

# User Manual

## Mitel Connect

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## 1 User Guide

### 1.1 Login Procedure

#### 1.1.1 Mitel Connect Environments

There are two Mitel Connect instances available.

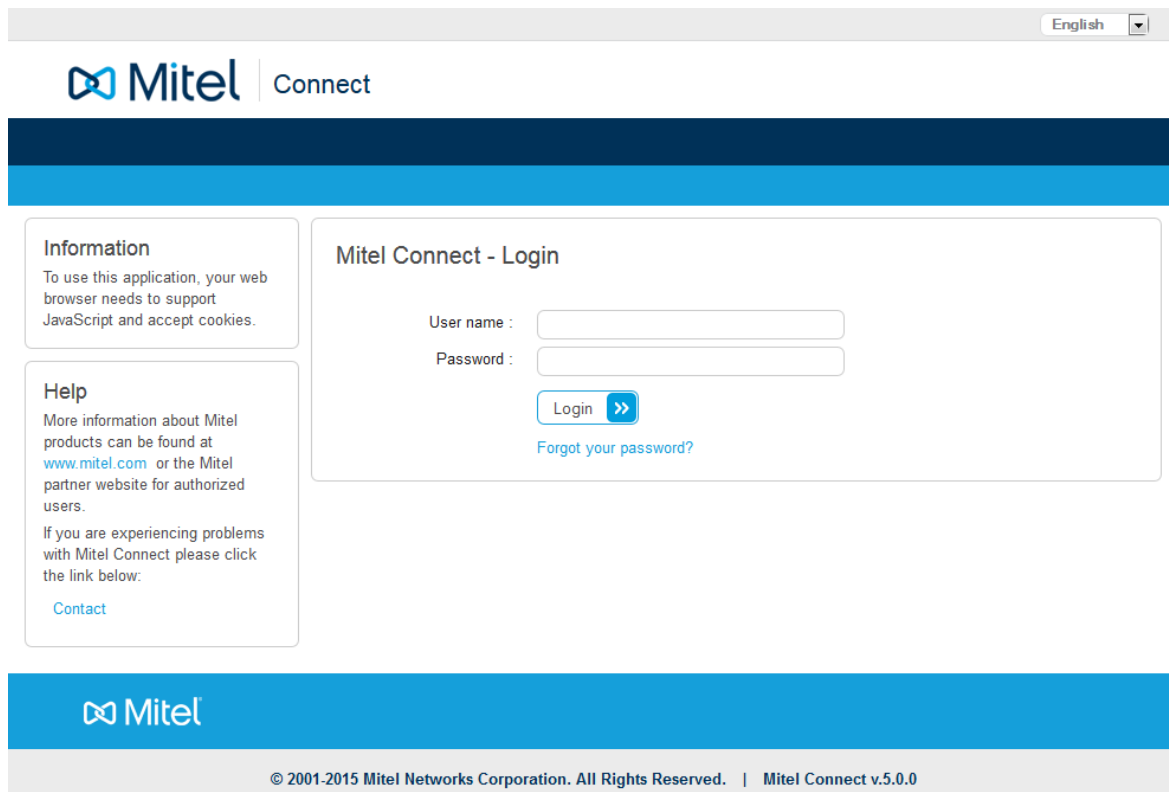
**Production:** <https://connect.mitel.com/>

**Training:** <https://training.connect.mitel.com/>

#### 1.1.2 Login Form

If you are not logged in yet, Mitel Connect will forward you to a login form.

Please enter your user name and password to proceed.



The screenshot shows the Mitel Connect login interface. At the top right, there is a language dropdown menu set to "English". The main header features the Mitel logo and the text "Connect". Below the header, there are two columns. The left column contains "Information" (stating that JavaScript must be enabled and cookies accepted) and "Help" (providing links to Mitel products and a "Contact" link). The right column is titled "Mitel Connect - Login" and contains input fields for "User name" and "Password", a "Login" button with a right-pointing arrow, and a link for "Forgot your password?". The footer includes the Mitel logo and copyright information: "© 2001-2015 Mitel Networks Corporation. All Rights Reserved. | Mitel Connect v.5.0.0".

#### User name

- Please use their registered e-mail address as user name.

#### Password

- Please use your Mitel Connect password to login


### 1.1.3 Request a new Password

If you lost or forgot your Mitel Connect password, you can request a new one by using the “Forgot your password?” link below the login form.

#### Password request

Please enter your Mitel Connect user name below.  
You will get an E-mail containing a link to reset your password.

User name\* :

Captcha : 

Text shown above\* :

\* indicates a required field

To request a new password, you have to enter:

- Your Mitel Connect user name
- A Captcha control input  
(enter the text displayed above the input field)

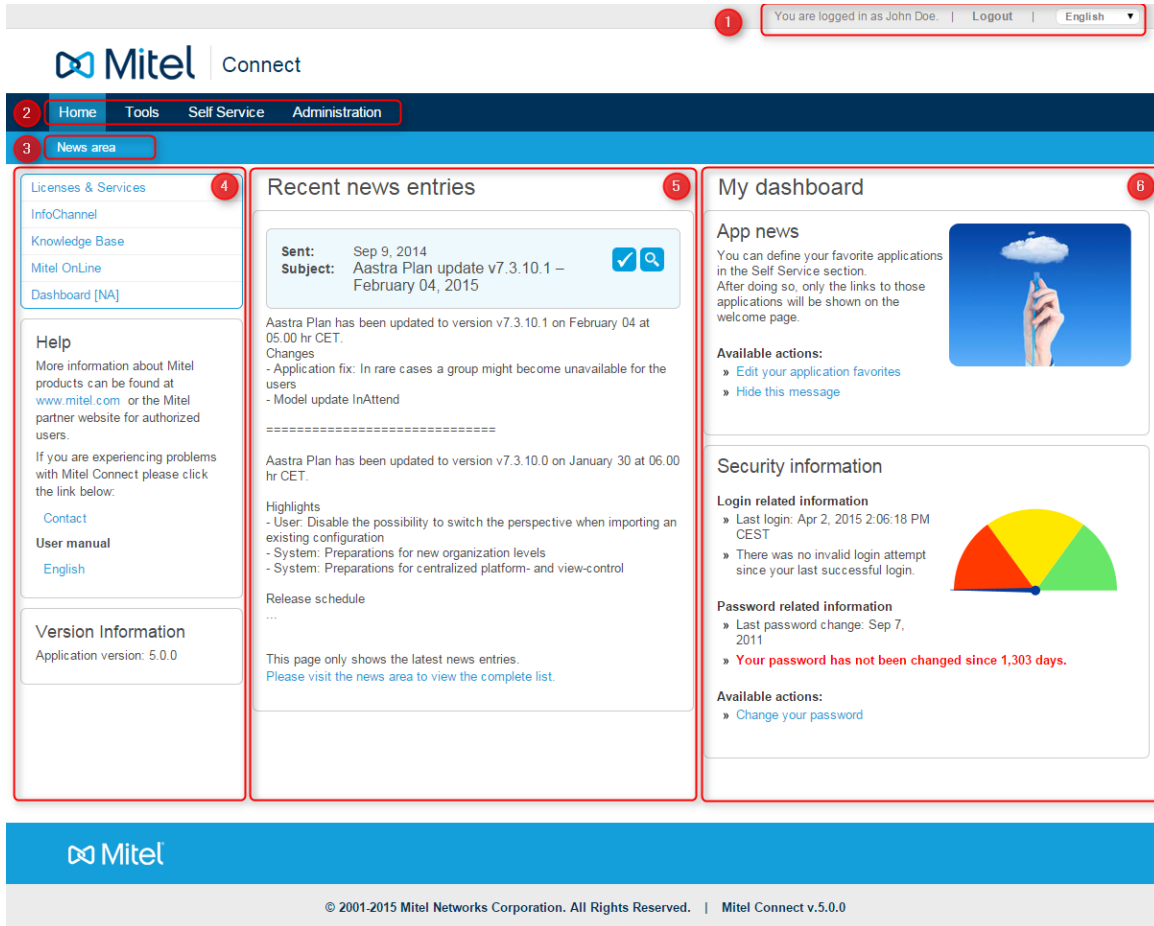
After submitting this form, you will receive an e-mail containing a special link to Mitel Connect.

This link will open a password form which allows you to enter a new password.

## 1.2 Welcome Page

The Welcome page consists of the following sub sections:

1. Service information
2. Main menu
3. Second level menu
4. Context content column
5. News content column
6. Dashboard content column



The screenshot shows the Mitel Connect interface. At the top right, a user is logged in as John Doe, with options for Logout and English. Below this is a navigation bar with Home, Tools, Self Service, and Administration. A secondary navigation bar highlights the News area. The main content area is divided into three columns:

- Column 1 (Left):** Contains 'Licenses & Services' (InfoChannel, Knowledge Base, Mitel OnLine, Dashboard [NA]), 'Help' (with links for Contact, User manual, English), and 'Version Information' (Application version: 5.0.0).
- Column 2 (Middle):** Titled 'Recent news entries', it shows a news item about an Aastra Plan update v7.3.10.1 from February 04, 2015. The text includes details about the update, changes, and highlights.
- Column 3 (Right):** Titled 'My dashboard', it features 'App news' (with an image of a hand pointing to a cloud), 'Security information' (with a pie chart), and 'Login related information' (showing last login on Apr 2, 2015). It also includes 'Password related information' (showing last password change on Sep 7, 2011) and a warning: 'Your password has not been changed since 1,303 days.' Available actions include 'Edit your application favorites', 'Hide this message', and 'Change your password'.

At the bottom, the footer contains the Mitel logo, copyright information for 2001-2015 Mitel Networks Corporation, and the version 'Mitel Connect v.5.0.0'.

### 1. Service information:

- Displays your complete name
- Offers the possibility to log out
- Offers the possibility to change the user interface language, the following are supported:
  - English
  - French
  - Spanish
  - Italian
  - Portuguese
  - German

**2. Main menu:**

- Depending on your privileges you will find links to all main areas of Mitel Connect here

**3. Second level menu:**

- Provides access to the news area which grants access to all accessible news entries

**4. Context content column:**

- At the top of this area you will find links to other applications which you are allowed to access
- The “Help” box offers you the possibility to download the latest version of this manual
- When reporting on bugs please always refer to the version number displayed in the “Version Information” box

**5. News content column:**

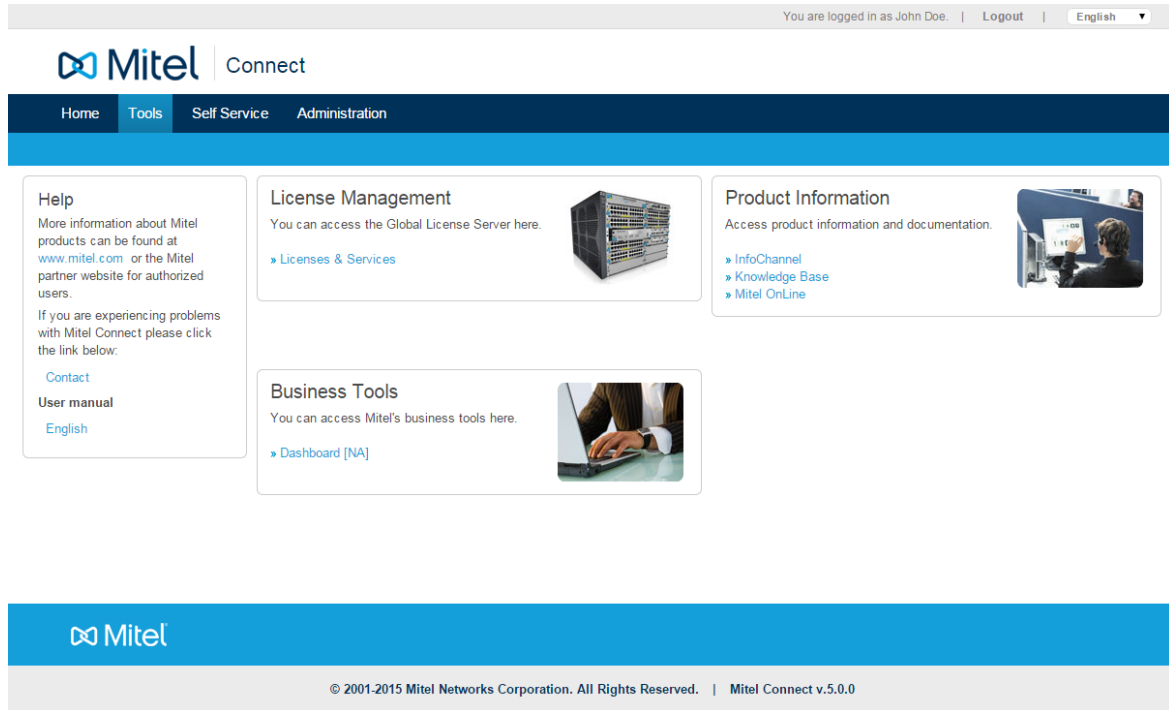
- This area will show the latest Mitel business tools related news
- You are able to hide news by marking them as read

**6. Dashboard content column:**

- Displays personalized information in so-called “dashlets”
- “Security information” dashlet:
  - Provides you textual and graphic indication showing whether your password can be considered as secure
  - It contains the following information:
    - Date and time of your last (previous) login
    - Number of invalid login attempts since this time
    - Date of the last password change
    - Number of days since the last password change
- “App news” dashlet:
  - Informs about the application favorites functionality
  - Reports about new applications becoming available for you (only if the application favorites feature has been activated)

### 1.3 Tools Section

The Tools section provides additional information and groups all available applications.



The screenshot shows the Mitel Connect user interface. At the top right, it indicates the user is logged in as John Doe, with options for Logout and a language dropdown set to English. The main navigation bar includes Home, Tools (which is highlighted), Self Service, and Administration. The Tools section is divided into four main areas:

- Help:** Provides information on where to find product details (www.mitel.com or partner websites) and a link to contact support if there are issues.
- License Management:** Offers access to the Global License Server and a link to Licenses & Services, accompanied by an image of server racks.
- Product Information:** Provides access to product information and documentation, with links to InfoChannel, Knowledge Base, and Mitel OnLine, accompanied by an image of a person at a computer.
- Business Tools:** Offers access to Mitel's business tools, with a link to the Dashboard [NA], accompanied by an image of hands typing on a laptop.

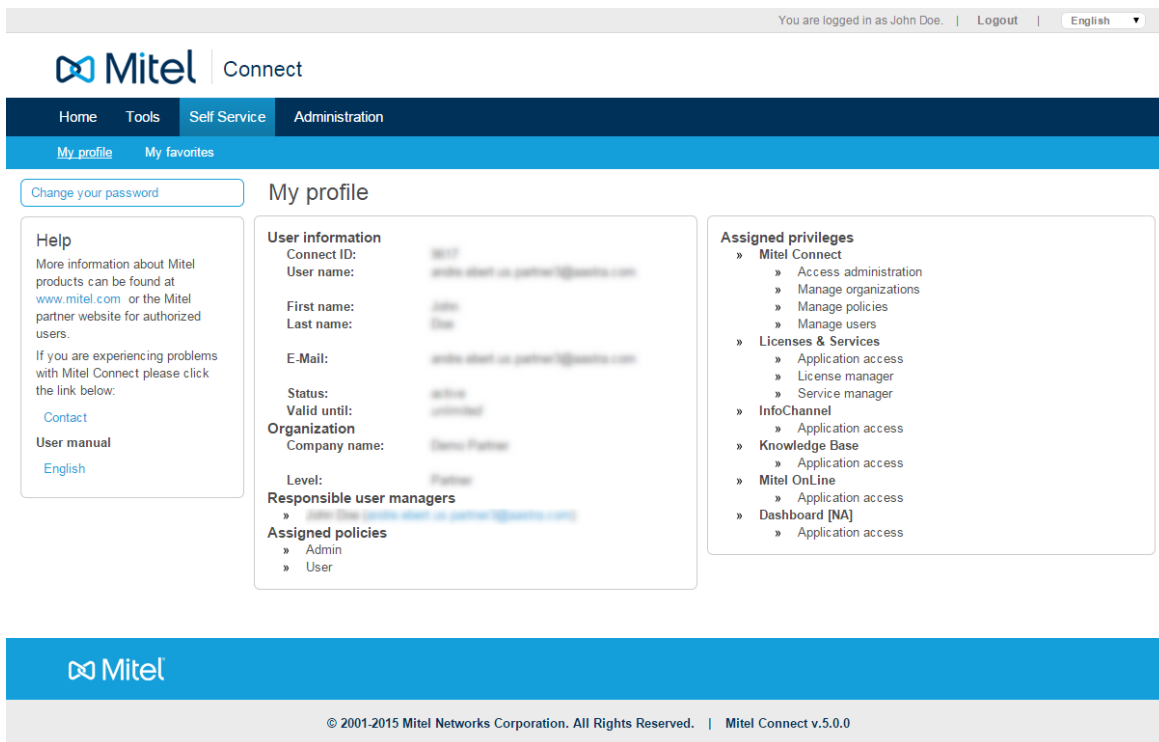
The footer of the page contains the Mitel logo and the copyright notice: © 2001-2015 Mitel Networks Corporation. All Rights Reserved. | Mitel Connect v.5.0.0

## 1.4 Self Service Section

Within the Self Service section you can view your user profile, change your password and update your application favorites.

The profile page gives you an overview about the data related to your account. Separate lists show which policies and privileges you own.

Please note that it also includes a list with the user managers of your organization. Those are your contacts in case you need additional privileges, access to other applications or Mitel Connect accounts for other people.



You are logged in as John Doe. | Logout | English ▾

Mitel Connect

Home Tools **Self Service** Administration

My profile My favorites

Change your password

### My profile

**Help**

More information about Mitel products can be found at [www.mitel.com](http://www.mitel.com) or the Mitel partner website for authorized users.

If you are experiencing problems with Mitel Connect please click the link below:

[Contact](#)

[User manual](#)

[English](#)

**User information**

Connect ID: 1017

User name: john.doe@partner@mitel.com

First name: John

Last name: Doe

E-Mail: john.doe@partner@mitel.com

Status: active

Valid until: unlimited

**Organization**

Company name: Service Partner

Level: Partner

**Responsible user managers**

- » John Doe (john.doe@partner@mitel.com)

**Assigned policies**

- » Admin
- » User

**Assigned privileges**

- » Mitel Connect
  - » Access administration
  - » Manage organizations
  - » Manage policies
  - » Manage users
- » Licenses & Services
  - » Application access
  - » License manager
  - » Service manager
- » InfoChannel
  - » Application access
- » Knowledge Base
  - » Application access
- » Mitel OnLine
  - » Application access
- » Dashboard [NA]
  - » Application access

Mitel

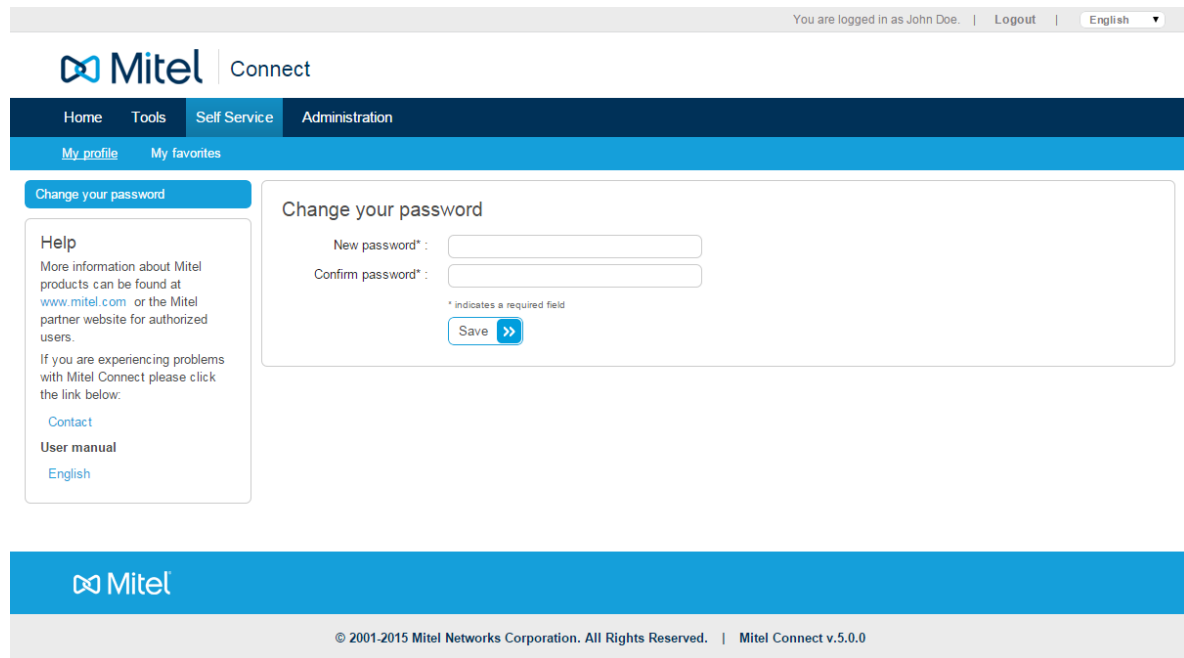
© 2001-2015 Mitel Networks Corporation. All Rights Reserved. | Mitel Connect v.5.0.0



### 1.4.1 Managing your Password

Via the “Change your password” link you can update your Mitel Connect password at any time. It is required that your password has certain strength and it is not possible to set your current one as new password again.

*Mitel recommends changing the password every 90 days.*



You are logged in as John Doe. | Logout | English ▼

Mitel Connect

Home Tools Self Service Administration

My profile My favorites

Change your password

Help  
More information about Mitel products can be found at [www.mitel.com](http://www.mitel.com) or the Mitel partner website for authorized users.  
If you are experiencing problems with Mitel Connect please click the link below:  
[Contact](#)  
[User manual](#)  
[English](#)

Change your password

New password\* :

Confirm password\* :

\* indicates a required field

Save >>

Mitel

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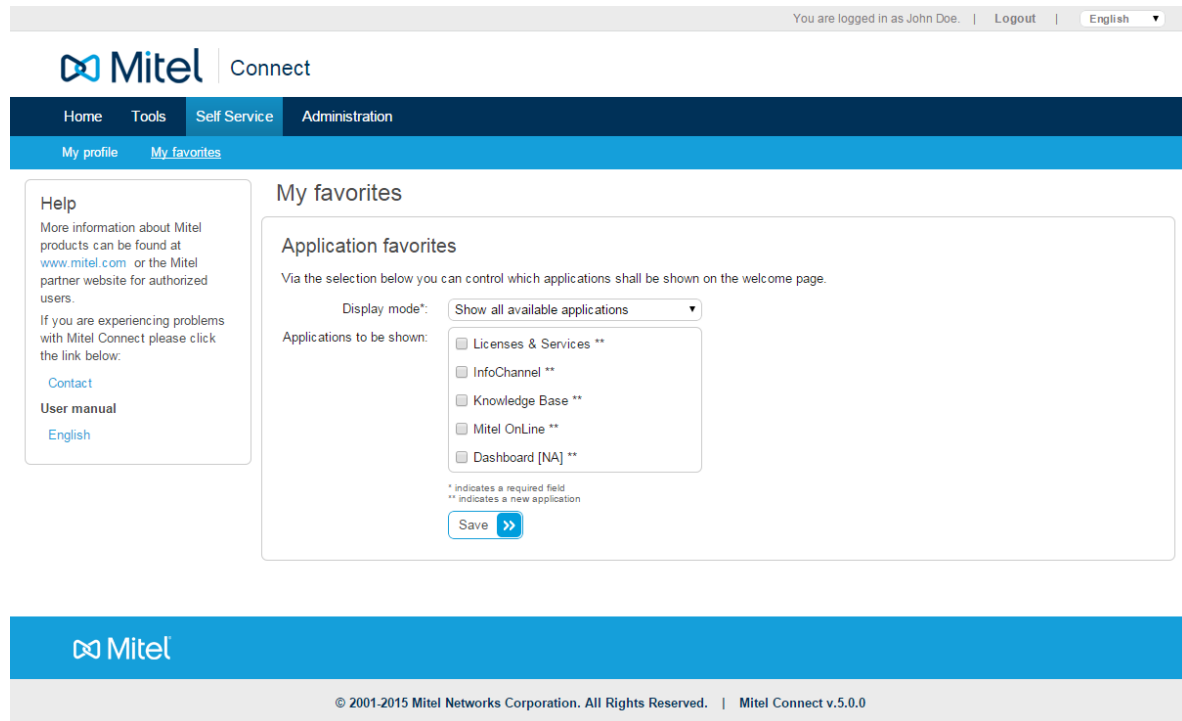
### Password strength rules

An Mitel Connect password has to match at least four of the following rules:

1. The password must be longer than five characters.
2. The password must be longer than eight characters.
3. The password must contain at least one upper case letter.
4. The password must contain at least one lower case letter.
5. The password must contain at least one number.
6. The password must contain at least one special character.

## 1.4.2 Manage Favorites

The favorites management which is reachable via the “My favorites” link allows you to customize which application link shall be displayed on the welcome page. By hiding unnecessary links you keep the list on the welcome page clear/clean.



The screenshot shows the Mitel Connect user interface. At the top right, it indicates the user is logged in as John Doe, with options for Logout and English. The main navigation bar includes Home, Tools, Self Service, and Administration. Below this, there are links for My profile and My favorites. The 'My favorites' section is active, showing 'Application favorites'. It includes a 'Display mode' dropdown set to 'Show all available applications' and a list of applications to be shown: Licenses & Services \*\*, InfoChannel \*\*, Knowledge Base \*\*, Mitel OnLine \*\*, and Dashboard [NA] \*\*. A 'Save' button is at the bottom. A help sidebar is visible on the left, and a footer at the bottom contains the Mitel logo and copyright information: © 2001-2015 Mitel Networks Corporation. All Rights Reserved. | Mitel Connect v.5.0.0

There are two display modes available:

1. Show all available applications
  - By selecting this mode links for all accessible applications are shown on the welcome page.
2. Only show applications selected below
  - Only the links for the selected applications are shown on the welcome page.
  - The “App News” dashlet will inform you in case new applications become accessible.

You can update the favorite settings and shown applications at any time.

## 2 Administration Guide

### 2.1 Wording

#### Organization

An organization represents a company. Each organization belongs to one of the following levels:

1. Corporate
2. Region
3. CSU
4. Partner
5. Direct Sales
6. Reseller
7. End Customer

If an organization is set to inactive, all users within and below it won't be able to login anymore.

#### Categories

Categories are used to group organizations in the Mitel Connect organization tree. They also allow defining templates for privileges and portfolios which are applied to the connected organizations.

#### Policy

Policies are always assigned to a specific organization and define a set of privileges which will be granted to the users. If a user is assigned to multiple policies, he will own all privileges combined from these policies.

If a policy is inactive the user won't get any of the privileges assigned to it.

#### User Account

Every person should only have one user account. In addition each account should only be used by one single person.

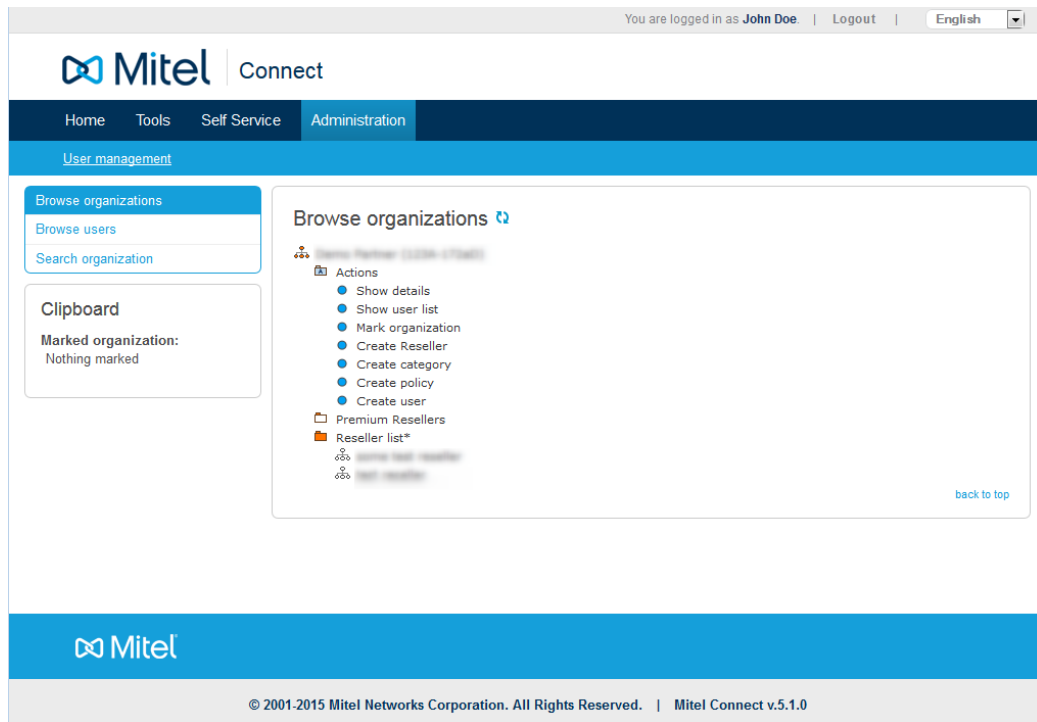
User accounts are always connected to a single organization. An account receives its privileges by owning policies.

Users having administrative rights are allowed to manage all user accounts within and below their own organization.

Accounts need to be activated before they can be used and can be set to inactive anytime. Inactive users are not able to login anymore.







## 2.2 Browse Organizations

The administration area allows you to view and (depending on your privileges) edit organizations, policies and users.




You will notice some icons in the Mitel Connect tree view, which indicate the type of a node.

### The following icons are available:

-  Icon used for organizations
-  A folder icon used for grouping the available actions
-  A folder icon used for grouping organizations (based on category or organization level)
-  Icon used for a policy (groups multiple user accounts)
-  Icon used for a user account
-  Icon used for an action (e.g. edit, create, etc.)

You can open and close nodes by clicking on their name. Below each organization you will find folders like:

- Actions: granting you access to management functionality
- Partners / Resellers / etc.: allowing you to view organizations below the current one

If you want to refresh the whole tree you can click on the refresh button  next to the “Browse organizations” headline.

*Items (categories or policies) with names ending on an asterisk (\*) have been automatically created by Mitel Connect.*

If you are allowed to view inactive elements (e.g. organizations, policies, users) you might recognize stricken red text. This is an indicator for an inactive element.


### 2.2.1 Organization Details View

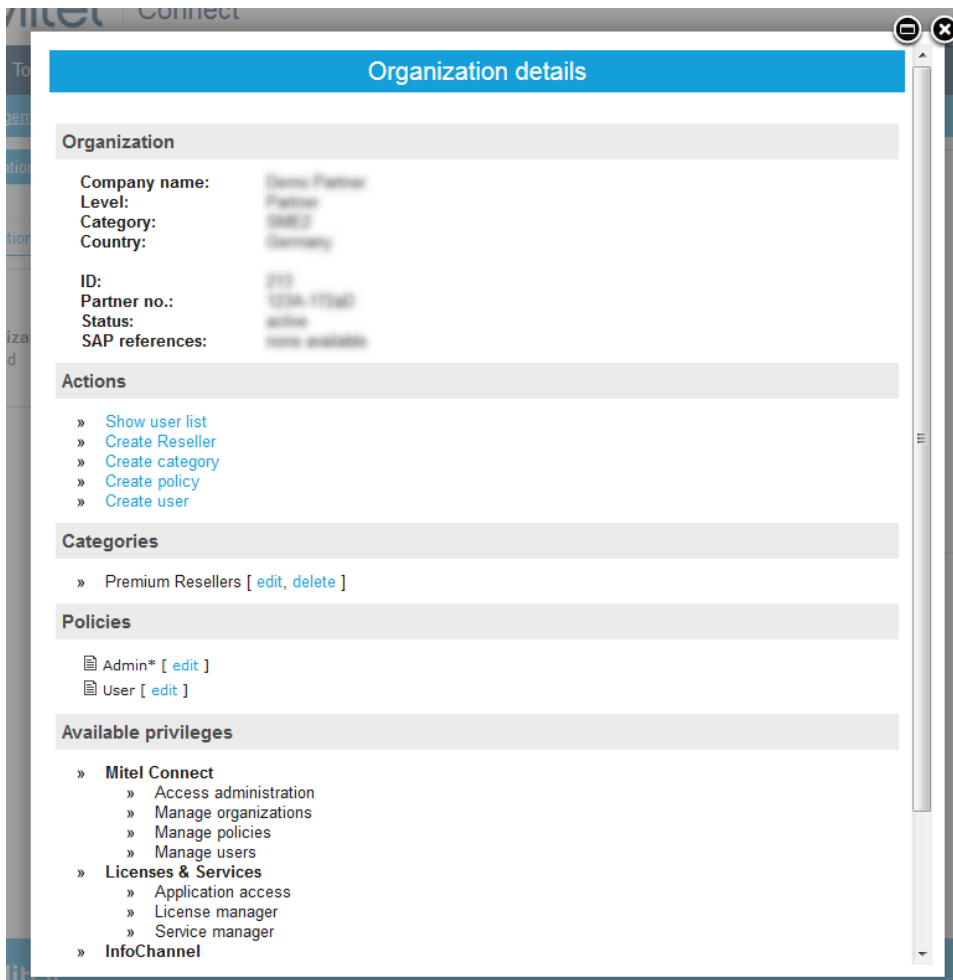
You can access this view by clicking on the “Show details” action in the organizations “Actions” folder.

The view will be opened in an on-page popup (without the need for a new browser window).

It shows you all elements assigned to an organization:

- The organization details (company name, level, country, category, ID, customer number)
- All actions available at this level
- All categories available at this level
- Existing policies (incl. the users owning them)

You can close this popup and all similar popups at any time by clicking on the close icon: 



Policies ending on an asterisk (\*) are administrative policies which automatically inherit all privileges of the organization.

### 2.2.2 User List

This list displays all users within an organization. Likewise the details view it opens up in an on-page popup. To access it, browse to the actions folder of an organization and click on the “Show user list” action.

The following information will be shown:

- User name:** The user name
- Policies:** All policies a user owns
- Activated:** Shows whether the user account was already activated via the link sent by e-mail.
- Valid until:** Shows until which date the account will be valid
- App Settings:** Allows you to modify the users settings for other applications (e.g. Aastra Plan). It will only be available if you have administrative rights in at least one of the tools.

User name	Policies	Activated	Valid until
[blurred]	Admin , User	yes	unlimited
[blurred]	User	no	unlimited
[blurred]	User	no	unlimited
[blurred]	User	yes	Aug 27, 2014
[blurred]	User	no	unlimited
[blurred]	User	no	unlimited
[blurred]	Admin	no	unlimited
[blurred]	Admin , User	no	unlimited
[blurred]	User	no	unlimited
[blurred]	User	no	unlimited

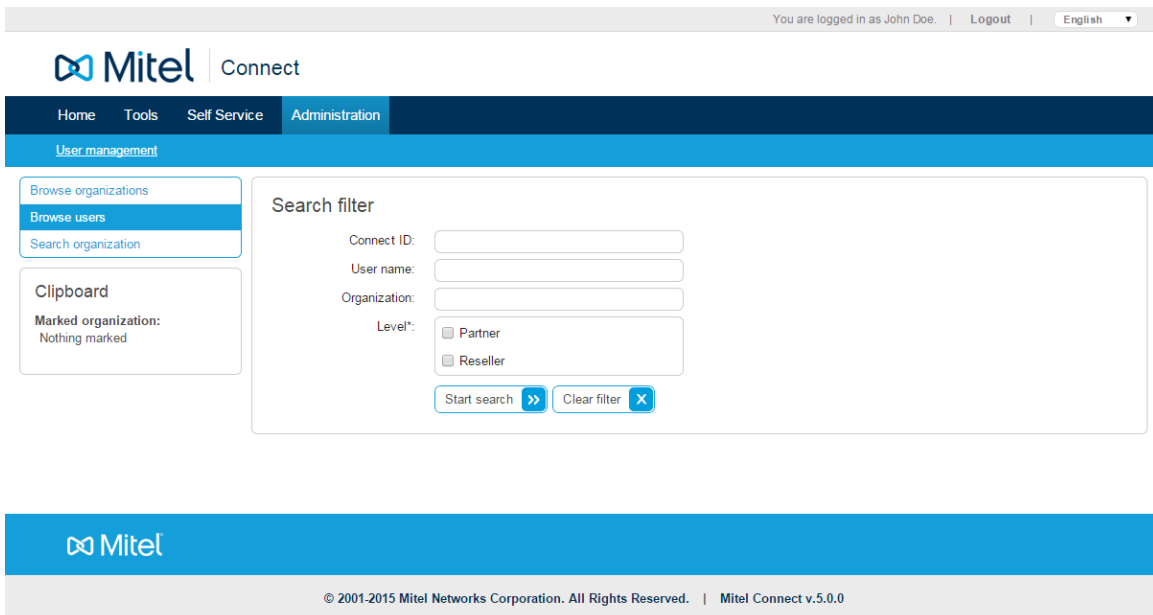
This button allows you to view the user details.

This button allows you to edit a user account. (also see “Managing User Accounts”)

## 2.3 Search Functionality

Mitel Connect offers two search forms in the Administration area:

- Browse users
  - Allows to search for an Connect ID, a user name, an organization name
  - As a result a list of users will be displayed
  - In addition the result can be filtered by the organization level
- Search organization
  - Allows to search for an organization via name



The screenshot displays the Mitel Connect Administration interface. At the top, it shows the user is logged in as John Doe, with options for Logout and English. The navigation menu includes Home, Tools, Self Service, and Administration. The current page is titled 'User management' and features three main sections: 'Browse organizations', 'Browse users' (which is highlighted), and 'Search organization'. A 'Clipboard' section indicates that no organizations are marked. The 'Search filter' form contains input fields for 'Connect ID', 'User name', and 'Organization', along with a 'Level' dropdown menu set to 'Partner' and 'Reseller'. 'Start search' and 'Clear filter' buttons are located at the bottom of the form. The footer contains the Mitel logo and copyright information: © 2001-2015 Mitel Networks Corporation. All Rights Reserved. | Mitel Connect v.5.0.0

## 2.4 Working with Organizations

### 2.4.1 Creating new Organizations

If you create new organizations (e.g. Resellers) you will have to set the following fields:

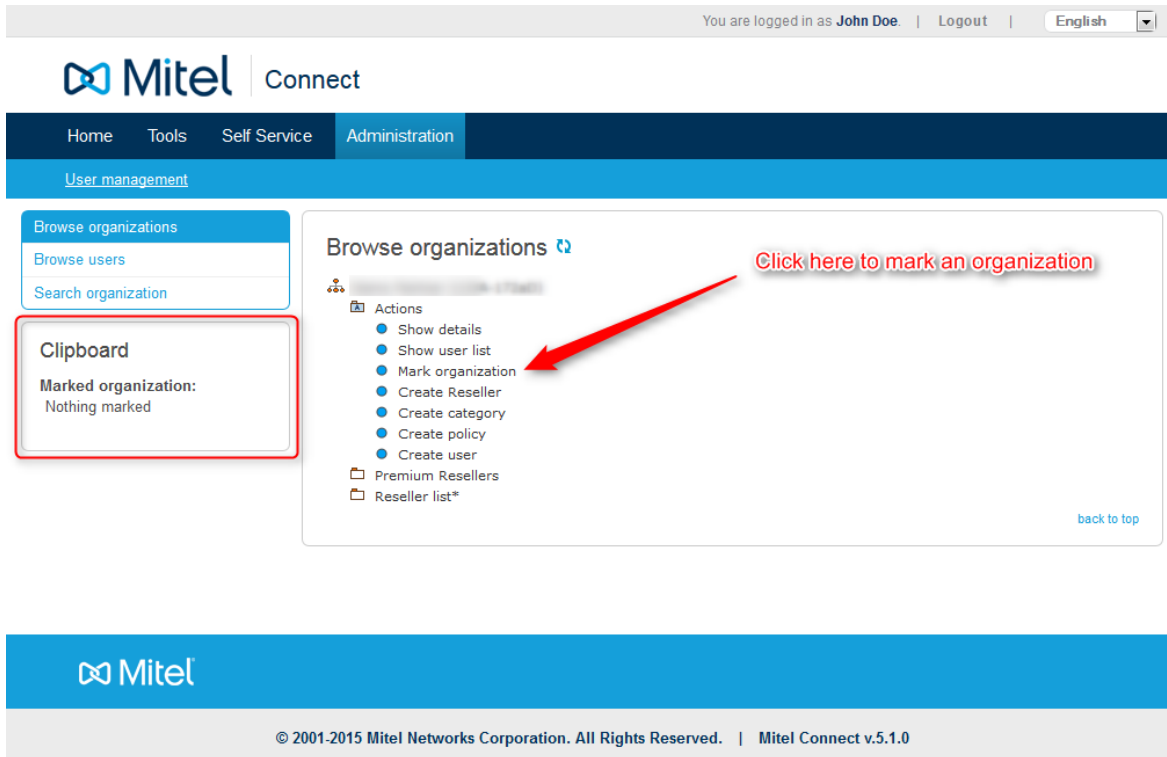
- Company name:** Name of the company
- Customer no.:** A customer number, the title differs depending on the organization level
- Mail domain:** This is a preset for the creation of users.  
e.g.: If you use “mitel.com” only E-mail addresses ending on “@mitel.com” will be permitted for this organization
- Country:** The country where the company is located in.
- Category:** Select the category this organization should belong to.
- Privileges:** Select the privileges which should be available for this organization.  
You can only select privileges available for the parent organization (one level above in the tree).
- Portfolios:** Defines the portfolio for which a partner has been certified.  
This is only available in case the portfolio management has been enabled for the corresponding CSU.
- Status:** The organization’s current status (active or inactive)

For each organization a default policy called “Admin” will be created.



### 2.4.2 Mark an Organization

Anytime when using the tree view you can mark one organization (at a time).

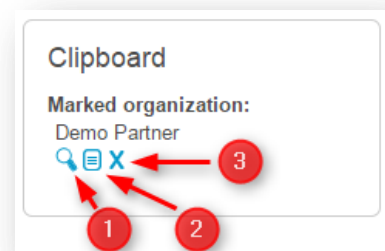


To mark an organization, open its “Actions” folder and click on “Mark organization”. To remove the mark, just click on the “Remove organization mark” link.

*A mark will only be stored temporarily within your browser session. When logging off or closing the browser the mark is removed.*

It allows you to:

1. Quickly access organizations details
2. Quickly access the user list
3. Remove the organization mark from the clipboard



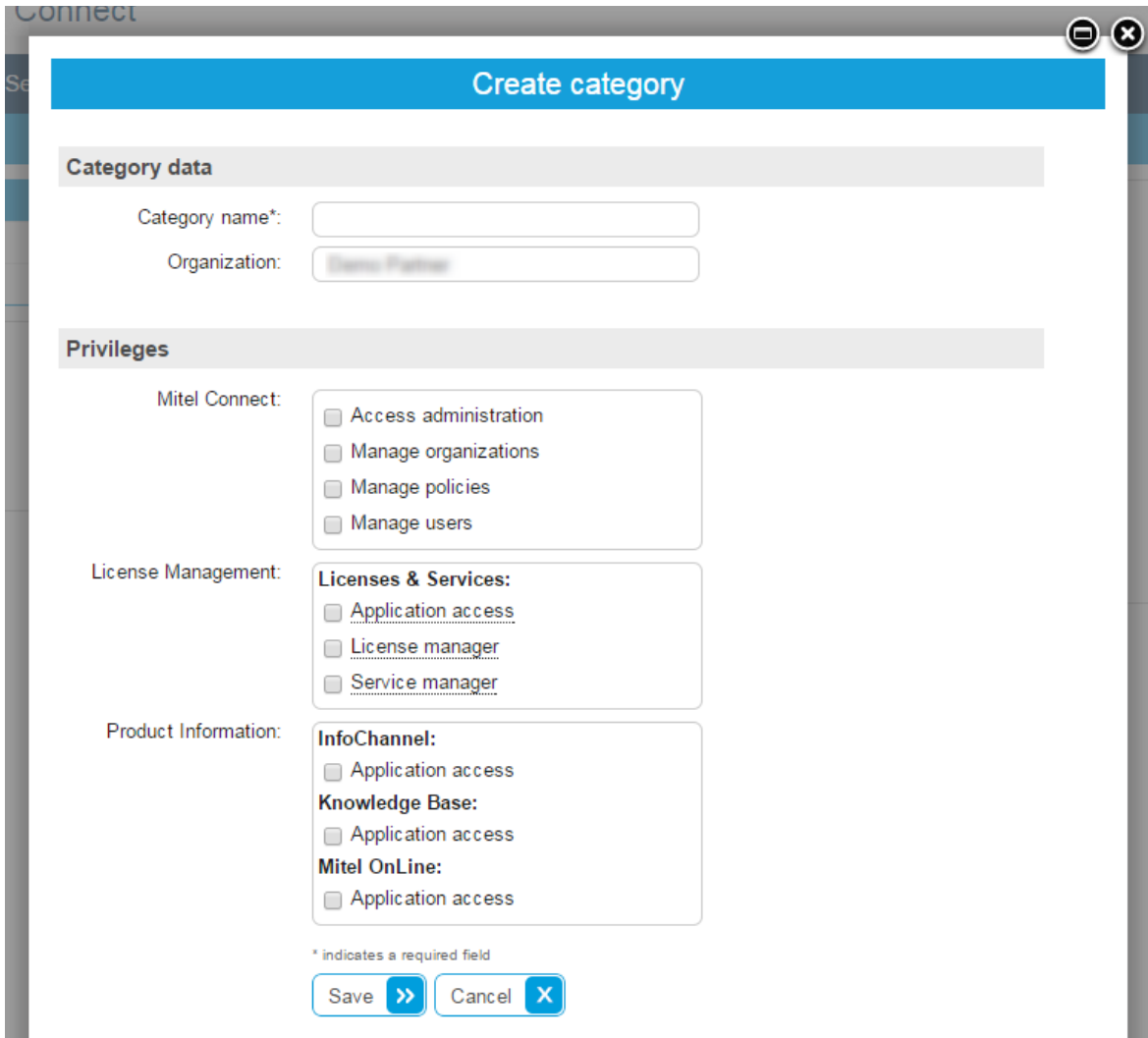
**Clipboard Actions**

### 2.4.3 Managing Categories

Categories are used to group organizations in the organization tree. Therefore each organization can only be assigned to one category.

While creating a new category you have to specify a name.

In addition you can define a privilege template which will be applied to all new organizations assigned to this category. If the corresponding CSU has the portfolio management enabled there will be the possibility to define a portfolio template.



You can manage (edit / delete) categories by using the organization details view.

Mitel Connect will automatically create additional categories (ending on an asterisk) based on the organization level. These categories will be used if you don't assign a customized one.

### 2.4.4 Managing Policies

While creating a new policy you must specify a name and check the required privileges. The optional description field can be used to explain the intended use of the policy.

Create policy

**Policy data**

Policy name\* :

Description :

Organization :

**Privileges**

Mitel Connect:

Access administration  
 Manage organizations  
 Manage policies  
 Manage users

License Management:

**Licenses & Services:**  
 Application access  
 License manager  
 Service manager

Product Information:

**InfoChannel:**  
 Application access  
**Knowledge Base:**  
 Application access  
**Mitel OnLine:**  
 Application access

Business Tools:

**Dashboard [NA]:**  
 Application access

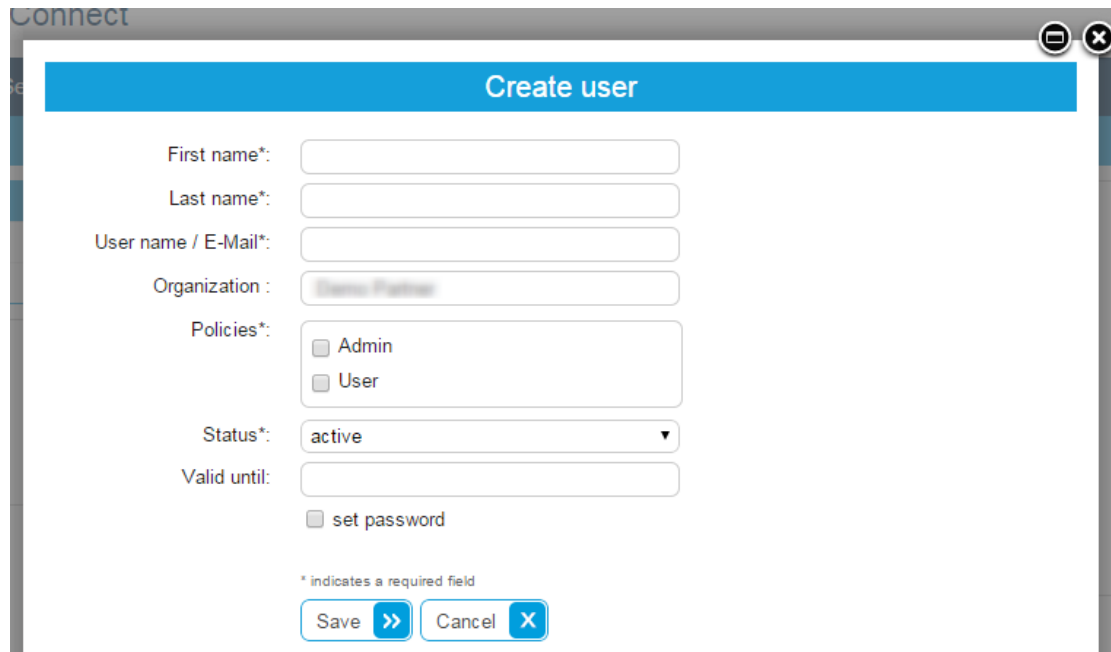
Status\* :

\* indicates a required field

## 2.5 Working with User Accounts

### 2.5.1 Creating new User Accounts

First name, last and E-Mail address need to be entered. The E-Mail address will become the user name for the new account.



The screenshot shows a web browser window titled "Connect" with a "Create user" form. The form includes the following fields and options:

- First name\*:
- Last name\*:
- User name / E-Mail\*:
- Organization:
- Policies\*:  Admin,  User
- Status\*:
- Valid until:
- set password

\* indicates a required field

Buttons: Save >>, Cancel X

#### Force password change

When an administrator creates a new account for security reasons the user needs to change the password on the first login.

The same applies if an administrator resets the password of an existing account.

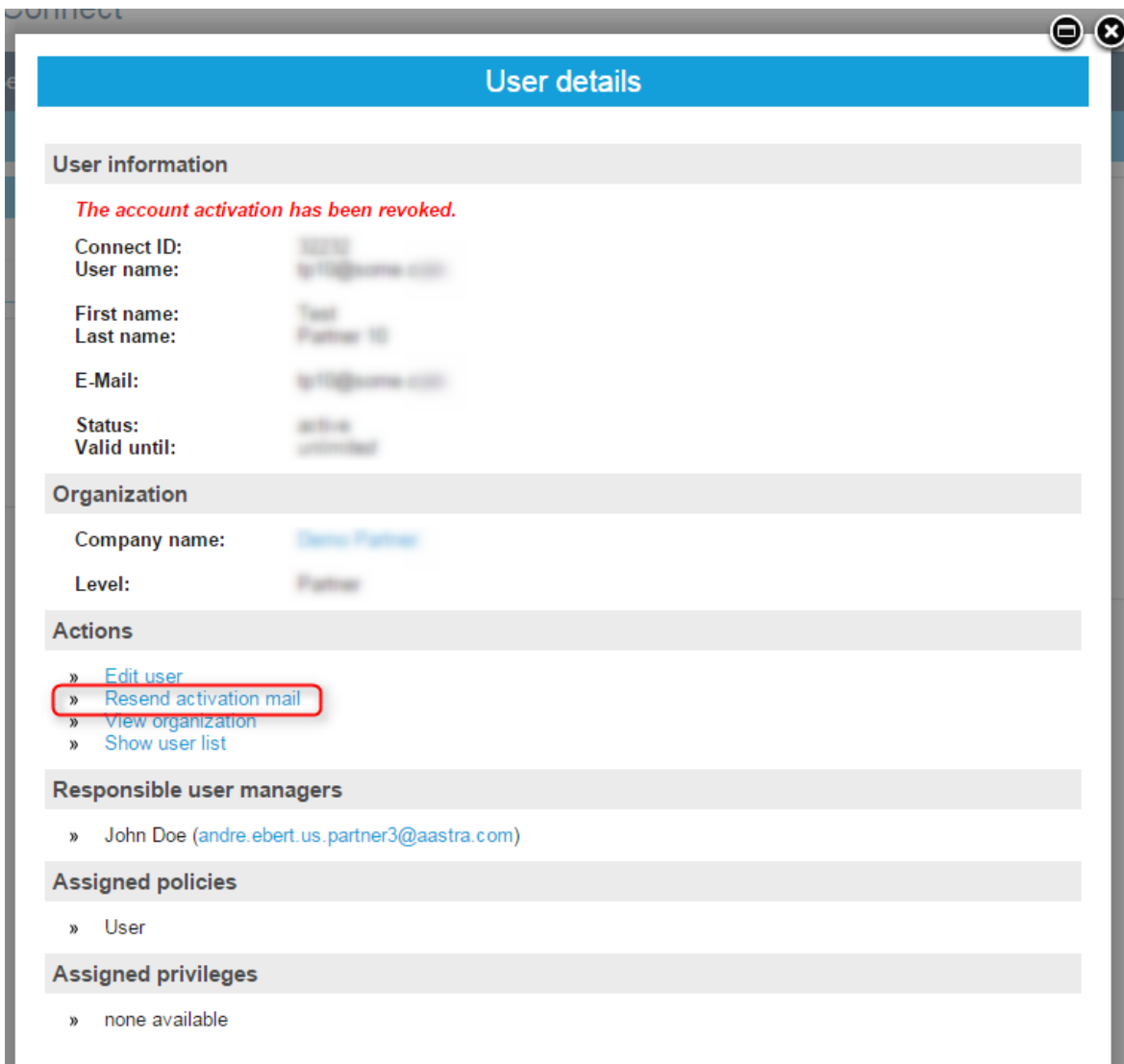
## 2.5.2 Account Activation

If you create new accounts two e-mails will be sent to the users' e-mail address.

The first e-mail contains the Mitel Connect URL and the password which can be used for the initial login. The second one contains the user name, an activation link and a disclaimer.

An account will not be usable until the corresponding activation link has been used.

In case an activation mail got lost the administrator has the possibility to resend it via the user details page.



**User details**

**User information**

*The account activation has been revoked.*

Connect ID: 3032  
User name: j.doe@aastra.com

First name: Test  
Last name: Partner 10

E-Mail: j.doe@aastra.com

Status: active  
Valid until: unlimited

**Organization**

Company name: Demo Partner  
Level: Partner

**Actions**

- » [Edit user](#)
- » [Resend activation mail](#)
- » [View organization](#)
- » [Show user list](#)

**Responsible user managers**

- » John Doe ([andre.ebert.us.partner3@aastra.com](mailto:andre.ebert.us.partner3@aastra.com))

**Assigned policies**

- » User

**Assigned privileges**

- » none available

### 2.5.2.1 Welcome E-Mail Template

**Subject:**

Welcome to Mitel Connect

**Content:**

Welcome to Mitel Connect!

Dear [COMPLETE NAME],

Please use the following password to access the application: [INITIAL PASSWORD]

You will receive a separate E-mail containing your user name and a link to activate your account.

URL: <https://connect.mitel.com/>

Terms and conditions

Please be advised that all content and materials located on Mitel Connect (the "materials") is confidential and proprietary to Mitel Networks Corporation ("Mitel"). Use and sharing of the materials is governed by the Terms and Conditions, which you accept and agree to by activating your account: [DISCLAIMER LINK]

Mitel does not make any representation or warranty as to the accuracy or completeness of the materials and Mitel will not be liable which results from the use of the materials.

Kind Regards,

[YOUR / ADMIN NAME]

[YOUR / ADMIN ORGANIZATION NAME]

[YOUR / ADMIN E-MAIL ADDRESS]

### 2.5.2.2 Account Activation E-Mail Template

**Subject:**

Mitel Connect: Account Activation

**Content:**

Dear [COMPLETE NAME],

Please click on the following link to activate your Mitel Connect account:

[https://connect.mitel.com/connect/acc\\_activation.xhtml?\[ACTIVATION PARAMTERS\]](https://connect.mitel.com/connect/acc_activation.xhtml?[ACTIVATION PARAMTERS])

Your user name: [USER NAME]

Please be advised that all content and materials located on Mitel Connect (the "materials") is confidential and proprietary to Mitel Networks Corporation ("Mitel"). Use and sharing of the materials is governed by the Terms and Conditions, which you accept and agree to by activating your account: [DISCLAIMER LINK]

Mitel does not make any representation or warranty as to the accuracy or completeness of the materials and Mitel will not be liable which results from the use of the materials.

Kind Regards,

[YOUR / ADMIN NAME]

[YOUR / ADMIN ORGANIZATION NAME]

[YOUR / ADMIN E-MAIL ADDRESS]

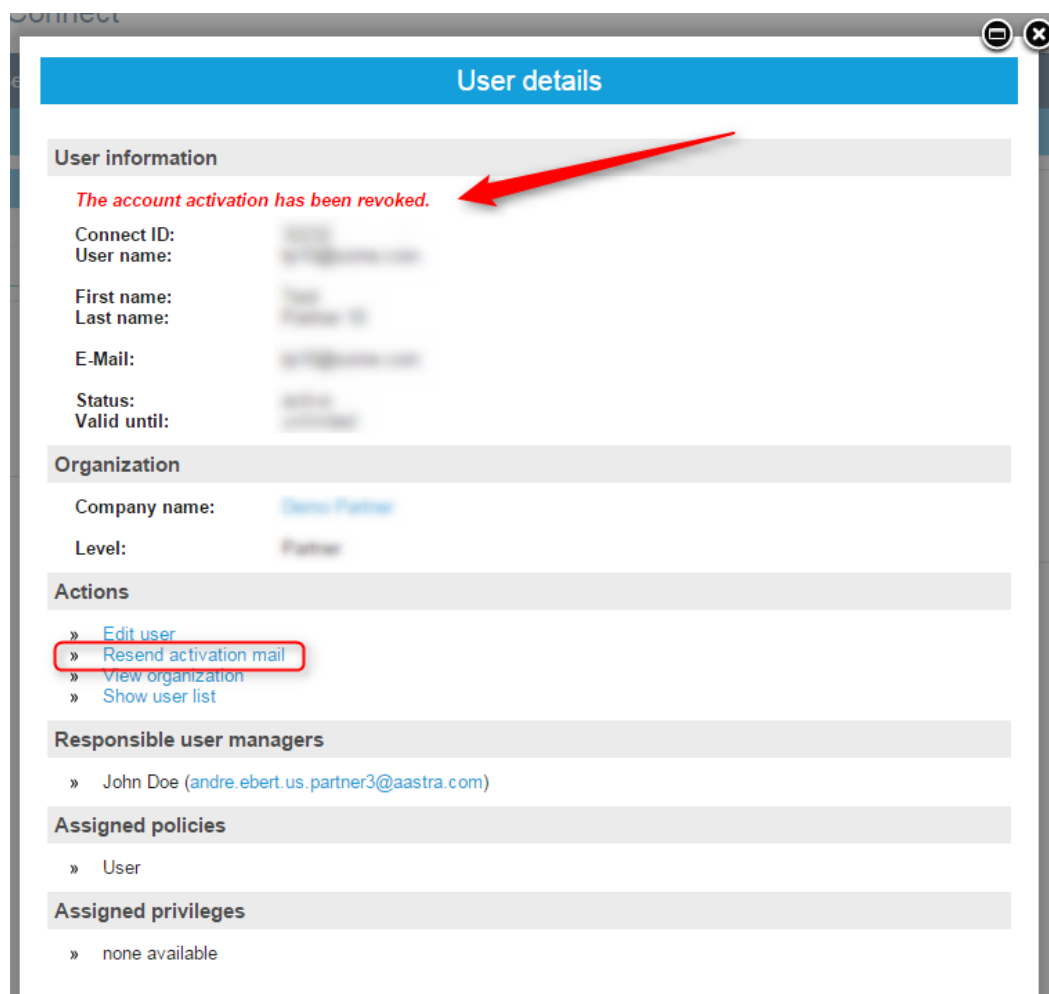
### 2.5.3 Account Activation Revocation

A weekly check marks all Mitel Connect accounts which have not been used for least three consecutive months for activation revocation.

During this process a mail will be sent to the user asking him to login again within the next four weeks. If the user does so the mark will automatically be removed and the account remains active.

If the user does not login the activation will be revoked and logging in will not be possible anymore until the account has been activated again.

On the user details page administrators can see if the activation of an account has been revoked. To activate it again, the activation mail has to be resent and the user needs to click the activation link (as already described above).



The screenshot displays the 'User details' page in Mitel Connect. The page is divided into several sections:

- User information:** Contains fields for Connect ID, User name, First name, Last name, E-Mail, Status, and Valid until. A red arrow points to a message: *The account activation has been revoked.*
- Organization:** Contains fields for Company name and Level.
- Actions:** A list of actions including [Edit user](#), [Resend activation mail](#) (highlighted with a red box), [View organization](#), and [Show user list](#).
- Responsible user managers:** Lists John Doe ([andre.ebert.us.partner3@aastra.com](mailto:andre.ebert.us.partner3@aastra.com)).
- Assigned policies:** Lists User.
- Assigned privileges:** Lists none available.



### 2.5.3.1 Account Inactive E-Mail Template

**Subject:**

Mitel Connect: Inactivity Information

**Content:**

Dear [COMPLETE NAME],

You did not login to Mitel Connect for 3 months.

Please make sure to login until [EXPIRATION DATE AND TIME], otherwise your account will be closed.

User name: [USER NAME]

URL: <https://connect.mitel.com/>

Kind Regards,  
Mitel Connect Support

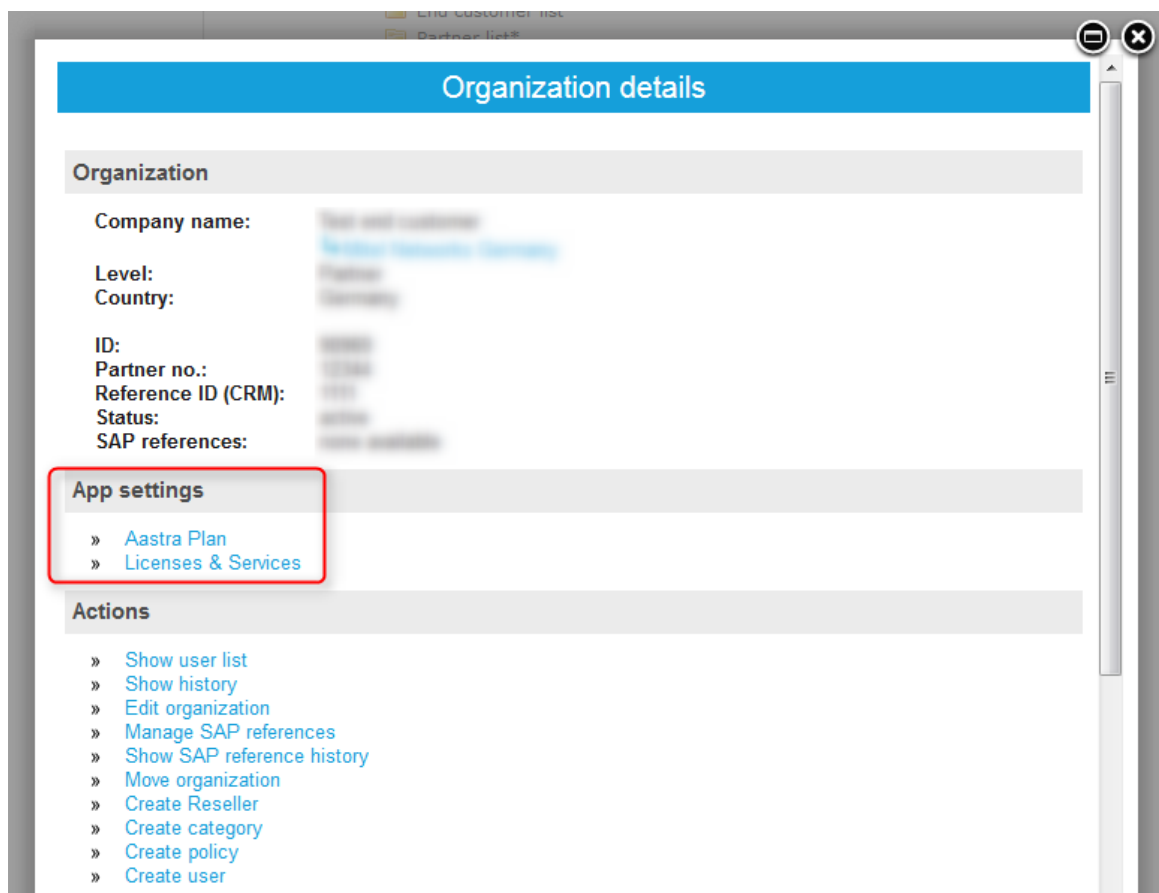
## 2.6 Application Specific Configurations

By default user and organization data is synchronized with the connected Single-Sign-On applications when a user logs into those applications.

In addition some applications support pushing user and organization data via the Mitel Connect administration. This is helpful in case user accounts of partner setups shall be prepared before the user logs in.

The feature is called “App settings” and can be found at the following places:

- To synchronize user accounts and their organization use
  - The user details page (popup)
  - The user list of an organization (popup)
  - The user browser (“Browse users” in the Administration)
- To synchronize organizations use
  - The organization details page (popup)
  - The organization search (“Search organization” in the Administration)



The link availability is tied to certain application privileges. For example in case of Aastra Plan only users having the Aastra Plan admin privilege will be able to use it.

The following applications support this feature:

- Aastra Plan  
(Privilege: Admin)
- Licenses & Services  
(Privilege: User Manager)