IP Office

one-X Portal for IP Office User Guide

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Chapter 1.
one-X Portal for IP Office

1. one-X Portal for IP Office

one-X Portal for IP Office is an application that runs on a web server connected to the IP Office telephone system 98⌐.
Using a web browser, you can access the one-X Portal and use it to perform actions such as:

- Control your telephone and telephone calls.

- View details of calls and directories of contacts.

- Configure settings that affect how your calls are treated by the telephone system.

This documentation covers the use of one-X Portal version 6.0.

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1.2 Logging In

one-X Portal is a licensed through licenses entered by your <u>system administrator</u> 99ʰ into the <u>IP Office system</u> 98ʰ. They also configure which IP Office users are allowed to use one-X Portal. If you are licensed to use one-X Portal, you need the following to login:

- Computer
  You need a computer with a network connection to the one-X Portal server.

- Web Browser
  You need a web browser that has JavaScript enabled. one-X Portal is tested using the current versions of Internet Explorer, Mozilla Firefox and Safari.

  - If you want sounds to be used, for example ringing for a call waiting, or voicemail playback through the computer, a media player such as <u>Windows Media Player</u> or <u>Quick Time</u> must be installed.

  - If using Internet Explorer, check that the option Play sound in webpages in enabled (Tools | Internet Options | Advanced | Multimedia).

  - The Remember me on this computer option shown in the login menu requires the browser to allow cookies.

- IP Office Extension
  one-X Portal can be used with most phones supported by the Avaya IP Office telephone system but not with Phone Manager PC Softphone.

- User Name
  Your need your IP Office user name as set by the system administrator. Note that this is not necessarily the same as the name shown on your phone's display.

- Password
  Your IP Office user password. Note that this may be different from your <u>telephone login code</u> 98ʰ if you also have one of those.

- Server Address
  You need the web address of the one-X Portal for IP Office server.

one-X Portal currently supports *English*, *French*, *German*, *Italian*, *Dutch*, *Brazilian Portuguese* and *Russian*. The language it uses will be the best match your browser language preferences. Note that changing your browser's language preferences may also affect the languages used by other websites which you browse.

- <u>Internet Explorer</u> 95ʰ
- <u>Mozilla Firefox</u> 96ʰ
- Safari
  The Safari browser does not have its own language settings. Instead it will match the language preferences of the computer on which it is running. Refer to the computer help.

Logging In

1. Using your web browser, browse to the address you have been given for the one-X Portal.

2. The login menu is displayed.

- If the page is blank, your browser is not configured to support Javascript and cannot be used for one-X Portal, contact your system administrator to enable JavaScript.

3. Enter your user name and password.

- If you tick the Remember me on this computer option, your user name will be remembered using a browser cookie. Only use this option if you are the only person who uses the computer.

- You can login at any extension on the phone system. While you are logged in, that phone will assume your extension number and settings. To do this select Login My Phone and enter the Base Extension number of the phone extension at which you want to be logged in. For more information see Hot Desking 16ᒣ.

4. Click Login.

- The message *"Invalid user credentials"* indicates that either the name or password was incorrect.

- The message *"Your telephone is logged out. Please log your telephone in, then try again"* indicates that you are not currently logged in at an IP Office 98ᒣ phone.

- The message *"A license could not be assigned to you. Please contact your administrator"* indicates that you are either not licensed for one-X Portal usage or that one-X Portal could not connect to the telephone system.

- The message *"Csta Resource not available"* indicates that your browser will not support one-X Portal.

1.3 Logging Out

When you have finished using one-X Portal, you should click on the Logout link shown in the top right of the one-X Portal display. This will end your one-X Portal session and return the browser to the log in screen 9ᐟ. It also frees up the license consumed by your one-X Portal session after your log in.

If you simply browse to another website, your browsers back, forward and history functions can be used to return to your one-X Portal session without needing to log in again. While this may be useful to you, it is a risk if you use one-X Portal from a shared computer or one in a publicly accessible location. Therefore we recommend that when you have finished using one-X Portal you always use the Logout control and close the browser.

If you simply close the browser or browse to another site, the license consumed by your one-X Portal session is only released after 6 hours.

1.4 Your Presence and Status

The information line at the top-right of the one-X Portal screen shows you your current status.

- **Call Waiting Indicator**
  This icon indicates that you have a call waiting to be answered.

- **New Voicemail Messages Indicator**
  This icon indicates that you have new unread voicemail messages. These will be shown as icons in the Messages 83⤴ gadget.

- **MarkG(675)** **Name and Number**
  Your name and extension number just in case you forget!

- **| In Office | Active Profile**
  Your currently active profile 72⤴. Profiles allow you to pre-configure sets of telephone settings and then apply them at any time by selecting which profile is active.

- **Your Presence Icon**
  This icon indicates your current presence that is being reported to other one-X Portal users. The different presence states are:

Icon	Presence	Description
	Available	This icon shows that you are currently not on any call.
	Busy	This icon shows that you currently have a call in progress.
	Do Not Disturb	This icon shows that you have enabled Do No Disturb status (see below). While in this state calls to you are redirected to voicemail if available or otherwise receive busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions 91⤴. In this state you can still make calls.
	Offline	This icon shows that you have enabled Offline status (see below). While in this state you cannot be instant messaged 37⤴ by other one-X Portal users.
	Logged Out	This icon shows that you are not actually logged in at an extension of the phone system. While in this state all calls to you are redirected to voicemail if available or otherwise receive busy tone. In this state you cannot make calls. However you can still use one-X Portal to alter your configuration settings.

- **Status Selector**
  This drop down selector allows you to quickly select between the following states:

Status	Description
Available	This is the normal state in which you can make and receive calls.
Do not disturb	While in this state calls to you are redirected to voicemail if available or otherwise receive busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions 91⤴. In this state you can still make calls.
Offline	You can select this state if you want to continue using one-X Portal but do not want other one-X Portal users to be able to send you instant messages 37⤴ using one-X Portal.

- **Help**
  Use this link to open the one-X Portal help in a new browser tab or window.

- **Logout 11⤴**
  Use this link when you have finished using one-X Portal. It will return you to the one-X Portal login screen 9⤴.

1.5 Gadgets and Tabs

The one-X Portal screen consists of two tabs; Main [13] and Configure [14].

Main

The Main tab contains a number of 'gadgets'; they are Calls [13], Call Log [13], Directory [14] and Messages [14].

- Calls [18]
  The Calls gadget shows details of you current calls, with a sub-tab for each call. The text boxes at the top of the gadget can be used to make new calls.
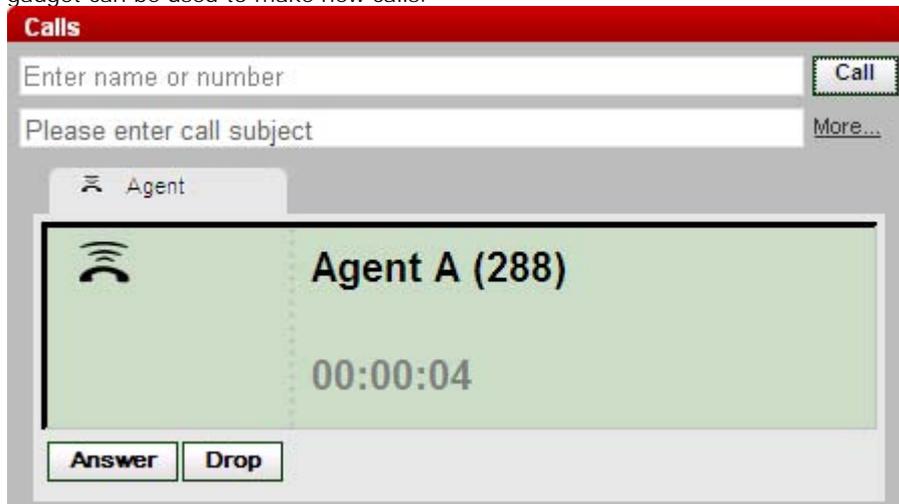
- Call Log [53]
  The Call Log gadget displays your call log which is stored by the telephone system.

- Directory 59

  The Directory gadget shows a number of different directories. The Personal directory is your own private contacts. The System directory contains shared directory contacts stored by the telephone system plus the details of the other users and hunt groups 98 on the phone system. The External directory allows you to search other directories, access to which has been configured by the system administrator 99.
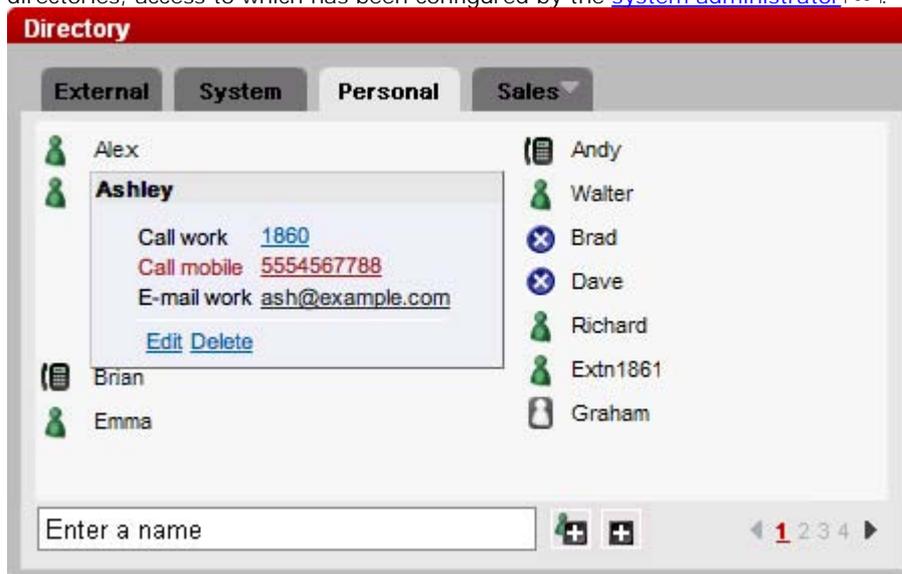
- Messages 83

  The Messages gadget shows you details of the messages in your voicemail mailbox. You can use the gadget to playback the messages via your phone.

Configure

The Configure 90 tab is used to setup and control a range of one-X Portal settings. The Save buttons are greyed out until you make changes that require saving (not all changes do). Changes requiring a save are also indicated by a * in the Configure tab label.

1.6 Phone Notes

The phone that you are using in parallel with one-X Portal will affect some aspects of how one-X Portal operates. This section provides notes on the interaction.

Phone Call Log

The call log shown by one-X Portal is stored on the telephone system as part of your user setting.

If you are using a 1400 Series, 1600 Series or 9600 Series phone with a Call Log button, the <u>same call log</u> is shown on the phone. You can then use and edit your call log from the phone or from one-X Portal. The two will change in parallel.

If you are using any other type of phone that has a call log, it will be a call log stored by the phone itself and so may not match the one-X Portal call log. For example calls made using the one-X Portal may not appear in the phone's call log.

Personal Directory

If you are using a 1400 Series, 1600 Series or 9600 Series phone with a Contacts button, or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.

1. As Personal directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal only.

2. The contacts can be edited through the phone or through one-X Portal.

3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current <u>Primary phone</u> 99 number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal if that selection is changed.

Number of Calls

one-X Portal does not limit the number of calls that you can make and receive. While you can only have one call connected at any time, you can have multiple held calls at the same time. However the phone system may limit the number of incoming calls that you can receive.

- Phones With Appearance Buttons
  Many Avaya phones have programmable buttons that are configured by the <u>system administrator</u> 99 as <u>appearance buttons</u> 98 . When using one of these phones, each call that you make or receive normally uses an appearance button and can be controlled using that button (press to hold, retrieve, view details, etc).

  - For an incoming call, the call is presented on a suitable appearance button if available. If no suitable appearance button is available, the telephone system will treat the call as if you are <u>busy</u> 98 to any further incoming calls.

  - For outgoing calls, you can use one-X Portal to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.

- Phones Without Appearance Buttons
  If the phone you are using does not have appearance buttons, your Calls Waiting On setting, as set by your system administrator, controls the number of calls that you can receive.

  - If your Calls Waiting On setting is <u>enabled</u>, you can use one-X Portal to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being <u>busy</u> 98 . However, using one-X Portal you can still make additional outgoing calls.

  - If your Calls Waiting On setting is <u>not enabled</u>, once you have one connected call to which you are talking the phone system treats you as being <u>busy</u> 98 . However, using one-X Portal you can still make additional outgoing calls.

Notes

1. You can only have one connected call at a time. If you connect to another call (by making a call, answering a call, unpark a call, retrieve a call from hold, etc.), the existing call to which you were connected is automatically put on hold. This is called Auto Hold. Your <u>system administrator</u> 99 can disable Auto Hold for the whole system. If this is done, when you connect to a call, any current call is disconnected.

2. Calls that have been parked are not included. Unlike held calls they are parked on the phone system rather than held at your phone.

1.7 Hot Desking

Typically you will have a permanent phone extension associated with your extension number. That phone extension can be used to make and answer your calls regardless of whether you have one-X Portal running or not. Hot desking allows you to assume control of another phone extension so that it uses your extension number and phone system settings.

You can select the extension at which you want to make and receive calls when you log in to one-X Portal 9 and so hot desk onto that phone extension. The phone assumes your extension number and you are logged off any other phone extension that you may have been using.

When you log out of one-X Portal, your extension number is returned back to your normal phone extension if you have one and it is not in use by another hot desking user. If you don't have a normal extension or it is not available, you are treated as being logged off from the phone system and your calls will go to voicemail if available or receive busy.

Chapter 2.
Making and Answering Calls

2. Making and Answering Calls

This section covers how you can use one-X Portal to make and answer calls. Using the Calls gadget, details of each call are shown on separate tabs using icons 19. The buttons 19 shown will vary but generally indicate actions that you can perform with the currently displayed call.

Make and Answer Calls		
• Make a Call 20	• Hold a Call 27	• Record a Call 30
• …from the Call Log 22	• Retrieve a Held Call 27	• Make a Supervised Transfer 32
• …from the Directory 21	• Park a Call 35	• Make an Unsupervised Transfer 31
• …from a Voicemail Message 23	• Unpark a Call 36	• End a Call 26
• Answer a Call 24	• Switch Between Calls 29	• Send Instant Messages (Chat) 37
• Pickup Calls 26	• Select Do Not Disturb 38	

Call Icons

Call icons are used by the Calls gadget. They indicate the current status of a call and are shown on the label of the gadget's sub-tabs and within the sub-tab's contents. Icons are shown for each end of the call, you and the number calling or called.

Icon	Name	Description
〜	Alerting	This icon indicates a call being presented to you to be answered 24ᐧ. Depending on other phone settings your phone may also give an audible ring and flash its lamp or icons. This icon is also shown at the top of the screen so that you can see that you have an alerting call even when the Calls gadget is not in view.
(	Connected	This icon indicates the call to which you are currently talking or listening.
(...	Making a Call	This icon is shown when you are in the process of making a call but not yet ringing or connected, for example still dialing the number.
⌣	Held	This icon indicates a call that you have placed on hold.
)))	Conference	This icon is shown when you start a conference call.
●	Recording	This icon indicates that you are recording the call.
!	Failed	This icon indicates that the call could not be connected.

Buttons

Each tab includes buttons that will change to match actions that you can perform with that call.

Label	Button Action
Answer 24ᐧ	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call.
Consult 32ᐧ	Hold a call and make a consultation call to another number.
Complete Transfer 32ᐧ	With a call on hold, transfer it to the current connected party.
Conference 43ᐧ	With a call on hold and another call in progress, you can conference the calls.
Drop 26ᐧ	For a currently connected call, pressing Drop disconnects the call. For an alerting call, pressing Drop will redirect the call using your a Forward on No Answer setting if set or otherwise to voicemail if available. You cannot drop a call returning from being held or parked for too long.
Hold 27ᐧ	Puts the call on hold.
Mute	Mute your connection to a call.
Mute All	For conferences which you initiate, this control allows you to mute all the other conference parties.
Record 30ᐧ	Start recording the current call.
Stop Rec. 30ᐧ	Stop recording the current call.
Retrieve 28ᐧ	Take a call back from hold.
Transfer 31ᐧ	Transfer the call.
Unmute	Unmute your connection to a call.
Unmute All	For conferences which you initiate, this control allows you to unmute all the other conference parties.

The buttons across the bottom of the Calls gadget are call park buttons 34ᐧ. Each represents a call park slot on the telephone system.

2.1 Making a Call

one-X Portal provides a number of ways to make calls.

- Using the Calls gadget. [20]
- Using the Directory. [21]
- Using the Call Log. [22]
- Using the Messages gadget. [23]

2.1.1 ... from the Calls Gadget

The text boxes and buttons at the top of the Calls gadget can be used make a call.

1. Using the text box at the top of Calls gadget, enter a number.

| Enter name or number | Call |

| Please enter call subject | More... |

- For external calls, remember to add any external dialing prefix used by your telephone system.

- You can also enter a name. If it matches a contact in your Personal or System directory, the number stored with that contact will be dialed by one-X Portal.

- If you enter a subject it will be added to the call details. If you are calling an internal user, it may be displayed on their phone or in their one-X Portal call display.

- If you need to enter an account code to make calls, click on More.... Use the additional text box to enter the required code. To hide the text box again, click on Less....

| 431 | Call |

| Please enter call subject | Less... |

| |

account...

2. When the details are set as you require, click Call. If you already have another call in progress, that call will be automatically put on hold [98].

- The progress of the call is displayed on a tab in the Calls gadget.
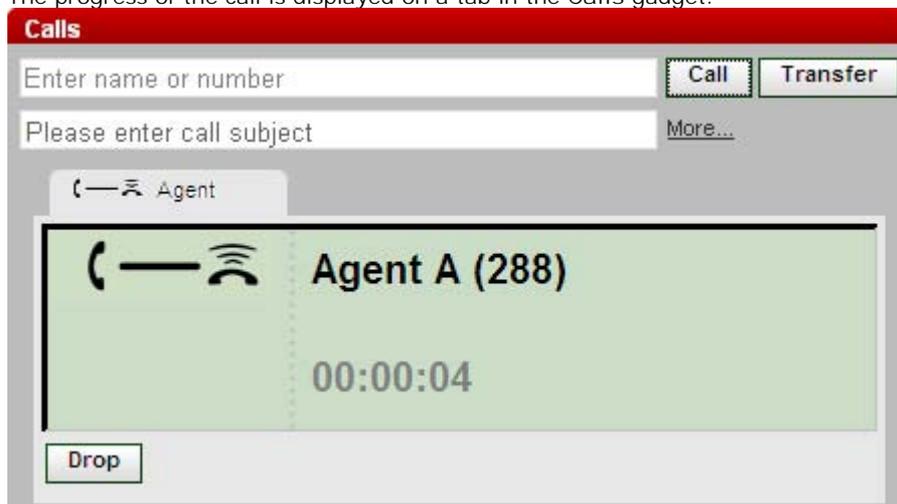
2.1.2 ... from the Directory

1. Using the Directory gadget on the Main tab, locate the name that you require in the directory.

2. To filter the names shown, start entering a name or number in the text box at the bottom of the directory tab. As you enter a name, directory contacts that do not match are hidden from the view.

   - For some directory contacts, one-X Portal can indicates the contacts current status by using different icons. For contacts that have multiple telephone numbers, the status is based that of the work number.

State	Icon	Description
Available	👤	The normal state for a user showing that their work extension is not in use.
Busy	⛔	The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb	❌	The user has set Do Not Disturb 12ᐧ. Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's Do Not Disturb exception list 91ᐧ.
Logged Out	👤	The user has logged out 98ᐧ from their phone. Calls to them will most likely go to voicemail if available.
Other	📱	This icon is used when the status is not known.

5. Click the name to show the directory details.

👤 **Joesph**

Call work   1860
Call mobile   555326777
Call other   55567788
E-mail work joe.work@example.com

Edit Delete

6. To call the number shown, click on it. Personal directory contacts can have several numbers available to be used.

   - The progress of the call is displayed on a tab in the Calls gadget.

Calls

Enter name or number   [Call] [Transfer]

Please enter call subject   More...

(─ ⚞ Agent

(─ ⚞   **Agent A (288)**

00:00:04

[Drop]

2.1.3 ... from the Call Log

You can use the numbers in the call log to make a repeat or return call.

1. Using the Call Log gadget on the Main tab, locate the contact that you want to call.

2. Click on the underlined number.

- The progress of the call is displayed on a tab in the Calls gadget.

2.1.4 ... from Voicemail

You can make a return call to someone who has left you a voicemail message.

1. Using the Messages gadget on the Main tab, locate the message from the person that you want to callback.

2. Click on the underlined name and number details of the message source.

- The progress of the call is displayed on a tab in the Calls gadget.
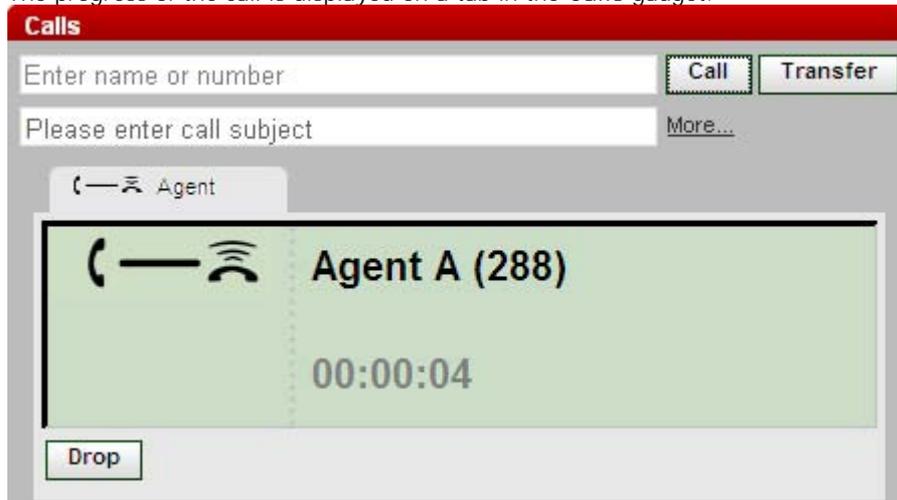
2.2 Answering a Call

When a new call alerts your phone, one-X Portal displays its details in the Calls gadget. one-X Portal also displays a ringing handset ⛑ icon at the top of the one-X Portal window to indicate that you have an alerting call.

By default new calls will ring your phone for 15 seconds before following your forward on no answer 98 settings or going to voicemail. If you already have a call connected, answering another call using one-X Portal will automatically put the existing call on hold 28.

1. Using the Calls gadget on the Main tab, select the tab with the ringing handset ⛑ icon. This will show details of the call including the number of the caller if available and also the name if available.
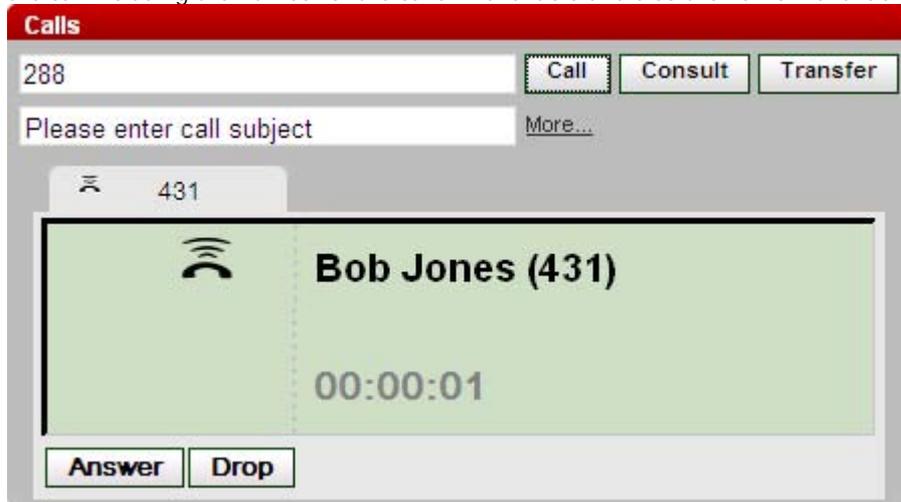
2. To answer the call, click Answer. If you already have another call in progress, that call will be automatically put on hold 98. Pressing Drop will redirect the call using your forward on no answer setting if set or otherwise to voicemail if available.
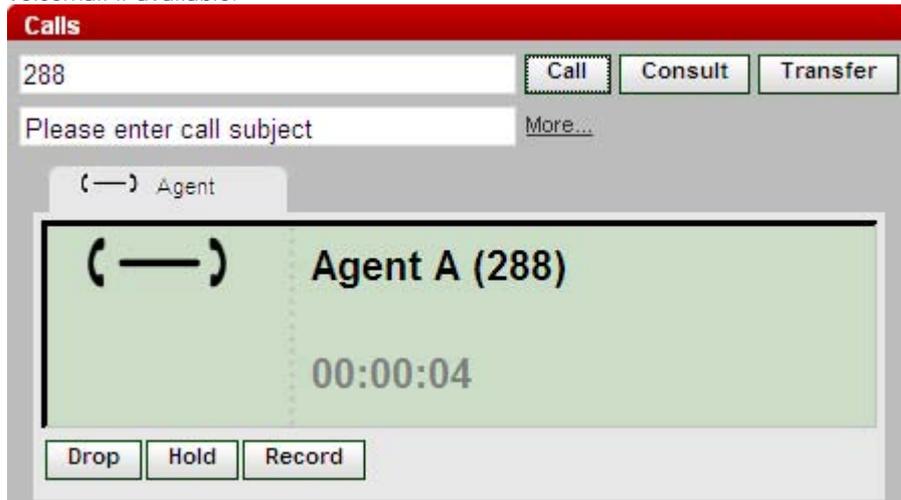
- The Answer button is not present for phones that cannot answer calls without the handset first being lifted or some other phone control being used. For those phones, answer the call by lifting the handset or using the phone's own controls for answering calls.

- The Calls gadget can display a range of other button indicating other actions that you can perform.

Label	Button Action
Answer 24	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call.
Consult 32	Hold a call and make a consultation call to another number.
Complete Transfer 32	With a call on hold, transfer it to the current connected party.
Conference 43	With a call on hold and another call in progress, you can conference the calls.
Drop 26	For a currently connected call, pressing Drop disconnects the call. For an alerting call, pressing Drop will redirect the call using your a Forward on No Answer setting if set or otherwise to voicemail if available. You cannot drop a call returning from being held or parked for too long.
Hold 27	Puts the call on hold.
Mute	Mute your connection to a call.
Mute All	For conferences which you initiate, this control allows you to mute all the other conference parties.

Label	Button Action
Record 30	Start recording the current call.
Stop Rec. 30	Stop recording the current call.
Retrieve 28	Take a call back from hold.
Transfer 31	Transfer the call.
Unmute	Unmute your connection to a call.
Unmute All	For conferences which you initiate, this control allows you to unmute all the other conference parties.

The buttons across the bottom of the Calls gadget are call park buttons 34. Each represents a call park slot on the telephone system.

2.3 Pickup a Call

Each one-X Portal user, including you, has an active profile that includes a Call Pickup 74 setting. When this setting is enabled, other one-X Portal users can see when you have a call waiting to be answered and can pickup the calls if required. Note that this is not applied to all calls waiting to be answered, for example it is not used for hunt group calls.

When a user has enabled call pickup, their name is shown on a red background in the one-X Portal directories when they have a calls waiting that can be answered using one-X Portal call pickup.

To pickup a call

1. A red background and a ☎ icon for a contact in the directories indicates that they have a call or calls waiting to be answered.

2. Click on the contact to display their details including information about the calls waiting to be answered.

☎ Joe Bloggs

Pickup call from
901234567890
Call work 6982 Conference

3. To pickup a call click on the number link.

2.4 Unanswered Calls

How unanswered calls are treated depends both on your phone settings and the type of call.

For Calls Direct To You

Using the IP Office 98 system configuration you have a set No Answer Time (the default is 15 seconds). For calls direct to you, if you do not answer within that time, the IP Office will do a number of things.

- If you have Forward on No Answer 98 enabled, the call will be redirected to that number to ring for another period of your No Answer Time before going to voicemail if available.

  - If your Forward on No Answer destination is an external number, the phone system will try to retrieve the call and send it to voicemail if it is still unanswered, however that may not be possible in all cases.

  - You can switch forwarding on/off and change the destination number using a one-X Portal profile 72.

- If you are enabled to use voicemail, the caller will hear your mailbox greeting. You can switch voicemail on or off using a one-X Portal profile 72.

- If neither of the above is available, the call will continue ringing.

If the call is answered by someone else or by voicemail, it will be recorded in your call log 53 as a missed call.

For Calls To A Hunt Group Of Which You Are A Member

Hunt groups 98 have their own No Answer Time setting. If unanswered by you, the call is normally presented to the next available member of the hunt group.

2.5 Ending a Call

You can end a call by clicking on the Drop button displayed with the call details in the Calls gadget.

2.6 Holding Calls

You can use one-X Portal to put calls on hold and to then retrieve calls from hold. While held, the caller will hear music on hold or regular hold reminder tones.

2.6.1 Holding a Call

1. Using the Calls gadget on the Main tab, select the call tab for the connected call. It will be the tab with two connected handset $(-)$ icons.

2. Click Hold. The call icon changes to an upturned handset ☙ icon.

Calls

| 288 | Call | Consult | Transfer |

Please enter call subject   More...

(—— ☙ Agent

(—— ☙ Agent A (288)

00:00:04

| Drop | Retrieve |

3. If you are not connected to another call, then after a set time the held call will automatically alert your phone again.

Notes

1. Held callers hear music on hold if available. The music heard depends on the phone system's configuration. If no hold music is configured, the caller will hear a double beep tone every 4 seconds.

2. The Hold Timeout for all held calls is set by the system administrator 99. By default it is 15 seconds but it can be changed or switched off. The returning held call ignores any forwarding or do not disturb 98 settings. You cannot drop a hold reminder.

3. If the system administrator has configured you for Busy on Held, while you have any held calls, the phone system will treat you as being busy 98 to further incoming calls.

2.6.2 Retrieving a Held Call

1. Using the Calls gadget on the Main tab, select the call tab for the held call. It will display an upturned handset ⍦ icon.

2. Click Retrieve.

3. The call icon changes to two connected handset (—) icons.

4. Any other call that you had connected is changed to a held call.

2.6.3 Ending a Held Call

1. Using the Calls gadget on the Main tab, select the call tab for the held call. It will display an upturned handset ⍦ icon.

2. Click Drop.

3. The caller is disconnected.

2.7 Switching Between Calls

You can have several calls in progress at the same time (see below). That includes calls that are alerting you and calls that are on hold. However, you can only have one connected call, including calls that are still ringing while you wait to be answered.

To view the details of any call, simply click on the tab for that call. Just viewing the call details does not affect the calls.
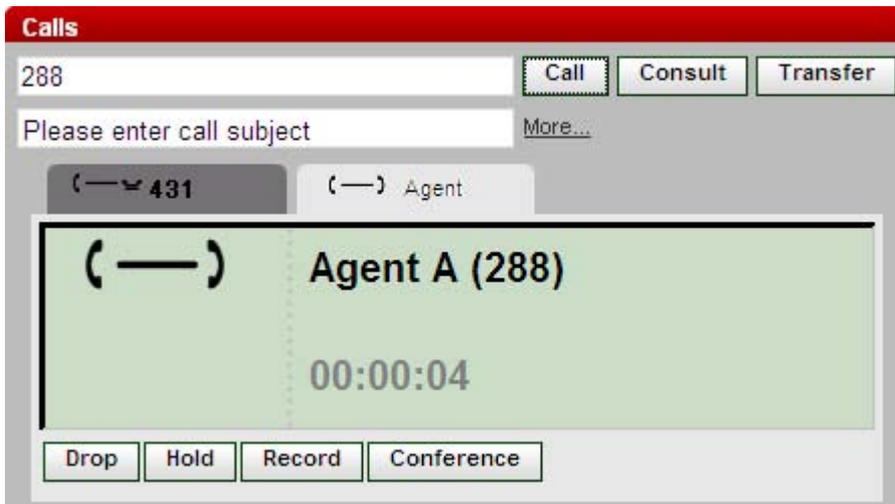
If you answer or make another call while you already have a call in progress, that call will be <u>automatically put on hold</u> 98 .

Number of Calls

one-X Portal does not limit the number of calls that you can make and receive. While you can only have one call connected at any time, you can have multiple held calls at the same time. However the phone system may limit the number of incoming calls that you can receive.

- Phones With Appearance Buttons
  Many Avaya phones have programmable buttons that are configured by the <u>system administrator</u> 99 as <u>appearance buttons</u> 98 . When using one of these phones, each call that you make or receive normally uses an appearance button and can be controlled using that button (press to hold, retrieve, view details, etc).

  - For an incoming call, the call is presented on a suitable appearance button if available. If no suitable appearance button is available, the telephone system will treat the call as if you are <u>busy</u> 98 to any further incoming calls.

  - For outgoing calls, you can use one-X Portal to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.

- Phones Without Appearance Buttons
  If the phone you are using does not have appearance buttons, your *Calls Waiting On* setting, as set by your system administrator, controls the number of calls that you can receive.

  - If your *Calls Waiting On* setting is <u>enabled</u>, you can use one-X Portal to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being <u>busy</u> 98 . However, using one-X Portal you can still make additional outgoing calls.

  - If your *Calls Waiting On* setting is <u>not enabled</u>, once you have one connected call to which you are talking the phone system treats you as being <u>busy</u> 98 . However, using one-X Portal you can still make additional outgoing calls.

Notes

1. You can only have one connected call at a time. If you connect to another call (by making a call, answering a call, unpark a call, retrieve a call from hold, etc.), the existing call to which you were connected is automatically put on hold. This is called Auto Hold. Your <u>system administrator</u> 99 can disable Auto Hold for the whole system. If this is done, when you connect to a call, any current call is disconnected.

2. Calls that have been parked are not included. Unlike held calls they are parked on the phone system rather than held at your phone.

2.8 Recording a Call

If your telephone system has a Voicemail Pro voicemail system attached, you are able to record calls.

- By default, the caller will hear a call recording warning. If you bring other parties into a call that is being recorded, for example by starting a conference, the warning will be heard again. Your system administrator 99 can switch off the call recording warning message, however doing this may be prohibited or subject to legal requirements.

- By default the recording is placed into your own voicemail mailbox. Your system administrator can change the mailbox into which your call recordings are placed.

- The recording will continue while you are connected to the call. If you transfer the call to another user or number, the recording ends.

To Start Call Recording

1. Using the Calls gadget on the Main tab, select the call tab for the call, it will display two connected handset (—) icons

2. Click Record.

3. The red recording dot ● icon is shown while the call is being recorded.

4. Once you have started call recording, you can stop it using the Stop Rec. button. Call recording also automatically stops if you park, transfer or conference the call. If you hold the call, call recording is paused while the call is on hold.

2.9 Transferring Calls

You can use one-X Portal to transfer calls. There are several types of transfer:

Unsupervised Transfer	An unsupervised transfer is one where, having dialed the number of the transfer destination, you complete the transfer without waiting for the call to be answered.
Supervised Transfer	A supervised transfer is one where you talk (or try to talk) to the transfer destination before completing the transfer. Your initial call to the transfer destination is called a consultation call or enquiry call. This method of transferring calls allows you to confirm if the transfer target is present and wants to accept the call.
Conference Transfer	You can also transfer a call by starting a conference 43 between all the parties and then leaving the conference.

Notes

1. Your system administrator 99 can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it <u>may</u> recall to you.

2. The ability to transfer an external call to another external number can be restricted by your system administrator.

2.9.1 Making an Unsupervised Transfer

An unsupervised transfer is one where, having dialed the number of the transfer destination, you complete the transfer without waiting for the call to be answered.

1. Using the Calls gadget on the Main tab, select the call tab for the call you want to transfer. You can transfer a connected call.
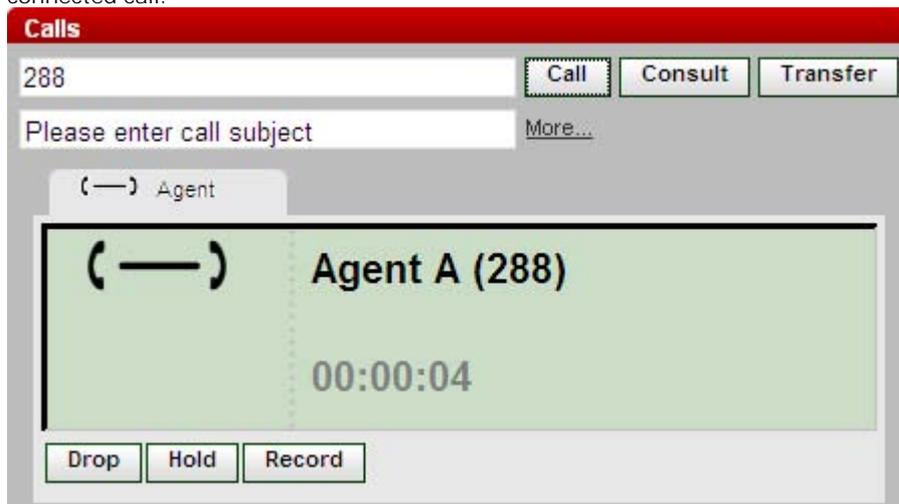
2. Using the text box at the top of the Calls gadget, enter the number to which you want to transfer the call and click Transfer. Alternatively, locate a name in the directory 33 and click on the Transfer option shown in the contact's details.

3. The call is transferred.

Notes

1. Your system administrator 99 can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it <u>may</u> recall to you.

2. The ability to transfer an external call to another external number can be restricted by your system administrator.

2.9.2 Making a Supervised Transfer

A supervised transfer is one where you talk (or try to talk) to the transfer destination before completing the transfer. Your initial call to the transfer destination is called a consultation call or enquiry call.

This method of transferring calls allows you to confirm if the transfer target is present and wants to accept the call.

1. Using the Calls gadget on the Main tab, select the call tab for the call you want to transfer.
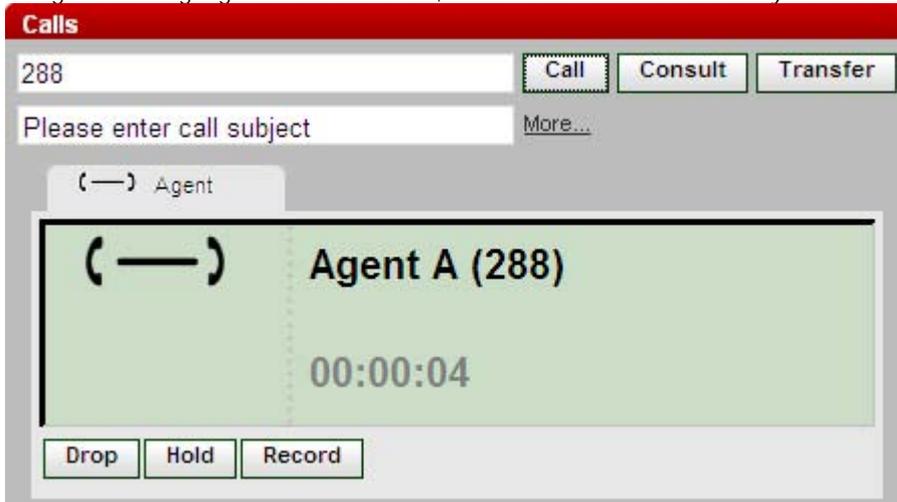
2. Using the text box at the top of the tab, enter the number to which you want to transfer the call and click Consult. Alternatively, locate a name in the directory 33 and click on the Consult option shown in the contact's details.

3. Your current call is put on hold. You will hear the progress of the call to the transfer destination. This is called an enquiry or consultation call.

4. To complete the transfer, click Complete Transfer. Alternatively you can turn the calls into a conference by clicking on Conference.

   - You can switch between the calls using the Retrieve button, however you can only complete the transfer while talking to the transfer destination.

Notes

1. Your system administrator 99 can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it may recall to you.

2. The ability to transfer an external call to another external number can be restricted by your system administrator.

2.9.3 Transfering Calls Using the Directory

You can transfer a call to a contact in your directory rather than having to enter the destination number yourself.

1. Use the Directory gadget to locate the party to which you want to transfer the call. Click on their name to display their number details.

2. Because you already have a connected call, options in addition to Call are displayed next to each contact number.

- Use the Transfer link to do a simple <u>unsupervised transfer</u> 31 .

- Use the Consult link to start a <u>supervised transfer</u> 32 .

2.10 Parking Calls

Normally when you put a call on hold, only you can retrieve that call. Parking a call is similar to holding a call. However a parked call can be retrieved by other users if they know the park slot number or name used to park the call. one-X Portal provides you with 4 park buttons. You can configure which park slot number or name each button uses. You can then use the buttons to park a call in a particular park slot, see when a call has been parked in that park slot by you or by someone else and to unpark a call parked in that slot.

Notes

1. If you park a call and leave it parked too long it will recall to you. The default is to recall after 5 minutes but your system administrator ^{99} can adjust this. You cannot drop a parked call that recalls your phone.

2. Park slots are unique to your telephone system. Park and unpark is not supported between different phone systems in a Small Community Network ^{99}.

2.10.1 Configuring Your Park Slots

one-X Portal provides you with 4 park slot buttons. You can configure which phone system park slots the buttons match. If the numbers or names you use match those also used by other users, you will be able to see when they have parked a call in those park slots. You can use the buttons to unpark those calls. Similarly other users will be able to see and unpark calls that you park.

1. Click on the Configure tab and scroll down to the Park Slots section.

Park Slots
```
1
2
3
4
```

2. For each of the park slot buttons that your one-X Portal supports, enter the park slot number or name that it matches. Typically numbers are used, with everyone using 1 to 4 as their defaults.

3. Click Save.

2.10.2 Parking a Call

1. Using the Calls gadget on the Main tab, select the tab representing the call that you want to park.
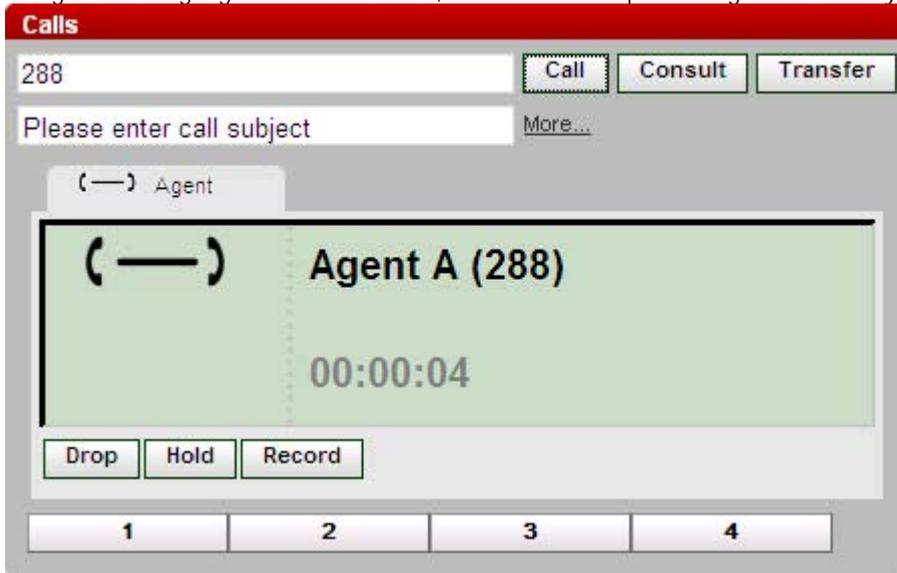
2. Click on one of the park buttons at the bottom of the Calls gadget.
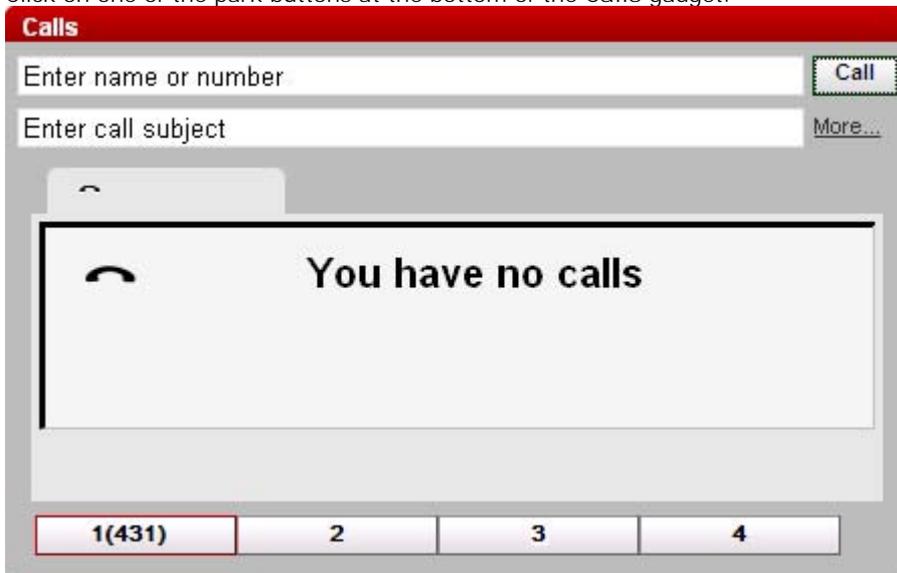
3. The call is parked and the button now indicates that the system park slot is in use.

Notes

1. If you park a call and leave it parked too long it will recall to you. The default is to recall after 5 minutes but your system administrator ⌐99¬ can adjust this. You cannot drop a parked call that recalls your phone.

2.10.3 Unparking a Call

1. Using the Calls gadget on the Main tab, the park buttons at the bottom of the Calls gadget will indicate if there is a call parked.

2. Placing your cursor over the button will display the name and number of the parked caller if known.

3. Click on the parked call button to unpark the call.

2.11 Instant Messaging Other Users

one-X Portal allows you to have instant message chat sessions with other one-X Portal users. You can only do this if they have one-X Portal running on their computer. You can use an instant message session even when on a call to the same user that you are messaging.

If you do not want other users to be able to start chat sessions with you while you are using one-X Portal, set your presence status 12ᐟ to *Offline*.

1. Locate the other one-X Portal user in your Directory gadget.

   - A grey 👤 icon indicates they are either available but not using one-X Portal or that they have selected Offline status. In either case they cannot be instant messaged.

2. Click on the user to display their contact details.

Agent A		
Work phone	4311	Call Add to conference
Chat with	Agent A	
Add to:	Sales ▾	

3. Click on the name next to Chat with if available. It will not be available if the user is currently not logged in to one-X Portal.

4. The instant message popup window will appear in your one-X Portal and in the other user's one-X Portal.

   Agent A (4311)

   Call

MarkG (6750):	Do you want to join the consultation council call?
Agent A (4311):	Yes. When is it?
MarkG (6750):	Now!
Agent A (4311):	Let me finish this call and then I'll join 5 mins max.

   Okay|

5. You can start typing your messages and they can reply.

6. You can start instant messaging session with other one-X Portal users at the same time. Each will appear in a separate popup.

2.12 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your Do Not Disturb Exceptions 91. All other callers are routed to voicemail if available or otherwise receive busy tone. You can still make calls while in the Do Not Disturb state.

To switch Do Not Disturb On

1. At the top-right, click on the ![icon] Available ▾ status selector.

2. Select *Do Not Disturb*.

3. Your status icon will change to ⊗ do not disturb.

To switch Do Not Disturb Off

1. At the top-right, click on the ⊗ Do not disturb ▾ status selector.

2. Select *Available* or *Offline*.

3. Your status icon will change to ![icon] available or 🚫 busy.

Chapter 3.
Conference Calls

3. Conference Calls

You can use one-X Portal to start and manage a conference call. The conference parties are listed in the Calls gadget.

Start and Manage Conference Calls		
• Setup a conference. 41 • Turning held calls into a conference call 43 • Turning a normal call into a conference 44	• Add another party to a conference 45 • Mute conference parties 46 • Drop conference parties 47	• Holding a Conference Call 48 • Set Your Conference Number 50

Notes

1. The maximum number of participants in any particular conference is 64. However that may be limited by the number of participants in other conferences already in progress. It may also be limited by other features, for example call recording, that also use the telephone system's conference facilities.

2. Depending on phone system settings, a conference can automatically end if all internal users exit leaving only external users.

3. The conference controls are not supported for a users whose extension is on another switch other than the one where the conference started

3.1 Setup a Conference

You can use the one-X Portal directories to select and call the parties that you want to include in the conference and then start the conference.

1. In the one-X Portal directory tabs, locate and click on the contact that you want to add to the conference.
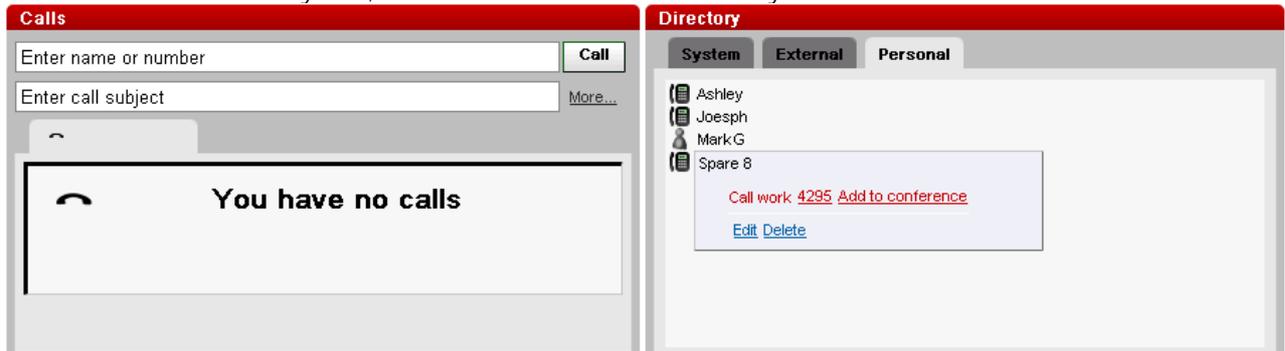
2. Select the contact number to call to click on the Add to conference option next to it.
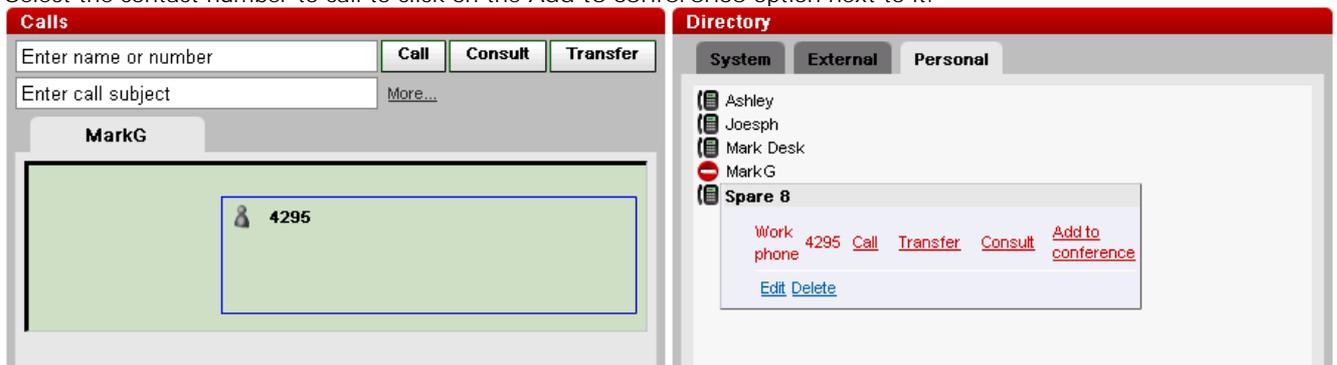
3. When the party answers, informs them that you want to include them in a conference. If they do not answer or do not want to be included in the conference, click on their icon shown in the call tab and click on Drop.
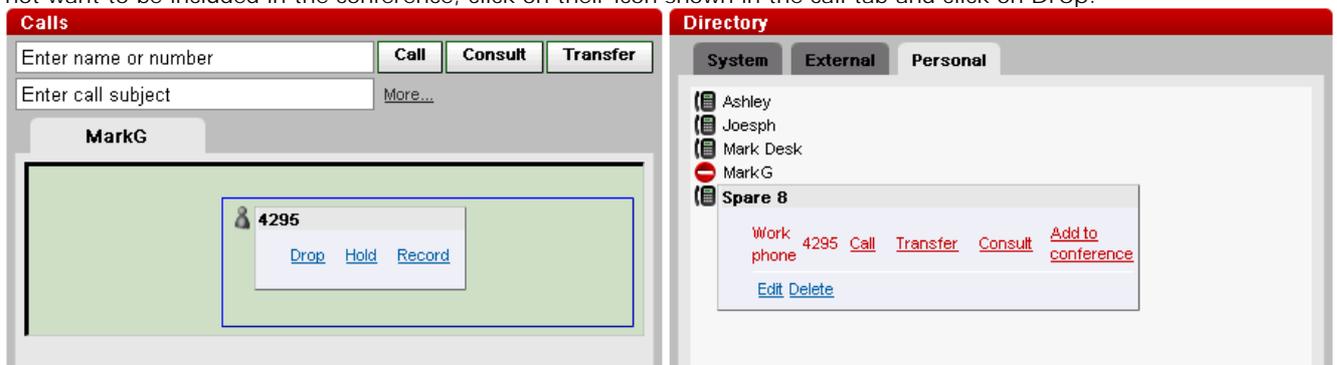
4. Click on the next contact that you want to add and select Add to conference to repeat the process. The previous party added is put on hold while you hear the progress of the call to the new contact.
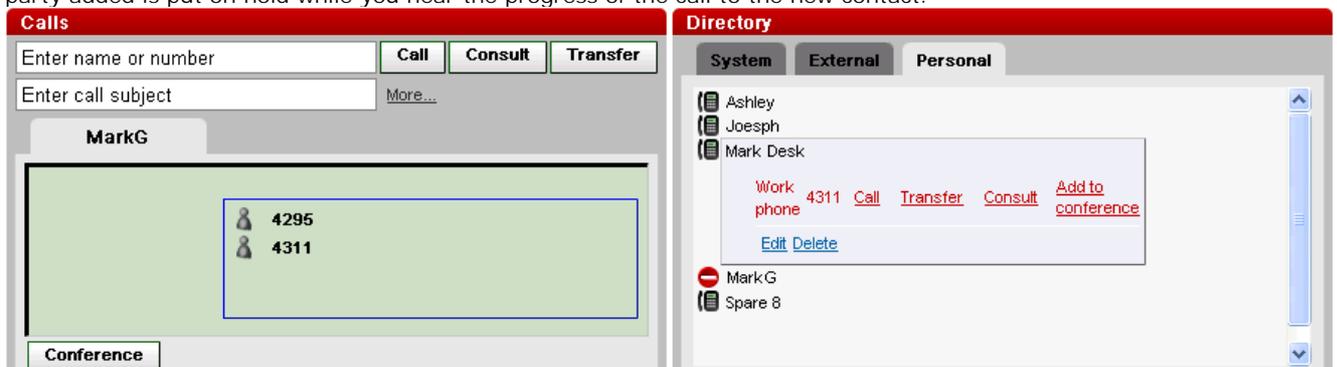
5. When you have added all the contacts, click on Conference to start the conference call.
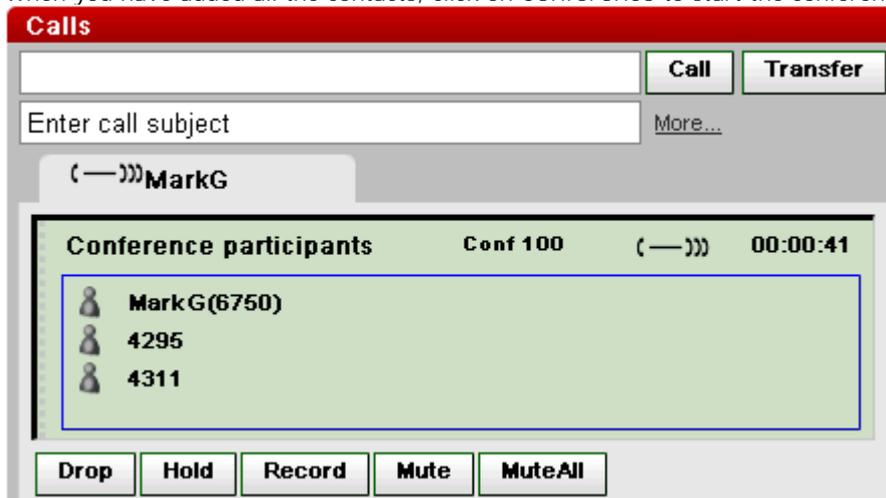
3.2 Turning Held Calls into a Conference

If you have several held calls or held calls plus a connected call, you can turn them into a conference call.

1. When you have several held calls, or a call in progress and other calls on hold, the tabs in the Calls gadget display a Conference button.
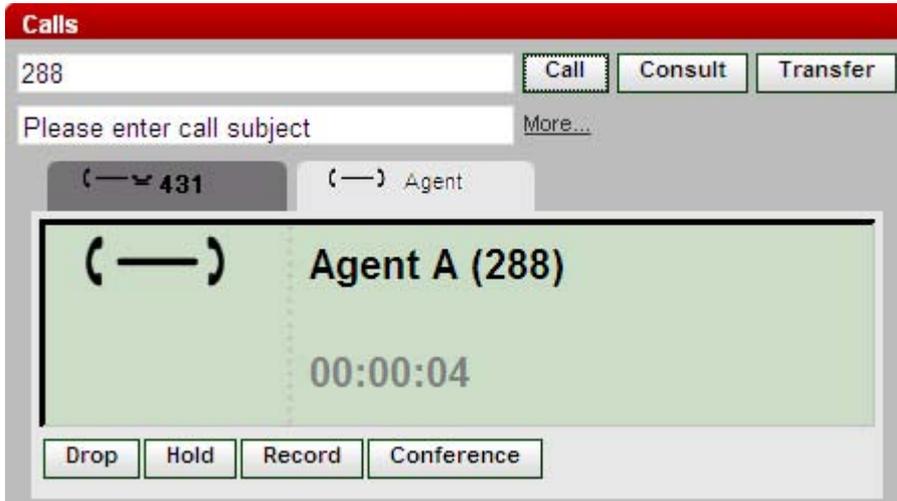
2. Click on the Conference button. All the calls will be added to a conference.

3.3 Turning a Normal Call into a Conference

With an existing call in progress, you can make another call and then start a conference.

1. Using the text box at the top of the tab, enter the number to which you conference with and click Consult. Alternatively, locate a name in the directory 33 and click on the Consult option shown in the contact's details.

2. Your current call is put on hold. You will hear the progress of the call to the transfer destination. This is called an enquiry or consultation call.

3. When answered to start the conference, click Conference.

3.4 Adding a Another Call to a Conference

You can add an additional party to the conference.

1. Enter the number you want to call and click on Call. Alternatively use the directory to call a contact.
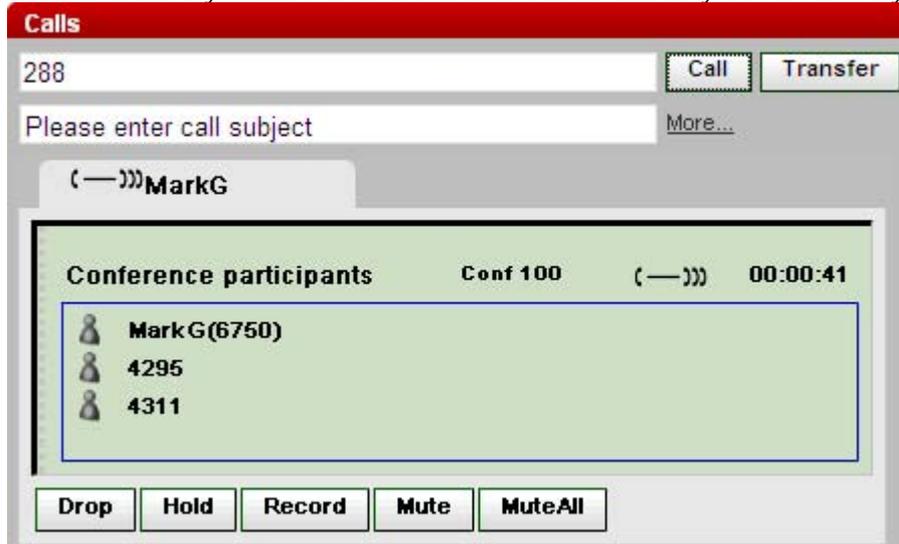
2. Your connection to the conference is put on hold but the other participants can still talk to each other.
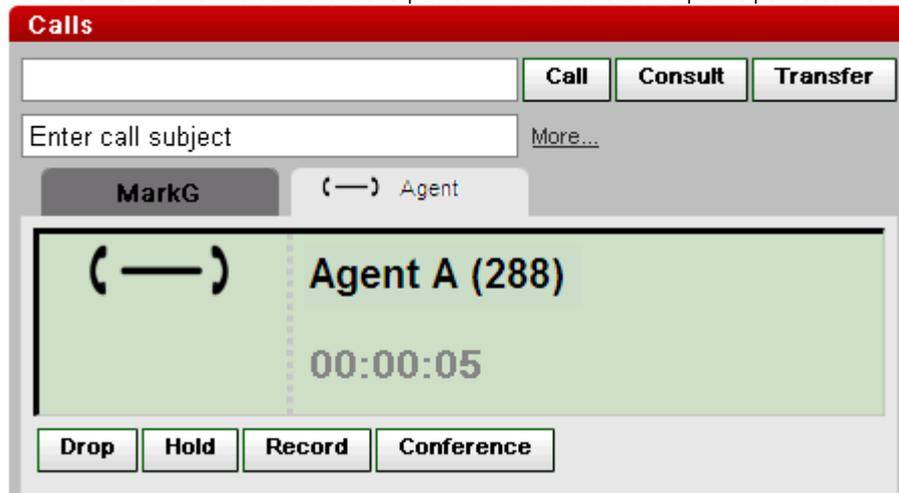
- If the other party is happy to join the conference, click on Conference.

- If the other party does not answer or does not want to join the conference, click on Drop. Then go to the tab for the conference call and click on Retrieve to rejoin the conference.

3.5 Muting Conference Parties

Parties within the conference can be muted. This can improve the clarity of the conference call, especially if it includes parties on analog connections or using speaker phones.

While a party's connection to the conference is muted, they are shown with a muted ![icon] 4311 icon.
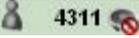
Note that the mute functions detailed here are performed by the telephone system. They do not switch on or off any mute function that may be provided by your phone.

To Mute Yourself
1. Click on the Mute button on the conference tab. Your icon will be changed to show that you are muted.

To Mute Another Party in the Conference
1. If you click on the details of a party in the conference, you will be displayed a list of the actions that you can perform. The options will vary depending on the conference party's current state and on whether you started the conference or not.

- Drop ![icon] 4311

    This option allows you to drop the party from the conference. Their icon is changed as shown to show that they are no longer in the conference.

- Mute ![icon] 4311

    This option allows you to mute the party. While muted their icon is changed as shown.

- Unmute

    Reconnect a party whose icon indicates that they were muted.

To Mute All Other Parties in the Conference
If you are able to do this, a Mute All button will be displayed at the bottom of the Calls gadget. Clicking on this will mute all the parties in the conference except you. While all the other parties are muted, your Calls gadget will display an Unmute All button.

3.6 Dropping Conference Parties

You can drop other parties from a conference. This can be useful if you have inadvertently added a call that has gone to voicemail to the conference or an external party has put their connection on hold (which may cause music on hold to be heard by the conference).

When a party has been dropped from the conference, they are shown with a dropped icon.

To Drop Yourself

1. Click on the Drop button on the conference tab. The conference call tab will disappear as you are no longer part of the conference.

To Drop Other Parties in the Conference

1. If you click on the details of a party in the conference, you will be displayed a list of the actions that you can perform. The options will vary depending on the conference party's current state and on whether you started the conference or not.

- Drop
  This option allows you to drop the party from the conference. Their icon is changed as shown to show that they are no longer in the conference.

- Mute
  This option allows you to mute the party. While muted their icon is changed as shown.

- Unmute
  Reconnect a party whose icon indicates that they were muted.

3.7 Holding a Conference

You can put a conference call on hold. The other parties in the conference will still be able to talk to each other without you. Your status in the conference display is updated to show that you are on hold. To return to the conference click on Retrieve.
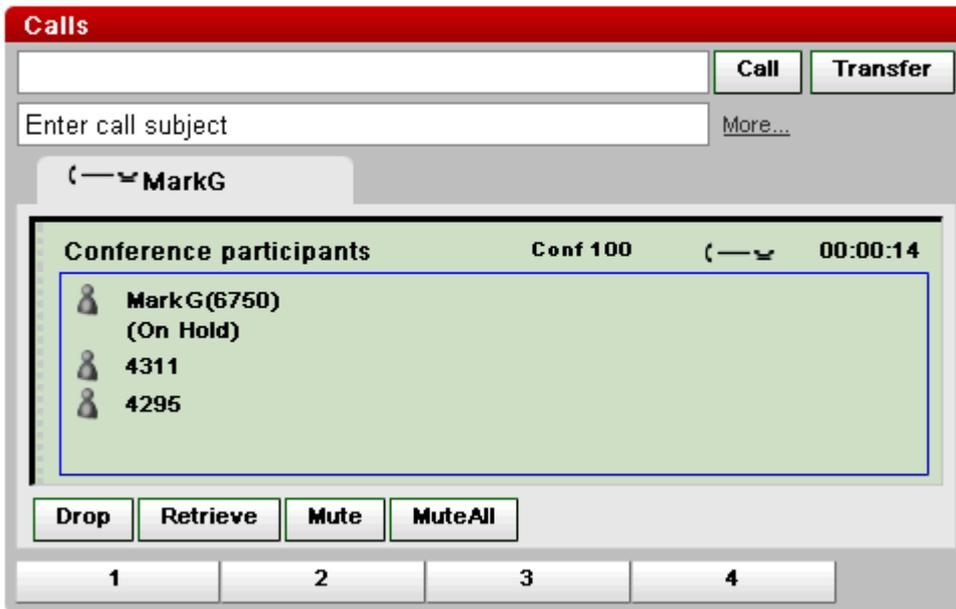
Note that this only applies to conference calls on your own phone system and displayed as conference calls by your one-X Portal. Putting your connection to any other type of conference, for example on another phone system, may cause that conference to hear your phone systems music on hold.

3.8 Conference Call Controls

When you have a conference call in progress, the conference call tab will display a range of controls.

Conference Buttons

The buttons on the conference tab can be used as follows:

- Drop
  Drop yourself from the conference.

- Hold
  Put you connection to the conference on hold. The other parties in the conference are still connected and can continue talking.

- Record
  You can start recording a conference call. All parties in the conference will hear an advice of call recording warning. If you add another party to the conference the warning is repeated.

- Mute
  Mute your connection to the conference. This can help the clarity of the conference when there are several parties. To unmute yourself click on the Unmute button.

- Mute All
  If you started the conference, you may also be able to use this control. It allows you to mute all other parties in the conference except yourself.

- Unmute
  Unmute your connection to the conference.

- Unmute All
  If you started the conference, you may also be able to use this control. It allows you to unmute all muted other parties in the conference.

Using the Conference Party Icons

By clicking on the icons of the parties in the conference you can perform actions on that party.

1. If you click on the details of a party in the conference, you will be displayed a list of the actions that you can perform. The options will vary depending on the conference party's current state and on whether you started the conference or not.

- Drop
  This option allows you to drop the party from the conference. Their icon is changed as shown to show that they are no longer in the conference.

- Mute
  This option allows you to mute the party. While muted their icon is changed as shown.

- Unmute
  Reconnect a party whose icon indicates that they were muted.

3.9 Configuring Your Conference Bridge Number

For conferences that you start, the one-X Portal conference display provides you with functions to mute and drop other parties or to mute all parties.

Each conference hosted by the IP Office is given an ID and your system administrator can configure methods for accessing or starting a conference with a particular ID. If your one-X Portal conference bridge number setting matches the conference ID, you will have the same conference controls to mute and drop other parties as provided for a conference that you started yourself.

1. Select the Configure tab.

2. Locate the Conference Bridge Number field.
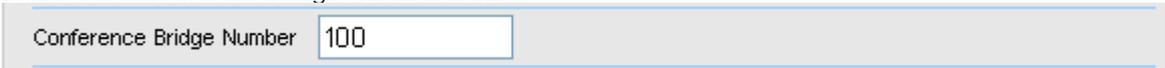
   Conference Bridge Number   100

3. Enter the name or number of the conference meet me that you want to control.

4. Click on Save.

Chapter 4.
The Call Log

4. The Call Log

The Call Log gadget displays details of calls you have made, received and missed. You can use the call log to make a call 20 or add the caller's details to your Personal Directory 55 .

Use My Call Log		
• View My Call Log 53	• Make a Call From the Call Log 54	• Add a Call Log Number to My Directory 55

Phone Call Log

The call log shown by one-X Portal is stored on the telephone system as part of your user setting.

If you are using a 1400 Series, 1600 Series or 9600 Series phone with a Call Log button, the same call log is shown on the phone. You can then use and edit your call log from the phone or from one-X Portal. The two will change in parallel.

If you are using any other type of phone that has a call log, it will be a call log stored by the phone itself and so may not match the one-X Portal call log. For example calls made using the one-X Portal may not appear in the phone's call log.

4.1 Using the Call Log

The Call Log displays details of calls you have made, received and missed. You can use the call log to <u>make a call</u> [20] or <u>add the caller's details to your Personal directory</u> [55].

Each call of particular type, to or from a particular number, only appears as a single call log record. For any additional calls of the same type and number as an existing call log record, the details (Time and Duration) shown for the existing record are updated and the Calls count is increased.

Tab	Description
All	This tab shows all the records from the other sub-tabs.
Incoming	This tab shows records for calls direct to your extension number that you have answered. Details of the 10 most recent calls are included.
Outgoing	This tab shows records for calls that you made. Details of the 10 most recent calls are included.
Missed	This tab shows records for calls that have rung your phone but were not answered there. They include calls then went to your voicemail, calls that were forwarded and calls that were picked up by another user. Details of the 10 most recent calls are included.

- Hunt Group Calls
  Your <u>system administrator</u> [99] can configure whether your missed calls call log includes missed calls for selected <u>hunt groups</u> [98]. Missed hunt group calls are calls not answered by a member of the hunt group. They do not have to actually rung you and they may have been answered by a non-group member or voicemail; if so that will be indicated in the missed call details. When this option applies to your call log, the Name column is relabeled From and a To column is also displayed so you can distinguish between your own calls and calls to a hunt group.

- ▼ ▲ Sort
  You can sort the call log entries by clicking on the column headers. The current column being used for sorting is indicated by a down arrow ▼ or up arrow ▲ icon. Clicking on the same column header again reverses the sort order.

- <u>Add the Caller Details to Your Personal Directory</u> [55]
  You can add the name and number to your Personal directory.

- Clear Tab
  Delete all records from the currently viewed tab.

- <u>Name</u> [54]
  The entries in the name column are underlined and can be clicked to make a return call to the number stored by the call log.

4.2 Making a Call from the Call Log

You can use the numbers in the call log to make a repeat or return call.

1. Using the Call Log gadget on the Main tab, locate the contact that you want to call.
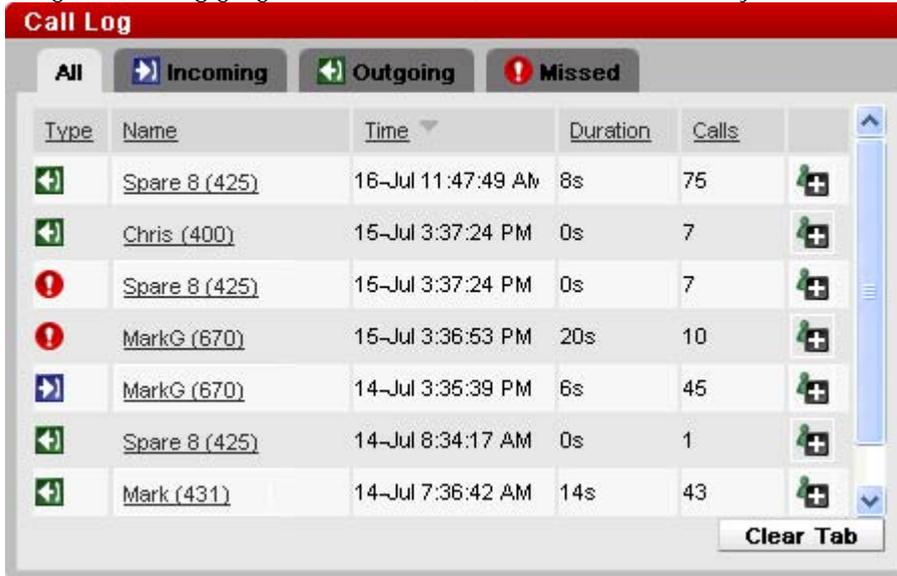
2. Click on the underlined number.

   - The progress of the call is displayed on a tab in the Calls gadget.
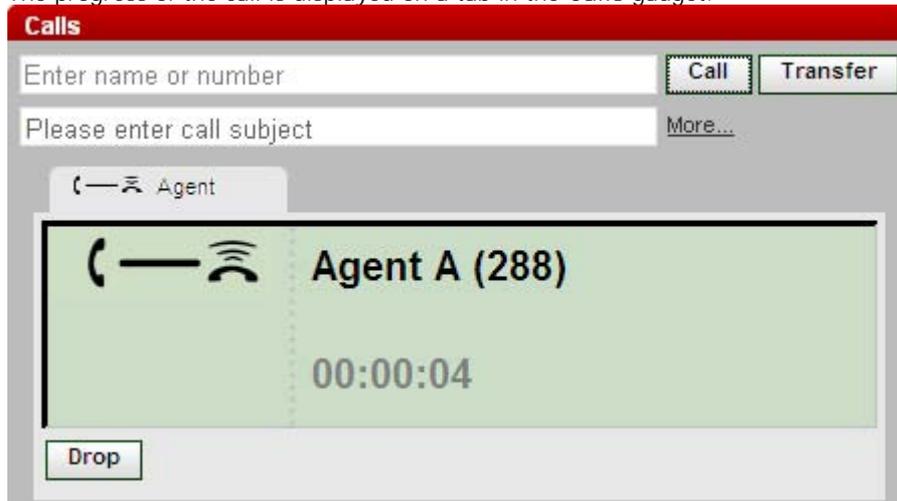
4.3 Adding a Caller to Your Directory

You can add the details of a caller shown in your call log to your Personal directory.

1. Locate the call in your call log.

2. Click on the add ![icon] icon next to the call details.

3. The contact details menu will be displayed pre-filled with the information from your call log.

   - Use the menu to enter and adjust the details as required.

Edit Contact	
Name :	
MarkG	
Work phone :	Work e-mail :
6750	
Mobile phone :	Personal e-mail :
Other phone :	Other e-mail :
Primary phone :	Group :
Work	☑ Personal
	☑ Team
	Save Cancel

   - If the Work phone setting matches a telephone system user's extension number, the directory contact will show the <u>user status</u> 60 of the user. This applies even if another number is currently selected as the <u>Primary phone</u> 99 .

   - You can use the Group list to select which of your personal <u>contacts tabs</u> 68 the contact should appear on.

   - You can add email addresses. These allow you to <u>start an email</u> 69 from the one-X Portal directory.

- When finished, click Save.

Chapter 5. Directories

5. Directories

Your one-X Portal can display several directories of names and associated telephone numbers. It does this in the Directory gadget.
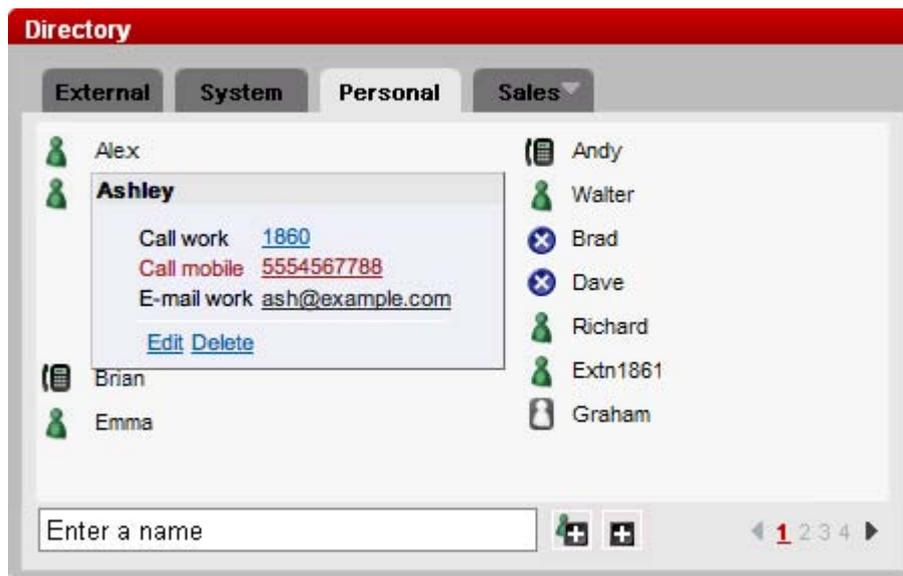
Each of the different types of directory listed below is shown on a separate tab. In addition you can create up to 4 additional tabs to which you can add selected contacts.

- Personal
  This tab shows your personal contacts stored by the phone system. If you are using an Avaya phone these contacts may also be accessible on the phone.

- System
  This tab shows contacts stored by the phone system for use by all users plus the details of other users and hunt groups.

- External
  This tab allows you to search an external directory of contacts if configured by your administrator.

Use the Directories		
• <u>View the Directories</u> [59]	• <u>Add a Directory Contact</u> [63]	• <u>Delete a Directory Contact</u> [68]
• <u>Search the Directories</u> [60]	• <u>...from My Call Log</u> [55]	• <u>Edit a Directory Contact</u> [67]
• <u>Make Calls from the Directory</u> [61]	• <u>...from a Voicemail Message</u> [85]	• <u>Transfer a Call to a Directory Contact</u> [33]
• <u>Adding a Contacts Group Tab</u> [68]	• <u>...from the System Directory</u> [64]	• <u>Email a Contact</u> [69]
		• <u>Instant Messaging a Contact</u> [70]

- Dialing by Name
  When making calls using the <u>Calls</u> [20] gadget, you can enter a name rather than a number. If the name matches a contact in your Personal directory or the System directory, the primary number of that contact is dialed.

- Name Display on Incoming Calls
  When receiving a call, if the number of the caller matches a contact in your Personal directory or the System directory, the name of the contact is displayed by your one-X Portal.

5.1 Viewing the Directories

Your one-X Portal can display several directories (System, Personal and External) of names and associated telephone numbers.
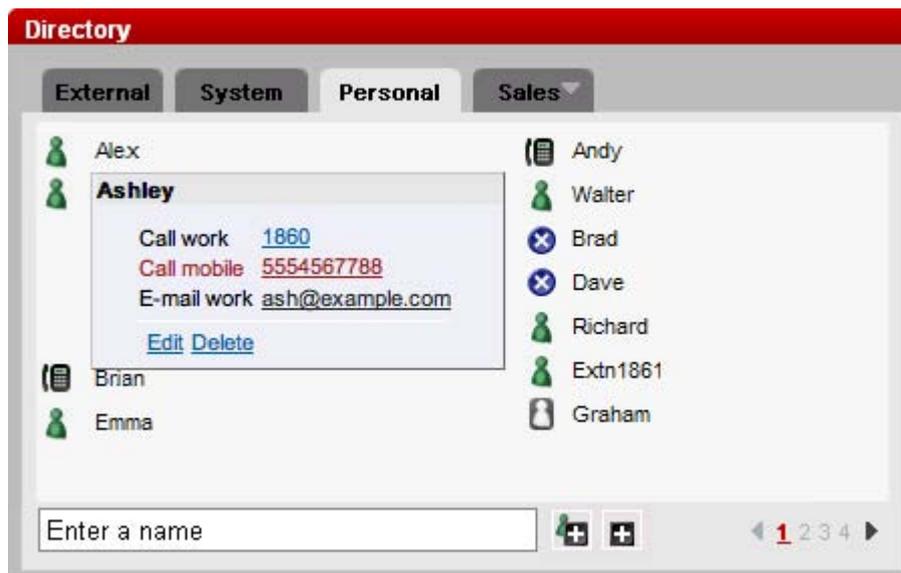
- Personal Directory
  This is your own directory of names and numbers. You can associate multiple numbers with a name and select which number to use when making a call. You can edit and change the directory contacts using one-X Portal.

    - For some types of phone *(see below)*, you can also access, use and edit your Personal directory from the phone.

- System Directory
  This is the directory of names and numbers from your telephone system plus all the users and groups 98 on the telephone system. Your one-X Portal administrator can also add System directory contacts. You cannot change these contacts. However, you can copy a System directory contact into your Personal directory 64.

- External Directory
  Your system administrator 99 can configure one-X Portal to access an external directory. If your one-X Portal server has been configured to do this, you can perform a search of the external directory. The results of the search are shown here.

Personal Directory

If you are using a 1400 Series, 1600 Series or 9600 Series phone with a Contacts button, or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.

1. As Personal directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal only.

2. The contacts can be edited through the phone or through one-X Portal.

3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current Primary phone 99 number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal if that selection is changed.

5.2 Directory Icons

- For some directory contacts, one-X Portal can indicates the contacts current status by using different icons. For contacts that have multiple telephone numbers, the status is based that of the work number.

State	Icon	Description
Available	👤	The normal state for a user showing that their work extension is not in use.
Busy	⛔	The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb	✖	The user has set Do Not Disturb 12. Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's Do Not Disturb exception list 91.
Logged Out	👤	The user has logged out 98 from their phone. Calls to them will most likely go to voicemail if available.
Other	📱	This icon is used when the status is not known.

5.3 Searching the Directories

Each of the individual directory tabs can be searched.

Searching the Personal and System Directories

Using the Personal directory and the System directory, you can use the text box at the bottom to enter a name. The directory contacts still shown will be those that match the name.

When there are multiple matches, you can use the page icons ◀ **1** 2 3 4 ▶ at the bottom right to move between pages. Alternatively, add more details to the search term to improve the search matching and so reduce the number of contacts displayed.

Searching the External Directory

To search the External directory, enter a name or number in the text box at the bottom and click on the magnifying glass 🔍 icon. one-X Portal will then search the remote directory and return the matching contacts. To clear the results click on the Clear button.

5.4 Making a Call

1. Using the Directory gadget on the **Main** tab, locate the name that you require in the directory.

2. To filter the names shown, start entering a name or number in the text box at the bottom of the directory tab. As you enter a name, directory contacts that do not match are hidden from the view.

   - For some directory contacts, one-X Portal can indicates the contacts current status by using different icons. For contacts that have multiple telephone numbers, the status is based that of the work number.

State	Icon	Description
Available	👤	The normal state for a user showing that their work extension is not in use.
Busy	⛔	The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb	✖	The user has set Do Not Disturb 12ᐟ. Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's Do Not Disturb exception list 91ᐟ.
Logged Out	👤	The user has logged out 98ᐟ from their phone. Calls to them will most likely go to voicemail if available.
Other	📳	This icon is used when the status is not known.

5. Click the name to show the directory details.

   👤 **Joesph**

   Call work   1860
   Call mobile   555326777
   Call other   55567788
   E-mail work   joe.work@example.com

   Edit Delete

6. To call the number shown, click on it. Personal directory contacts can have several numbers available to be used.

   - The progress of the call is displayed on a tab in the Calls gadget.

   Calls

Enter name or number		**Call** **Transfer**
Please enter call subject		More...

   (—ᔭ Agent

   (—ᔭ **Agent A (288)**

   00:00:04

   Drop

5.5 Transferring a Call

You can transfer a call to a contact in your directory rather than having to enter the destination number yourself.

1. Use the Directory gadget to locate the party to which you want to transfer the call. Click on their name to display their number details.

2. Because you already have a connected call, options in addition to Call are displayed next to each contact number.

- Use the Transfer link to do a simple <u>unsupervised transfer</u> 31.

- Use the Consult link to start a <u>supervised transfer</u> 32.

5.6 Adding a New Personal Directory Contact

In addition to the method below, you can add caller details from a <u>voicemail message</u> 85ᵀ, from the <u>call log</u> 55ᵀ or from the <u>System directory</u> 64ᵀ.

1. Using the Directory gadget on the Main tab, select the Personal directory tab.

2. In the box at the bottom of the tab, enter the name or number you want to add and click the add 🟢 icon.

3. The menu for entering contact details is displayed.

   - Use the menu to enter and adjust the details as required.
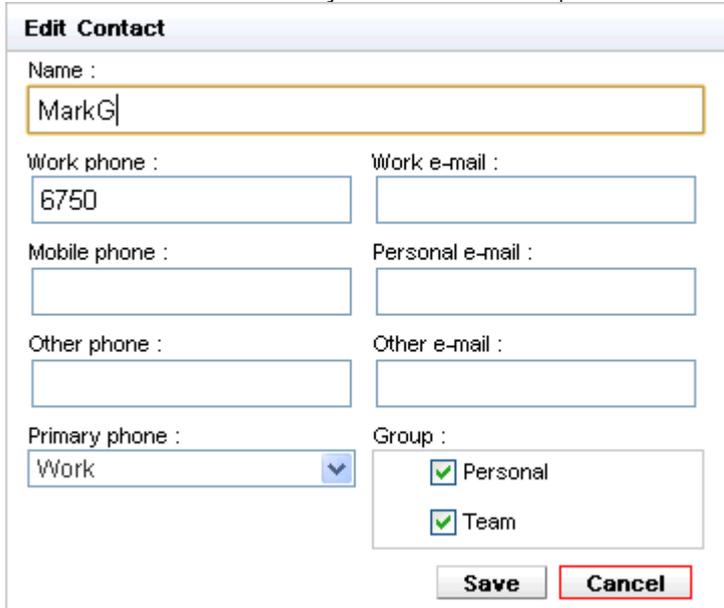
Edit Contact

     Name :

     MarkG

     Work phone :
     6750

     Work e-mail :

     Mobile phone :

     Personal e-mail :

     Other phone :

     Other e-mail :

     Primary phone :
     Work ▾

     Group :
     ☑ Personal
     ☑ Team

     Save   Cancel

   - If the Work phone setting matches a telephone system user's extension number, the directory contact will show the <u>user status</u> 60ᵀ of the user. This applies even if another number is currently selected as the <u>Primary phone</u> 99ᵀ.

   - You can use the Group list to select which of your personal <u>contacts tabs</u> 68ᵀ the contact should appear on.

   - You can add email addresses. These allow you to <u>start an email</u> 69ᵀ from the one-X Portal directory.

   - When finished, click Save.

Personal Directory

If you are using a 1400 Series, 1600 Series or 9600 Series phone with a Contacts button, or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.

1. As Personal directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal only.

2. The contacts can be edited through the phone or through one-X Portal.

3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current <u>Primary phone</u> 99ᵀ number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal if that selection is changed.

5.6.1 Adding a Contact from the System Directory

You can add a contact in the System directory to your Personal directory. The copy remains linked to the System directory, you cannot edit it but changes in the System directory will apply to the copy in your Personal directory.

1. Using the Directory gadget on the Main tab, select the System directory tab.

2. Locate the contact that you want to add and click on the name to display the details.
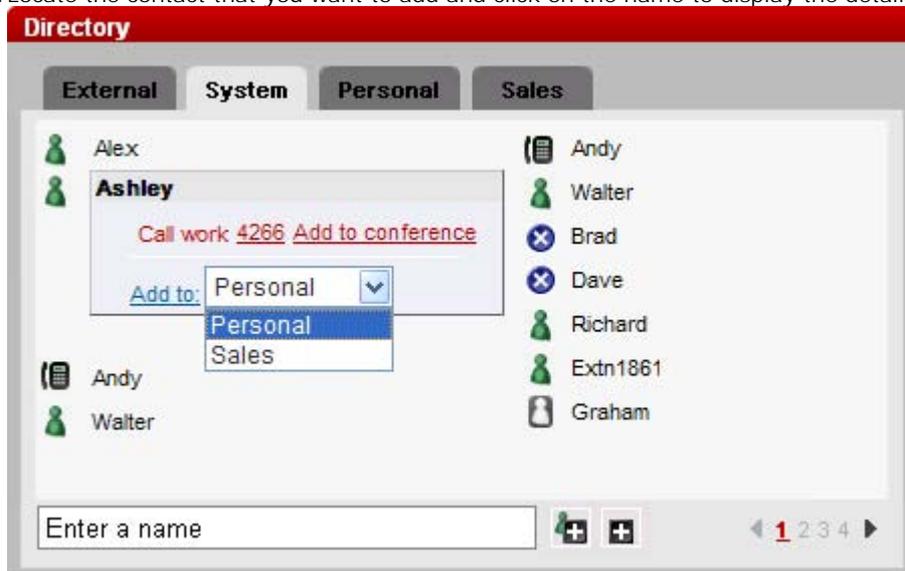
3. Use the drop down list to select which of your personal contacts tabs 68⌐ you want to add a copy of the system directory contact.

4. Click on Add to.

5. The contact is added to the selected tab.

Hint

- To add a copy of a system contact that you can then edit and add other contact details such as additional numbers and email addresses, use the standard method of adding a personal directory contact. If the Work Phone number matches a system user's extension number, the personal contact will show the user status of that user.

5.6.2 Adding a Caller from the Call Log

You can add the details of a caller shown in your call log to your Personal directory.

1. Locate the call in your call log.

2. Click on the add ![icon] icon next to the call details.

3. The contact details menu will be displayed pre-filled with the information from your call log.

- Use the menu to enter and adjust the details as required.

Edit Contact

Name :

MarkG

Work phone :   Work e-mail :

6750

Mobile phone :   Personal e-mail :

Other phone :   Other e-mail :

Primary phone :   Group :

Work   ☑ Personal

☑ Team

Save   Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the user status 60 of the user. This applies even if another number is currently selected as the Primary phone 99.

- You can use the Group list to select which of your personal contacts tabs 68 the contact should appear on.

- You can add email addresses. These allow you to start an email 69 from the one-X Portal directory.

- When finished, click Save.

5.6.3 Adding a Voicemail Caller to the Directory

You can add the details of a caller who left you a voicemail message to your Personal directory.

1. Click on Main.

2. View the Messages.

3. Click on the add ✚ icon shown in the message details.

- Use the menu to enter and adjust the details as required.

Edit Contact

Name :

MarkG

Work phone :   Work e-mail :

6750

Mobile phone :   Personal e-mail :

Other phone :   Other e-mail :

Primary phone :   Group :

Work   ☑ Personal

                       ☑ Team

                       Save   Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the user status 60ʰ of the user. This applies even if another number is currently selected as the Primary phone 99ʰ.

- You can use the Group list to select which of your personal contacts tabs 68ʰ the contact should appear on.

- You can add email addresses. These allow you to start an email 69ʰ from the one-X Portal directory.

- When finished, click Save.

5.7 Editing a Personal Contact

1. Using the Directory gadget on the Main tab, locate the name that you require in the directory.

2. To filter the names shown, start entering a name or number in the text box at the bottom of the directory tab. As you enter a name, directory contacts that do not match are hidden from the view.

5. Click the name to show the directory details.

- Click Edit.

    - This option is not available for contacts that have been added from the system directory, they remain linked to the matching entry on the System directory tab.

- Use the menu to enter and adjust the details as required.

    - If the Work phone setting matches a telephone system user's extension number, the directory contact will show the user status [60] of the user. This applies even if another number is currently selected as the Primary phone [99].

    - You can use the Group list to select which of your personal contacts tabs [68] the contact should appear on.

    - You can add email addresses. These allow you to start an email [69] from the one-X Portal directory.

- When finished, click Save.

5.8 Deleting a Personal Directory Contact

Note that if the same contact appears on several personal tabs, this action will only delete the contact from the currently displayed tab. To see which tabs a personal contact appears on, select Edit instead of Delete.

1. Using the Directory gadget on the Main tab, locate the name that you require in the directory.

2. To filter the names shown, start entering a name or number in the text box at the bottom of the directory tab. As you enter a name, directory contacts that do not match are hidden from the view.

5. Click the name to show the directory details.

6. Click Delete.

5.9 Adding Another Personal Contacts Tab

In addition to the standard directory tabs (Personal, System and External) you can create up to 5 additional tabs for personal contacts. You can use those additional tabs in the same way as the Personal tab.

The same personal contact can appear on several tabs. The tabs are selected when editing the personal contact 67⟩.

Adding a Personal Contacts Tab

1. Select the Personal tab in the Directory gadget.

2. Click on the ➕ add icon.
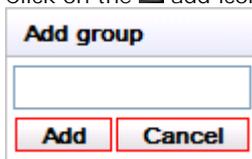
3. Enter a name for the new tab and click Add.

4. The new tab will be displayed.

Renaming an Additional Tab

To rename a tab, click on the ▼ down arrow icon by the tab name and select Edit. Enter the name required and click Modify.

Deleting a Personal Contacts Tab

To delete a personal directory tab, click on the ▼ down arrow icon by the tab name and select Remove.

If you delete a tab that contains personal contacts, those contacts will be moved to your Personal tab. If you do not want this to happen you must delete the contacts 68⟩ from the tab before deleting it.

5.10 Emailing a Contact

Contacts in your Personal and External directories can include email addresses. You can click these in order to email the contact.

1. Using the Directory gadget on the Main tab, locate the name that you require in the directory.

2. To filter the names shown, start entering a name or number in the text box at the bottom of the directory tab. As you enter a name, directory contacts that do not match are hidden from the view.

3. Click on the directory name to display the number and email address details.

4. Click on the email address that you want to use. Some contacts can have more than one email address from which you can select.

5. A new email will be started using the computer's default email application, with the selected email address in the To field.

5.11 Instant Messaging a Contact

one-X Portal allows you to have instant message chat sessions with other one-X Portal users. You can only do this if they have one-X Portal running on their computer. You can use an instant message session even when on a call to the same user that you are messaging.

If you do not want other users to be able to start chat sessions with you while you are using one-X Portal, set your presence status 12ᐟ to *Offline*.

1. Locate the other one-X Portal user in your Directory gadget.

   - A grey 👤 icon indicates they are either available but not using one-X Portal or that they have selected Offline status. In either case they cannot be instant messaged.

2. Click on the user to display their contact details.

3. Click on the name next to Chat with if available. It will not be available if the user is currently not logged in to one-X Portal.

4. The instant message popup window will appear in your one-X Portal and in the other user's one-X Portal.

5. You can start typing your messages and they can reply.

6. You can start instant messaging session with other one-X Portal users at the same time. Each will appear in a separate popup.

Chapter 6.
Profiles

6. Profiles

one-X Portal allows you to create profiles which contain a set of telephone system settings. By selecting which of your saved profiles is active, you apply that set of settings to the telephone system. Thus using profiles you are able to easily control where your calls are directed and how they are treated.

By default you have 3 profiles, called Office, Mobile and Home. You can edit these profiles but you cannot delete them. However you can also add 4 more profiles which you can edit and delete. A special profile call Detected 73ᐟ may also appear. It is displayed when your current telephone system settings don't match any of your profiles.

Profile Settings	
Mobility 76ᐟ	• Default Deskphone 76ᐟ • Forward calls. 77ᐟ • Mobile Twinning. 77ᐟ • Telecommuter. 78ᐟ
Voicemail 79ᐟ	• Voicemail on/off. • Voicemail Ringback on/off. • Voicemail Outcalling on/off. • Listen on your phone/Listen on your PC. • Select which voicemail greeting to use.
Call Pickup 76ᐟ	• Call Pickup on/off.

Example

Using a set of profiles, you can quickly switch between different forwarding locations and different calls received. For example, you could configure a set of profiles as follows:

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	⦿	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	○	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	○	Edit
Add a new profile definition			

This user has configured the profiles to work as follows:

- The Office profile is set to send calls to the user's desk extension. Voicemail is on if calls ring unanswered and so is call pickup to allow other one-X Portal users to pickup calls.

- The Mobile profile is set to use mobile twinning to ring at both the user's desk extension and at another number. Voicemail and call pickup are also still on.

- The Home profile is set to forward calls to an external number. Voicemail is on but call pickup is off.

Create and Use Profiles		
• Selecting Your Active Profile 73ᐟ • Adding a New Profile 75ᐟ	• Editing a Profile 74ᐟ	• The 'Detected' Profile 73ᐟ

6.1 The Detected Profile

If your settings on the telephone system do not match any of your profiles, one-X Portal will show you as being set to a profile called *Detected*. This profile will contain your current settings read from the phone system.

Name	Description	Active	
Detected	At Deskphone, VM OFF, Ringback ON, Email OFF, Call Pickup OFF	⊙	View
Office	Mobile Twinned at :96775655, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit
Mobile	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit
Home	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit
Add a new profile definition			

The Detected profile can reappear even after you have selected an active profile. When you select a profile to be active, that profile's settings are applied to your settings on the telephone system. However many of those settings can also be changed using other methods such as dialing short codes. If you do that, your telephone system settings no longer match your profile and so you are changed back to the Detected profile.

- Changing Voicemail Settings Using Other Interfaces
  one-X Portal loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal may be incorrect. If you make voicemail setting changes through a method other than one-X Portal, you should log out of one-X Portal and log in again.

6.2 Selecting Your Profile

Your currently active profile is shown in the status line ⌐12⌐ at the top-right of the one-X Portal screen.

1. Select the Configure tab.

2. The list of profiles is shown at the top of the form.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	⊙	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	○	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	○	Edit
Add a new profile definition			

3. In the list of profiles, click on the profile that you want used.

- When you select or edit an active profile, there is a small delay while the profile settings are applied to your settings on the telephone system. An orange background indicates that the profile changes have not yet been fully applied by the telephone system. A green background indicates that the active profile changes have now been fully applied.

6.3 Editing a Profile

1. Select the Configure tab.

2. The list of profiles is shown at the top of the form.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	◉	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	○	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	○	Edit
Add a new profile definition			

3. In the list of profiles, click on the Edit link next to the profile that you want to edit.

Profile Definition

Name

Office

▶ Mobility
▶ Voicemail
▶ Call Pickup
▶ Active Greeting

[OK] [Cancel]

4. Use the ▶ and ▼ arrow icons to show and hide the different sets of settings that are available to you to use within your profiles.

5. When you have set the profile as required, click on OK.

6. Click on Save.

- When you select or edit an active profile, there is a small delay while the profile settings are applied to your settings on the telephone system. An orange background indicates that the profile changes have not yet been fully applied by the telephone system. A green background indicates that the active profile changes have now been fully applied.

6.4 Adding a Profile

In addition to the 3 default profiles, you can add 4 more.

1. Select the Configure tab.

2. The list of profiles is shown at the top of the form.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	◉	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	○	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	○	Edit
Add a new profile definition			

3. Click on Add a new profile definition.

Profile Definition

Name

[   ]

▶ Mobility
▶ Voicemail
▶ Call Pickup
▶ Active Greeting

[OK] [Cancel]

4. Enter a name for the profile.

5. Use the ▶ and ▼ icons to show and hide the different sets of settings that are available to you to use within your profiles.

6. When you have set the profile as required, click on OK.

7. Click on Save.

6.5 Profile Settings

This section summarizes the various different settings that are part of a profile.

Profile Settings	
Mobility 76	• Default Deskphone 76 • Forward calls. 77 • Mobile Twinning. 77 • Telecommuter. 78
Voicemail 79	• Voicemail on/off. • Voicemail Ringback on/off. • Voicemail Outcalling on/off. • Listen on your phone/Listen on your PC. • Select which voicemail greeting to use.
Call Pickup 76	• Call Pickup on/off.

6.5.1 Call Pickup

This option allows you to set whether other one-X Portal users to be able to <u>pickup your calls</u> 26 when this profile is your active profile.

In their Directory gadget, your contact will indicate when you have calls waiting to be answered and allow them to pickup the call.

6.5.2 Mobility - Use Default Deskphone

In this mode, your calls simply ring at the IP Office extension which you are using. This mode has no additional mobility settings.

6.5.3 Mobility - Forward

In this mode, you can have your calls forwarded to another number that you set. The calls can either be forwarded without ringing at the extension you are using or only after having first rung unanswered at that extension.

Normally only your incoming external calls are forwarded. Internal and groups calls are only forwarded if configured elsewhere by your system administrator or using controls on your phone.

These options control when your calls are forwarded while the profile is active:

- **Forward all incoming calls unconditionally to**
  If this option is selected, the calls are forwarded immediately without ringing at your IP Office extension. This function is also called 'send all calls' or 'forward all'.

- **Forward all incoming calls on no answer to**
  If this option is selected, calls are only forwarded if you phone is busy or if the call has rung unanswered for a period of time.

- Number
  This sets the number to which you want your calls to be forwarded. You can enter an internal or external number. Remember to add any external dialing prefix used by your phone system if the number is external.

- You can also use your IP Office phones menus to select your forwarding settings. If those settings differ from the one set in your profile, the one-X Portal will change your profile to Detected.

6.5.4 Mobility - Mobile Twinning

Mobile twinning allows your incoming calls to ring at both your IP Office extension and at another number that you have entered. The option to use Mobile Twinning is not available to all users.
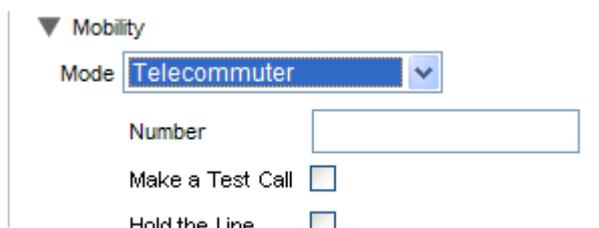
- Number
  This sets the number to which your twinned calls will be sent in addition to ringing at your desk extension.

6.5.5 Mobility - Telecommuter Mode

Telecommuter mode allows you to make and receive calls using a phone at a remote location with all calls being started by and going via the telephone system. It requires you to also have a data connection from that location over which you can connect a web browser to your company's one-X Portal server. This mode is not available to all users.

- You make calls using one-X Portal to dial the number. The phone system will make a call to your configured telecommute number and when answered it will then make a call to the number dialed as if it had been dialed from your normal internal extension. The numbers that you can call will still be subject to your normal dialing restrictions if any.

- Incoming calls to your normal extension are redirected to the telecommute number and accompanying call details are displayed in one-X Portal.

- While telecommute mode is selected, you are logged out of your normal phone extension. When you end telecommute mode, your extension number is returned back to your normal phone extension if you have one and it is not in use by another hot desking 16ᔈ user. If you don't have a normal extension or it is not available, you are treated as being logged off from the phone system and your calls will go to voicemail if available or receive busy.

- The phone at the telecommute number location is assumed to be a single line phone. If call waiting is enabled in your IP Office configuration it can be used for a single additional call when an existing call via the IP Office is connected.

- Number
  Enter the telecommute number to which you want calls to your directed. This must be a number that can be dialed directly from the phone system.

- Make a Test Call
  If selected, when you make this profile active, the telephone system will make a call to the telecommute number. Note that if you log in to one-X Portal with this profile already active no test call is made.

- Hold the Line
  This setting controls how you use the connection from the phone system to the telecommute number.

  - If Not Selected
    In this mode, the phone system only calls the telecommute number when required, that is when making or receiving a call for you. For example, when you make a call using one-X Portal, the phone system will call the telecommute number and only when answered will it connect and make a call to the number you dialed in one-X Portal. You can end the call through either using one-X Portal or simply replacing the handset.

    - In this mode, it is possible for the telecommute number to also receive and make non-telecommute calls. You can recognize telecommute calls as they will be displayed in one-X Portal.

    - Calls will not succeed if the phone system detects that the wrong type of trunk is being used (analog loop start or analog loop start emulation).

    - Pages calls are not redirected to the telecommute number. Intercom and dial direct calls are redirected but as normal calls.

  - If Selected
    In this mode, once you make the profile active, the phone system will make a call to the telecommute number. When you answer you should leave the connection open (off-hook). You should then use one-X Portal to make, answer and control calls without replacing the handset between calls.

    - This option should be used whenever analog loop start trunks or analog loop start emulation trunks are involved or you suspect they are involved. This may include cellular phones connected to cellular gateways on analog trunks.

    - In this mode, if the continuous call is ended while there are parked or held calls, whether a new call is established when using one-X Portal to unhold/unpark the calls may not always work.

6.5.6 Voicemail

The following profile settings can be used to alter your voicemail operation.

- **Voicemail**
  This setting controls whether voicemail is used to take voicemail messages when you cannot answer calls.

- **Voicemail Ringback**
  When on, if you have any new voicemail messages, when you next user your phone extension, after that call the voicemail server will call you to alert you to the messages.

- **Voicemail Outcalling**
  If you have outcalling configured for your voicemail mailbox, you can use this profile setting to switch the use of outcalling on or off.

- **Listen to messages on**
  This setting allows you to select whether when using the Messages gadget, one-X Portal should playback your messages to your phone or to your browser. Playback to your browser is only supported for Voicemail Pro.

  - If using Internet Explorer, check that the option Play sound in webpages in enabled (Tools | Internet Options | Advanced | Multimedia).

  - A handset [icon] icon is shown on your messages gadget when you are set for playback to your phone.

  - A headset [icon] icon is shown on your messages gadget when you are set for playback to your browser.

- **Active Greeting**
  If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have recorded 87. Within each of your one-X Portal profiles you can use the Active Greeting setting to select which greeting should be used for your mailbox when the profile is active.

- Changing Voicemail Settings Using Other Interfaces
  one-X Portal loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal may be incorrect. If you make voicemail setting changes through a method other than one-X Portal, you should log out of one-X Portal and log in again.
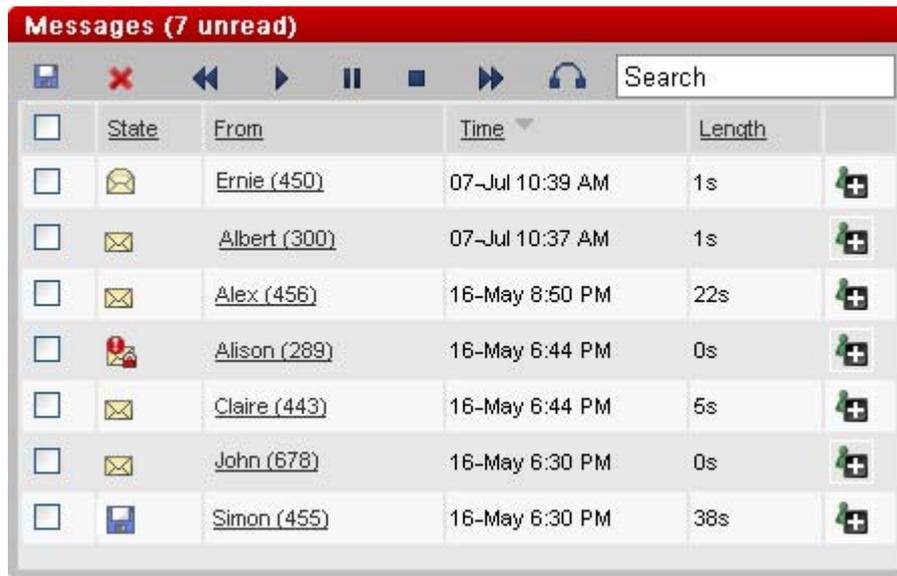
Chapter 7. Voicemail

7. Voicemail

If your telephone system has an Avaya voicemail server attached, you can check the messages in your voicemail mailbox using one-X Portal Messages gadget.

	State	From	Time ▼	Length	
☐	✉	Ernie (450)	07–Jul 10:39 AM	1s	
☐	✉	Albert (300)	07–Jul 10:37 AM	1s	
☐	✉	Alex (456)	16–May 8:50 PM	22s	
☐	⚠	Alison (289)	16–May 6:44 PM	0s	
☐	✉	Claire (443)	16–May 6:44 PM	5s	
☐	✉	John (678)	16–May 6:30 PM	0s	
☐	💾	Simon (455)	16–May 6:30 PM	38s	

Messages (7 unread)

Access and Use Voicemail		
• Play My Messages 83 • Switch Between Phone and PC Playback 84	• Add a Voicemail Caller to My Directory 85 • Call Someone Who Left a Message 84	• Change My Voicemail Mailbox Code 86 • Record Mailbox Greetings 87 • Select Your Mailbox Greeting 88

- Changing Voicemail Settings Using Other Interfaces
  one-X Portal loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal may be incorrect. If you make voicemail setting changes through a method other than one-X Portal, you should log out of one-X Portal and log in again.

7.1 Checking Voicemail Messages

A closed envelope ✉ icon at the top right of the one-X Portal screen indicates that you have unread messages. These, and other messages, can be viewed and accessed using the Messages gadget.

1. On the Main tab, the Messages gadget displays the voicemail messages in your mailbox.

2. You can click on a column header to sort the messages using that column.

3. You can use the Search box at the top to filter the messages displayed to matching From value names or numbers.

4. To call the number associated with the message, click on the underlined From details.

5. You can click on the check boxes to select a message or messages and then:

   - 💾 Save - Mark the messages as saved. The messages' icon (see below) changes to a computer disk 💾 icon.

   - ❌ Delete - Delete the messages.

   - ▶ Play the message - While it is playing you can use the other controls below. This only works for a single selected message. You can also select the message to play by clicking on the ✉, ✉ or 💾 message icon.

      - ■ Stop

      - ❚❚ Pause

      - ⏩ Skip Forwards

      - ⏪ Skip Backwards

      - 📞 This icon indicates that your current active [profile] 72⃕ is set to playback messages to your phone extension.

      - 🎧 This icon indicates that your current active [profile] 72⃕ is set to playback messages through your PC.
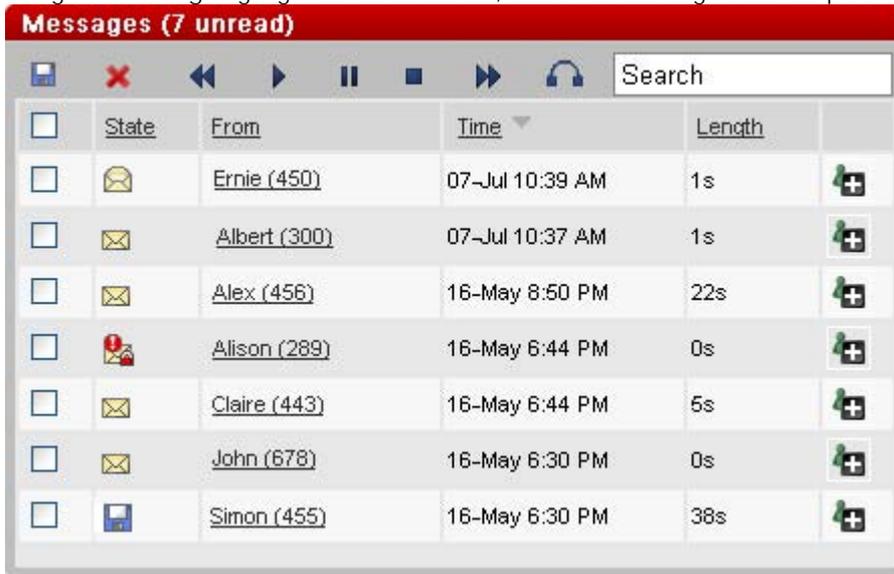
Message Icons

- ✉ Unread message

- ✉ Read message
  Note that by default, a read message is permanently deleted from the mailbox after 30 days unless changed to a saved message.

- 💾 Saved message
  Setting a message as saved stops it being automatically deleted after a period of time.

- 🛑 Priority message
  This icon is added the message icon to indicate that the caller has set the message as a priority message. For example ✉ is a priority unread message.

- 🔒 Private message
  This icon is added to the message icons above to indicate that the caller has set the messages as a private message. Private messages cannot be forwarded to another voicemail mailbox. For example ✉ is a private unread message, ✉ is a private priority message.
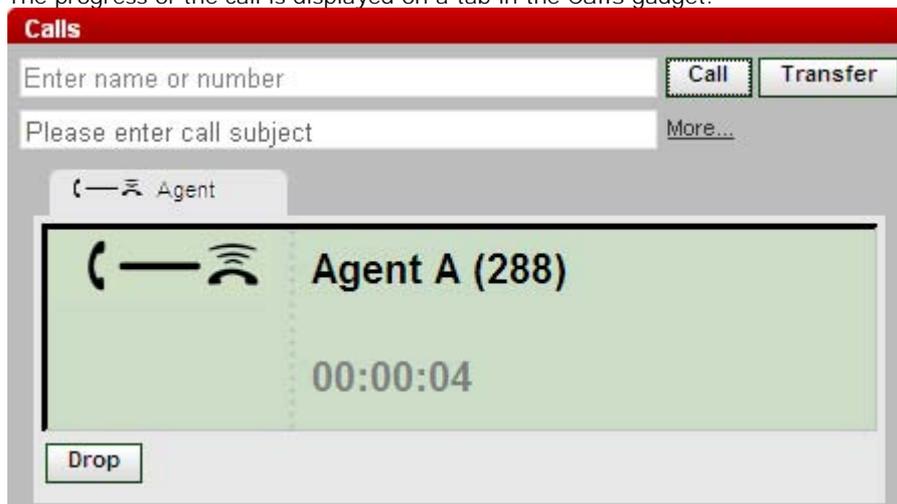
7.2 Call Someone Who Left a Message

You can make a return call to someone who has left you a voicemail message.

1. Using the Messages gadget on the Main tab, locate the message from the person that you want to callback.

	State	From	Time ▼	Length	
☐	✉	Ernie (450)	07–Jul 10:39 AM	1s	
☐	✉	Albert (300)	07–Jul 10:37 AM	1s	
☐	✉	Alex (456)	16-May 8:50 PM	22s	
☐		Alison (289)	16-May 6:44 PM	0s	
☐	✉	Claire (443)	16-May 6:44 PM	5s	
☐	✉	John (678)	16-May 6:30 PM	0s	
☐	💾	Simon (455)	16-May 6:30 PM	38s	

Messages (7 unread)

2. Click on the underlined name and number details of the message source.

- The progress of the call is displayed on a tab in the Calls gadget.

Calls

Enter name or number   [Call] [Transfer]

Please enter call subject   More...

(— Agent

Agent A (288)

00:00:04

[Drop]

7.3 Switching Between Phone and PC Playback

You can have the Messages gadget playback your messages to your phone or to your computer. The setting used is part of your currently active profiles 72ᵗʰ voicemail options.

7.4 Adding a Caller to Your Personal Directory

You can add the details of a caller who left you a voicemail message to your Personal directory.

1. Click on Main.

2. View the Messages.

3. Click on the add 🞧 icon shown in the message details.

   - Use the menu to enter and adjust the details as required.

   Edit Contact

   Name :
   [MarkG]

   Work phone :   Work e-mail :
   [6750]   [   ]

   Mobile phone :   Personal e-mail :
   [   ]   [   ]

   Other phone :   Other e-mail :
   [   ]   [   ]

   Primary phone :   Group :
   [Work   ▼]   ☑ Personal
                          ☑ Team

                   [Save] [Cancel]

   - If the Work phone setting matches a telephone system user's extension number, the directory contact will show the <u>user status</u> 60⌐ of the user. This applies even if another number is currently selected as the <u>Primary phone</u> 99⌐.

   - You can use the Group list to select which of your personal <u>contacts tabs</u> 68⌐ the contact should appear on.

   - You can add email addresses. These allow you to <u>start an email</u> 69⌐ from the one-X Portal directory.

   - When finished, click Save.

7.5 Changing Your Voicemail Code

Using one-X Portal's Messages gadget you can [access your voicemail messages](#) 83 without needing any special code as you have logged into one-X Portal using a name and password. However when accessing your voicemail mailbox by other methods, such as through the phone, you can have access protected by a voicemail passcode.

You can use one-X Portal to set and change your voicemail code.

1. Select the Configure tab.

2. Locate the Voicemail Passcode section.
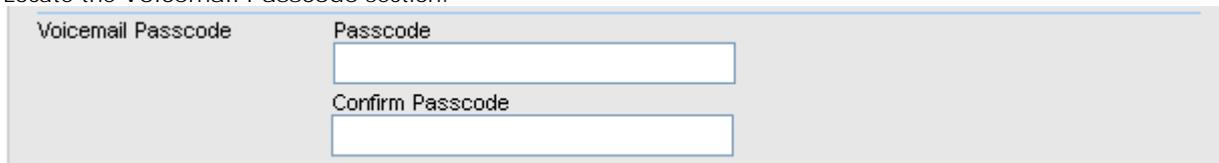
Voicemail Passcode	Passcode
	Confirm Passcode

3. Enter the new code that you want to use and confirm the code.

4. Click on Save.

- Changing Voicemail Settings Using Other Interfaces
  one-X Portal loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal may be incorrect. If you make voicemail setting changes through a method other than one-X Portal, you should log out of one-X Portal and log in again.

7.6 Recording Voicemail Greetings

You can use one-X Portal to record up to 9 greeting files for use with your voicemail mailbox. You can then use the Active Greeting 79 setting within your profiles to select which of the greetings should be used by each profile.

- **Changing Voicemail Settings Using Other Interfaces**
  one-X Portal loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal may be incorrect. If you make voicemail setting changes through a method other than one-X Portal, you should log out of one-X Portal and log in again.

1. Select the Configure tab.

2. Click on Edit Personalized Greetings.

   Personalized Greetings

	Name					
1	In Office	▶	●	■	💾	✖
2	Out of Office	▶	●	■	💾	✖
3	Out of Hours	▶	●	■	💾	✖
4	Greeting-4	▶	●	■	💾	✖
5	Greeting-5	▶	●	■	💾	✖
6	Greeting-6	▶	●	■	💾	✖
7	Greeting-7	▶	●	■	💾	✖
8	Greeting-8	▶	●	■	💾	✖
9	Greeting-9	▶	●	■	💾	✖

   OK   Cancel

3. A call will be made to your extension/

4. In the name field enter a name that will be used for the greeting.

5. Use the ● Record icon to start recording and the ■ Stop icon to finish recording. While recording a red background is displayed.

6. Once a greeting has been uploaded you can use the ▶ Play and ■ Stop icons to playback the greeting. You can also delete the file by clicking on ✖ Delete.

7. To save the recording click on the 💾 Save icon. You will hear a tone when the file has been saved.

7.7 Select Your Voicemail Greeting

If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have <u>recorded</u> 87ˊ.
Within each of your one-X Portal <u>profiles</u> 72ˊ you can use the Active Greeting setting to select which greeting should be
used for your mailbox when that profile is active.

Chapter 8.
Configuration

8. Configuration

The Configure tab is used to setup and control a range of one-X Portal settings. The Save buttons are greyed out until you make changes that require saving (not all changes do). Changes requiring a save are also indicated by a * in the Configure tab label.

Configure My one-X Portal		
• Create and Manage Profiles 72	• Configure Park Slots 93	• Set Do Not Disturb Exceptions 91
• Change My Keyboard Shortcuts 92	• Set Your Conference Number 50	• Change My Voicemail Mailbox Code 86
• Enable Sounds 94	• Upload Voicemail Greetings 87	• Select My Language 95

8.1 Do Not Disturb Exceptions

Calls from numbers in this list are still be able to ring your phone even when you have Do Not Disturb enabled 38ᐟ. This only applies for calls direct to your extension number; it does not apply for calls to any hunt group 98ᐟ of which you are a member.

Numbers are added to the Do Not Disturb Exceptions list in a number of ways. You can use one-X Portal to added numbers from your Personal and the System directories to your existing Do Not Disturb Exceptions list. Numbers added in other ways, for example by your system administrator, are shown and can be deleted using one-X Portal.

1. Click on the Configure tab.

2. In the Presence section, click on Do Not Disturb Exceptions.

Do Not Disturb Exceptions

Personal	System		Exceptions
☐ Masih 8549	(8549)		**x** Spare 8 (4295)
☐ Mario	(4013)		**x** David (4355)
☐ MarkG	(6750)		**x** Ashley (4266)
☐ Matt A	(8551)		**x** Alec (4160)
☐ MMM	(504)		
☐ NPI	(5126)		
☐ page_all	(8888)		
☐ Peter	(4714)		
☐ Philippe	(8889)		
☐ RD	(5135)		

◀ 1 2 3 **4** 5 6 7 ▶

OK   Cancel

3. The list of exceptions is shown. Where the number in the exception list matches a number in your Personal or System directory, the name is also displayed in the exceptions list.

- To Add a Number from the Directory
  Click on either the Personal or System tab. Select the contacts that you want added to your Exceptions. For Personal directory contacts, it will be the contact's primary phone 99ᐟ number that is added.

- To Remove a Number
  To remove a number from the list of exceptions, click on the X next to the number.

4. Click OK.

5. Click Save.

Note

1. Names are not stored as part of the exceptions list, only the numbers. The names shown in the list are done by the one-X Portal matching numbers in the exceptions list to the primary phone 99ᐟ numbers of your directory contacts. If the directory contact no longer matches the number in the exceptions list, no name is displayed.

2. one-X Portal does not currently allow the entry of the wildcards *N* and *X*, where *N* represents any numbers and *X* represents any single digit. For example, to allow all numbers from 5551000 to 5551099, add the exception number as either *55510XX* or *55510N*. These can be entered by your system administrator 99ᐟ.

8.2 Keyboard Shortcuts

You can use the following default keyboard short cuts within one-X Portal. You can also change them if required.

- Answer a Call: Ctrl+Alt+A

- Make a Call: Ctrl+Alt+C

- Hold the Current Call: Ctrl+Alt+H

- Drop the Current Call: Ctrl+Alt+D

Changing Your Keyboard Shortcuts

You can change the keyboard shortcuts to your own selection of keys.

- IMPORTANT
  Your web browser's own keyboard shortcuts take priority over those useable with one-X Portal. For example, attempting to enter Ctrl+Q will probably cause your web browser to close. Consult your web browser help for details of the keyboard shortcuts that it uses.

1. Select the Configure tab.

2. In the Keyboard shortcuts section, click on the shortcut that you want to change.

3. Press the key or key combination that you want to use as your shortcut. If the key or key combination is available to be used, the key string will be added.

4. Click Save.

8.3 Park Slots

one-X Portal provides you with 4 park slot buttons. You can configure which phone system park slots the buttons match. If the numbers or names you use match those also used by other users, you will be able to see when they have parked a call in those park slots. You can use the buttons to unpark those calls. Similarly other users will be able to see and unpark calls that you park.

1. Click on the Configure tab and scroll down to the Park Slots section.

Park Slots

```
1
2
3
4
```

2. For each of the park slot buttons that your one-X Portal supports, enter the park slot number or name that it matches. Typically numbers are used, with everyone using 1 to 4 as their defaults.

3. Click Save.

8.4 Sound Configuration

If your computer and browser are configured for audio, one-X Portal can provide sounds to indicate events such as a call ringing or new voicemail message. This requires the browser to support a media player such as <u>Windows Media Player</u>[1] or <u>Quick Time</u>.

- If using Internet Explorer, check that the option Play sound in webpages in enabled (Tools | Internet Options | Advanced | Multimedia).

1. Click on the Configure tab and scroll down to Sound Configuration.

Sound Configuration		Sound configuration options for the application
	☐ Enable Sound Notifications (Call Ringing etc.)	

2. To enable the use of sounds by your one-X Portal, select Enable Sound Notifications.

3. Click on Save to save the change.

8.4.1 Proxy Server Exceptions

The playback of voicemail messages on your computer may require the IP address of the voicemail server to be entered into your browsers list of proxy server exceptions.

- Internet Explorer
  Select Tools | Internet Options | Connections | LAN settings | Advanced. Enter the IP address of the voicemail server in the Exceptions list.

- Google Chrome
  Click on the customize icon and select Options. Select Under the Hood and click on Change proxy settings. Select Connections | LAN settings | Advanced. Enter the IP address of the voicemail server in the Exceptions list.

- Firefox
  Select Tools | Options | Network | Setting | Manual proxy configuration. Enter the IP address of the voicemail server in the No proxy for list.

8.5 Language

one-X Portal currently supports *English*, *French*, *German*, *Italian*, *Dutch*, *Brazilian Portuguese* and *Russian*. The language it uses will be the best match your browser language preferences. Note that changing your browser's language preferences may also affect the languages used by other websites which you browse.

- <u>Internet Explorer</u> 95
- <u>Mozilla Firefox</u> 96
- Safari
  The Safari browser does not have its own language settings. Instead it will match the language preferences of the computer on which it is running. Refer to the computer help.

8.5.1 Language IE

1. Click on Tools and select Internet Options.

2. On the General tab, click on the Languages button.

Language Preference

Language Preference

Add the languages you use to read websites, listing in order of preference. Only add the ones you need, as some characters can be used to impersonate websites in other languages.

Language:

English (United Kingdom) [en-gb]	Move up
German (Germany) [de-DE]	Move down
	Remove
	Add...

Prefix and suffix options

☐ Do not add 'www' to the beginning of typed web addresses

Specify the suffix (for example .net) that should be added to typed web addresses when you press Ctrl + Shift + Enter.

Suffix: .

OK   Cancel

3. Use the menu to select languages and to configure your preferred order of preference for your selected languages.

4. Click OK twice.

5. If you are already running one-X Portal, you will need to login again for one-X Portal to use the new language selection.

8.5.2 Language Firefox

1. Click on Tools and select Options.

2. Select the Content icon.

3. In the Languages section, click Choose….

4. Use the menu to select languages and to configure your preferred order of preference for your selected languages.

5. Click OK twice.

6. If you are already running one-X Portal, you will need to login again for one-X Portal to use the new language selection.

8.5.3 Language Google Chrome

1. Click on the customize icon and select Options.

2. Select Under the Hood. Scroll down and click on Change font and language settings.

3. Select the Languages tab. Use the tab to put the languages into your order of preference.
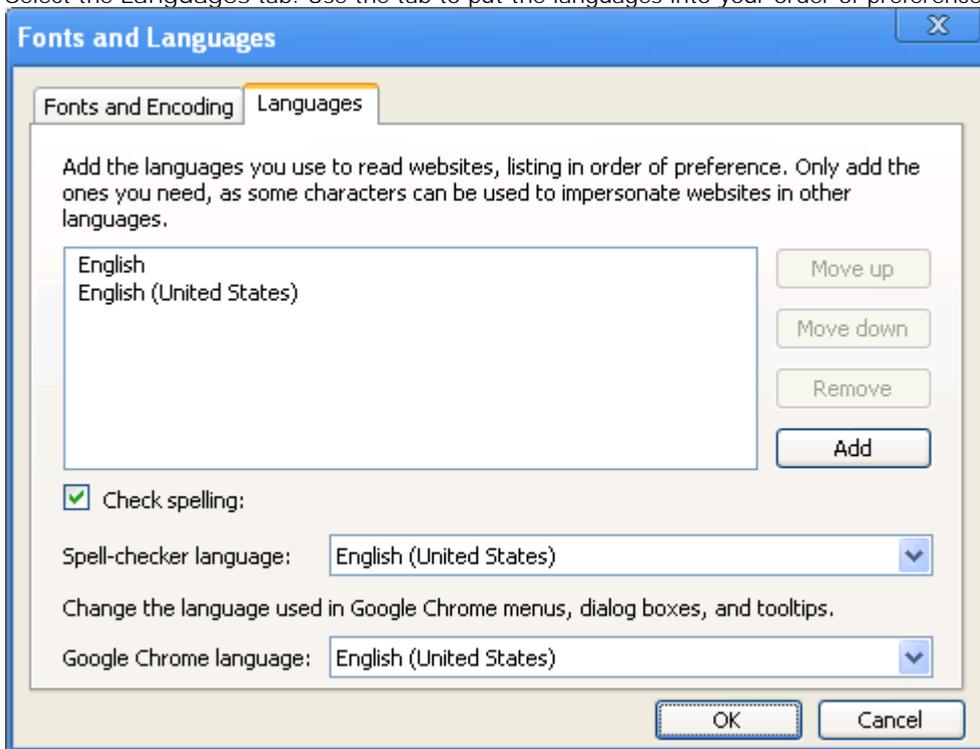
Chapter 9.
Glossary

9. Glossary
9.1 Appearance Buttons

Many Avaya phones have programmable buttons that can be configured for different functions. These include setting them as 'appearance buttons' which can be used to make and answer different types of calls. The different types are 'call appearance', 'line appearance', 'bridged appearance' and 'coverage appearance' buttons.

9.2 Auto Hold

By default, if you already have a call connected and then go and make or answer another call, the existing call is automatically put on hold. This is called Auto Hold. The system administrator can disable Auto Hold for the whole system, in which case the existing calls are disconnected. This documentation assumes that Auto Hold is being used.

9.3 Busy

Both the phone system and one-X Portal can allow you to make and receive multiple calls. Therefore even when you are active on calls you are not necessarily seen as being busy to further incoming calls. See

However, there are some conditions where you will be treated as being busy to any further incoming calls. When this occurs, the following may happen to the incoming call, in order of priority of use:

1. If you have a Forward on Busy ⌐98⌐ destination enabled, the call is forwarded to that destination.

2. If you have voicemail enabled, the call is sent to voicemail.

3. If neither of the above is available, the caller receives busy indication.

9.4 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your Do Not Disturb Exceptions ⌐91⌐. All other callers are routed to voicemail if available or otherwise receive busy tone. You can still make calls while in the Do Not Disturb state.

9.5 Forward on Busy

A Forward on No Answer/Busy number can be set for your calls. When set and enabled; if a call arrives for you when you are busy ⌐98⌐ to any further calls, it will be forwarded to that number. The number can be internal or external.

9.6 Forward on No Answer

A Forward on No Answer/Busy number can be set for your calls. If set and enabled, if a call for you rings unanswered for too long, it will be forwarded to your Forward on No Answer number. The number can be internal or external.

9.7 Forward To

Also known as Forward All or Forward Unconditional. When enabled, some of your calls are forwarded to the selected number. Normally only external personal calls are forwarded, however it is possible to also forward internal and hunt group calls though that cannot currently be setup using one-X Portal.

9.8 Hot Desk

If you have a login code for the telephone system, that allows you to use any phone on the system as your own extension. This ability to work at any phone is referred to a hot desking.

9.9 Hunt Group

A hunt group is a set of telephone users. The group has its own name and extension number. Calls to that extension number are presented to the hunt group members who are available (ie. not logged off and not already on a call).

9.10 IP Office

IP Office is a telephone system from Avaya. It works with the one-X Portal to provide call information and control of your phone.

9.11 Log In/Log Out

If you have a login code for the telephone system, that allows you to use any phone on the system as your own extension. You can also log out. While logged out from any phone, calls to you are treated in the same way as if your phone was busy ⌐98⌐.

Logging in and out of a phone is separate from logging in or out of one-X Portal. You must be logged in to an extension in order to login to one-X Portal.

9.12 Park

Normally when you put a call on hold, only you can retrieve that call. Parking a call is similar to holding a call. However a parked call can be retrieved by other users if they know the park slot number or name used to park the call. one-X Portal provides you with 4 park buttons. You can configure which park slot number or name each button uses. You can then use the buttons to park a call in a particular park slot, see when a call has been parked in that park slot by you or by someone else and to unpark a call parked in that slot.

9.13 Primary Phone

Some contacts in your directories can have several associated phone numbers. The Primary phone setting for each of those contacts is used to indicate which of the numbers should be used by one-X Portal when that contact is selected for a function.

9.14 System Administrator

This term refers to the person able to make changes to your telephone system or arrange those changes.

9.15 Small Community Network

Your telephone system may actually be several telephone systems connected together in a network (called a Small Community Network). While most telephone and one-X Portal features will work for names and numbers anywhere in the network some features will not. For example, parking and unparking of calls is not supported between networked telephone systems. You system administrator will advise you if there are any other restrictions in your network.

9.16 Supervised Transfer

A supervised transfer is one where you talk (or try to talk) to the transfer destination before completing the transfer. Your initial call to the transfer destination is called a consultation call or enquiry call.

This method of transferring calls allows you to confirm if the transfer target is present and wants to accept the call.

9.17 Unsupervised Transfer

An unsupervised transfer is one where, having dialed the number of the transfer destination, you complete the transfer without waiting for the call to be answered.

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