



## Clearspan Engage – Pre-Onboarding Instructions

Product General Availability Date: February 1st, 2021

### Pre-Onboarding Instructions for Clearspan Administrators

OpEasy Administrator Export and Review Step: In order for Clearspan Engage to authenticate each user, the valid email address that is provisioned in OpEasy must match the Clearspan User ID or an Alternate ID that is provisioned in OpEasy.

OpEasy Administrator Communication Step: **Please Contact your Clearspan Operations Manager or Clearspan Sales Representative to coordinate this conversion.**

OpEasy Administrator Provisioning Step: Disable Integrated IM&P service on **ALL** users in the enterprise (Best Practice: review and remove Integrated IM&P service from any user that is not going to use CS Engage. Enabling will trigger billing for CS Engage for those non-users.)

Clearspan System Administrator Step: Clearspan Ops team provisions pass through URL for the enterprise to Clearspan Engage.

OpEasy Administrator Provisioning Step: Re-Enable IM&P to trigger flow through provisioning (Creates User Accounts in Webex)

OpEasy Administrator Provisioning Step: Remove existing devices that may conflict with new CS Engage service (Example: Communicator, Mobile Devices are now removed, Communicator / Broadworks services removed.)

OpEasy Administrator Provisioning Step: Create CS Engage Devices for end users (Desktop, Mobile, Tablet)

OpEasy Administrator Final Step:

**Provide Clearspan Engage Onboarding Instruction email which includes:**

- i. Notification of Clearspan **IM&P disabled** for non-CS Engage users
- ii. Instruct New Users to **delete any free WebEx Accounts** from either Personal Computer, Tablet or Laptop <<https://help.webex.com/en-us/5m4i4y/Delete-Your-Free-Webex-Account>>
- iii. **New user log in Credentials:** Valid Email, Clearspan Password.
- iv. Instruct End User with client download links, log in credentials with email address(es), link to New User Set Up Instructions & FAQ document [**To Be Added**]