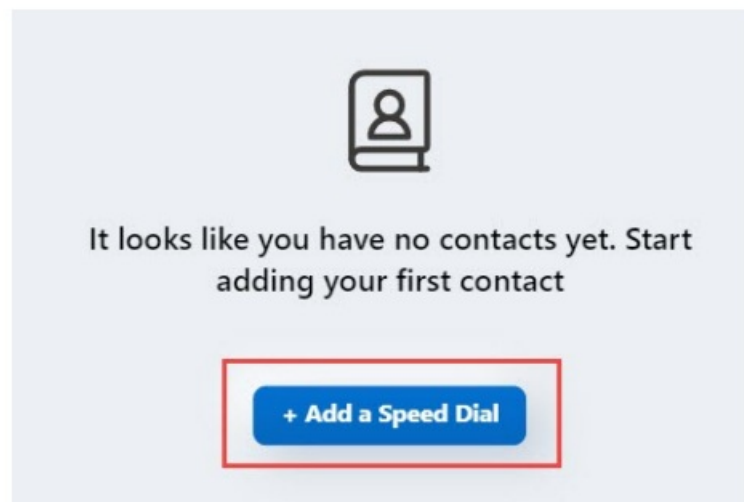
### Place a Call using Speed Dial

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



**To add a contact as a speed dial:**

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




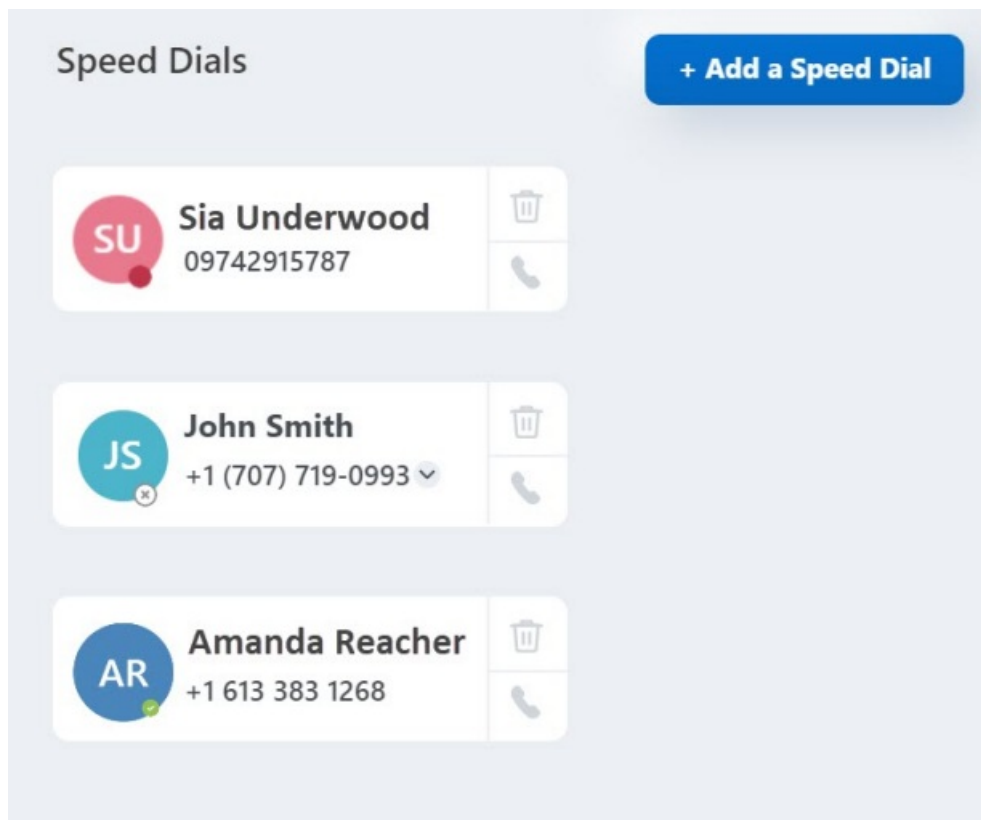
2. In the Search field, type the name of the contact. The Search field displays a list of contacts whose names match the letters that you type. Hover over the name of the contact you want to add, and click ADD to add the

contact as a speed dial. Clicking Cancel cancels the operation.

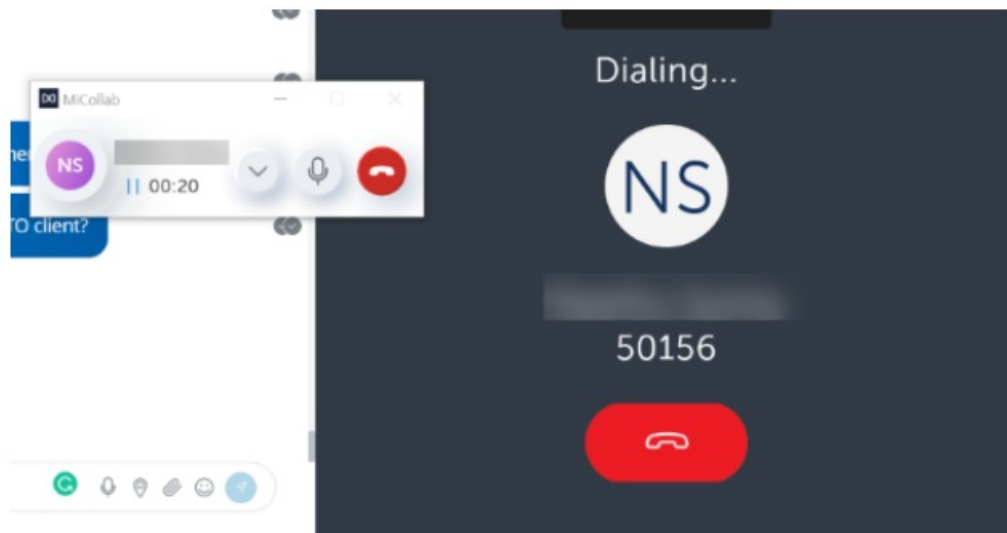


To place a call using speed dial:



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




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



### Note:

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

### To delete a speed dial:

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

Delete

Are you sure you want to delete John Smith?

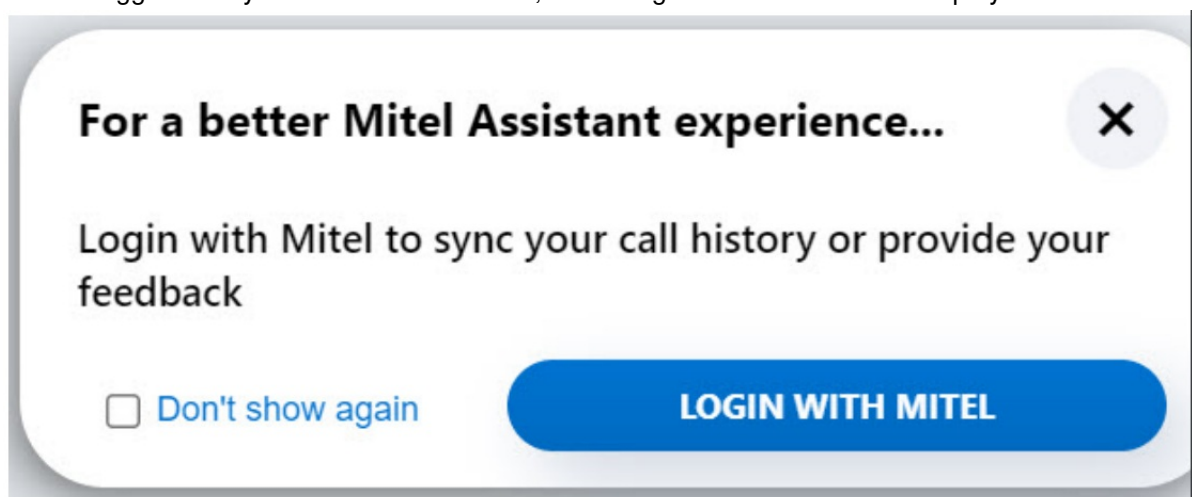
Delete

Cancel

### Call History


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

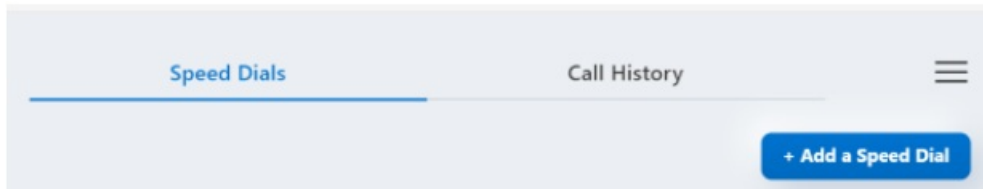
If you have not logged in to your Cloud Link account, a message as shown below is displayed:



## To log in to your Cloud Link account from Mitel Assistant:

1. Click **LOGIN WITH MITEL** or click **Sign in** above the +Add a Speed Dial button.
2. Enter your login credentials in the **Sign into Mitel** pop up that opens and click **Next**.

You are successfully logged in to your Cloud Link account. The Call History tab and a  button are displayed next to the **Speed Dials** tab.






### **Note:**

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



## To view your call history:

1. Click the Call History tab next to the Speed Dials tab.

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


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

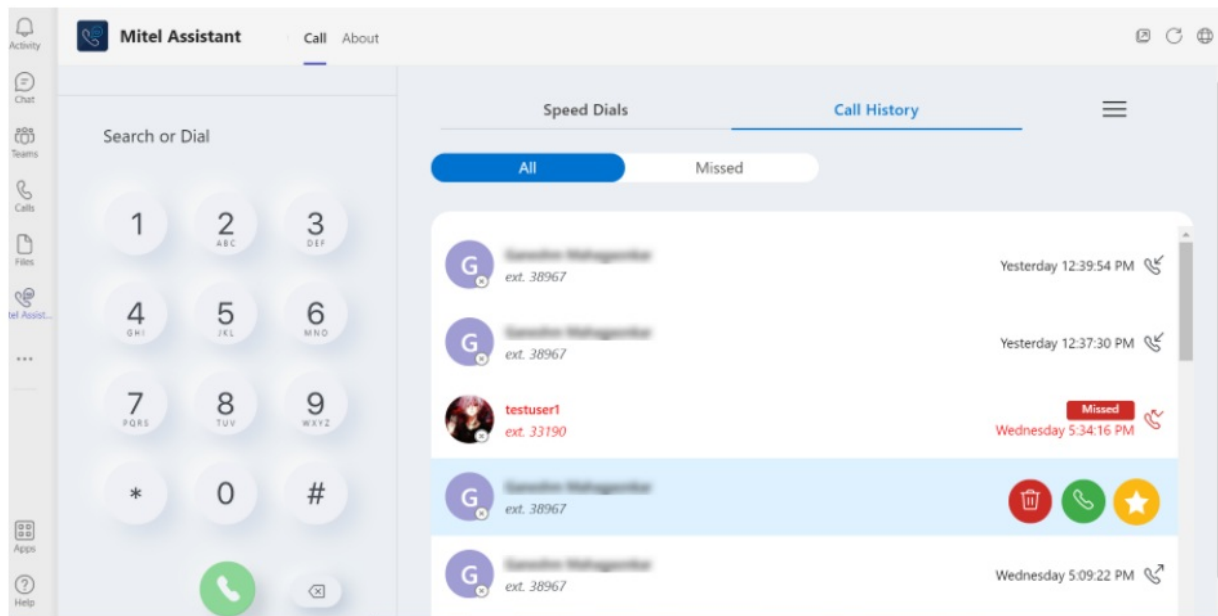
When you hover over a call log entry, the following options are displayed:

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

### **Note:**

With Mi Voice Business, Mi Collab version 9.7 is required for placing calls from the **Call History** tab.

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



### To log out from the Cloud Link account or to provide feedback:

1. Click the button, and do either of the following:
  - Click **Issues and Feedback** to raise an issue or provide feedback.
  - Click **Log** out to log out from your Cloud Link account.

#### **Note:**

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

### 1.8 Presence Status in Microsoft Teams and Mitel Assistant

If your organization has a Mitel Mi Voice Office 400, MI Voice 5000, MI Voice Business, or a MI Voice MX-ONE PBX deployment, your administrator can deploy a Cloud Link gateway integration and enable the Cloud Link-to-MS Teams Presence Integration feature. This synchronizes your PBX presence status. Thus, when you are Busy on the phone, you will appear Busy to other users in the Teams client.

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

Teams automatically sets your presence status in some cases; for example, when you are in a Teams audio call or in meeting. To explicitly set the status yourself, go to your profile at the top of Teams and select one from the list. Similarly, the Cloud Link-to-MS Teams Presence Integration feature will synchronize your presence status from PBX to Teams. Therefore, if you are on a call with your desk phone or Mi Collab/Mitel One soft phone, you will appear Busy in Teams.

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

#### **Note:**

This is supported only for Mi Voice Office 400.

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

#### **Note:**

This is not synchronized back with your Mi Collab/Mitel One client or to PBX.

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



For a high-level perspective on how to deploy and integrate Cloud Link solution with Microsoft Teams, see **MS Teams Solution Guide**.


1.9 Removing Mitel Assistant

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

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Documents / Resources

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