



IP Office 8.0

Using one-X Portal for IP Office

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Contents

1. one-X Portal for IP Office

1.1 How Do I...	8
1.2 Logging In	9
1.2.1 Logging in using external clients	10
1.3 Logging Out	11
1.4 The Main Page	11
1.5 Your Presence and Status	14
1.5.1 Viewing Presence status	17
1.6 Phone Notes	17
1.7 Hot Desking	18

2. Changing the Layout

2.1 Selecting a Skin	22
2.2 Changing the Column Widths	22
2.3 Show/Hide Gadgets	22
2.4 Add External gadgets	23
2.5 Maximizing a gadget	23
2.6 Resizing a Gadget	24
2.7 Moving Gadgets	24
2.8 Default Layout	24
2.9 Adding a custom tab	24
2.10 Deleting a custom tab	24

3. Making and Answering Calls

3.1 Call Details	27
3.2 Call Buttons	29
3.3 Call Icons	30
3.4 Making a Call	31
3.4.1 ... from the Calls Gadget	31
3.4.2 ... using the Dial Pad	32
3.4.3 ... from the Directory	32
3.4.4 ... from the Call Log	33
3.4.5 ... from Voicemail	34
3.5 Answering a Call	34
3.6 Pickup a Call	35
3.7 Unanswered Calls	36
3.8 Ending a Call	36
3.9 Muting a call	36
3.10 Holding Calls	36
3.10.1 Holding a Call	37
3.10.2 Retrieving a Held Call	38
3.10.3 Ending a Held Call	38
3.11 Switching Between Calls	39
3.12 Recording a Call	40
3.13 Transferring Calls	40
3.13.1 Making an Unsupervised Transfer	41
3.13.2 Making a Supervised Transfer	41
3.13.3 Transferring Calls Using the Directory	42
3.14 Parking Calls	43
3.14.1 Configuring Your Park Slots	43
3.14.2 Parking a Call	44
3.14.3 Unparking a Call	45
3.15 Sending DTMF tones	45
3.16 Instant Messaging Other Users	46
3.16.1 Promoting from an IM to voice call	47

3.17 Do Not Disturb	47
3.18 Agent Controls	47
3.19 Twinned Call Control	48

4. Conference Calls

4.1 Setup a Conference	52
4.2 Conference manager recognition	54
4.3 Conference speaker recognition	54
4.4 Turning Held Calls into a Conference	55
4.5 Adding another call to a conference	56
4.6 Muting Conference Parties	57
4.7 Dropping a participant in a conference	58
4.8 Dropping all the participants in a conference	58
4.9 Locking a Meet Me conference	58
4.10 Parking a conference call	58
4.11 Holding a Conference	59
4.12 Conference Call Controls	59
4.13 Configuring Your Conference Bridge Number	60
4.14 Personal Meet Me Conference	60

5. Call Log

5.1 Using the Call Log	64
5.2 Making a Call from the Call Log	65
5.3 Adding a Caller to Your Directory	65

6. Directories

6.1 Viewing the Directories	69
6.2 Directory Icons	69
6.3 Searching the Directories	70
6.4 Making a Call	71
6.5 Transferring a Call	72
6.6 Adding a New Personal Directory Contact	73
6.6.1 Adding a Contact from the System Directory	73
6.6.2 Adding a Caller from the Call Log	74
6.6.3 Adding a Voicemail Caller to the Directory	74
6.7 Editing a Personal Contact	74
6.8 Deleting a Personal Directory Contact	74
6.9 Adding A Personal Contacts Group	75
6.9.1 Outlook group	76
6.10 Emailing a Contact	77
6.11 Instant Messaging a Contact	77

7. Profiles

7.1 The Detected Profile	82
7.2 Selecting Your Profile	82
7.3 Editing a Profile	82
7.4 Adding a Profile	82
7.5 Profile Settings	83
7.5.1 Call Pickup	83
7.5.2 Mobility - Use Default Deskphone	83
7.5.3 Mobility - Forward	83
7.5.4 Mobility - Mobile Twinning	84
7.5.5 Mobility - Telecommuter Mode	84
7.5.6 Voicemail	85

8. Voicemail

8.1 Voicemail screening	89
8.2 Checking Voicemail Messages	91
8.3 Call Someone Who Left a Message	92

8.4 Switching Between Phone and PC Playback.....	92	12.5 Avaya IP Office Plug-in settings.....	134
8.5 Adding a Caller to Your Personal Directory.....	93	12.5.1 Connection.....	135
8.6 Changing Your Voicemail Code.....	93	12.5.2 User.....	135
8.7 Recording Voicemail Greetings.....	93	12.5.3 Logging.....	136
8.8 Select Your Voicemail Greeting.....	93	12.6 Making a call using Avaya IP Office Plug-in.....	136
9. MyBuddy		12.6.1 Typing name or number.....	136
9.1 Help command.....	97	12.6.2 Using the dial pad.....	137
9.2 Notifications.....	97	12.6.3 Adding an account code and a subject.....	137
9.3 Call management.....	97	12.7 Avaya IP Office Plug-in call functions.....	137
9.3.1 Storing home and mobile numbers.....	98	12.7.1 Integrating call with Outlook Features.....	137
9.4 Following another user.....	99	12.7.2 Answering a call using Avaya IP Office Plug-in.....	138
9.5 Controlling a conference.....	100	12.7.3 Placing a call on mute.....	138
10. Configuration		12.7.4 Holding or unholding a call.....	138
10.1 Keyboard Shortcuts.....	104	12.7.5 Transferring a call using Avaya IP Office Plug-in.....	138
10.2 Park Slots.....	104	12.7.6 Ending a call.....	139
10.3 Sound Configuration.....	104	12.7.7 Starting a conference call.....	139
10.3.1 Proxy Server Exceptions.....	105	12.8 Avaya IP Office Plug-in additional features.....	143
10.3.2 Implementing audio branding.....	105	12.8.1 Call Log.....	143
10.4 IM/Presence.....	105	12.8.2 Contact Directory.....	144
10.4.1 Advertise on Call status.....	106	12.8.3 Outlook contact synchronization.....	145
10.5 Do Not Disturb Exceptions.....	107	12.8.4 Presence information.....	146
10.6 The World Clock Gadget.....	107	12.8.5 Voice mail options.....	147
10.7 Language.....	108	12.8.6 Multiple language support.....	148
11. one-X Call Assistant		13. Avaya IP Office Plug-in for Salesforce.com	
11.1 one-X Call Assistant System Requirements.....	111	13.1 Avaya IP Office Plug-in for Salesforce.com system requirements.....	153
11.1.1 Hardware Requirements.....	111	13.2 Installing Avaya IP Office Plug-in for Salesforce.com.....	153
11.1.2 Software Requirements.....	111	13.2.1 Configuring Windows Firewall for Avaya IP Office Plug-in for Salesforce.com.....	154
11.2 one-X Call Assistant icons.....	112	13.3 Starting Avaya IP Office Plug-in for Salesforce.com.....	156
11.3 Installing one-X Call Assistant.....	113	13.4 Integrating Avaya IP Office Plug-in for Salesforce.com.....	156
11.3.1 Configuring Windows Firewall for one-X Call Assistant.....	115	13.4.1 Managing Call Center Users.....	157
11.4 Starting one-X Call Assistant.....	117	13.5 Screen Pop functionality.....	157
11.5 Starting one-X Portal for IP Office.....	118	13.5.1 Screen Pop settings.....	158
11.6 one-X Call Assistant settings.....	118	13.5.2 Screen Pop.....	160
11.6.1 Connection.....	119	13.6 Logging into one-X Portal for IP Office.....	160
11.6.2 Hot Key Dialing.....	119	13.7 Logging out of one-X Portal for IP Office.....	161
11.6.3 Screen Popping.....	120	13.8 Making a call.....	161
11.7 one-X Call Assistant additional features.....	122	13.8.1 Using the dial pad.....	161
11.7.1 one-X Call Assistant Messages.....	122	13.8.2 Searching the contacts.....	161
11.7.2 Voicemail Messages.....	124	13.8.3 Typing the number.....	161
11.7.3 Missed Calls.....	124	13.9 Avaya IP Office Plug-in for Salesforce.com call functions.....	162
11.7.4 Multiple language support.....	124	13.9.1 Answering a call.....	162
11.7.5 Help menu.....	125	13.9.2 Mute or unmute a call.....	162
11.7.6 New version available notification.....	125	13.9.3 Hold or unhold a call.....	162
12. Avaya IP Office Plug-in for Microsoft® Outlook®		13.9.4 Ending a call.....	162
12.1 Avaya IP Office Plug-in System Requirements.....	128	13.9.5 Transferring a call.....	162
12.1.1 Hardware Requirements.....	128	14. Glossary	
12.1.2 Software Requirements.....	128	14.1 Ad hoc conference.....	166
12.1.3 Microsoft® Outlook® versions.....	129	14.2 Appearance Buttons.....	166
12.2 Installing Avaya IP Office Plug-in.....	129	14.3 Auto Hold.....	166
12.2.1 Configuring Windows Firewall for Avaya IP Office Plug-in.....	131		
12.3 Logging in.....	134		
12.4 Logging out.....	134		

14.4 Busy	166
14.5 Conference Manager.....	166
14.6 Do Not Disturb.....	166
14.7 Forward on Busy.....	166
14.8 Forward on No Answer.....	166
14.9 Forward To.....	166
14.10 Hot Desk.....	166
14.11 Hunt Group.....	166
14.12 IP Office.....	166
14.13 Log In/Log Out.....	167
14.14 Meet Me conference.....	167
14.15 Park	167
14.16 Primary Phone.....	167
14.17 System Administrator.....	167
14.18 Small Community Network.....	167
14.19 Supervised Transfer.....	167
14.20 Unsupervised Transfer.....	167
Index	168

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](#)^[166]. Using a web browser, you can access the one-X Portal for IP Office 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.

The screenshot displays the one-X Portal for IP Office interface. At the top, the user is logged in as 'Extn401(401)' with a status of 'Available'. The interface is divided into several main sections:

- Calls:** Shows a call in progress to '1550' with a duration of '00:00:14'. It includes buttons for 'Call', 'Consult', and 'Transfer', and a 'More' menu.
- Directory:** Displays a list of contacts under the 'Personal' tab, including 'Alfred', 'Brad', and 'Ethel'. A search bar is available, and a tooltip for 'Brad' shows options to 'Call mobile - 1550' and 'Call other - 402'.
- Messages (2 new):** A table showing recent messages with columns for State, From, Time, and Length.

State	From	Time	Length
✉	301 (301)	15-Mar 12:15pm	0s
✉	311	05-Feb 02:41pm	13s
✉	311	05-Feb 02:23pm	8s
✉	311	22-Jan 12:30pm	8s
✉	313	21-Jan 07:10pm	11s
- Call Log:** A table showing call history with columns for Type, From, Time, Length, and Calls.

Type	From	Time	Length	Calls
↓	Extn203 (203)	28-Jun 2:49:08 PM	0s	2
↓	Extn203 (203)	28-Jun 2:49:18 PM	0s	1
↓	Extn201 (201)	06-Jul 3:41:49 PM	8s	1
↑	Extn402 (402)	06-Jul 8:48:33 PM	8m	1
- World Clock:** A simple clock widget.
- Agent Control:** A widget for managing agent status.

The bottom of the interface features a navigation bar with 'oneX Applications', 'World Clock', 'Agent Control', and 'Appearance' icons.

This documentation covers the use of one-X Portal for IP Office version 8.0.

1.1 How Do I...

- [Login](#) ⁹ / [Logout](#) ¹¹

Change the one-X Portal for IP Office Layout		
<ul style="list-style-type: none">• Select a Skin ²²• Add External gadgets ²³• Move a Gadget ²⁴• Delete a custom tab ²⁴	<ul style="list-style-type: none">• Change the Column Widths ²²• Maximize a gadget ²³• Default the Layout ²⁴	<ul style="list-style-type: none">• Show/Hide a Gadget ²²• Resize a Gadget ²⁴• Add a custom tab ²⁴

Make and Answer Calls		
<ul style="list-style-type: none">• Make a call ³¹• Unanswered calls ³⁶• Hold calls ³⁶• Transfer calls ⁴⁰• Instant message other users (Chat) ⁴⁶• Enable Mobile Twinning ⁴⁸	<ul style="list-style-type: none">• Answer a call ³⁴• End a call ³⁶• Switch between calls ³⁹• Park calls ⁴⁴• Select Do Not Disturb ⁴⁷	<ul style="list-style-type: none">• Pick up a call ³⁵• Mute a call ³⁶• Record a call ⁴⁰• Send DTMF tones ⁴⁵• Use Agent controls ⁴⁷

Start and Manage Conference Calls		
<ul style="list-style-type: none">• Set up a conference ⁵²• Turn held calls into a conference call ⁵⁵• Drop a participant in a conference ⁵⁸• Park a conference call ⁵⁸• Configure the Conference Bridge number ⁶⁰	<ul style="list-style-type: none">• Recognize the Conference manager ⁵⁴• Add another party to a conference ⁵⁶• Drop all participants in a conference ⁵⁸• Hold a conference call ⁵⁹• Join a Personal Meet Me conference ⁶⁰	<ul style="list-style-type: none">• Recognize the Conference speaker ⁵⁴• Mute conference parties ⁵⁷• Lock a Meet Me conference ⁵⁸• Use Conference call controls ⁵⁹

Use My Call Log		
<ul style="list-style-type: none">• Use the Call Log ⁶⁴	<ul style="list-style-type: none">• Make a call From the Call Log ⁶⁵	<ul style="list-style-type: none">• Add a Call Log number to my Directory ⁶⁵

Use the Directories		
<ul style="list-style-type: none">• View the Directories ⁶⁹• Make calls from the Directory ⁷¹• Edit a Directory Contact ⁷⁴• Email a Contact ⁷⁷	<ul style="list-style-type: none">• View the user status in the Directory ⁶⁹• Transfer a call from the Directory ⁷²• Delete a Directory Contact ⁷⁴• Instant Message a Contact ⁷⁷	<ul style="list-style-type: none">• Search the Directories ⁷⁰• Add a Directory Contact ⁷³• Add a Contacts Group Tab ⁷⁵

Create and Use Profiles		
<ul style="list-style-type: none">• Use the 'Detected' Profile ⁸²• Add a New Profile ⁸²	<ul style="list-style-type: none">• Select an Active Profile ⁸²• Configure the Profile ⁸³	<ul style="list-style-type: none">• Edit a Profile ⁸²

Access and Use Voicemail		
<ul style="list-style-type: none"> • Enable/Disable Voicemail screening ^[89] • Switch between Phone and PC playback ^[92] • Record Mailbox Greetings ^[93] 	<ul style="list-style-type: none"> • Check Voicemail messages ^[91] • Add a Voicemail caller to my Directory ^[93] • Select Mailbox Greetings ^[93] 	<ul style="list-style-type: none"> • Call someone who left a message ^[92] • Change my Voicemail Mailbox Code ^[93]

Use MyBuddy		
<ul style="list-style-type: none"> • Use the Help command ^[97] • Follow another user ^[99] 	<ul style="list-style-type: none"> • Get Notifications ^[97] • Control a conference ^[100] 	<ul style="list-style-type: none"> • Manage calls ^[97]

Configure my one-X Portal for IP Office		
<ul style="list-style-type: none"> • Change My Keyboard Shortcuts ^[104] • Configure IM/Presence ^[105] • Select my Language ^[106] 	<ul style="list-style-type: none"> • Configure Park Slots ^[104] • Set Do Not Disturb Exceptions ^[107] 	<ul style="list-style-type: none"> • Enable Sounds ^[104] • Configure the World Clock ^[107]

Use the one-X Call Assistant (Windows PCs Only)		
<ul style="list-style-type: none"> • Check the one-X Call Assistant system requirements ^[111] • Start the one-X Call Assistant ^[117] • Use the one-X Call Assistant additional features ^[122] 	<ul style="list-style-type: none"> • View the one-X Call Assistant icons ^[112] • Start the one-X Portal for IP Office ^[118] 	<ul style="list-style-type: none"> • Install the one-X Call Assistant ^[113] • Configure the one-X Call Assistant ^[118]

Use the Avaya IP Office Plug-in for Microsoft® Outlook®		
<ul style="list-style-type: none"> • Check the Avaya IP Office Plug-in system requirements ^[128] • Log out of the Avaya IP Office Plug-in ^[134] • Use the Avaya IP Office Plug-in call functions ^[137] 	<ul style="list-style-type: none"> • Install the Avaya IP Office Plug-in ^[129] • Configure the Avaya IP Office Plug-in ^[134] • Use the Avaya IP Office Plug-in additional features ^[143] 	<ul style="list-style-type: none"> • Log into the Avaya IP Office Plug-in ^[134] • Make a call using the Avaya IP Office Plug-in ^[136]

Use the Avaya IP Office Plug-in for Salesforce.com		
<ul style="list-style-type: none"> • Check the Avaya IP Office Plug-in for Salesforce.com system requirements ^[153] • Integrate Avaya IP Office Plug-in for Salesforce.com with the one-X Portal for IP Office ^[158] • Log out of one-X Portal for IP Office using Avaya IP Office Plug-in for Salesforce.com ^[161] 	<ul style="list-style-type: none"> • Install the Avaya IP Office Plug-in for Salesforce.com ^[153] • Use Screen pop functionality ^[157] • Make a call ^[161] 	<ul style="list-style-type: none"> • Start Avaya IP Office Plug-in for Salesforce.com ^[156] • Log into one-X Portal for IP Office using Avaya IP Office Plug-in for Salesforce.com ^[160] • Use the Avaya IP Office Plug-in for Salesforce.com call functions ^[162]

1.2 Logging In

one-X Portal for IP Office is a licensed through licenses entered by your [system administrator](#) ^[167] into the [IP Office system](#) ^[168]. They also configure which IP Office users are allowed to use one-X Portal for IP Office. If you are licensed to use one-X Portal for IP Office, you need the following to log in:

- **Computer**
You need a computer with a network connection to the one-X Portal for IP Office server.
- **Web Browser**
one-X Portal for IP Office is tested using the current versions of **Google Chrome, Internet Explorer, Mozilla Firefox** and **Safari**.
- The web browser should be Javascript enabled.

Note: By default, Javascript is enabled for **Internet Explorer**.

- 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 [Windows Media Player](#) or [Quick Time](#) must be installed.
- If using Internet Explorer, check that the option **Play sound in webpages** is 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 for IP Office can be used with most phones supported by the Avaya IP Office telephone system but not with Phone Manager PC Soft phone.
- **User Name**
You 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 can be different from your [telephone login code](#)^[167] if you also have one of those.
- **IP Address**
You need the IP address of the one-X Portal for IP Office server.

one-X Portal for IP Office 8.0 supports **English(US and UK), French, German, Italian, Dutch, Brazilian Portuguese, Latin Spanish, Russian** and **Simplified Chinese**. You can set the language in the login page as an **Administrator** or as a **User**. Set the language only when you are accessing the one X portal for the first time on a browser. To set the language of your preference do the following:

1. Log in as a User.
2. Choose the language listed under **Language**.
3. Click **Login**.

Note: The language that you set is applicable only to the one X Portal. This setting does not affect the language of other websites that you access using the browser.

Logging In

1. In the web browser, browse to **http://<server name>:<server port>/onexportal.html** where *<server name>* is the name or the IP address the server and *<server port>* is the port number that is assigned for the one-X Portal for IP Office.

Note: one-X Portal for IP Office 8.0 continues to support the URL **http://<server name>:<server port>/inyama/inyama.html**

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 for IP Office, 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 use one-X Portal for IP Office to also login at any extension on the phone system. That phone will then 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](#)^[168].
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](#)^[166] 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 for IP Office usage or that one-X Portal for IP Office could not connect to the telephone system.
 - The message *"Csta Resource not available"* indicates that your browser will not support one-X Portal for IP Office.

1.2.1 Logging in using external clients

You can login to one-X Portal for IP Office even when you are on move if you are configured as an user one-X Portal for IP Office. You can log in to one-X Portal for IP Office using external instant messaging clients such as Pidgin in a Microsoft Office and Linux environment, One Team on a iPhone, and Adium in an Apple Macintosh environment.

Before you begin

1. Download and install:
 - a. Pidgin in a Microsoft Office and Linux environment.

- b. One Team on a iPhone.
- c. Adium in an Apple Macintosh environment.

2. one-X Portal for IP Office username and password.

Exceptions for the login credentials on an external XMPP client

User name: If your username for one-X Portal for IP Office contains spaces then the username on the external client is without the spaces.

Password: If the password is not set for one-X Portal for IP Office then the password on the external client is your extension number.

1.3 Logging Out

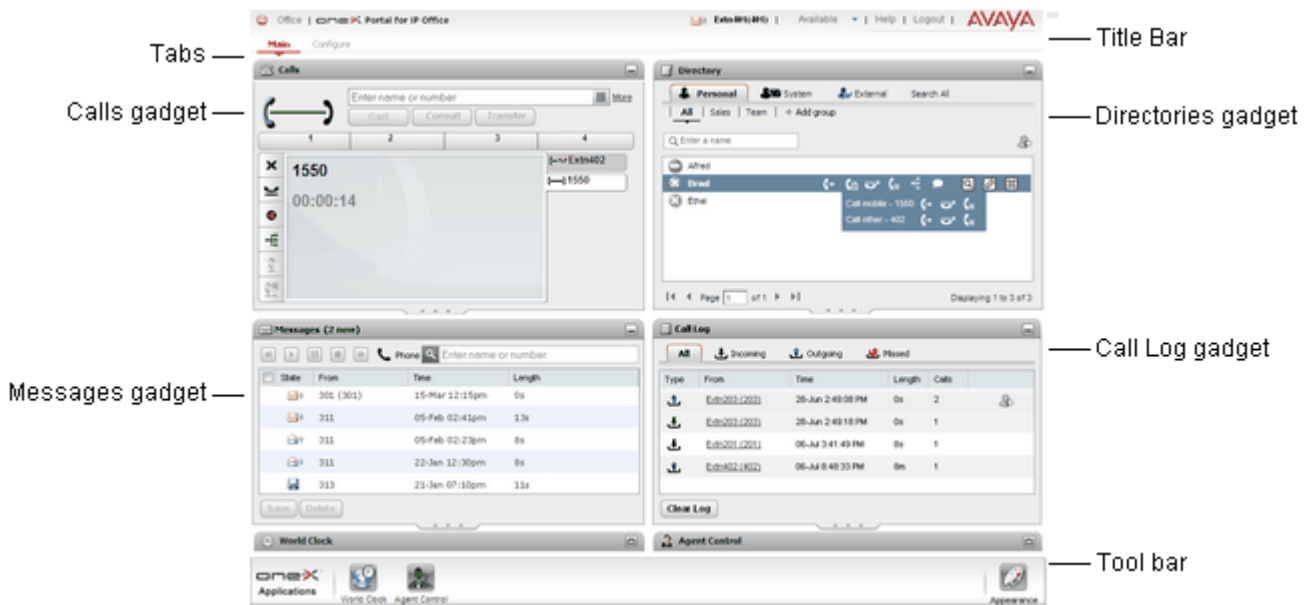
When you have finished using one-X Portal for IP Office, you should click on the **Logout** link shown in the top right. This will end your one-X Portal for IP Office session and return the browser to the [log in screen](#)^[9]. It also frees up the license consumed by your one-X Portal for IP Office session. If you are a Customer Call Reporter agent or used one-X Portal for IP Office to login to an extension, you will be prompted whether you also want to log out from the phone you are using.

If you simply browse to another website, your browser's back, forward and history functions can be used to return to your one-X Portal for IP Office session without needing to log in again. While this can be useful to you, it is a risk if you use one-X Portal for IP Office from a shared computer or one in a publicly accessible location. After you have finished using one-X Portal for IP Office 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 for IP Office session is only released after 6 hours.

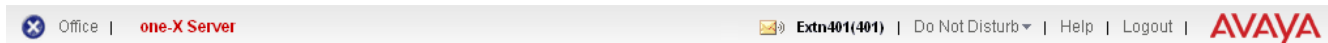
1.4 The Main Page

The one-X Portal for IP Office consists of two tabs or pages; **Main** and [Configure](#)^[10]. The elements displayed on the **Main** tab are described below.



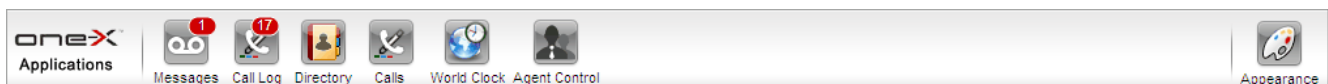
Title Bar^[14]

The title bar shows you information about yourself.



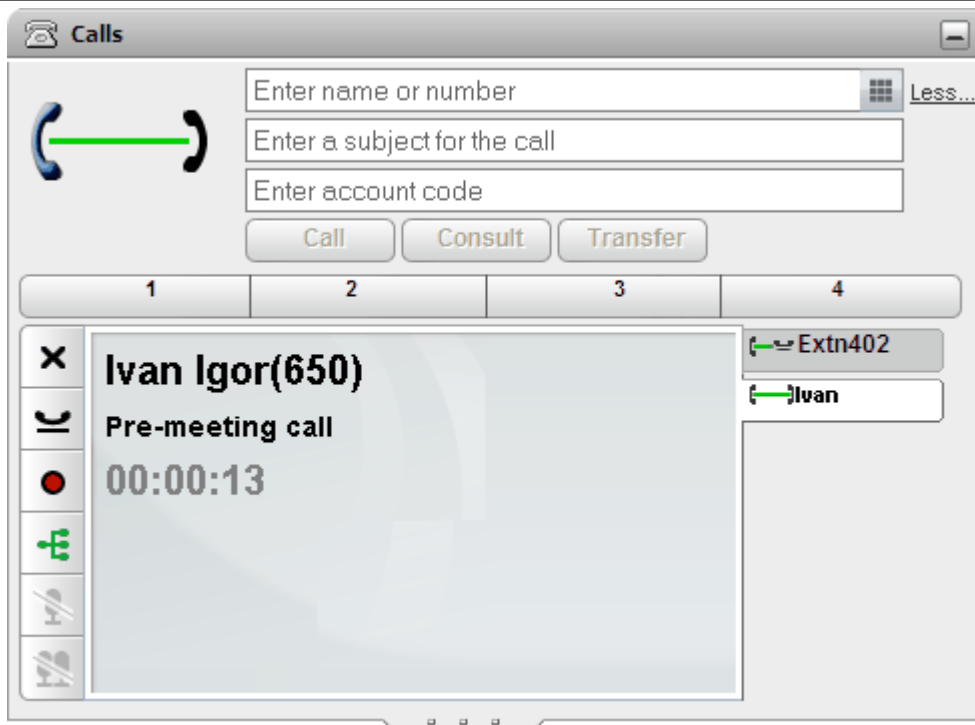
Toolbar

The toolbar at the bottom is used to access controls for the one-X Portal for IP Office [appearance](#)^[22] and to display icons for [minimized gadgets](#)^[22].



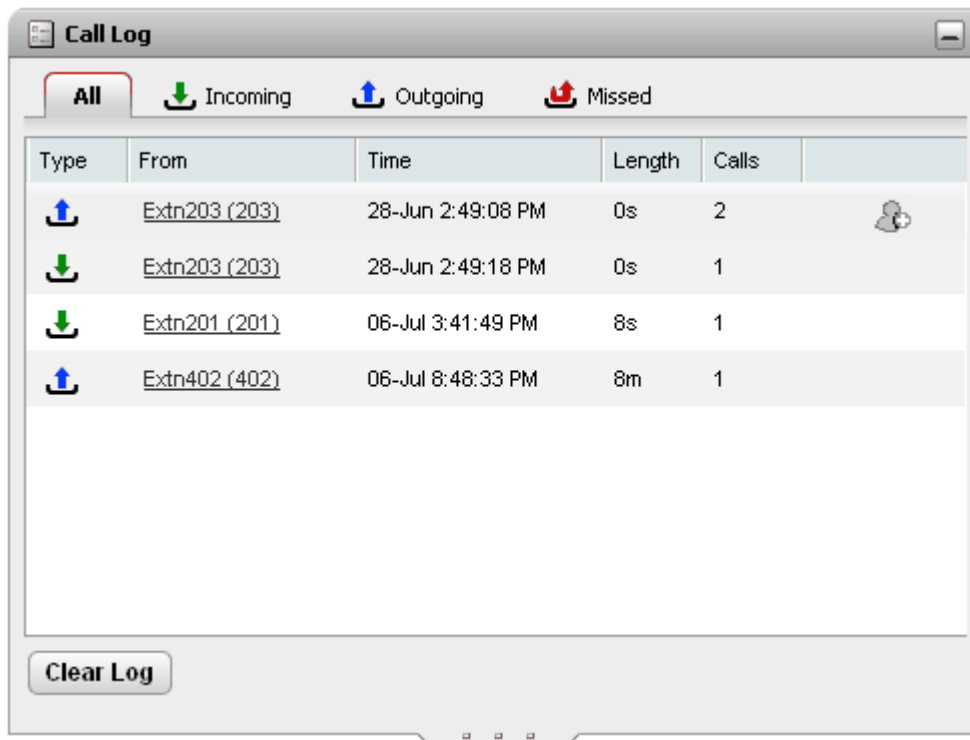
Calls Gadget^[27]

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.



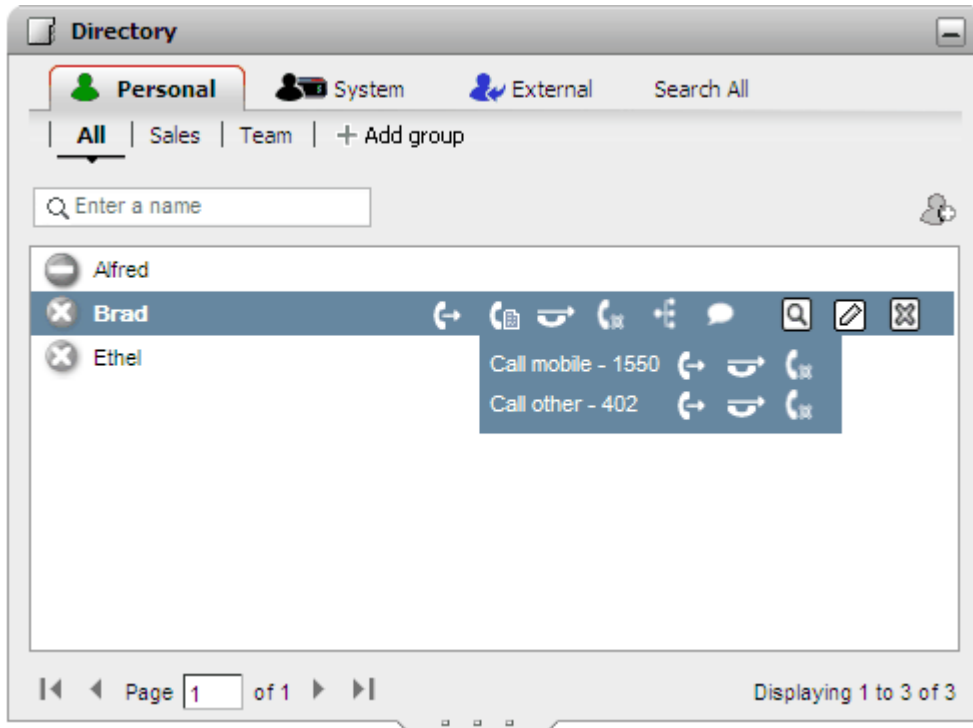
[Call Log](#) 64

The **Call Log** gadget displays your call log which is stored by the telephone system.



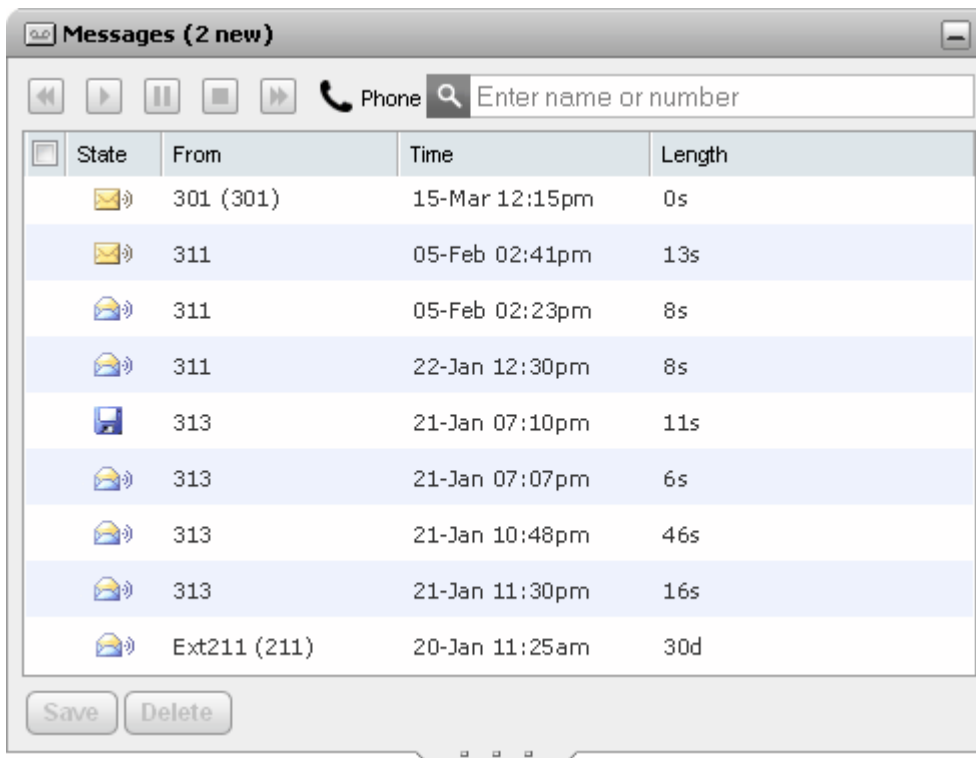
[Directory](#) 69

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](#) 166 on the phone system. The **External** directory allows you to search other directories, access to which has been configured by the [system administrator](#) 167.



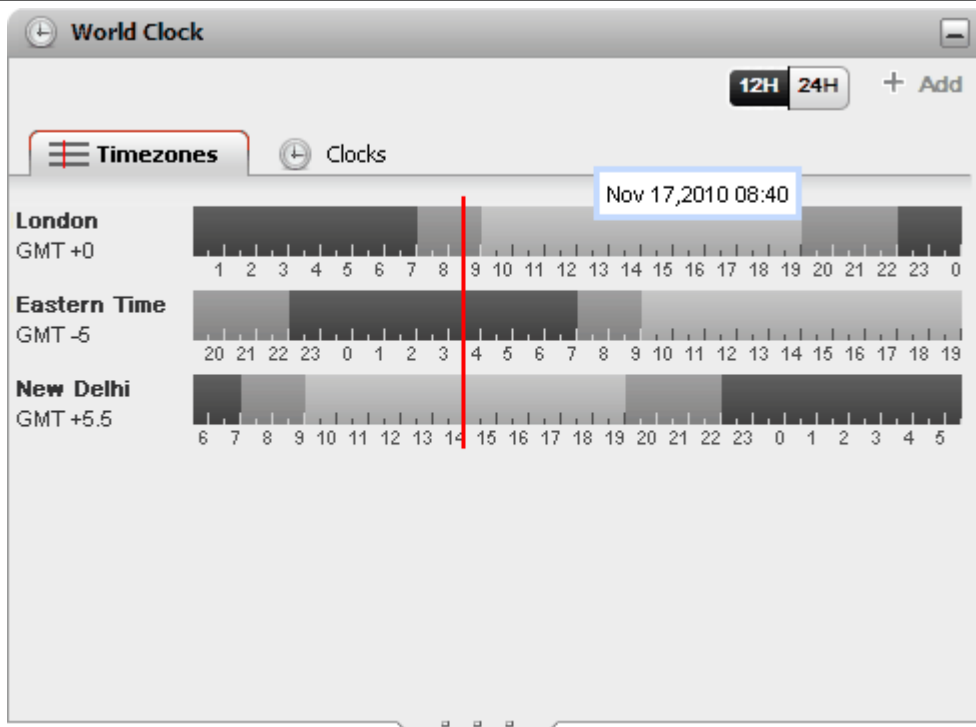
Messages ⁹¹

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 or via your browser if it supports multimedia.



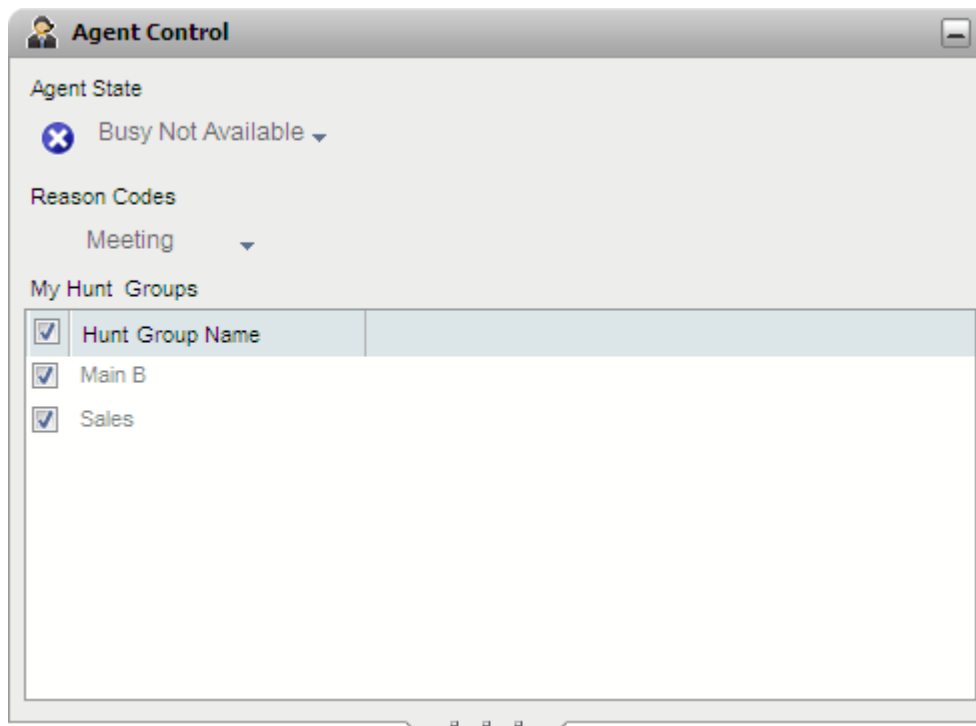
World Clock ¹⁰⁷

The World Clock gadget shows you the current time in different time zones that you select. It can be used in a time zones band view or a time zones clock view.



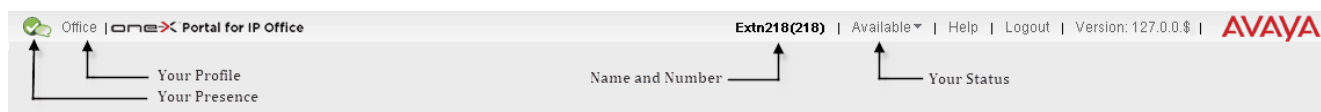
Agent Control

If you are also a Customer Call Reporter agent, this gadget is displayed. You can use it to see your current agent state and to change that state. You can also use it to change your membership status in the various Customer Call Reporter queues to which you belong.



1.5 Your Presence and Status

The title bar at the top-right of the screen shows you your current status and allows you to access a number of functions.



The items on the left of the title bar show:







 **Your Presence**

This icon indicates your current presence in the one-X Portal for IP Office interface. The presence changes as you use your phone, log in or out. The icons are similar to those shown in the directory gadget for other users. The column on the left is the icon you see. The column on the right is the icon that is displayed to the other one-X Portal for IP Office users in their one-X Portal for IP Office directory.






There are two types of presence:

1. **Telephony presence:** This presence is related to the status of phone.
2. **XMPP presence:** This presence is related to status of the user associated with the IM.




The telephony presence will be associated with an extension on the one-X Portal for IP Office. The various states are as follows:

Presence Icon	Presence Status	Description
	Available	The status indicates that you are available and can be called.
	Busy	The status indicates that you have a call in progress.
	Do Not Disturb	The status indicates that you have enabled <i>Do No Disturb</i> on the phone system. Calls to you are redirected to voicemail if available. Otherwise, the callers receive a busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions [107].
	Logged Out	The status indicates that you have not logged into the extension on the phone system. Calls to you are redirected to voicemail if available. Otherwise, the callers receive a busy tone. You cannot make calls. However you can still use one-X Portal for IP Office to alter your configuration settings.
	Ringing	This status indicates that the phone is ringing and you have an incoming call.
	Unknown	This status indicates that your presence on the phone system is unknown. The presence cannot be determined as the phone number is not an extension on the IP Office

The XMPP presence indicates the status of an entry in the directory with respect to IM. The possible states are as follows:

Presence Icon	Presence Status	Description
	Available/ Online	The status indicates that you are logged into the IM server and available for chat.
	Do not disturb	The status indicates that you have enabled <i>Do No Disturb</i> on the IM
	Offline	The status indicates that you have not logged into the server. You want to continue using the one-X Portal for IP Office. If you choose to enable <i>Offline</i> , then other one-X Portal for IP Office users will not be able to send you instant messages [46] using the one-X Portal for IP Office.
	Away	The status indicates that you are logged into the IM but currently away from your desk.
	Unknown	This status indicates that your presence on the IM is unknown.

In addition to the aforementioned presence icons, the following icons will also be displayed in the left column of the one-X Portal for IP Office interface:

Presence Icon	Description
	This icon shows that you are available on the desk phone as well as for chat.
	This icon shows that you are available on the desk phone but not available for chat. While in this state, you cannot be instant messaged [46] by other one-X Portal for IP Office users.
	This icon shows that you are logged out from the desk phone, but logged into the IM.

- **Office Your Profile**

Your currently [active profile](#)^[81]. Profiles allow you to pre-configure sets of telephone settings and then apply them at any time by selecting which profile is active. You can select your current profile and edit profiles on the [Configure](#)^[81] page.

The items on the right of the title bar show:

- **Extn218(218) Name and Number**

Your name and number will be displayed on the one-X Portal for IP Office interface.

- **Available Your Status**

This drop-down shows your current status and allows you to 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 the other users will receive a busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions ^[107] . In this state, you can still make calls.
Offline	You can select this state if you want to continue using one-X Portal for IP Office but do not want other one-X Portal for IP Office users to be able to send you instant messages ^[46] using the one-X Portal for IP Office.

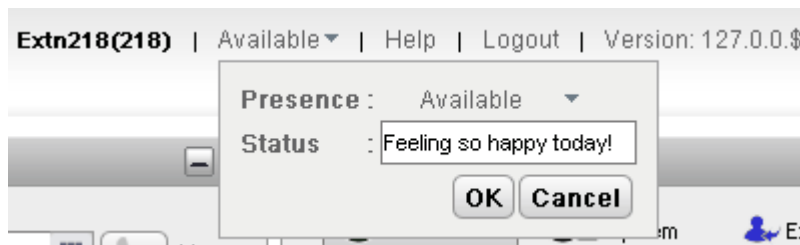
Note: The one-X Portal for IP Office client provides a presence selector in the status section. The presence the user selects will be reflected appropriately on the phone and XMPP server. For example, if the user selects *Do Not Disturb*, the phone and the IM will be switched to *DND* mode (no one will be able to call or chat with the user). However, if the user logs out from the one-X Portal for IP Office and logs in through a third party client, the telephony presence will be *DND* but IM/Presence will be *Online*. Hence, the user will be able to use only the IM facilities.

You can also **set a custom message** as the status in the one-X Portal for IP Office. By default, the status message is blank.

Click on the **Your Status** drop-down menu in the header section of the one-X Portal for IP Office. The following two fields are available:

Presence: Select the type of presence, that is, *Available*, *Do Not Disturb* and *Offline* from the drop-down menu.

Status: Type the custom message, you want to set. The other users who are using the one-X Portal for IP Office client or third party clients can view the custom message.



The custom message is displayed only if you are logged into the one-X Portal for IP Office client. On log off, the custom message is not visible to the other users.

Note: If you select *Offline* as the presence, then the custom message is not displayed to the other users. However, the custom message set by you is stored on the one-X Portal for IP Office. The next time you log in to the one-X Portal for IP Office web client, the custom message is displayed to the other users.

The custom message is client-dependent and associated with the one-X Portal for IP Office client. You can type a maximum of 50 characters as a custom message.

- **Help**

Use this link to open the one-X Portal for IP Office help in a new browser tab or window.

- **Logout**^[11]

Use this link when you have finished using one-X Portal for IP Office. It will return you to the one-X Portal for IP Office [login screen](#)^[9].

- **Version**

This displays the version number of the one-X Portal for IP Office you are currently using.

1.5.1 Viewing Presence status

You can view the presence status of contacts in the [Call log](#)^[63], [Messages](#)^[89], and [Directory](#)^[68] gadget. The presence icons are displayed to the left of the name column in the gadgets. Since, the presence of a user is displayed in the Directory gadget, the calendar information will be also be reflected.

1.6 Phone Notes

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

one-X Portal for IP Office Call Log

The call log shown by one-X Portal for IP Office is stored on the telephone system as part of your user settings. Up to 30 records (10 on IP Office IP406 V2 and IP412 systems) are stored, with new records replacing the old ones when the limit is reached. However for repeated call records to or from the same number, the existing record is updated and the number of calls count included in the record is increased.

Your system administrator configures which calls are logged. For example, calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls unless configured to do so by your system administrator.

Hunt group calls are not logged unless you answer the specific call. Again your system administrator can configure your call log to include missed hunt group calls.

Phone Call Log

If you are using a 1400, 1600, 9500 or 9600 Series phone with a **Call Log** or **History** button, or an M-Series or T-Series phone, by default the same call log as shown by one-X Portal for IP Office is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal for IP Office. 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 does not match the call log shown in one-X Portal for IP Office. For example, calls made using the one-X Portal for IP Office do not appear in the phone's call log and vice versa.

In either case, the one-X call log is limited to displaying 255 records.

Personal Directory

If you are using a 1400, 1600, 9500 or 9600 Series phone with a **Contacts** button, or M-Series, T-Series 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 for IP Office application and by the telephone system and kept in sync. The one-X Portal for IP Office application and the telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits).
2. The contacts can be edited through the phone or through one-X Portal for IP Office.
3. Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current **Primary phone**^[167] 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 for IP Office if that selection is changed.

Number of Calls

one-X Portal for IP Office 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 limits the number of incoming calls that you can receive.

Phones With Appearance Buttons

Many Avaya phones have programmable buttons that are configured by the [system administrator](#)^[167] as [appearance buttons](#)^[168]. 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 [busy](#)^[168] to any further incoming calls.
- For outgoing calls, you can use one-X Portal for IP Office 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 enabled, you can use one-X Portal for IP Office 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 [busy](#)^[168]. However, using one-X Portal for IP Office you can still make additional outgoing calls.

-
- If your **Calls Waiting On** setting is not enabled, once you have one connected call to which you are talking the phone system treats you as being busy^[166]. However, using one-X Portal for IP Office 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 system administrator^[167] 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.

Incoming Calls

The calls that are indicated to you through one-X Portal for IP Office are still fully controlled by the IP Office system settings. For example, your call waiting settings, number of appearance buttons, etc. This applies to both calls direct to you and calls to hunt groups of which you are a member. Issues with incoming calls not alerting the one-X Portal for IP Office user will be down to IP Office system configuration settings.

Outgoing Calls

The outgoing calls that you can make are subject to the your IP Office configuration settings. The one difference from making calls using your phone is that you can use the one-X Portal for IP Office to make additional calls. For example, when all your call appearance buttons on the phone are in use, you can still use one-X Portal for IP Office to make additional calls.

On some phones, the call log shown by the phone and the redial function uses information stored by the phone. Typically this will not include calls made using one-X Portal for IP Office.

Call Gadget Buttons

Within the sub-tab shown for each call in progress or held, a number of buttons are included. The buttons indicate actions that you can perform and vary according to factors such as the type of phone, the current state of the call, whether you already have other calls connected or held, etc.

It is important to understand that it is not the one-X Portal for IP Office application that controls which buttons are displayed. The actions currently performable on each call are indicated to one-X Portal for IP Office as part of the information from the telephone system.

When the user is using a phone that the IP Office system cannot force off-hook, the following differences are applicable. This applies to analog phones and to most SIP phones.

- When an incoming calls is presented while the phone is on-hook, one-X Portal for IP Office will not enable the **Answer** button. You need to manually take the phone off hook to answer the call using the phone's own controls.
- When making a call from one-X Portal for IP Office with the phone is on-hook (for example after entering a number and clicking on **Call** or having selected to play a voicemail message), the telephone system will call you and will only make the outgoing call when you answer.

Some phones allow actions such as entering the number to call without going off-hook. This is called en-bloc dialing. The IP Office system, and therefore the one-X Portal for IP Office, is unaware of such activity until the prepared digits are sent from the phone.

- This typically applies to phones on a DECT system and to SIP phones.
- Avaya 1400, 1600, 9500, 9600, M-Series and T-Series phones can be optionally set to use en-bloc dialing.

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 for IP Office 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.

Normally logging in at another extension requires you to dial a special number including your login code that is different for the password you use for IP Office applications. However, you can use the one-X Portal for IP Office login menu to both login to one-X Portal for IP Office and to specify the phone to which you want to be logged on.

Administrator Login AFA Login

AVAYA
one-X™

Version: 127.0.0.\${env.BUILD_NUMBER}

Portal for IP Office

User name

Password

Language English ▾

Remember me on this computer

▼ Login to phone

Login my phone

Base extension IP Office ▾

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When you use this method to log in to both one-X Portal for IP Office and a phone, when you log out of one-X Portal for IP Office you are also logged off the phone. 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.

Changing the Layout

2. Changing the Layout


There are a number of ways in which the layout applied to the one-X Portal for IP Office gadgets can be adjusted. Any changes you make are stored by the one-X Portal for IP Office in your user settings and restored when you log in again.

Change the one-X Portal for IP Office Layout		
<ul style="list-style-type: none">• Select a Skin ^[22]• Add External gadgets ^[23]• Move a Gadget ^[24]• Delete a custom tab ^[24]	<ul style="list-style-type: none">• Change the Column Widths ^[22]• Maximize a gadget ^[23]• Default the Layout ^[24]	<ul style="list-style-type: none">• Show/Hide a Gadget ^[22]• Resize a Gadget ^[24]• Add a custom tab ^[24]

2.1 Selecting a Skin

You can change the skin style of one-X Portal for IP Office. The styles that are available are the default and black skins. The styles are consistent with the Appearance Menu.



1. Click **Appearance** . The system displays the skin styles.




2. Click the preferred skin style. The system changes the one-X Portal for IP Office interface to the preferred skin style.

3. Click anywhere on your one-X Portal for IP Office application to exit the settings.

2.2 Changing the Column Widths

The area in which the gadgets are displayed is effectively two columns. By default the columns are of equal width (50:50). However, you can also select to have 60:40 or 40:60 column width ratios.



1. Click **Appearance** . The system displays the skin styles.

Click on the **Layouts** icons to select the ratio of columns widths it represents.




2. Click the preferred skin style. The system changes the one-X Portal for IP Office interface to the preferred skin style.

3. Click anywhere on your one-X Portal for IP Office application to exit the settings.

2.3 Show/Hide Gadgets

Hide/Minimize a Gadget

You can minimize any of the gadgets shown on the **Main** tab by selecting the  icon in the top right of the gadget. The gadget is reduced in size to just its title bar.

Note: To minimize a gadget that is maximized you should first restore it.

While minimized, the gadget is also replaced by an icon in the toolbar at the bottom of the one-X Portal for IP Office.



- [Calls Gadget](#) ^[27]

Note that if you receive a new call while you have the calls gadget minimized it will be automatically restored in order to display the caller details.



- [Messages Gadget](#) ^[89]

This icon also shows the number of unread messages in your mailbox.



- [Call Log Gadget](#) ^[63]

This icon also shows the number of missed calls in your call log.



- [Directory Gadget](#) ^[68]

This icon displays directories of names and associated telephone numbers.



- [World Clock Gadget](#) ^[107]


This gadget shows the current time in various selected time zones.



- [Agent Control Gadget](#) ^[47]

This gadget is shown to Customer Call Reporter agents who also use one-X Portal for IP Office.

Show/Restore a Gadget

To restore a gadget, either click on its icon in the toolbar at the bottom of the screen or click the  icon in the gadgets title bar.

2.4 Add External gadgets

one-X Portal for IP Office 8.0 enables you to add and use the external gadgets without launching an independent application for each gadget.

Some of the gadgets that might come in handy when you are using one-X Portal are: Project management, Calendar, Currency converter, google translate, news, google maps, and others. The system displays only those gadgets that the administrator of one-X Portal for IP Office has enabled for the user.

Note: After you add an external gadget, the system displays the gadget even if you log out and then later log in.

You can add an external gadget to **Main** tab and custom tabs only. You cannot add an external gadget to the **Configure** tab.

To add an external gadget:

1. Click the tab where you would like to add the external gadgets.



2. Click **Gadgets**, in the toolbar. One-X portal displays a list of categories such as, **ALL, COMMUNICATION, FINANCE, PRODUCTIVITY, TECHNOLOGY**, and others.

3. Select a category.

4. Enable the gadget that you want to add. The system displays the gadget in the panel that has least number of gadgets.

To remove an external gadget:

You can remove only the external gadgets from one-X portal for IP Office. You cannot remove the default gadgets from the one-X portal for IP Office **Main** tab.

- Click **Close** in the title bar of the external gadget.
- Click **Yes** to confirm that you would like to delete the gadget from one-X portal for IP Office.

2.5 Maximizing a gadget

You can maximize any of the gadgets that appear on the **Main** tab by selecting the  icon in the top right of the gadget title bar.

Note: To maximize a gadget that is minimized you should first restore it. To maximize a gadget that is minimized you should first restore it. The system displays the maximized settings only as long as you are logged in. If you log out and then log in to one-X Portal for IP Office, the system does not display the maximized gadget settings.

When a gadget is maximized the system displays other gadgets as icons in the toolbar at the bottom of the one-X Portal for IP Office.



- [Calls Gadget](#) ^[27]

Note that if you receive a new call while you have any of the other gadgets maximized the incoming call indicator appears on the header.



- [Messages Gadget](#) ^[89]

This icon displays the number of unread messages in your mailbox.



- [Call Log Gadget](#) ^[63]

This icon displays the number of missed calls in your call log.



- [Directory Gadget](#) ^[68]

This icon displays directories of names and associated telephone numbers.



- [World Clock Gadget](#) ^[107]

This gadget displays the current time in various selected time zones.



- [Agent Control Gadget](#) ^[47]


This gadget appears for Customer Call Reporter agents who also use one-X Portal for IP Office.

Show/Restore a gadget

To restore a gadget, click the  icon in the gadgets title bar.

2.6 Resizing a Gadget

In addition to changing the ratio of the two column widths used for the gadgets, you can also change the height of each gadget.

To change the height of a gadget, click and drag  **resize** in the gadget.

Note: You will not be able to resize a gadget that is maximized.


2.7 Moving Gadgets


You can move the gadgets between each of the columns and change the order of the gadgets within a column. To do this, click and drag the gadget title bar to the require column and position.

2.8 Default Layout

If you have adjusted the layout of one-X Portal for IP Office, you can the layout to its default arrangement using the following option.



1. Click **Appearance** . The system displays the skin styles.

2. Click **Reset to Factory UI** . The system changes the one-X Portal for IP Office interface to the default skin style.

3. Click anywhere on your one-X Portal for IP Office application to exit the settings.

2.9 Adding a custom tab

In addition to the two existing default tabs you can add two custom tabs.

To add a custom tab:

1. Click **'Add tab'** in the one-X Portal for IP Office window.
2. Type the name of the custom tab in **Add Personalized Tab** dialog box. Ensure that the name of the custom tab does not exceed 20 characters.

Note: You cannot change the name of the custom tab after you add.

3. Click **Add**.

2.10 Deleting a custom tab

To delete a custom tab:


Note: You can delete only the custom tabs. You cannot delete the default tabs.

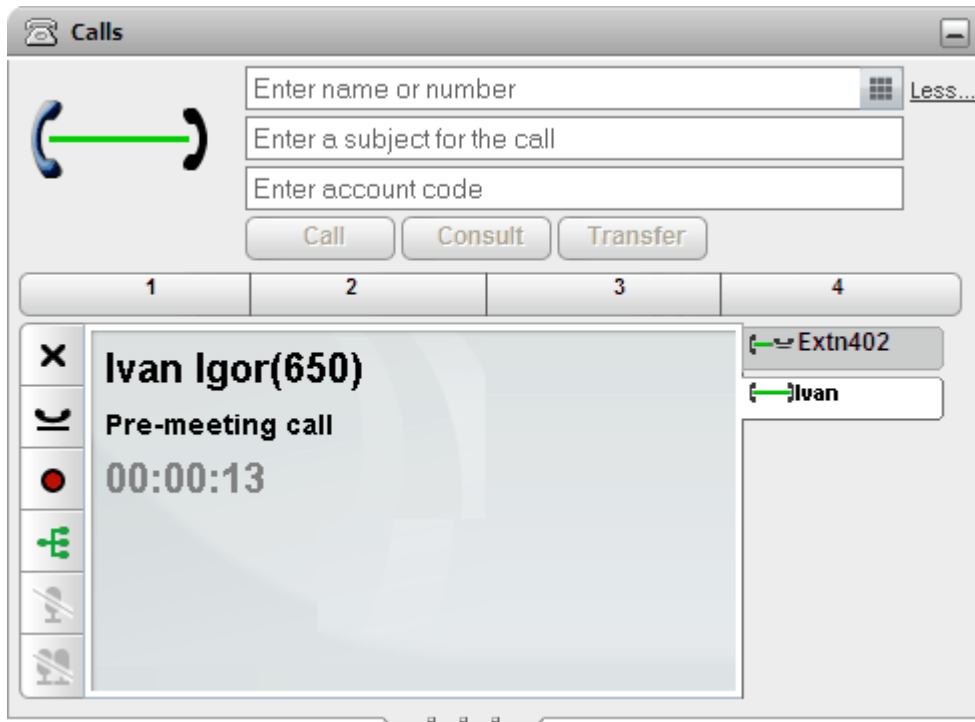
1. Click the custom tab that you would like to delete in the one-X Portal for IP Office window.
2. Click **Delete**, in the custom tab.
3. Click **Yes**, to confirm that you would like to delete the custom tab, and the gadgets that you added to the custom tab.

Chapter 3.

Making and Answering Calls

3. Making and Answering Calls

This section covers how you can use one-X Portal for IP Office to make and answer calls. Using the  **Calls** gadget, details of each call are shown on separate tabs. The [buttons](#)^[29] shown will vary but generally indicate actions that you can perform with the currently displayed call.

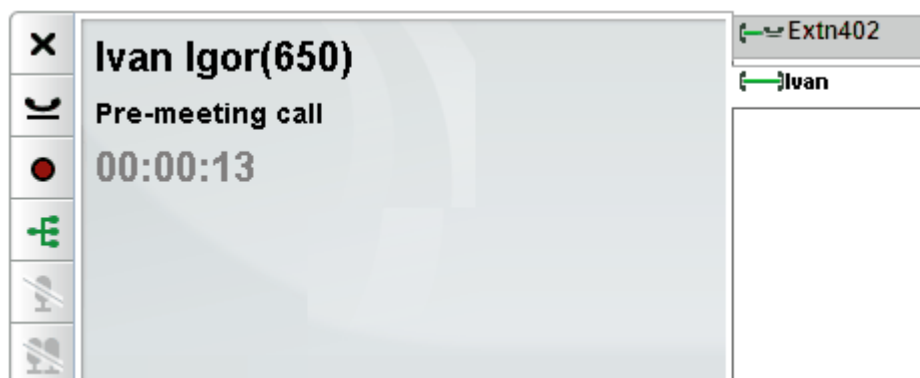


Make and Answer Calls

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Make a call^[31] • Unanswered calls^[36] • Hold calls^[36] • Transfer calls^[40] • Instant message other users (Chat)^[46] • Enable Mobile Twinning^[48] | <ul style="list-style-type: none"> • Answer a call^[34] • End a call^[38] • Switch between calls^[39] • Park calls^[44] • Select Do Not Disturb^[47] | <ul style="list-style-type: none"> • Pick up a call^[35] • Mute a call^[36] • Record a call^[40] • Send DTMF tones^[45] • Use Agent controls^[47] |
|---|---|--|

3.1 Call Details

The lower part of the calls gadget displays call details.



Call Tabs

The call tabs on the right show a tab for the current connected call and one for each held and alerting call. Each tab has a [call status icon](#)^[30] its call and the caller's number or associated name.

- You can click on the tabs to select which call's details are shown in the center panel without affecting the currently connected call.

-
- When a new call arrives, its tab is automatically selected in order to show the new call details. Similarly when you make a new call its tab is automatically selected.
 - The call details for a new call also show if it has come via another user.
 - If a call has been transferred, the name of the caller being transferred is shown followed by the source of the transfer in brackets.



- If a call has been forwarded to you, the name of the caller is shown followed by > and the name of whoever forwarded the call to you. This is also used for hunt group calls, showing the caller and the hunt group.



Call Buttons

The buttons shown on the left are used to perform actions on the call whose details are currently shown in the center panel, ie. the selected tab. The buttons are greyed out when not useable.

Call Details

The calls details in the center panel show the following:

Caller Name and Number

The top row shows the caller number. If the telephone system is able to associate a name with the number, it will display that name and then the number in brackets. The telephone system can associate a name by matching the number to entries in its directory or your directory.

Call Tag/Account Code

The middle row is not always shown as it shows information not always present on calls.

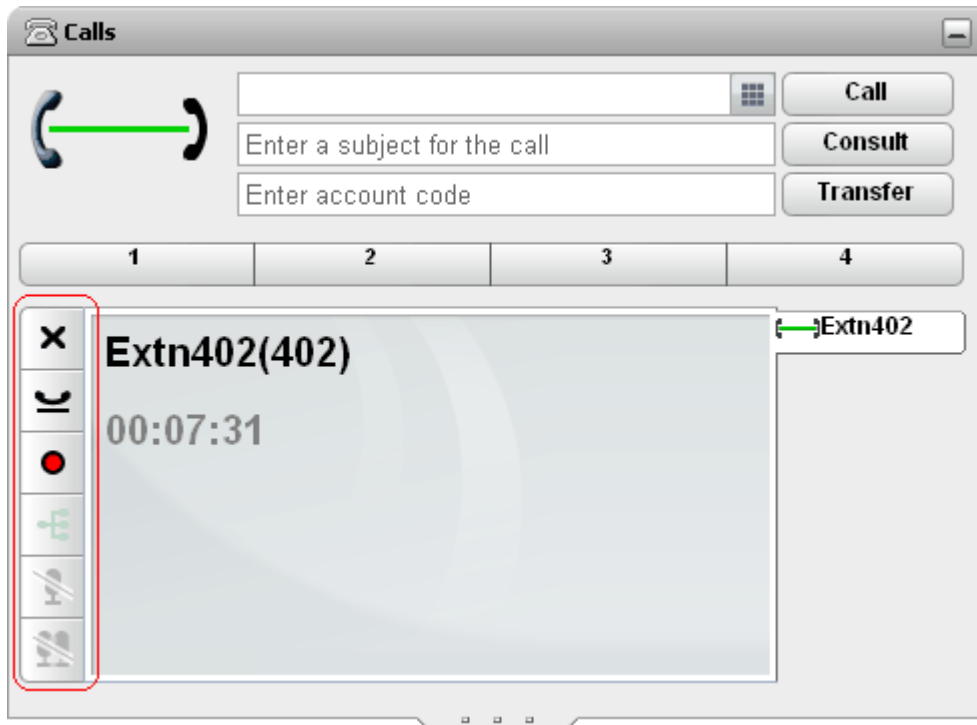
- If there is an account code associated with the call, the account code is displayed. Using one-X Portal for IP Office, an account code can be entered when [making a call](#) or, for incoming calls, the telephone system can automatically associate an account code based on the caller's number.
- If there is a tag associated with the call, the tag is displayed. The tag overrides display of the account code if there is also an account code associated with the call. Depending on the phone being used the tag is also displayed on the phone. A call tag is a short text message that can be associated with a call.
- You can use one-X Portal for IP Office to enter a call tag when making or transferring a call. The tag is seen by you and also by the other party if they are another internal user and have a suitable phone or are also using one-X Portal for IP Office.
- The telephone system can also add tags to a call in certain situations.

Call Timer

The bottom line shows the call timer since it was presented to your one-X Portal for IP Office.

3.2 Call Buttons


The buttons down the left hand edge of the call display are used to access features for the currently displayed call .

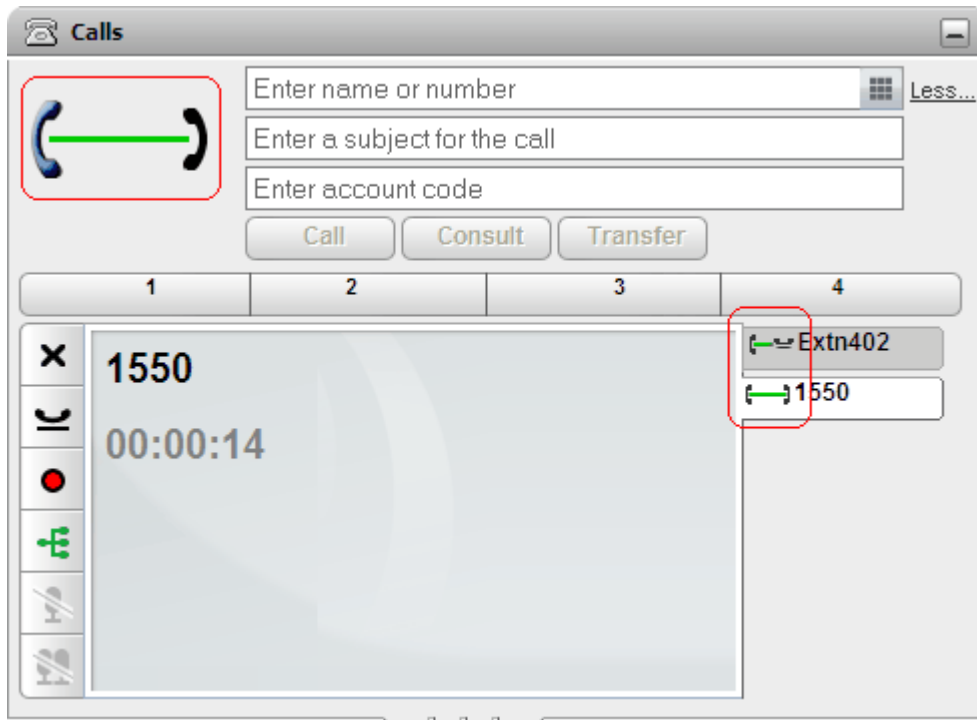











Icon	Action	Description
	Answer Call	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call.
	Drop Call	For a currently connected call, pressing X disconnects the call.
	Redirect Call	For an alerting call, pressing X will 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.
	Record Call	Start recording the current call.
	Stop Recording	Stop recording the current call.
	Hold Call	Puts the call on hold.
	Retrieve Held Call	Take a call back from hold.
	Complete Transfer	With a call on hold and another call in progress, transfer the held call to the current connected party.
	Conference Call	With a call on hold and another call in progress, you can conference the calls.
	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.
	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.

Note: The **Drop Call** button is enabled. However, clicking the **Drop Call** button does not end the call.

3.3 Call Icons

Call icons are used by the  **Calls** gadget to indicate the current status of a call. A large icon is also shown top right to indicate the status of your currently connected call if you have one. The tab on the right for each call also includes a small version of the icon showing the status of the call that the tab represents.




Icon	Description
	<ul style="list-style-type: none"> Idle/On Hook This icon indicates that you currently have no call connected.
	<ul style="list-style-type: none"> Alerting/Ringing This icon indicates a call being presented to you to be answered ^[34] . Depending on other phone settings your phone also gives an audible ring and flash its lamp or icons.
	<ul style="list-style-type: none"> Dialing 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.
	<ul style="list-style-type: none"> Outgoing Call Ringing This icon indicates that the call you have made is now ringing. Note that for analog telephone lines, calls are treated as answered immediately as those lines do not provide call progress signals to the telephone system, just audible ringing that you can hear.
	<ul style="list-style-type: none"> Could Not Connect The icon indicates that the call you were making could not be connected for some reason.
	<ul style="list-style-type: none"> Connected This icon indicates the call to which you are currently talking or listening.
	<ul style="list-style-type: none"> Held Call This icon indicates a call that you have been put on hold.
	<ul style="list-style-type: none"> On Hold This icon indicates that another user on your system has put your call to them on hold.
	<ul style="list-style-type: none"> Conference This icon is shown when you are in a conference call that you started.

3.4 Making a Call

You can use the one-X Portal for IP Office in a number of ways to make calls:

- [From the Call Gadget](#)^[31]
- [Using the Dial Pad](#)^[137]
- [From the Directory](#)^[32]
- [From the Call Log](#)^[33]
- [From the Voicemail](#)^[34]

3.4.1 ... 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.




- 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 [primary phone](#)^[167] number stored with that contact will be dialed.
- You can also add a subject and or an account code to a call. Click on **More....** Use the additional text boxes to enter the required information. To hide the text box again, click on **Less....**

Enter name or number Less...


Enter a subject for the call



Enter account code

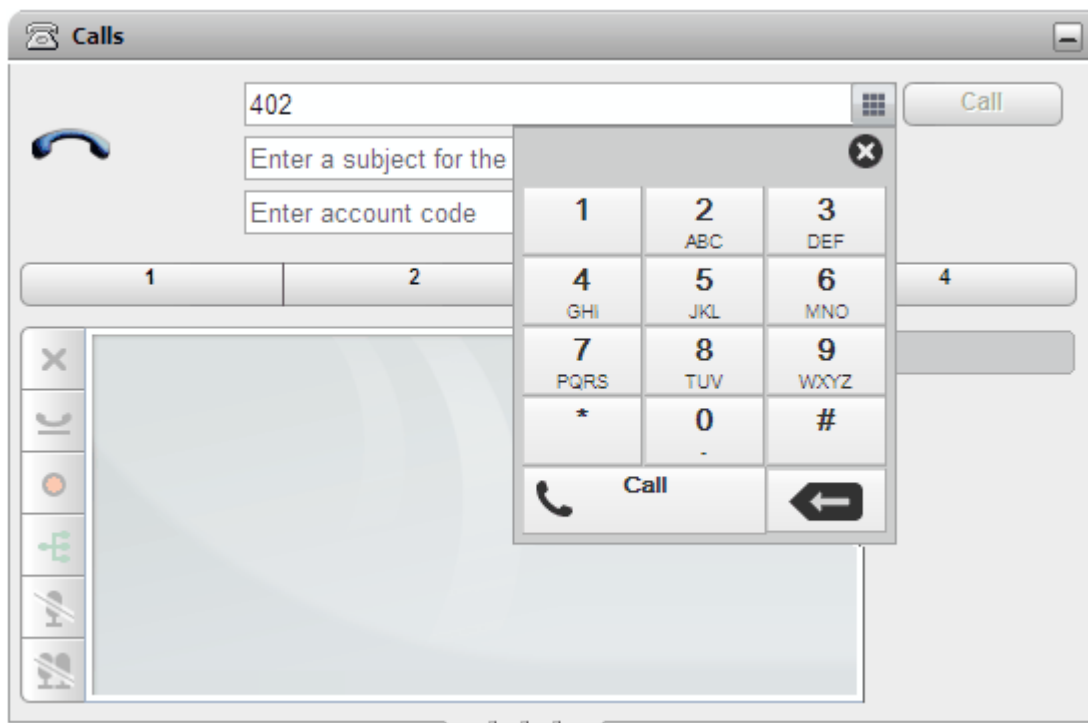
Call





- If you enter a subject it will be added to the call details. If you are calling an internal user, it is displayed on their phone or in their one-X Portal for IP Office call display.
 - If you enter an account code, it will be included in the call log details output by the telephone system after the call. For some users, entry of a valid account code is required to make external calls.
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](#)^[166].
- The progress of the call is displayed on a tab in the  **Calls** gadget.

3.4.2 ... using the Dial Pad


You can access a number dialing pad as part of the  **Calls** gadget.

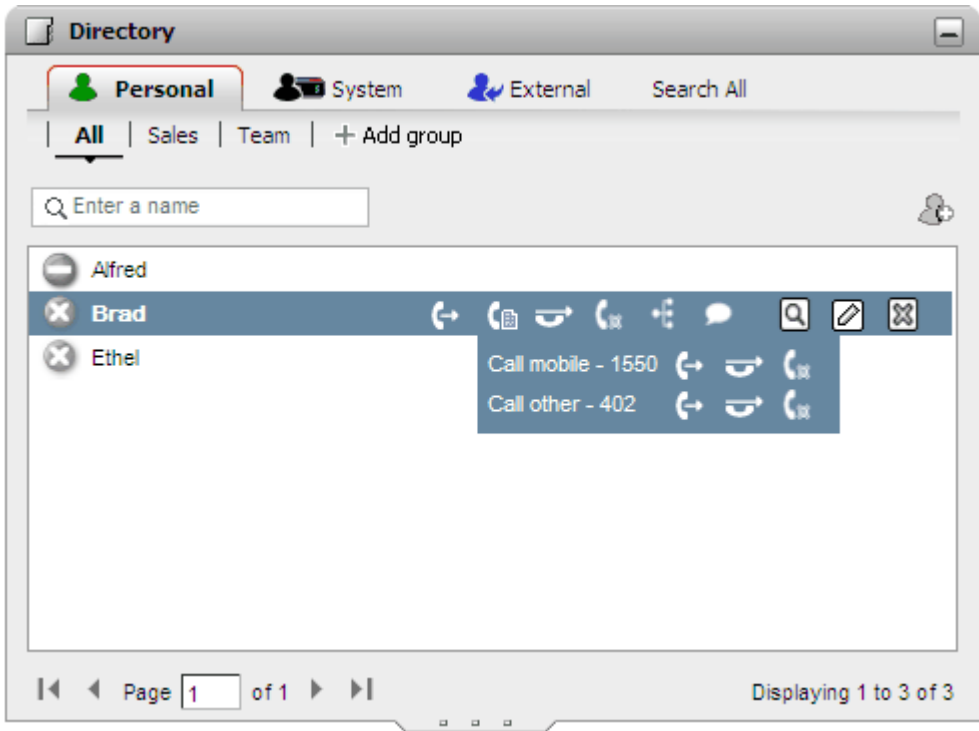
- Using the  **Calls** gadget, click on the  dial pad icon.



- Using the dial pad enter the number you want to call. For external calls, remember to add any external dialing prefix used by your telephone system.
- To delete the last digit entered, click on the  delete icon.
- At any time you can exit the dial pad to continue entering call details into the other fields if required. Click the  dial pad icon to hide the dial pad.
- When the details are set as you require, click the  call icon. If you already have another call in progress, that call will be [automatically put on hold](#)^[166].
 - The progress of the call is displayed on a tab in the  **Calls** gadget.

3.4.3 ... from the Directory

- Using the  **Directory** gadget on the **Main** tab, locate the name that you require in the directory.
- To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
- To call the contact shown, hover your cursor over it. [Directory icons](#)^[69] for the directory functions you can perform are displayed.



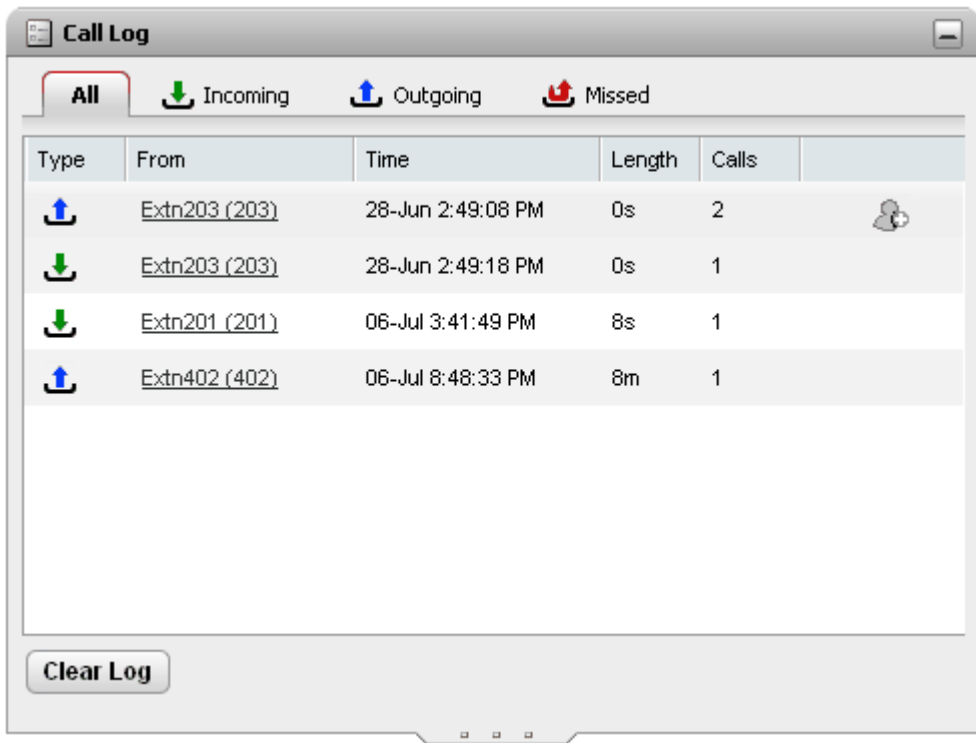
4. To make a call to the contacts primary number, click on the call icon. If the icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.

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

3.4.4 ... 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.



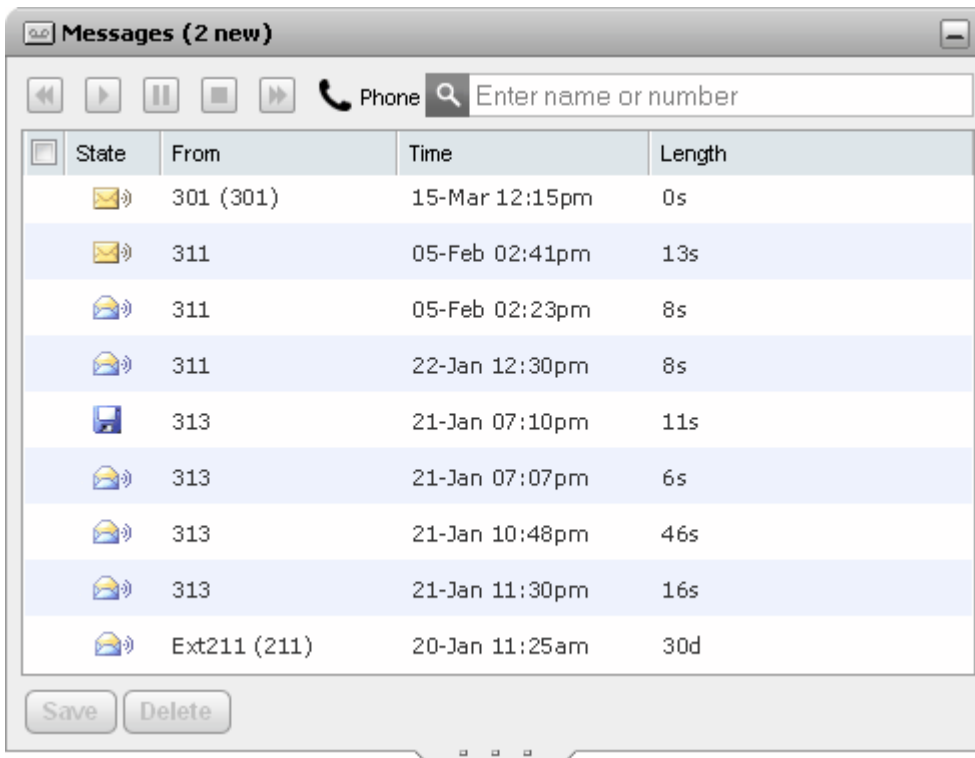
2. Click on the name or number to make a call.

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

3.4.5 ... 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 name or number details of the caller to make a return call.

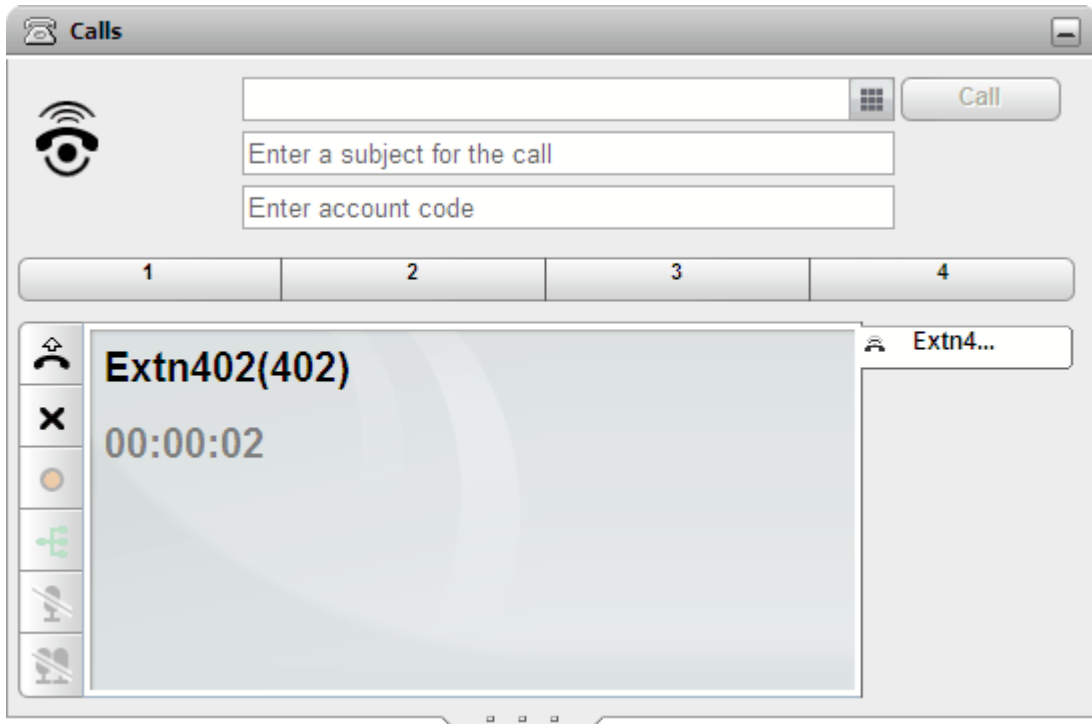
- The progress of the call is displayed on a tab in the  **Calls** gadget.

3.5 Answering a Call

When a new call alerts your phone, one-X Portal for IP Office displays its details in the  **Calls** gadget. If you have hidden the calls gadget it is automatically opened again.

By default new calls will ring your phone for 15 seconds before following your [forward on no answer](#)¹⁶⁶ settings or going to voicemail. If you already have a call connected, answering another call using one-X Portal for IP Office will automatically put the existing call on [hold](#)³⁸⁷.

1. The  **Calls** gadget on the **Main** tab shows details of the alerting call including the number of the caller if available and the name if available. If you already have a call or calls in progress, select the tab with the ringing handset  icon.



2. To answer the call, either use your phone or click the call answer button. If you already have another call in progress, that call will be [automatically put on hold](#)^[166].

- Alternatively, pressing the **X** call drop button will redirect the call using your forward on no answer setting if set or otherwise to voicemail if available.

To drop a call, you must have voicemail configured on the desk phone.

When you log in to the one-X Portal for IP Office and receive an incoming call, the call appears in the call gadget. If you have the voicemail configured, you can click *Drop* on an incoming call. The call automatically transfers to the voicemail. Here, the caller can leave a message for you, which you can listen to.

However, if you do not have voicemail configured and you have an incoming call, you cannot drop the call. Even though, the drop button is enabled on the call gadget, when you click *Drop* the call does not get disconnected. The same principle applies to the desk phone too.

- The call 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 buttons](#)^[29] indicating actions that you can perform.

3.6 Pickup a Call

Each one-X Portal for IP Office user, including you, has an active profile that includes a [Call Pickup](#)^[82] setting. When this setting is enabled, other one-X Portal for IP Office users can answer your calls when they see that you have a call waiting to be answered. 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, the icon normally used to indicate they are ringing is also accompanied by their name being shown on a red background.

To pickup a call

1. A red background indicates that the contact has a call or calls waiting to be answered and has call pickup enabled.



2. Click on the icon to display information about the calls waiting to be answered.



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

3.7 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](#)^[166] 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**^[166] 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 is not be possible in all cases.
- You can switch forwarding on/off and change the destination number using a one-X Portal for IP Office [profile](#)^[81].
- 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 for IP Office [profile](#)^[81].
- 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](#)^[64] as a missed call.

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

[Hunt groups](#)^[166] 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.

3.8 Ending a Call

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

3.9 Muting a call

one-X Portal for IP Office 8.0 enables the user to place a call on mute.

Note: When a user places a call on mute only the user is on mute and not the other party.

Placing a user of one-X Portal in an active call on mute

You can place a user of one-X Portal in all types of active calls, such as a transferred active call and a consulted active call, on mute.

- To place a user on mute, click **Mute** in the **Calls** gadget.
- To unmute a user, click **Unmute** in the **Calls** gadget.

Parked call

A user cannot place a parked call on mute. To place a user in a parked call on mute, first unpark the call.

Call on Hold





If you place a user on mute and then put the call on hold later, the system does not retain the user on the mute mode when you retrieve the call. However, if the other party places the call on hold the user of one-X Portal for IP Office can place the call on mute and the system retains the mute status even after the call is retrieved.

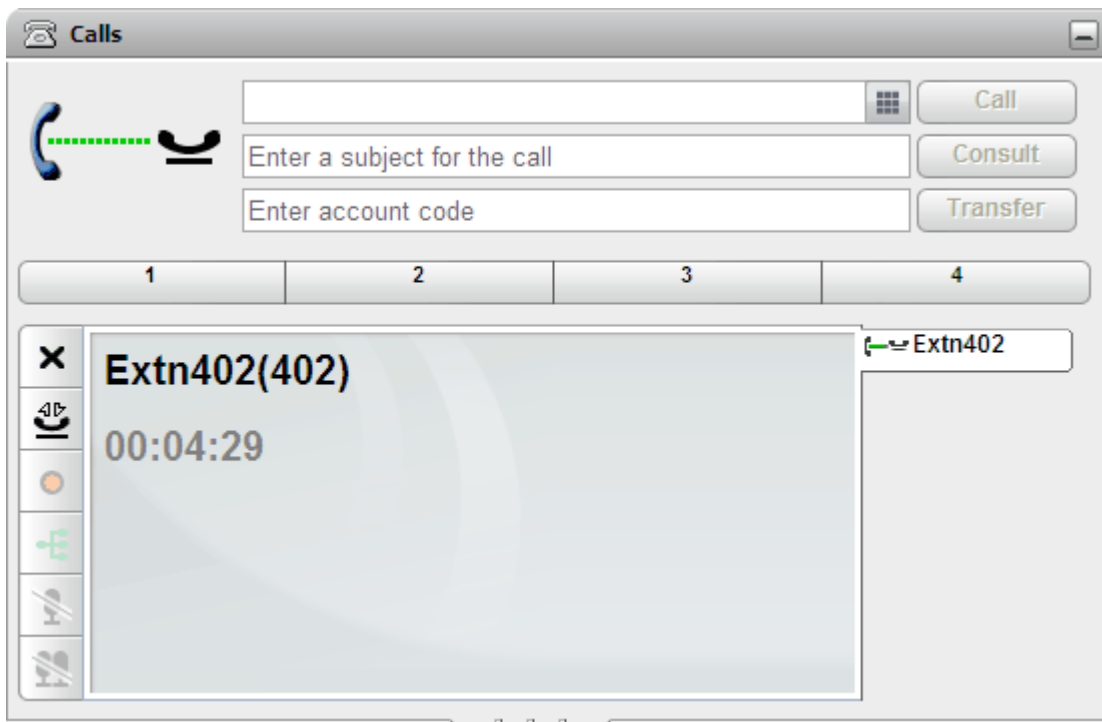
Note: When you press the mute button on the phone, the one-X Portal for IP Office 8.0 does not reflect the status of the call as muted.

3.10 Holding Calls

You can use one-X Portal for IP Office 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.

3.10.1 Holding a Call

- 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  icon on the right.
- Click on the  hold call button on the left. The call icon changes to .





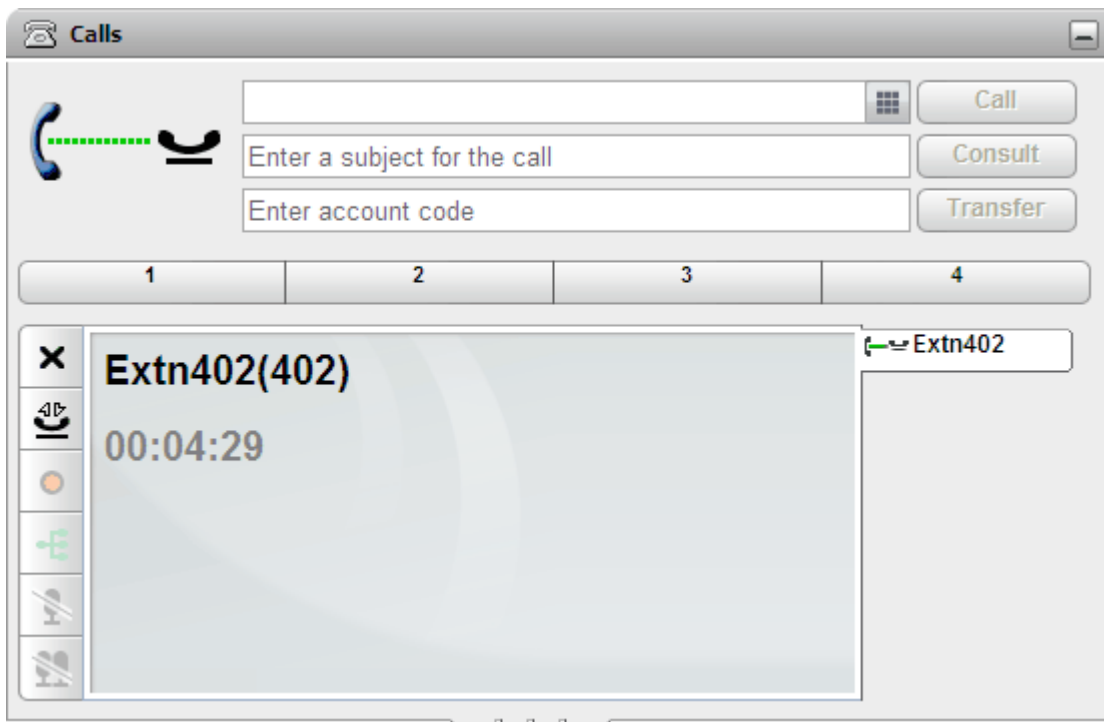
- If you are not connected to another call, then after a set time the held call will automatically alert your phone again.



Notes

- 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.
- The **Hold Timeout** for all held calls is set by the [system administrator](#)^[167]. 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](#)^[168] settings. You cannot drop a hold reminder.
- 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](#)^[169] to further incoming calls.



3.10.2 Retrieving a Held Call

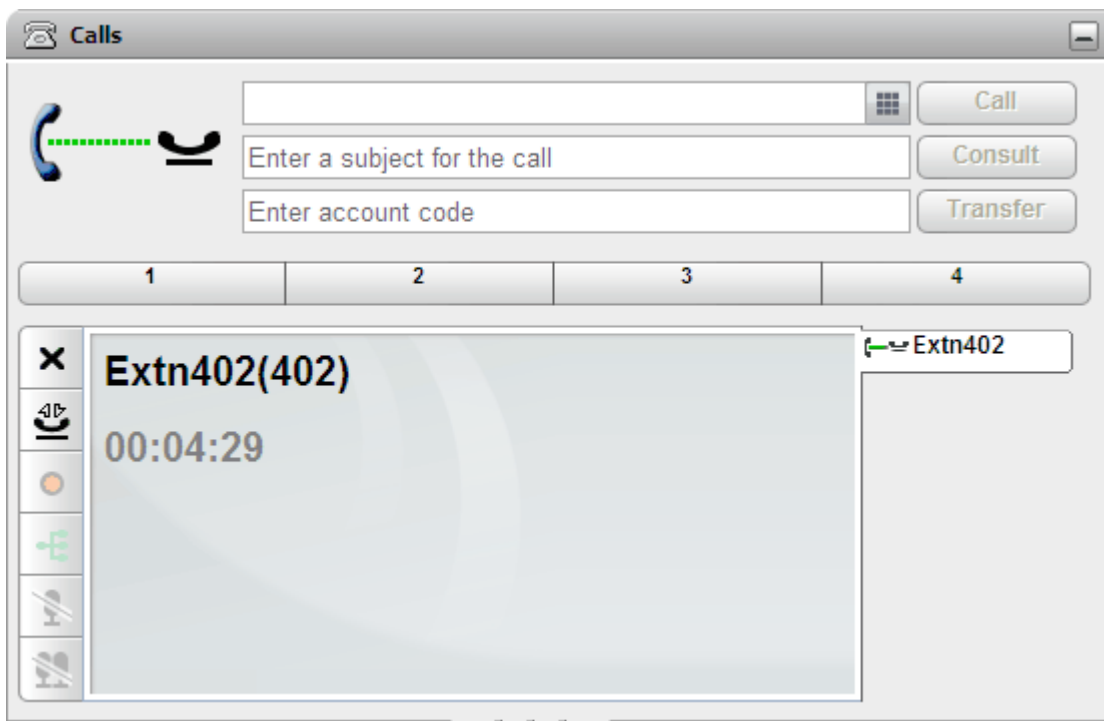
1. Using the  **Calls** gadget on the **Main** tab, select the call tab for the held call. It will display a  icon.




2. Click the  retrieve held call button on the left. The call icon changes to a  icon.
3. If you were connected to another call it is automatically changed to a held call.

3.10.3 Ending a Held Call

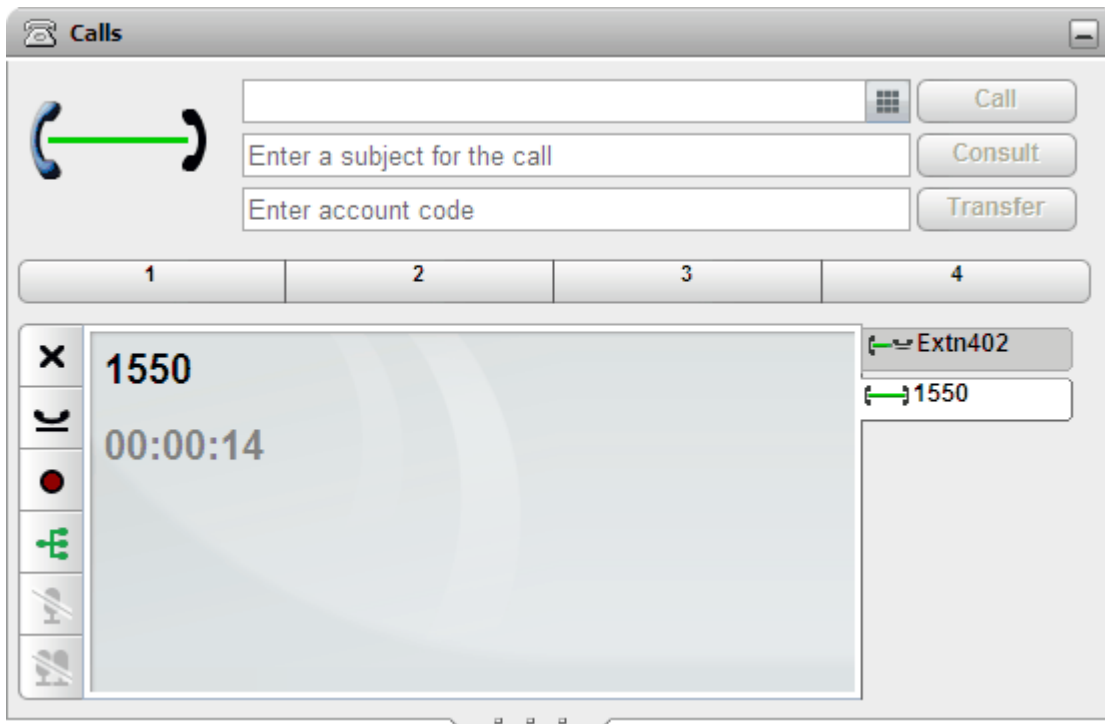
1. Using the  **Calls** gadget on the **Main** tab, select the call tab for the held call. It will display a  icon.





2. Click on the  drop call button on the left. The held call is disconnected.

3.11 Switching Between Calls

You can have several calls in progress at the same time. That includes calls that are alerting you and calls that are on hold. However, you can only have one connected call at any time. Each call is shown by a tab on the left and the icon will indicate the [state of that call](#)^[30] (connected, held, alerting, etc).



To view the details of any call, simply click on the tab for that call. Just viewing the call details does not answer or otherwise affect the call. To switch to another call, click on the  call answer or  retrieve held call button. The call to which you were connected will be [automatically put on hold](#)^[166].

Number of Calls

one-X Portal for IP Office 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 limits the number of incoming calls that you can receive.

Phones With Appearance Buttons

Many Avaya phones have programmable buttons that are configured by the [system administrator](#)^[167] as [appearance buttons](#)^[168]. 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 [busy](#)^[169] to any further incoming calls.
- For outgoing calls, you can use one-X Portal for IP Office 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 [enabled](#), you can use one-X Portal for IP Office 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 [busy](#)^[169]. However, using one-X Portal for IP Office you can still make additional outgoing calls.
- If your **Calls Waiting On** setting is [not enabled](#), once you have one connected call to which you are talking the phone system treats you as being [busy](#)^[169]. However, using one-X Portal for IP Office 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 [system administrator](#)^[167] 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.

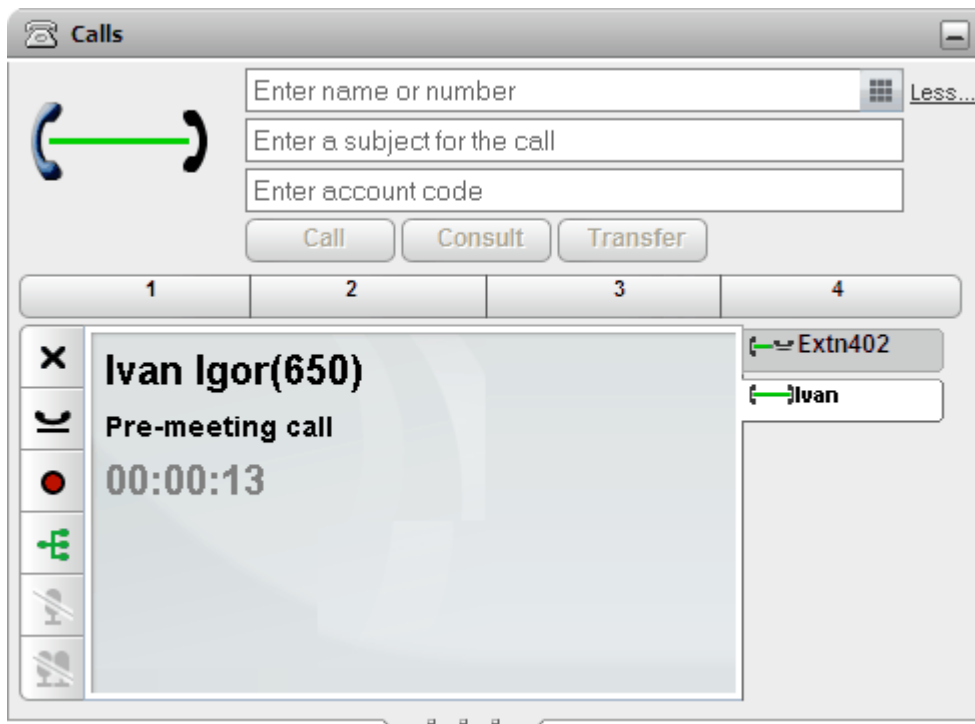
3.12 Recording a Call




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](#)^[167] can switch off the call recording warning message. However, doing this can 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 connected call. It will be the tab with two connected handset () icon on the right.



2. To start recording the call, click on the  record button on the right. If the button is displayed as a  icon then recording is not available for some reason.
3. Once recording has started the button changes to a  icon. Click on this to end recording. Call recording also automatically stops if you park, transfer or turn the call in to a conference. If you hold the call, call recording is paused while the call is on hold.

3.13 Transferring Calls

You can use one-X Portal for IP Office 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 ^[55] between all the parties and then leaving the conference.



Notes

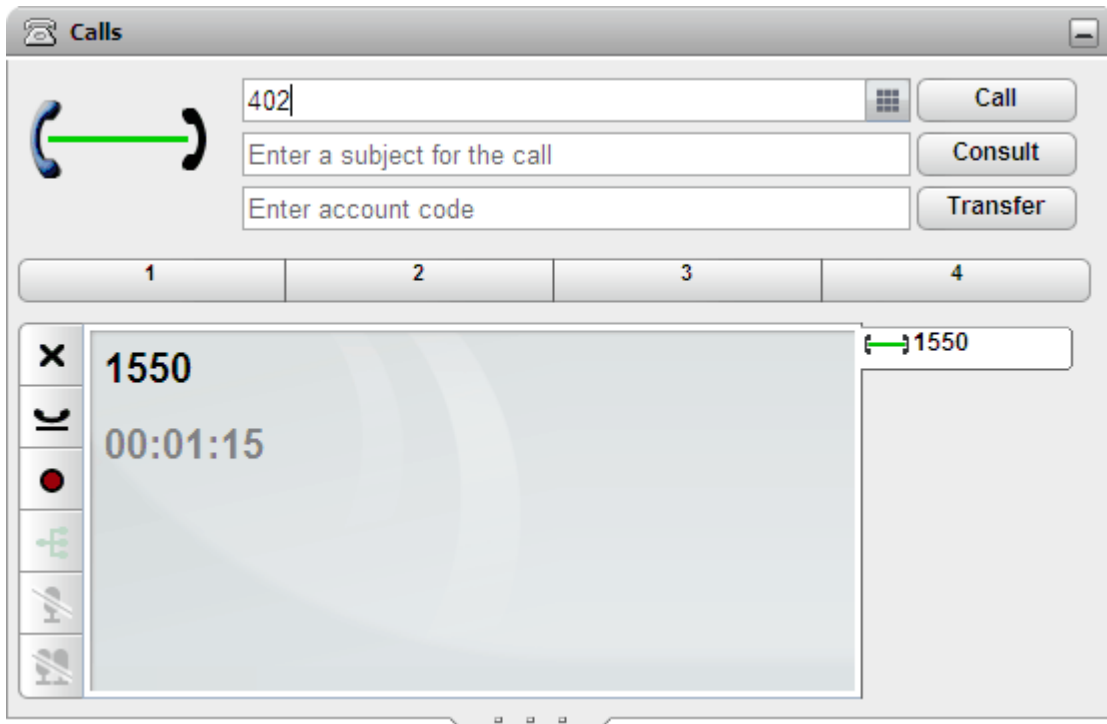
1. Your [system administrator](#)^[167] can enable a **Transfer Return Time** for you. When set, if a transferred call is not answered within that time, it can recall to you.


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

3.13.1 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.

- Using the  **Calls** gadget on the **Main** tab, select the call tab for the call you want to transfer. Click  to retrieve the call from hold.



- Using the text box at the top of the  **Calls** gadget, enter the number to which you want to transfer the call and click the **Transfer** button.
- The call is transferred.



Notes

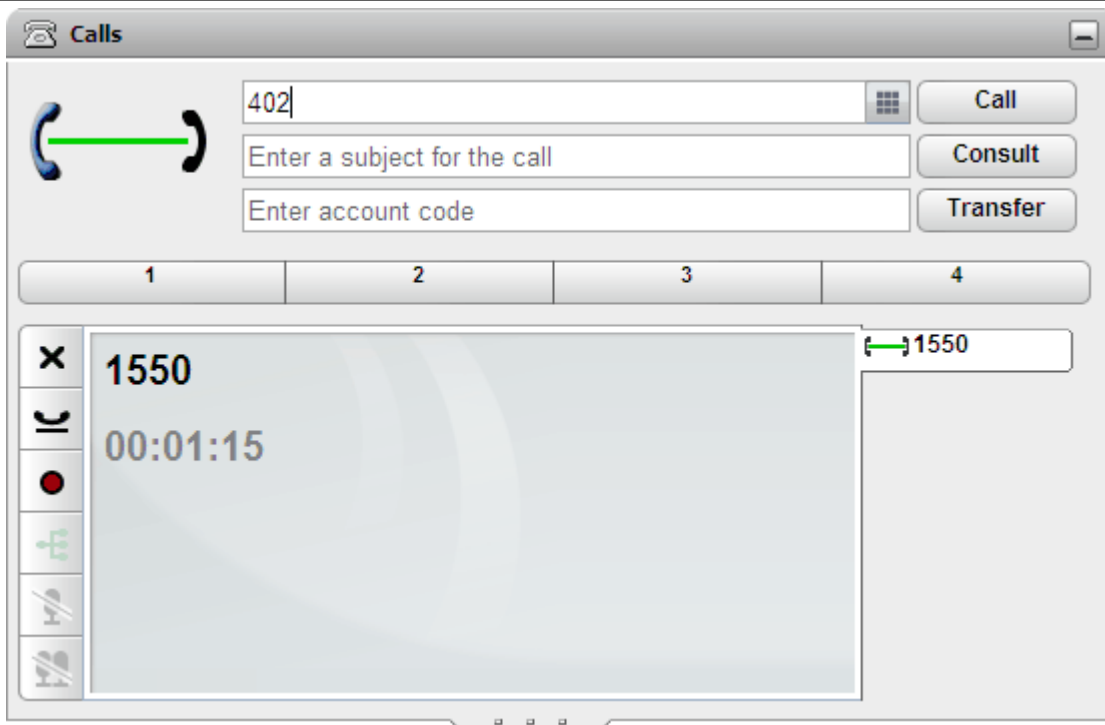
- Your [system administrator](#) ⁽¹⁶⁷⁾ can enable a **Transfer Return Time** for you. When set, if a transferred call is not answered within that time, it can recall to you.
- The ability to transfer an external call to another external number can be restricted by your system administrator.

3.13.2 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.

- Using the  **Calls** gadget on the **Main** tab, select the call tab for the call you want to transfer. Click  to retrieve the call from hold.



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 the **Consult** button.
3. Your current call is put on hold. You will hear the progress of the call to the transfer destination. When answered this is called an enquiry or consultation call.
 - **If the other party wants to accept the transfer:** Click on the tab of the held call. Click on the complete transfer button.
 - **If the other part does not answer or does not want to accept the transfer:** Click on the **X** button to end the enquiry call. Click on the tab of the held call. Click on the retrieve held call button.
 - **Switching between calls:** You can switch between the calls using the button on the tab of the current held call. However, you can only complete the transfer by putting the original call on hold and then clicking the complete transfer on its tab.

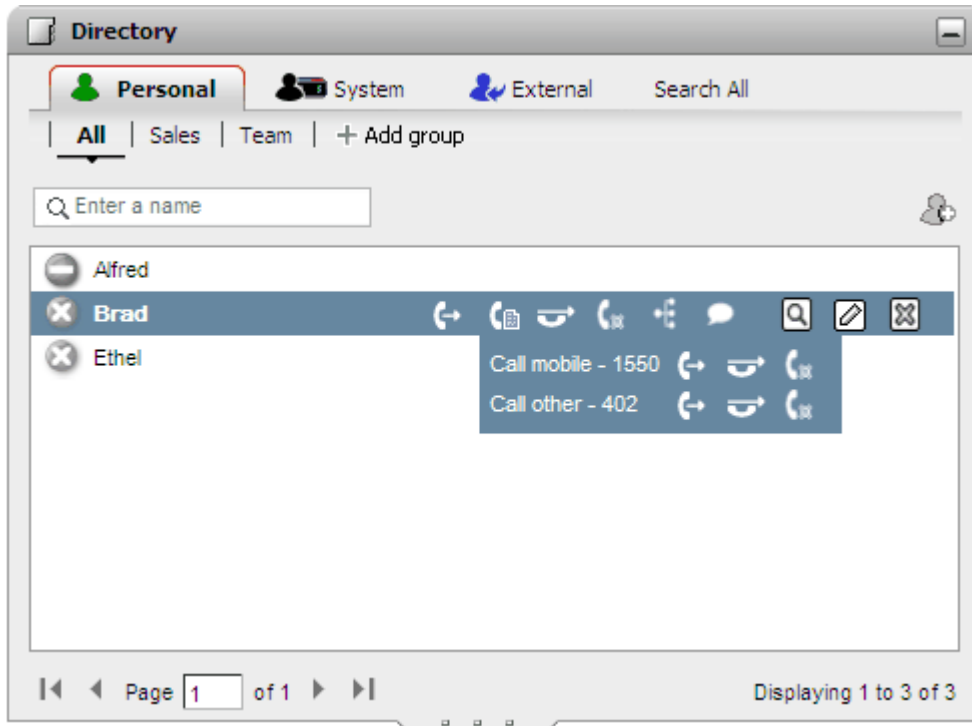
Notes

1. Your [system administrator](#)⁽¹⁶⁷⁾ can enable a **Transfer Return Time** for you. When set, if a transferred call is not answered within that time, it can recall to you.
2. The ability to transfer an external call to another external number can be restricted by your system administrator.





3.13.3 Transferring 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, additional options are shown when you hover the cursor over a directory contact.

- Use the  transfer icon to do a simple [unsupervised transfer](#) ^[41] to the contact's primary number.
- Use the  consult icon to start a [supervised transfer](#) ^[41] to the contact's primary number.
- Use the  conference icon to conference yourself, the held call and the contact's primary number.
- If the  icon is displayed, the contact has alternate numbers. You can click on the icon and select the same options as above for those numbers.

3.14 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 for IP Office 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](#) ^[167] 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](#) ^[167].

3.14.1 Configuring Your Park Slots


one-X Portal for IP Office provides four park slot buttons. You can configure the phone system park slots to the buttons. If the numbers or names you use match those used by other users, you can view the calls that are parked in those park slots by others. You can use the buttons to unpark those calls. Similarly other users can view and unpark calls that you park.

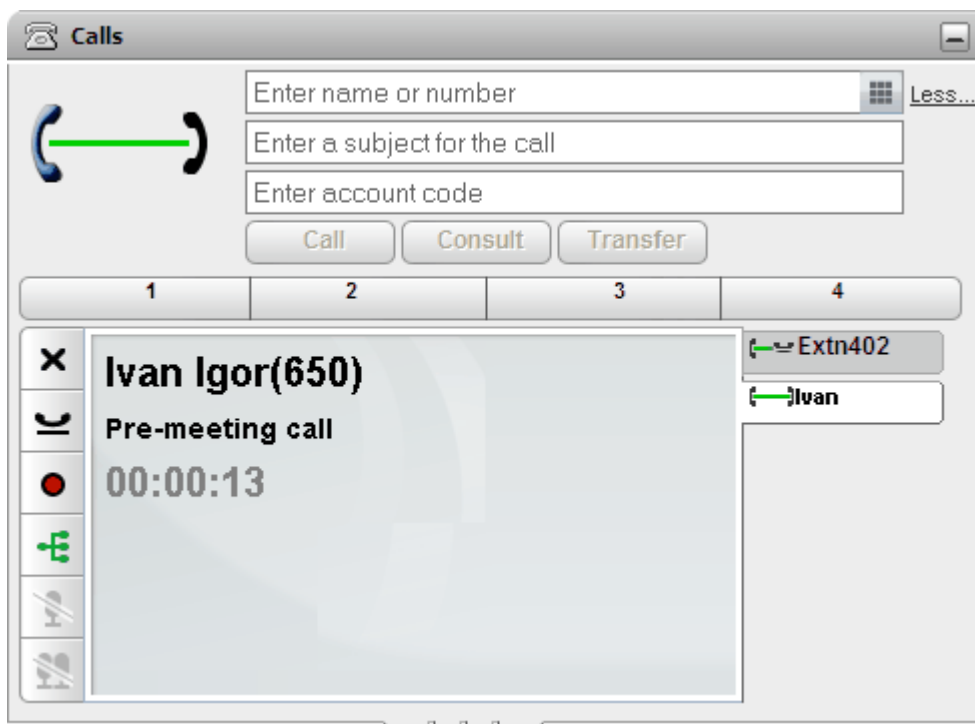
1. In the **Configure** tab select **Telephony**.
2. In the **Park Slots** section enter the park slot number or name of the park slot. By default the park slots are named from 1 to 4.

Note: Ensure that the name of the park slot does not exceed nine characters. The name of the park slot can be alpha numeric and include special characters.

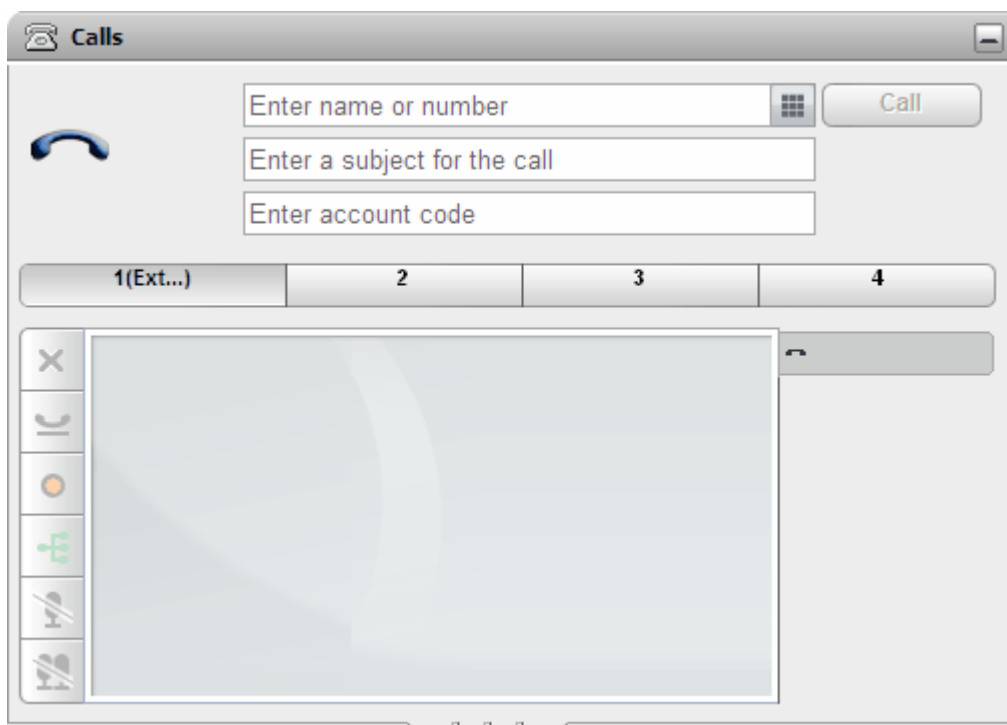
3. Click **Save**.

3.14.2 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 across the middle of the  **Calls** gadget.




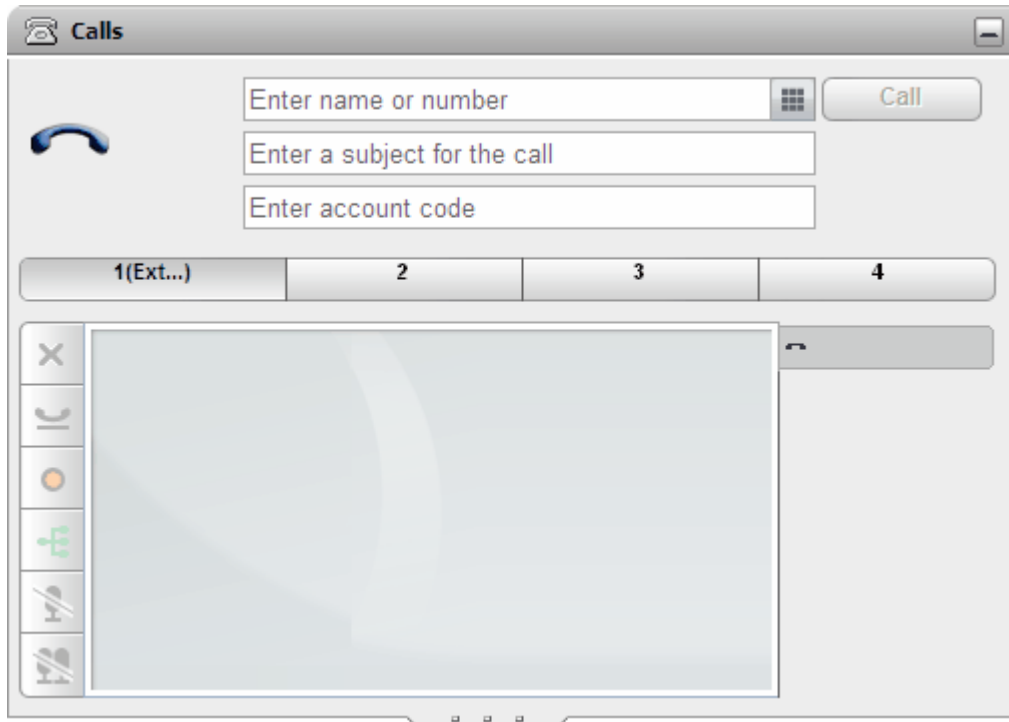
3. The call is parked and the button now indicates that system park slot is in use.

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](#) ^[167] can adjust this. You cannot drop a parked call that recalls your phone.

3.14.3 Unparking a Call

- Using the  **Calls** gadget on the **Main** tab, the park buttons across the middle will indicate if there is a call parked.



- Placing your cursor over the button will display the name and number of the parked caller if known.
- Click on the parked call button to unpark the call.


3.15 Sending DTMF tones

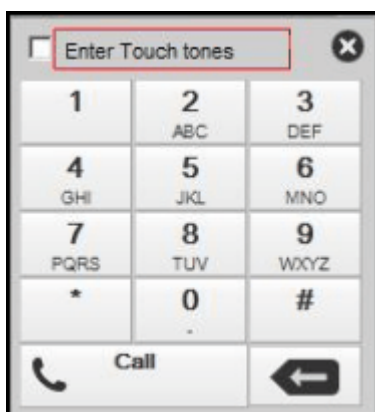
You can send DTMF (Dual Tone Multi-Frequency) signals using one-X Portal for IP Office.

Select the **Enter Touch tones** option in the dial pad if you want to send DTMF signals using the one-X Portal for IP Office, else the system initiates a new call.

Note: You can send DTMF signals only for an active call or an active conference call. You cannot send DTMF signals when you place a call on hold.

To enable the Touch tones option:

- Click  dial pad, in the **Calls** gadget.




- Select the **Enter Touch tones** option.
- Click the numbers and the characters in the dial pad to send the DTMF signals.

To disable the Touch tones option:


After you send the DTMF signals, close the dial pad. The system resets the **Touch tones** option.

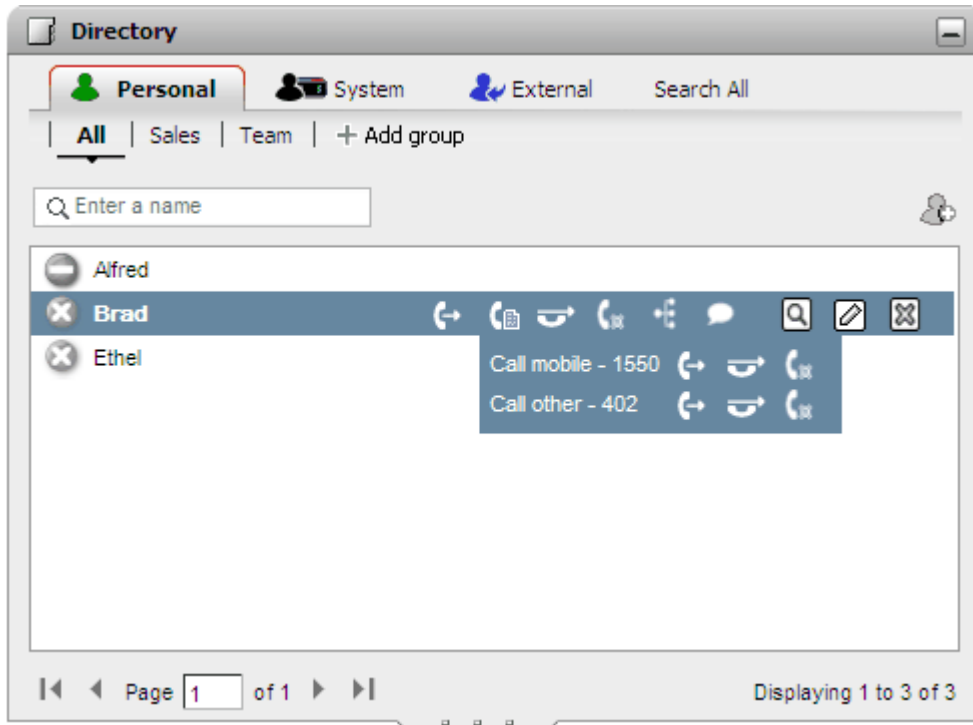
Note: The system does not display the dial pad when any activity occurs. For example, when you receive a call or when a call is dropped.



3.16 Instant Messaging Other Users

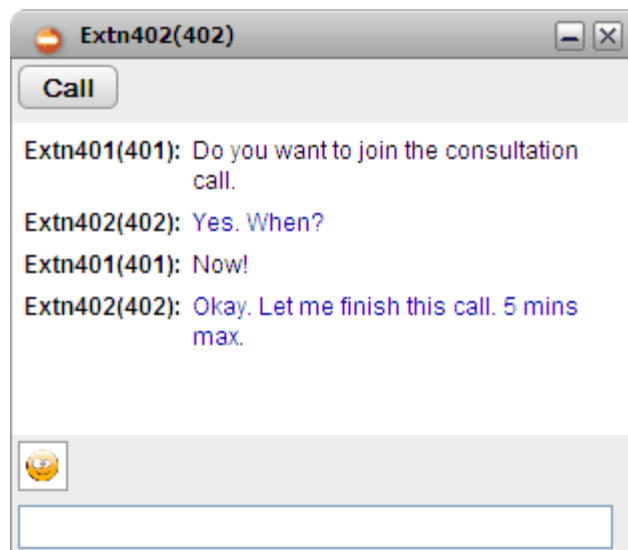
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

If you do not want other users to be able to start chat sessions with you while you are using one-X Portal for IP Office, [set your presence status](#) ^[14] to **Offline**.

1. Locate the other one-X Portal for IP Office user in your  **Directory** gadget.



2. With your cursor hovering over the contact, a  chat icon indicates that they are available to be chatted with. Click on the  chat icon to open a chat window.
3. The instant message popup window will appear in your one-X Portal for IP Office and in the other user's one-X Portal for IP Office.



4. You can start typing your messages and they can reply.
5. You can start instant messaging session with other one-X Portal for IP Office users at the same time. Each will appear in a separate popup.

3.16.1 Promoting from an IM to voice call

Sometimes, an IM (Instant Message) session is insufficient to get an idea across to the other person, or a phone call is a quicker way to achieve the desired result. You can call the person in an IM conversation window using *@call* command.

Note: You can promote from an IM to voice call only when you are on an IM conversation with a contact listed in your one-X Portal for IP Office **System** directory.

You can promote from an IM to voice call even when you are using the Avaya one-X® Mobile preferred for IP Office or an external IM client.

To promote from IM to voice call:

1. At any time during an IM conversation with a contact listed in your one-X Portal for IP Office **System** directory, type *@call*.
2. Press **Enter**.

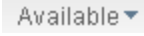

The system initiates a call between your phone and the other person. The system displays a message that reads: "<user name> wants to talk to you - your phone will ring shortly" where <user name> is the name or extension of the user who has initiated the call.

Note: Promoting from an IM to voice call, does not end the conversation on the IM. You still can communicate via the phone and the IM at the same time.

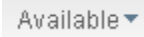


3.17 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your [Do Not Disturb Exceptions](#)^[107]. 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  status selector.
2. Select **Do Not Disturb**.
3. Your status icon will change to  do not disturb.

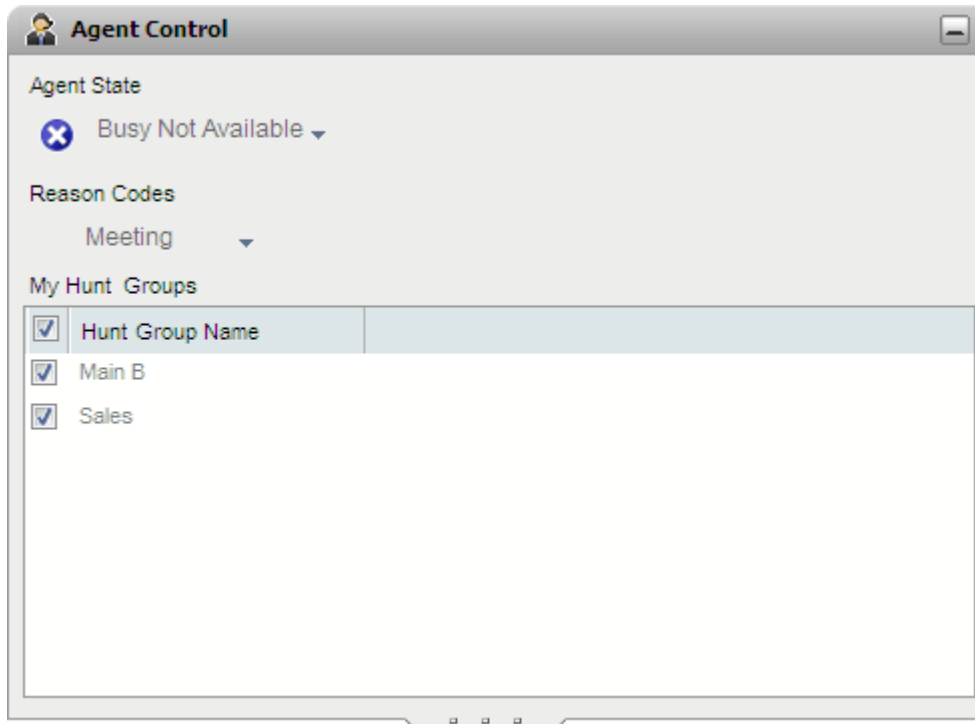
To switch Do Not Disturb Off

1. At the top-right, click on the  status selector.
2. Select **Available** or **Offline**.
3. Your status icon will change to  available or  offline.

3.18 Agent Controls

If you are also a Customer Call Reporter agent, this gadget is displayed in the one-X Portal for IP Office. You can use it to see your current agent state and to change that state. You can also use it to change your membership status in the various Customer Call Reporter queues to which you belong.

The changes you make using the gadget, such as the time you spend in each agent state, will be included in the reports generated by the Customer Call Reporter. They can be seen by your Customer Call Reporter supervisor and can in some cases can be overridden by the supervisor.



Changing Your Agent State

The agent state shown is controlled both by you and by the telephone system. For example, after each call your state automatically changes to **After Call Work** for a short period and then automatically changes back to **Available**. However you can also change it when you need to, for example when you have finished your after call work you can manually change the state back to **Available**.

- Available**
 In this state you are available to receive and answer queue calls when you are not already on a call. Note that this is different from the available presence status used by the one-X Portal for IP Office itself. While this state is shown in your one-X Portal for IP Office, your Customer Call Reporter display may show you in additional states as you are presented with and answer calls (for example **Ringling** and **Busy**).
- After Call Work**
 This state is used after queue calls to allow you to perform actions such as completing call records. It is meant to be a temporary state and is automatically canceled by the telephone system after a time set by the system administrator.
- Busy Not Available**
 Select this state when you want to remain logged in but need to stop receiving queue calls. You will be prompted to select a **Reason Code** for being in Busy Not Available from the set of codes available on the telephone system.

Your Queues

The **My Hunt Groups** section displays the Customer Call Reporter queues of which you have been configured as a member. You can use the list to enable or disable your current membership. You only receive calls for queues for which your membership is currently enabled.

The checkbox at the top of the list will enable/disable your membership for all queues for which you are allowed to change your membership. Disabling your membership of all your queues is reported in Customer Call Reporter as a special state called **Present**.

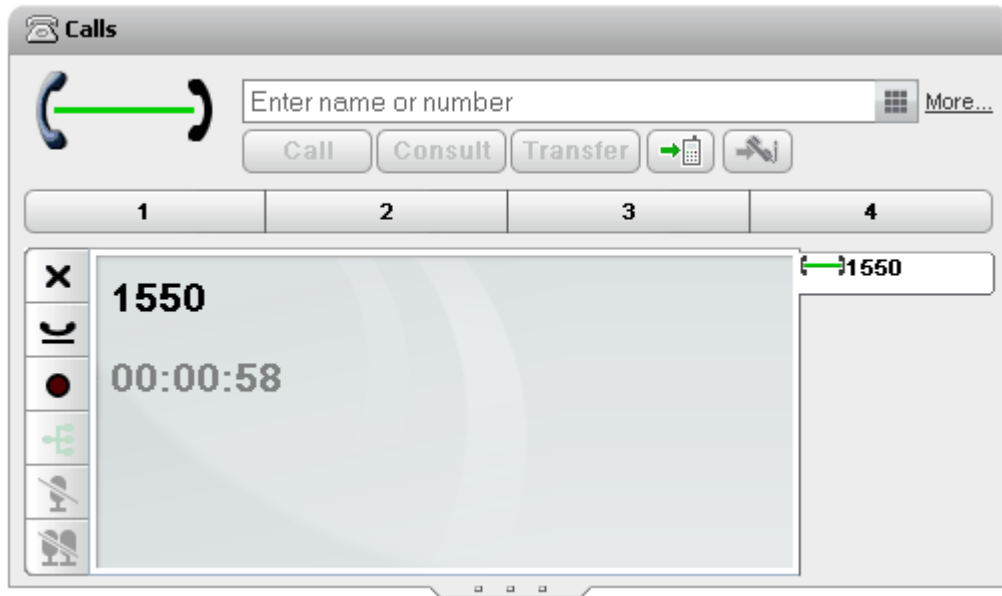
- Which Queues Can I Control?**
 Your telephone system administrator is able to configure for which queues you can change your membership state, by default it is none. Refer to the one-X Portal for IP Office Installation Manual. The hunt group name is greyed out if you cannot control your membership status for that hunt group.



3.19 Twinned Call Control

Mobile twinning allows you to have your incoming calls alert at both your normal extension and at another number. Your system administrator controls which users are able to use this feature.

If you are allowed to use mobile twinning, you can switch it on or off and set the destination number as part of your current one-X Portal for IP Office [profile](#)⁸⁴. It can also be configured for you by your system administrator or through the menu of your desk phone.

When you have mobile twinning enabled, your **Calls Gadget** displays two additional buttons:



-  **Transfer to Twin**
When you have answered a call on your normal extension, you can transfer it to your twinned number by clicking this button. The phone system will attempt to transfer the call to that number. If not answered the call will return, to your normal extension. It also returns if answered too quickly, such as the call going immediately to a cell phone's voicemail because the cell phone was busy or off.
-  **Claim from Twin**
When you have a call twinned call that you answered on at your twinned extension number, you can have it transferred back to your normal extension by clicking this button.

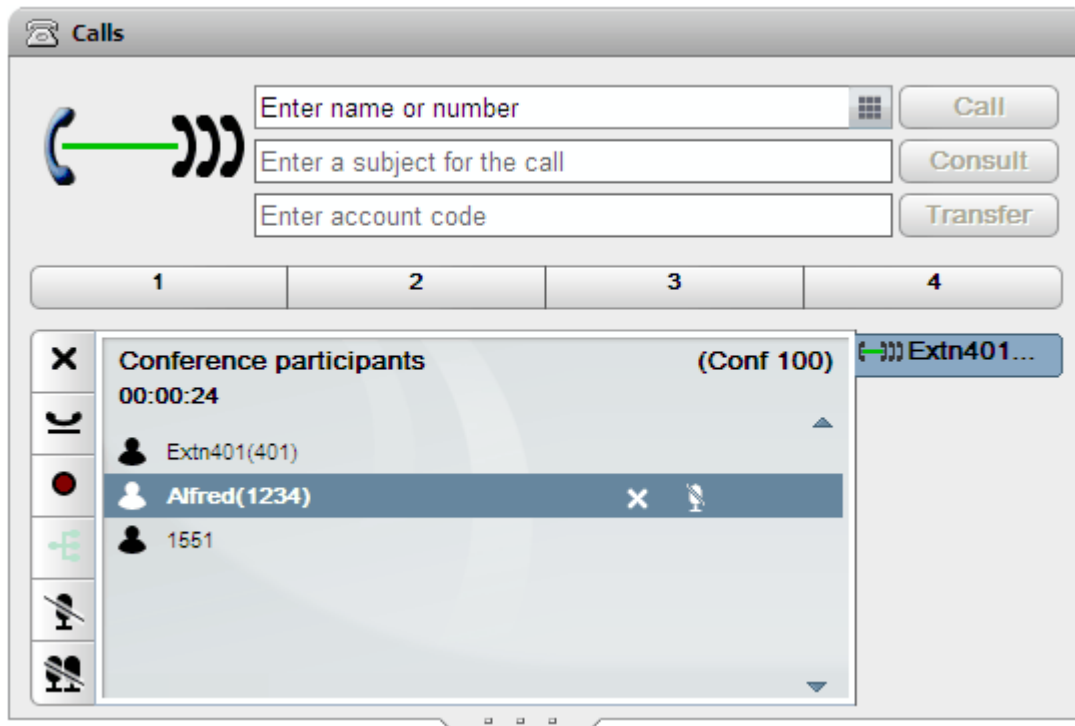


Chapter 4.

Conference Calls

4. Conference Calls

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





Notes

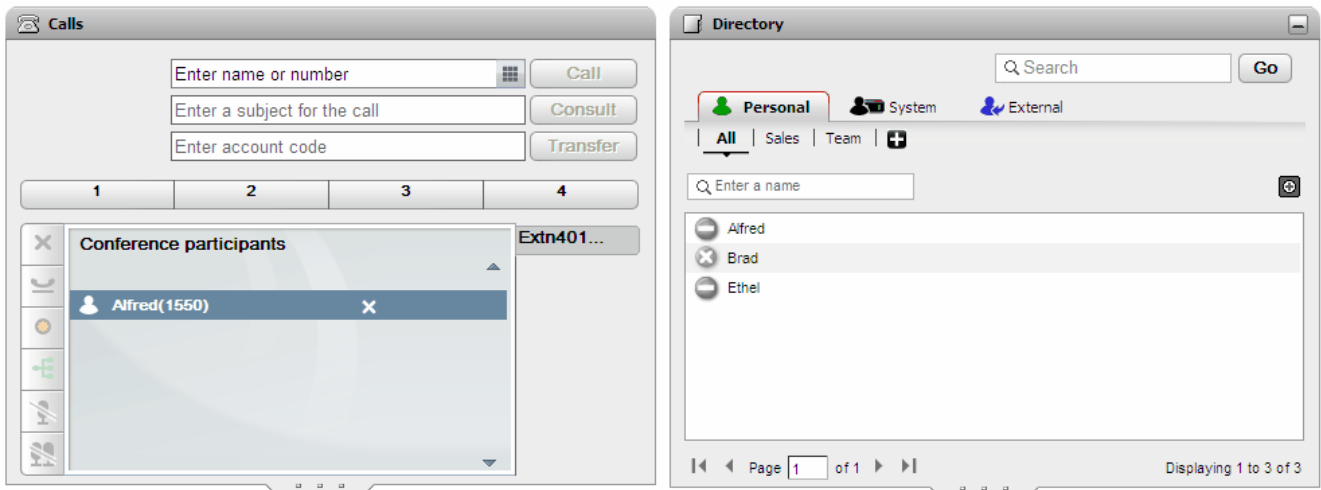
1. The maximum number of participants in any particular conference is 64. However, that is limited by the number of participants in other conferences already in progress. It also is limited by other features. For example call recording, that also use the telephone system's conference facilities.
2. Depending 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 on another phone system than the one where the conference started.

Start and Manage Conference Calls		
<ul style="list-style-type: none"> • Set up a conference 52 • Turn held calls into a conference call 58 • Drop a participant in a conference 58 • Park a conference call 58 • Configure the Conference Bridge number 60 	<ul style="list-style-type: none"> • Recognize the Conference manager 54 • Add another party to a conference 56 • Drop all participants in a conference 58 • Hold a conference call 59 • Join a Personal Meet Me conference 60 	<ul style="list-style-type: none"> • Recognize the Conference speaker 54 • Mute conference parties 57 • Lock a Meet Me conference 58 • Use Conference call controls 59

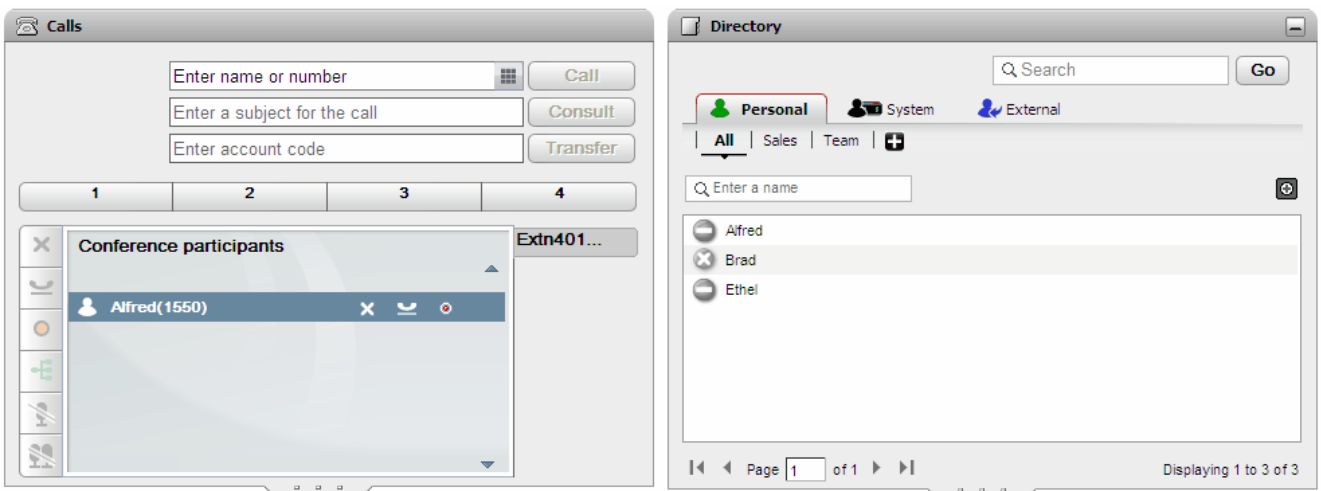
4.1 Setup a Conference

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

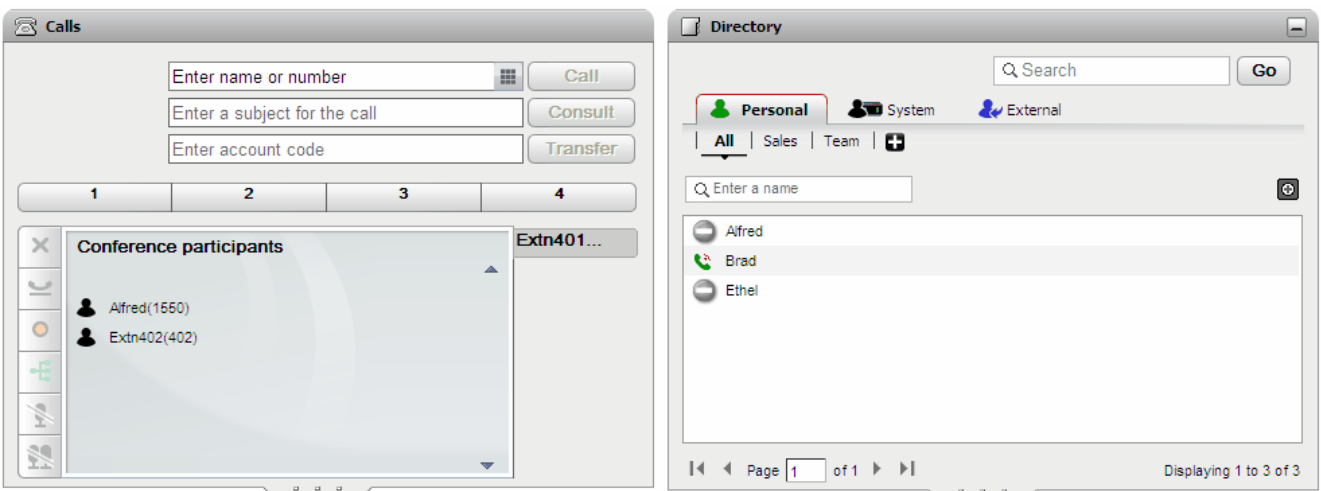
1. In the  directory gadget, locate and hover over the contact you want to add to start a conference with. Click on the  icon. This will start a call to that contact but with the calls gadget using the conference information display rather than the normal call information display.



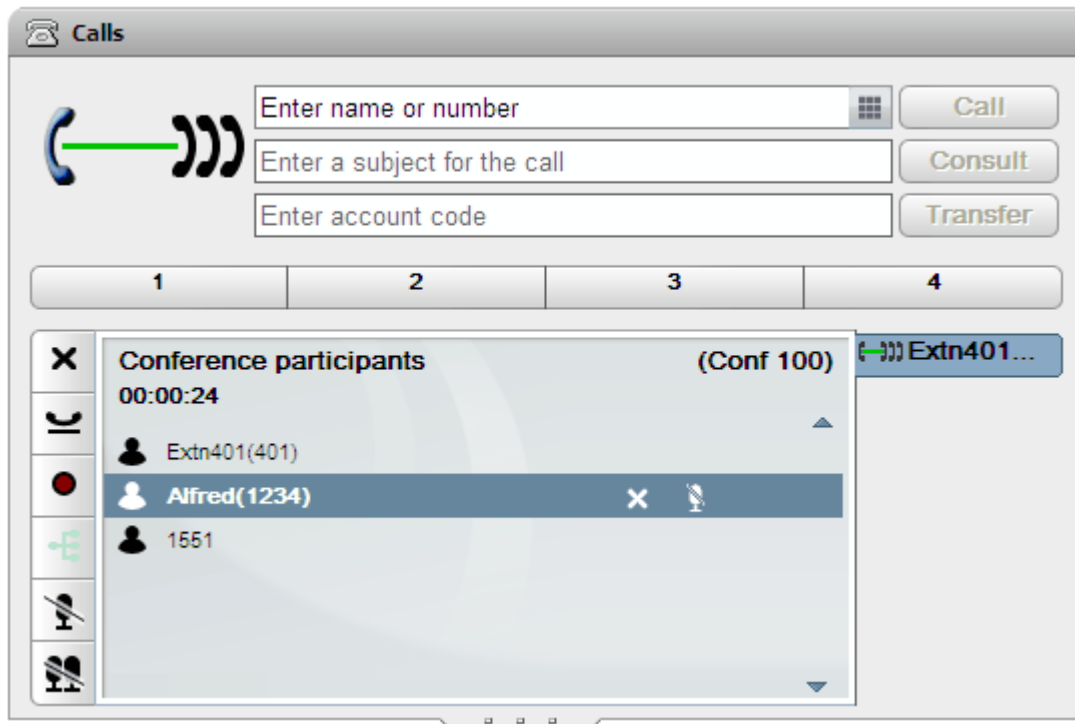
2. When the party answers, informs them that you want to include them in a conference. If they do not answer or do not want to be included in the conference, hover over them in the calls gadget and click on the **X** drop icon shown. The icons also allow you to hold the call or record the call.



3. Locate and hover over the next contact you want to add to the conference. Click on the **+** icon. The previous party added is put on hold while you hear the progress of the call to the new contact.



4. When you have added all the contacts, click on the **+** conference icon in the calls gadget in order to start the conference.





4.2 Conference manager recognition



When you initiate an Ad hoc conference from your desk phone, the one-X Portal for IP Office is able to recognize you as the conference manager.

For example, you call Extn 202 and Extn 203. If you press the *Conference* button on the desk phone, then you will be made the manager of the conference. As a conference manager, you have all the special privileges.

1. You can *mute self* or *mute all* participants in the conference.
2. You can *drop self* or *drop all* participants in the conference.

4.3 Conference speaker recognition

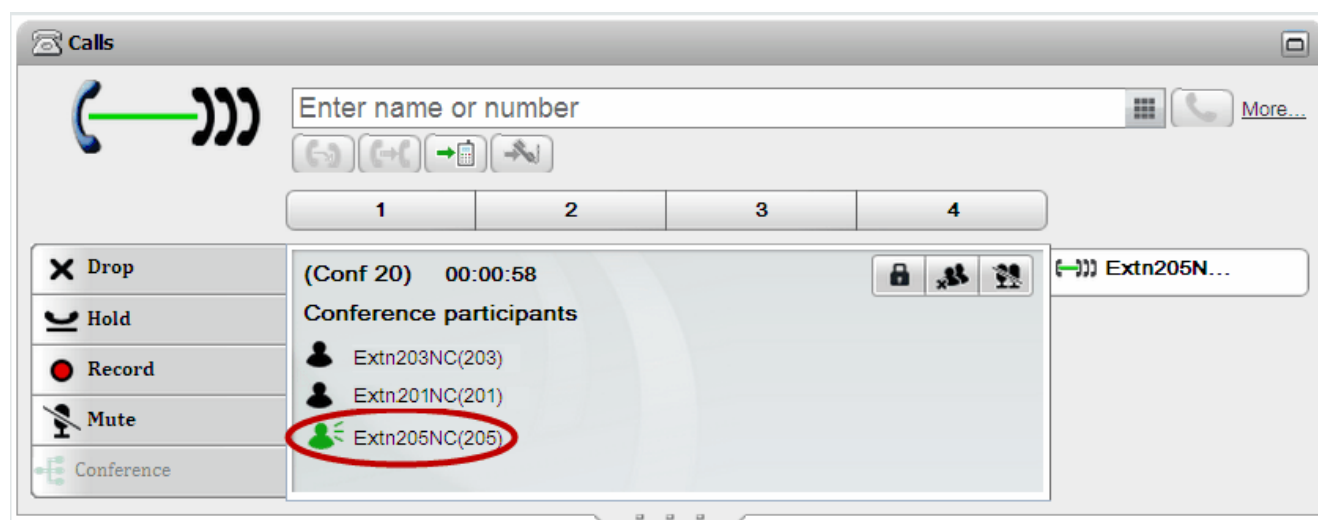
The one-X Portal for IP Office interface will display the loudest speaker in a conference with a green  icon. The  icon is visible only in a Meet Me Conference.


The  icon denotes that the speaker has the loudest tone among the other participants in the conference. The  icon varies from participant to participant according to the level of loudness while speaking in the conference.

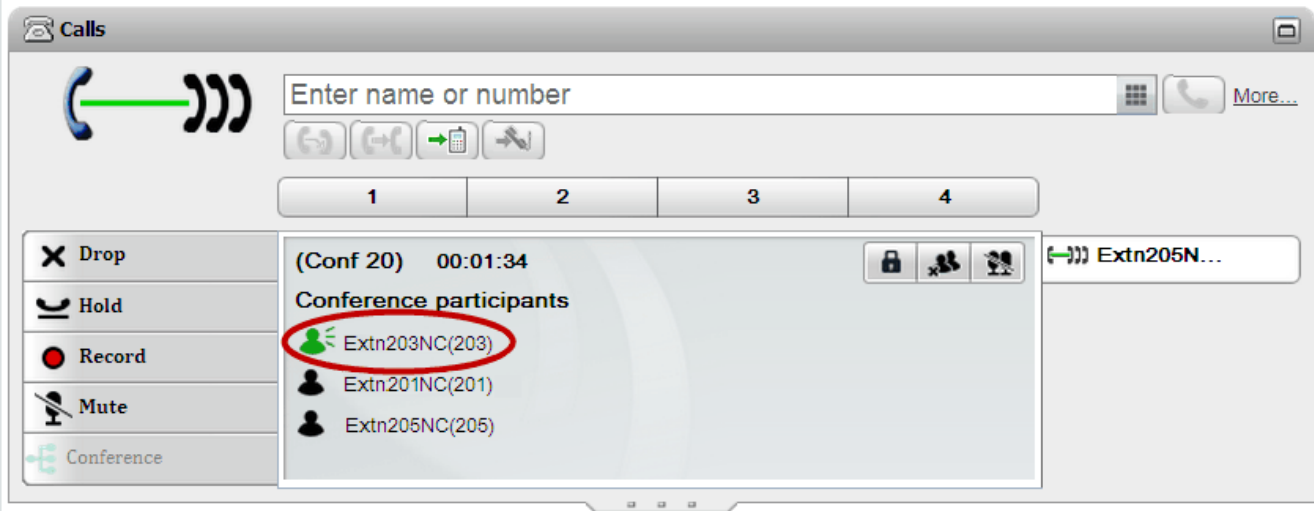
For example,

There are three participants **Extn203NC**, **Extn201NC**, and **Extn205NC** in a Meet Me conference call.

The  icon is visible on **Extn205NC** which denotes that **Extn205NC** is currently the loudest speaker in the conference.




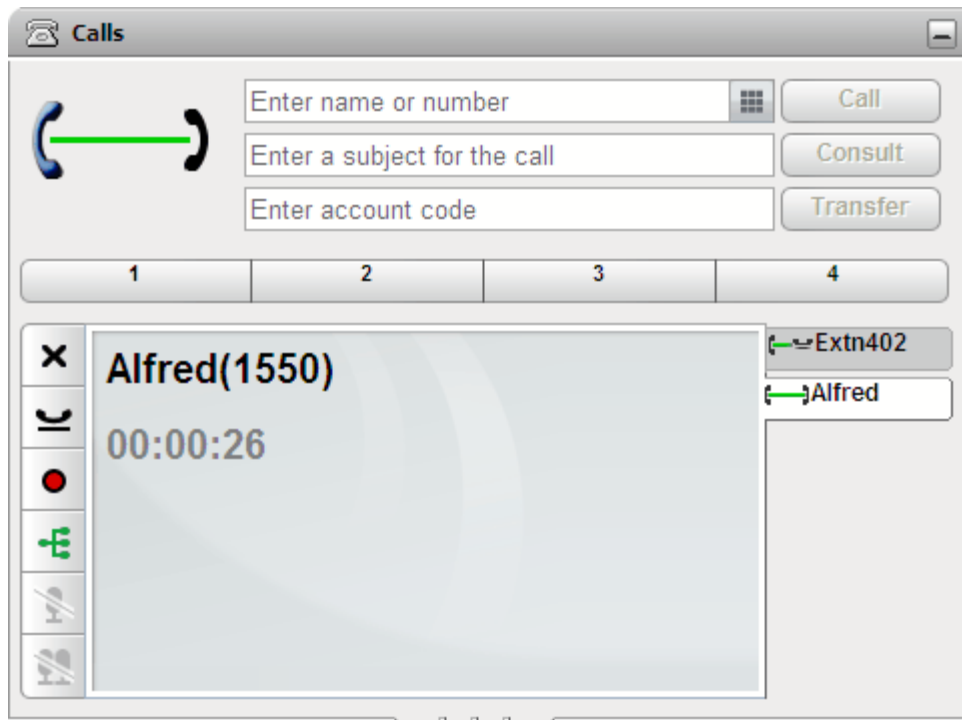
During the conference call, the  icon shifts to **Extn203NC** according to the level of loudness.




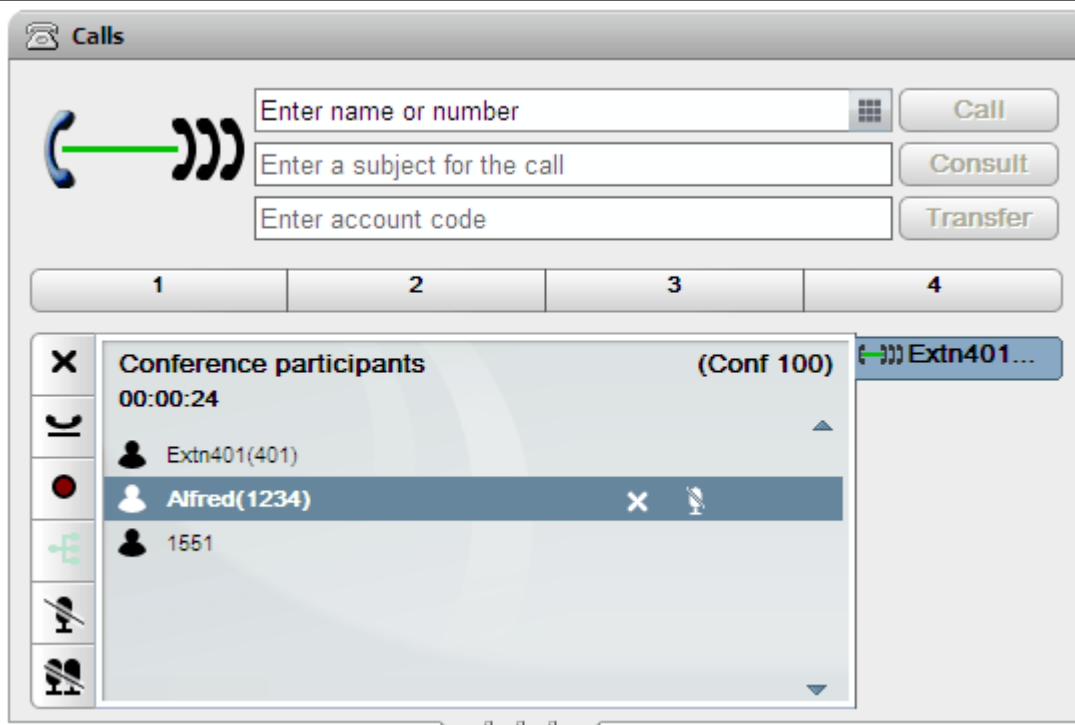
4.4 Turning Held Calls into a Conference

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 call gadget displays a  conference icon.



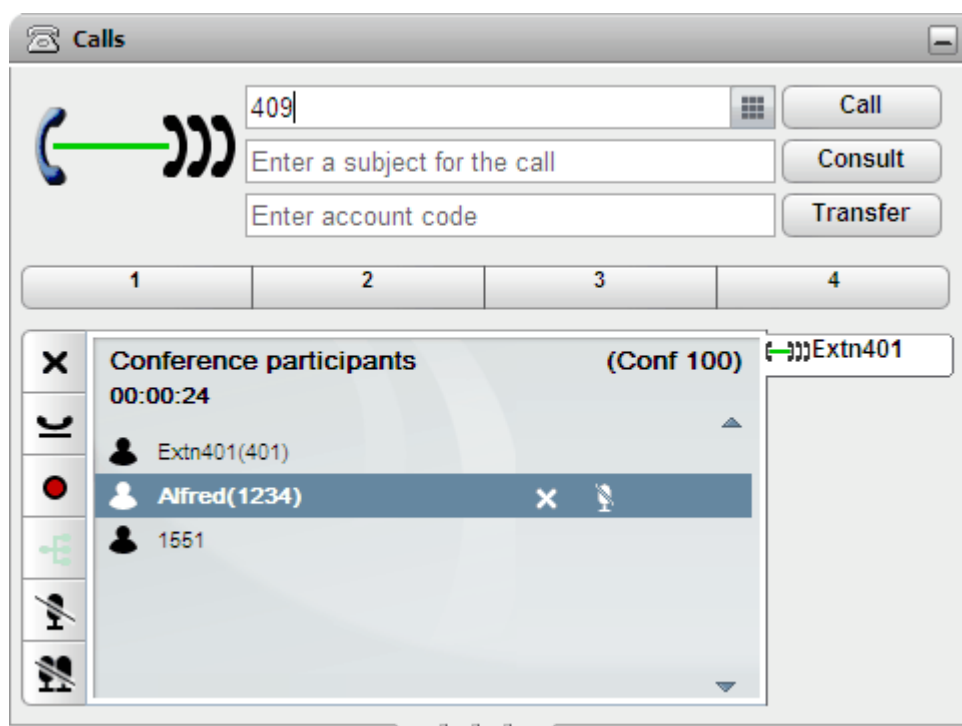
2. Click on the  conference button. All the calls will be added to a conference.



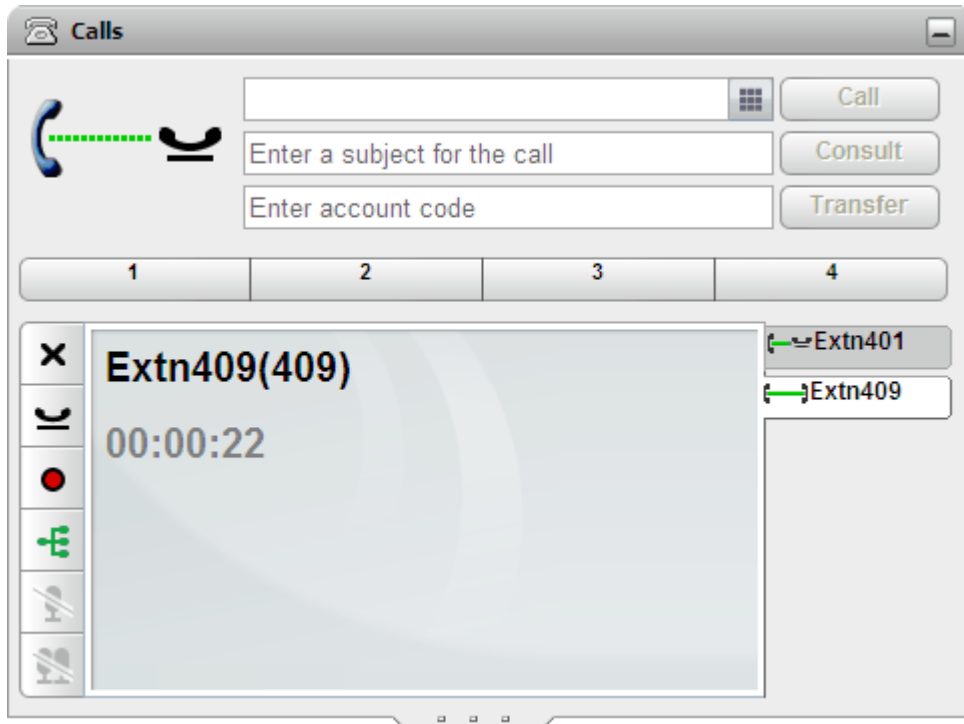
4.5 Adding another call to a conference




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

4.6 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 party icon.

Note that the mute functions detailed here are performed by the telephone system. They do not switch on or off any mute function 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. When you hover the cursor over a participant in the conference, the system displays a list of actions that you can perform. The options vary depending on whether you are the [conference manager](#)^[166] and the current state of the participant.



- To drop the participant from the conference, click  **Drop**. The  indicates that the participants are no longer in the conference.
- To place the participant in the conference on mute, click  **Mute**. The  indicates that the participant is placed on mute.
- To place a participant in the conference on unmute, click  **Unmute**.

To Mute All Other Parties in the Conference


If you are able to do this, a  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  button.

4.7 Dropping a participant in a conference

You can drop other parties from a conference as a [conference manager](#)^[166]. This can be useful if you inadvertently add a call that is directed to a voicemail or an external participant places a call on hold. When a external participant places a call on hold in the conference call a music on hold is heard.

The system displays the [conference manager](#)^[166] of an Ad hoc conference and a Meet Me conference call at the top of the conference tab in the **Calls** gadget. It displays the conference manager when the conference is initiated on a phone device and when the conference is initiated using one-X Portal for IP Office.

When a participant has been dropped from the conference, the system displays a dropped  icon.





To Drop yourself

1. Click the **Drop** button in the conference tab.

To Drop Other Parties in the Conference

1. When you hover the cursor over a participant in the conference, the system displays a list of actions that you can perform. The options vary depending on whether you are the [conference manager](#)^[166] and the current state of the participant.



- To drop the participant from the conference, click **X Drop**. The  indicates that the participants are no longer in the conference.
- To place the participant in the conference on mute, click  **Mute**. The  indicates that the participant is placed on mute.
- To place a participant in the conference on unmute, click  **Unmute**.

4.8 Dropping all the participants in a conference

In one-X Portal for IP Office 8.0 you can drop all the participants in an [Ad hoc conference](#)^[166] and [Meet Me conference](#)^[167].

The system displays the [conference manager](#)^[166] of an Ad hoc conference and a Meet Me at the top of the conference tab in the **Calls** Gadget. It displays the conference manager when the conference is initiated on a phone device and when the conference is initiated using one-X Portal for IP Office.

Note: Only a [conference manager](#)^[166] can drop all the participants in a conference call.

- To drop all the participants in a call, click **DropAll** in the **Calls** gadget.

4.9 Locking a Meet Me conference

You can lock a [Meet Me conference](#)^[167] as a [conference manager](#)^[166]. After you lock a conference call, new participants can not join the conference call. To include new participants, you must unlock the conference call.

Note: In an Ad hoc conference even a conference manager cannot lock a conference. This functionality is available only in a Meet Me conference.

- To lock a conference call, click **Lock Conference** in the **Calls** gadget.
- To unlock a conference call, click **Unlock Conference** in the **Calls** gadget.

Note: A locked conference is unlocked if a [conference manager](#)^[166] exits from the conference.

4.10 Parking a conference call

You can park a conference call as a [conference manager](#)^[166].

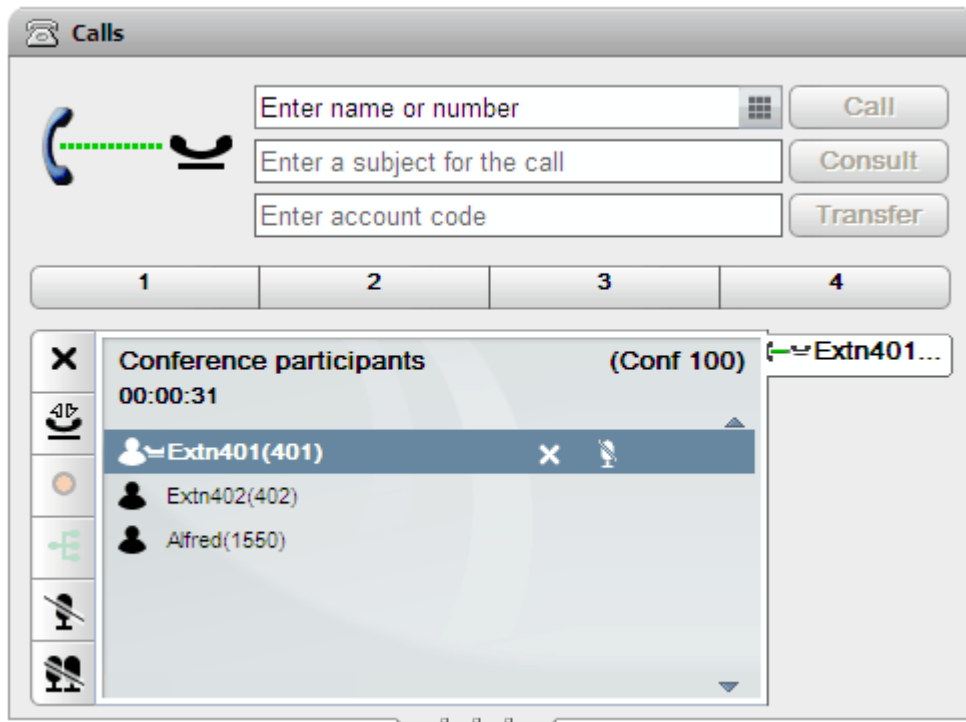
Only a conference manager can park a conference call in any of the available park slots. However, any participant can unpark a conference call that was parked.

Note: Only the conference manager retains the ownership privileges of a conference call even if any other participant unparks a conference call.

- To park a conference call, in the **Calls** gadget, select the park slot where you want to place the call.
- To unpark a conference call, in the **Calls** gadget, select the park slot where you parked the call and then click the **Unpark** button

4.11 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**.



- **! WARNING**

Note that this only applies to conference calls on your own phone system and displayed as conference calls by your one-X Portal for IP Office. Putting your connection to any other type of conference, for example on another phone system, causes that conference to hear your phone system's music on hold.

4.12 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:

Icon	Action	Description
	Drop Call	For a currently connected call, pressing X disconnects the call.
	Record Call	Start recording the current call.
	Stop Recording	Stop recording the current call.
	Hold Call	Puts the call on hold.
	Retrieve Held Call	Take a call back from 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.
	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.
	DropAll	To drop all the participants in a conference call.
	LockConference	To lock a Meet Me conference call.

Using the Conference Party Icons

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

1. When you hover the cursor over a participant in the conference, the system displays a list of actions that you can perform. The options vary depending on whether you are the [conference manager](#)^[166] and the current state of the participant.



- To drop the participant from the conference, click **X Drop**. The indicates that the participants are no longer in the conference.
- To place the participant in the conference on mute, click **Mute**. The indicates that the participant is placed on mute.
- To place a participant in the conference on unmute, click **Unmute**.

4.13 Configuring Your Conference Bridge Number

For conferences that you start, the one-X Portal for IP Office 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 for IP Office 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. In the **Configure** tab select **Telephony**.
2. In the **Conference Bridge Number** section enter your own personal conference bridge number.
3. Click **Save**.

4.14 Personal Meet Me Conference

Personal MeetMe conferences are conferences with conference number as an existing IP Office user extension number.


Within the Small Community Network (SCN) setup, to join the Personal Meet Me conference using short code, the same *Conference Meet Me* short code should be configured in all the IP offices.

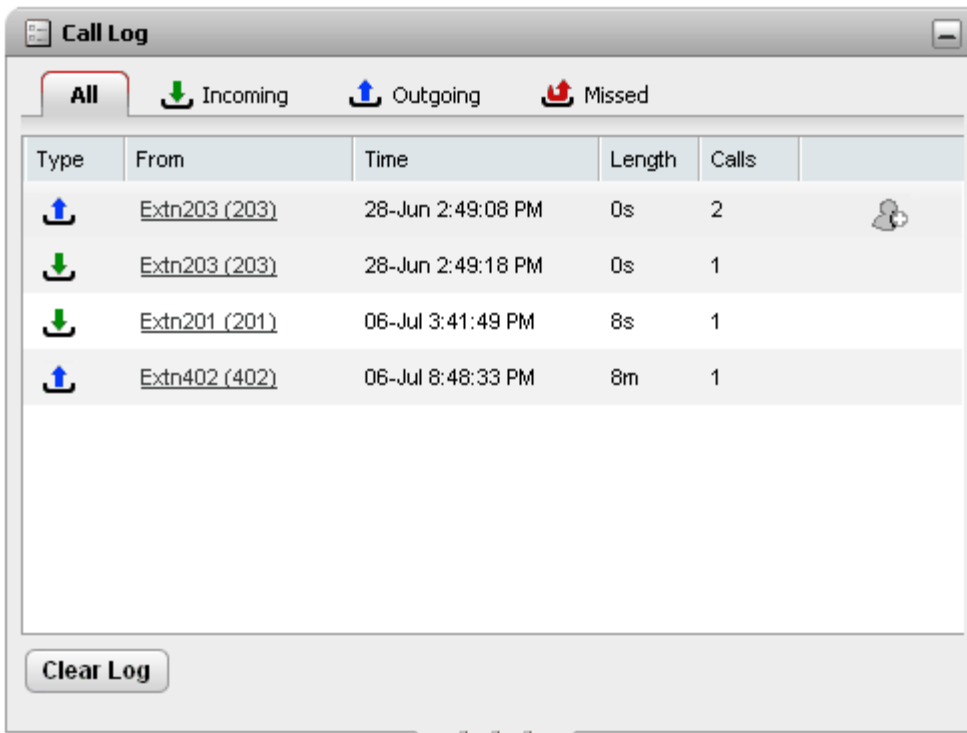
For example, if IPO-A and IPO-B are in SCN then for a user to join a personal conference, same Conference Meet Me short code needs to be configured in both IPO-A and IPO-B.






Chapter 5.

Call Log

5. 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](#)^[31] or [add the caller's details to your Personal Directory](#)^[65].



Type	From	Time	Length	Calls	
	Extn203 (203)	28-Jun 2:49:08 PM	0s	2	
	Extn203 (203)	28-Jun 2:49:18 PM	0s	1	
	Extn201 (201)	06-Jul 3:41:49 PM	8s	1	
	Extn402 (402)	06-Jul 8:48:33 PM	8m	1	

Clear Log

one-X Portal for IP Office Call Log

The call log shown by one-X Portal for IP Office is stored on the telephone system as part of your user settings. Up to 30 records (10 on IP Office IP406 V2 and IP412 systems) are stored, with new records replacing the old ones when the limit is reached. However for repeated call records to or from the same number, the existing record is updated and the number of calls count included in the record is increased.

Your system administrator configures which calls are logged. For example, calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls unless configured to do so by your system administrator.

Hunt group calls are not logged unless you answer the specific call. Again your system administrator can configure your call log to include missed hunt group calls.

Phone Call Log


If you are using a 1400, 1600, 9500 or 9600 Series phone with a **Call Log** or **History** button, or an M-Series or T-Series phone, by default the same call log as shown by one-X Portal for IP Office is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal for IP Office. The two will change in parallel.

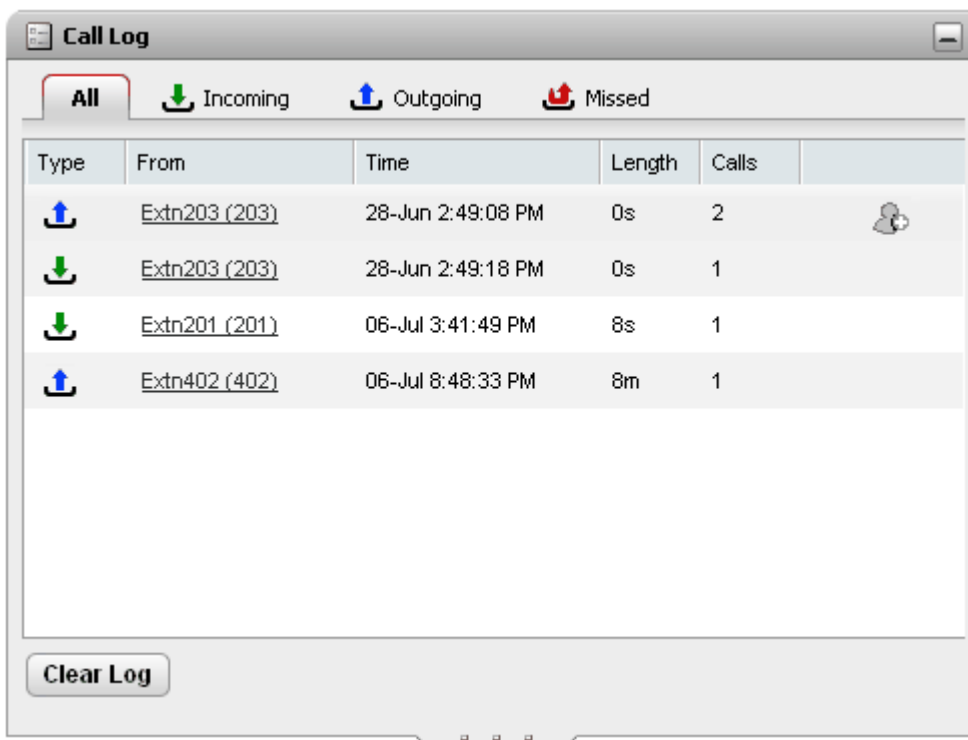
If you are using any other type of phone that has a call log, it will be a call log stored by the phone itself and so does not match the call log shown in one-X Portal for IP Office. For example, calls made using the one-X Portal for IP Office do not appear in the phone's call log and vice versa.

In either case, the one-X call log is limited to displaying 255 records.




Use My Call Log		
• Use the Call Log ^[64]	• Make a call From the Call Log ^[65]	• Add a Call Log number to my Directory ^[65]

5.1 Using the Call Log

The  **Call Log** displays details of calls you have made, received and missed. You can use the call log to [make a call](#)^[31] or [add the caller's details to your Personal directory](#)^[65].



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 callers are included.
 Outgoing	This tab shows records for calls that you made. Details of the 10 most recent callers 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 [system administrator](#)^[167] can configure whether your missed calls call log includes missed calls for selected [hunt groups](#)^[166]. Missed hunt group calls are calls not answered by a member of the hunt group. They do not have to actually ring you and they are answered by a non hunt 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.

-  [Add the Caller Details to Your Personal Directory](#)^[65]

You can add the name and number to your **Personal** directory.

- **Clear Log**


Delete all records from the currently viewed tab.

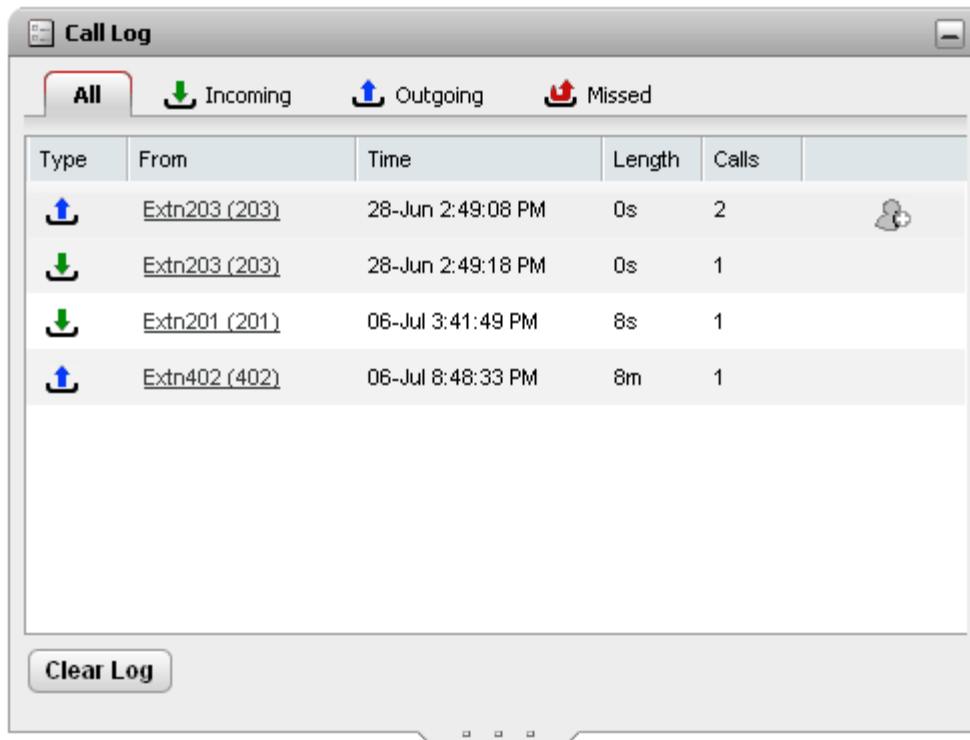
- **Name**^[65]


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.

5.2 Making a Call from the Call Log

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


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



- Click on the name or number to make a call.
 - The progress of the call is displayed on a tab in the  **Calls** gadget.

5.3 Adding a Caller to Your Directory

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


- Locate the call in the call log.
- Click the add  icon.
- The system displays the **Add New Contact** window with the details of the contact the call log.
 - Type the details of the contact in the **Add New Contact** window.
 - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the [Primary phone](#)^[167].
 - You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
 - You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
 - When finished, click **Save**.

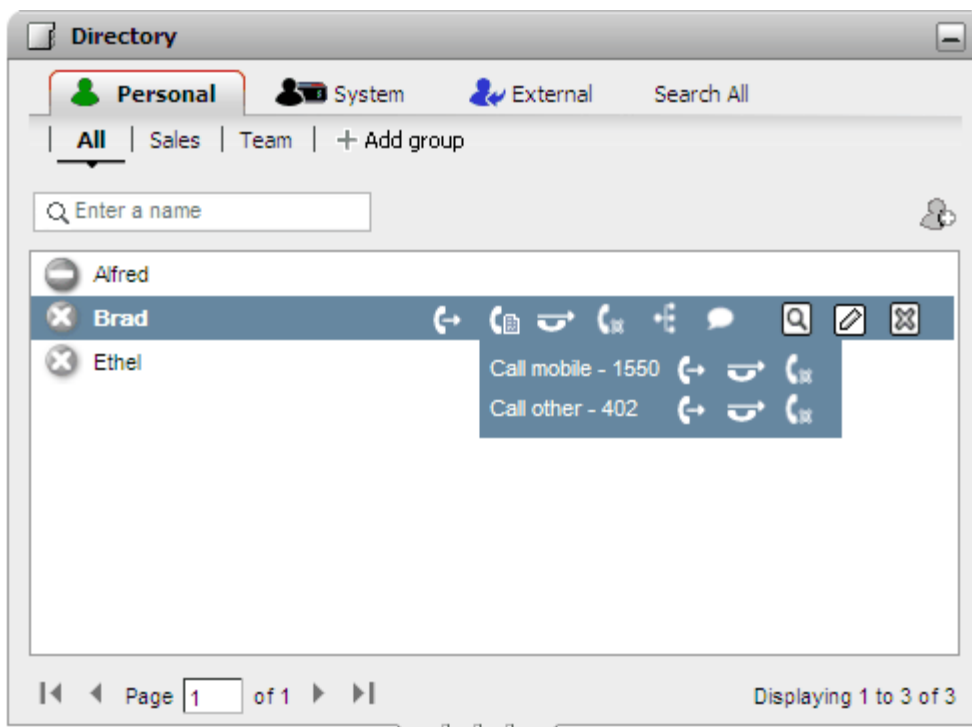


Chapter 6.

Directories

6. Directories

Your one-X Portal for IP Office can display several directories of names and associated telephone numbers. It does this in the  **Directory** gadget. When you hover your cursor over a contact, icons for various actions are displayed.



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 are also accessible on the phone. You can arrange your personal contacts into up to 5 hunt groups.

- **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.

- **Search All**

This tab is displayed when the search box at the top of the gadget has been used to search all the directories. The tab displays the results of the search.

- **Dialing by Name**

When making calls using the  **Calls** 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.

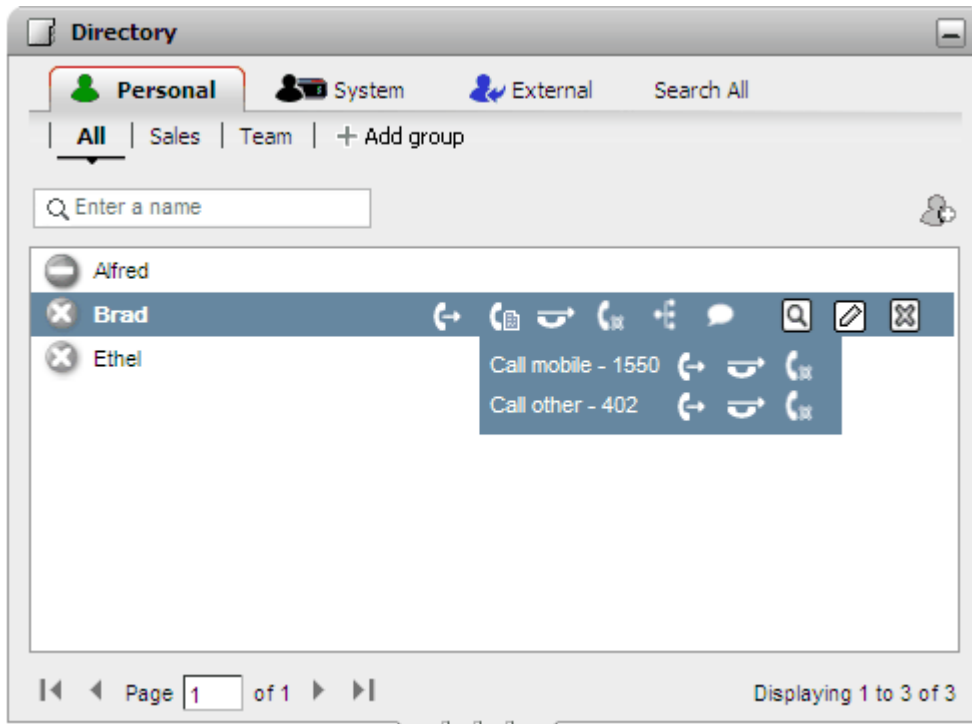
- **Name Display on Incoming Calls**

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 for IP Office.

Use the Directories		
<ul style="list-style-type: none"> • View the Directories ⁶⁹ • Make calls from the Directory ⁷¹ • Edit a Directory Contact ⁷⁴ • Email a Contact ⁷⁷ 	<ul style="list-style-type: none"> • View the user status in the Directory ⁶⁹ • Transfer a call from the Directory ⁷² • Delete a Directory Contact ⁷⁴ • Instant Message a Contact ⁷⁷ 	<ul style="list-style-type: none"> • Search the Directories ⁷⁰ • Add a Directory Contact ⁷³ • Add a Contacts Group Tab ⁷⁵

6.1 Viewing the Directories

The one-X Portal for IP Office 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 IP Office. You can also setup sub-groups of selected contacts. 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 [Hunt groups](#)^[166] on the telephone system. Your one-X Portal for IP Office administrator can also add System directory contacts. You cannot change these contacts. However, you can copy a System directory contact into your [Personal directory](#)^[73].

- **External Directory**

Your [system administrator](#)^[167] can configure one-X Portal for IP Office to access an external directory. If your one-X Portal for IP Office server has been configured to do this, you can perform a search of the external directory. The results of the search are shown here.

- **Results**

This additional option is used to display the results of a [cross directory search](#)^[70].

Personal Directory

If you are using a 1400, 1600, 9500 or 9600 Series phone with a **Contacts** button, or M-Series, T-Series 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 for IP Office application and by the telephone system and kept in sync. The one-X Portal for IP Office application and the telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits).
2. The contacts can be edited through the phone or through one-X Portal for IP Office.
3. Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current [Primary phone](#)^[168] 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 for IP Office if that selection is changed.

6.2 Directory Icons





The directory uses a range of icons to indicate both the state of a contact and actions that you can perform using the contact. Some of these are only displayed when you hover the cursor over the contact.



Call Actions








Action	Icon	Description
Call		Call the contact using their primary contact number.
Alternate		If the contact has alternate numbers, call the contact by displaying and selecting one of those alternate numbers.
Transfer		With a call already connected, transfer the call to this contact.
Consult		With a call already connected, make a transfer enquiry call to this contact.
Conference		With a call already connected, start a conference between yourself, the current call and this contact.
Chat		Start a one-X Portal for IP Office chat session with another one-X Portal for IP Office user or a contact available on GTalk and OCS.

Directory Actions

Action	Icon	Description
Add		Add a contact shown in the System or External directory to your Personal directory.
Details		View details of a directory contact.
Edit		For Personal directory contacts, edit the contact details.
Delete		For Personal directory contacts, delete the contact.

Contact Icons

one-X Portal for IP Office indicates the contacts current status on XMPP, OCS 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 available and not in use.
		<ul style="list-style-type: none"> Grey is not using one-X Portal for IP Office or they have set their portal presence^[14] to offline. The icon is green if the user is also logged into one-X Portal for IP Office (unless they have set their presence to offline).
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 ^[14] . 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 ^[107] .
Logged Out		The user has logged out ^[167] 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 or cannot be known, for example external numbers.
Ringling		This icon is used for an internal contact that is currently ringing.




6.3 Searching the Directories

When viewing a directory, the number of contacts it contains is displayed at the bottom right of the directory gadget along with a summary of which contacts are included on the current page.

Each of the directories has its own search option that can be used to reduce the number of matches that you need to scroll or page through in order to find the required contact. In addition the directory gadget has its own search option that will search and show results from all the directories.

Searching the Personal and System Directories

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

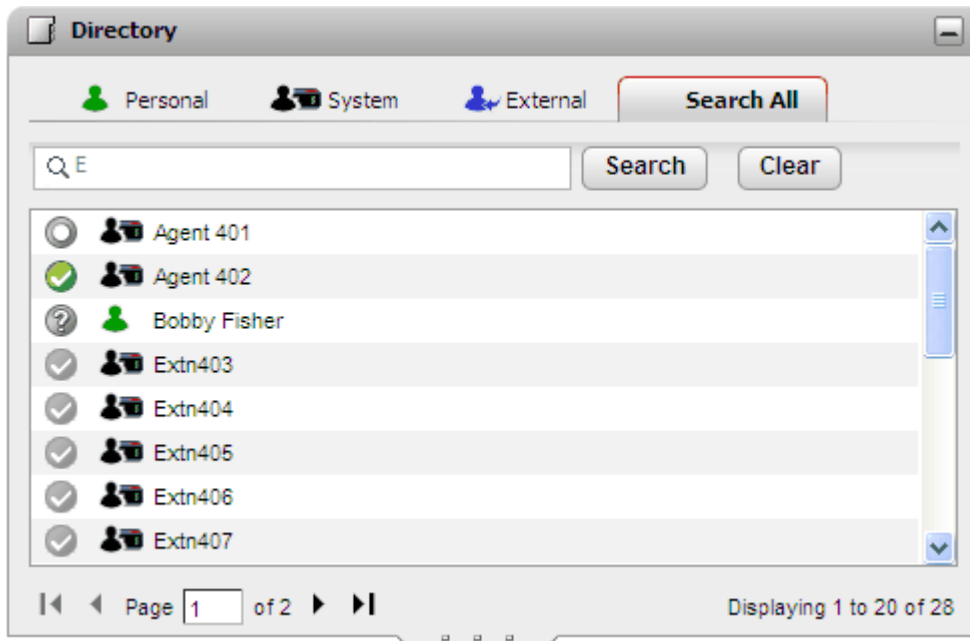
When there are multiple matches, you can use the    page icons at the bottom left to move between pages. Alternatively, add more details to the search term to improve the search matching and so reduce the number of contacts displayed.

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 **Go** button. one-X Portal for IP Office will then send a search request to the remote directory and display the results.

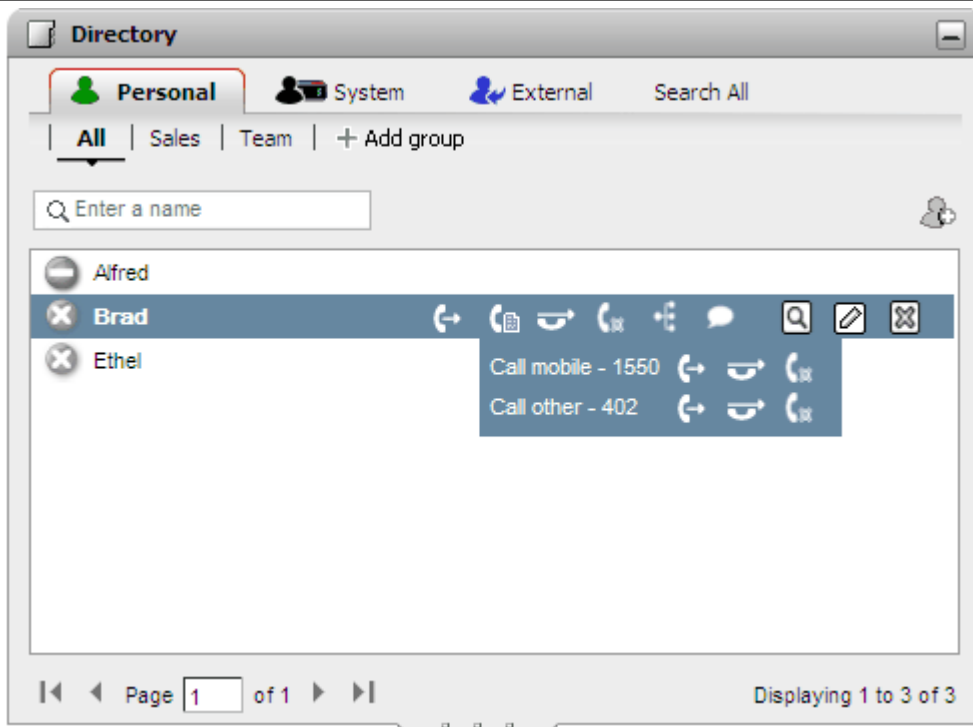
Searching All the Directories

To search all the directories, click on the **Search All** label. This displays a new tab. Enter your search name or number into the search box at the top and click the **Search** button.



6.4 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 top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. To call the contact shown, hover your cursor over it. [Directory icons](#)⁶⁹ for the directory functions you can perform are displayed.



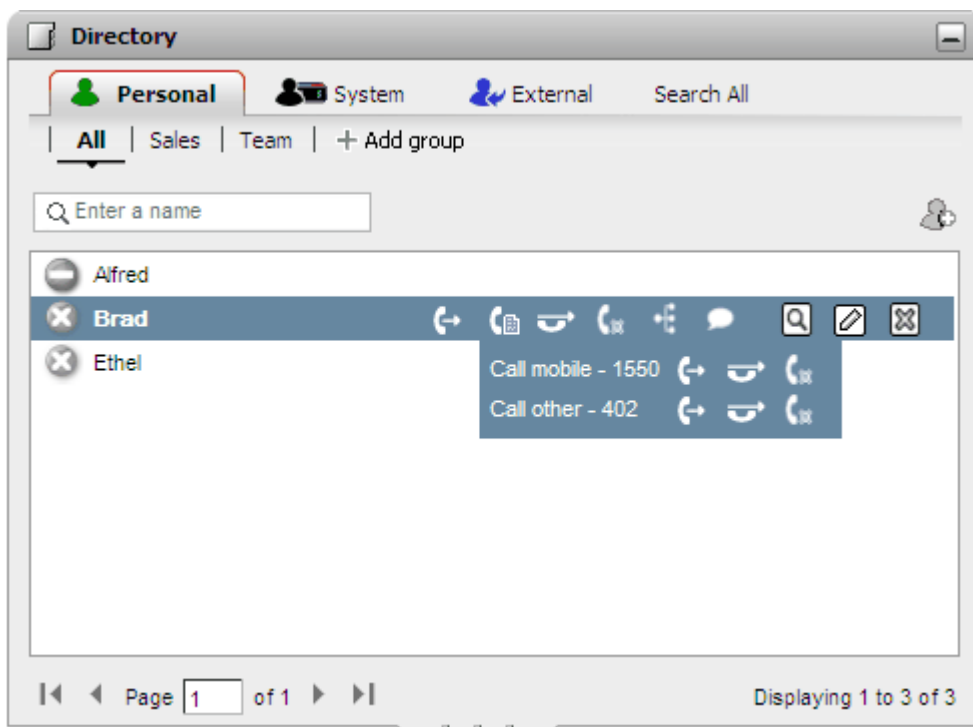
4. To make a call to the contacts primary number, click on the call icon. If the icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.

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

6.5 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, additional options are shown when you hover the cursor over a directory contact.

- Use the transfer icon to do a simple [unsupervised transfer](#) ^[41] to the contact's primary number.

- Use the  consult icon to start a [supervised transfer](#)^[41] to the contact's primary number.
- Use the  conference icon to conference yourself, the held call and the contact's primary number.
- If the  icon is displayed, the contact has alternate numbers. You can click on the icon and select the same options as above for those numbers.

6.6 Adding a New Personal Directory Contact

You can add a new contact in the Personal directory. You can also add caller details from a [voicemail message](#)^[93], the [call log](#)^[65] or the [System directory](#)^[73] to your personal directory.

1. In the  **Directory** gadget on the **Main** tab, select the **Personal** directory tab.
2. Type the name or number that you want to add and click the  icon.
3. The system displays the **Add New Contact** window.
 - Type the details of the contact in the **Add New Contact** window.
 - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the **Primary phone**^[167].
 - You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
 - You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
 - When finished, click **Save**.



Personal Directory

If you are using a 1400, 1600, 9500 or 9600 Series phone with a **Contacts** button, or M-Series, T-Series 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 for IP Office application and by the telephone system and kept in sync. The one-X Portal for IP Office application and the telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits).
2. The contacts can be edited through the phone or through one-X Portal for IP Office.
3. Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current **Primary phone**^[167] 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 for IP Office if that selection is changed.

6.6.1 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 is updated in your **Personal** directory.


1. In the  **Directory** gadget on the **Main** tab, select the **System** directory tab.
2. Locate the contact that you want to add to **Personal** directory. Hover the cursor over the contact and click on the  add icon.
3. You cannot edit the contact details but you can select the [personal contact groups](#)^[75] to which you want to add the system contact.
4. Click **Add** to add the contact in the hunt group that you selected.

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.



6.6.2 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 the call log.
2. Click the add  icon.
3. The system displays the **Add New Contact** window with the details of the contact the call log.
 - Type the details of the contact in the **Add New Contact** window.
 - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the **Primary phone**^[167].
 - You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
 - You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
 - When finished, click **Save**.

6.6.3 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** gadget.
3. Click the add  icon in the message details.
 - Type the details of the contact in the **Add New Contact** window.
 - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the **Primary phone**^[167].
 - You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
 - You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
 - When finished, click **Save**.

6.7 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 top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. Hover the cursor over the directory contact.

Note: You cannot edit a contact who is added in your personal directory from the System directory, they remain linked to the matching entry on the System directory tab.

- Click  **edit**.
- Type the details of the contact in the **Add New Contact** window.
- If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the **Primary phone**^[167].
- You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
- You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
- When finished, click **Save**.

6.8 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 top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.

3. Hover the cursor over the directory contact.

4. Click on the  delete icon.


6.9 Adding A Personal Contacts Group

You can add up to five groups in your personal directory in addition to the default **All** group. personal contact can be listed in more than one groups.

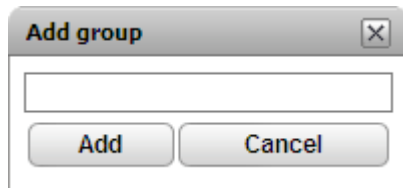
When [editing the personal contact](#) ^[74] select the group in which the personal contact is listed.

Note: You cannot add, rename or delete a group named Outlook in the personal contacts group. For more information, see [Outlook group](#) ^[76] and [Outlook contact synchronization](#) ^[145].

Adding a personal contacts group

1. Select the **Personal** tab in the  **Directory** gadget.

2. Click the **+ add** icon.



3. Enter a name for the new tab.

4. Click **Add**.

The system displays a new tab in the Personal directory.

Renaming a group

To rename a group:

1. In the personal directory tab, select the group

2. Click  **edit**.

The system displays **Edit group** dialog box.

3. Type the new the name in the text box.

4. Click **Modify**.

Deleting a group

To delete a group:

1. In the personal directory tab, select the group.

2. Click  **Delete**.

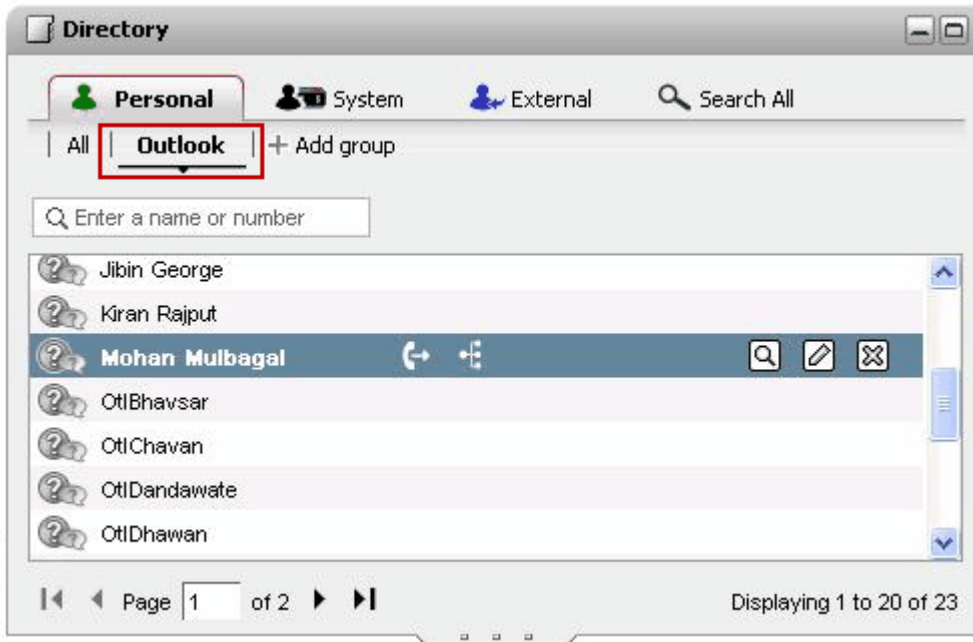
3. Click **Yes**, to confirm that you would like to delete the group.

6.9.1 Outlook group

You can synchronize and upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office. After the Microsoft® Outlook® [contact synchronization](#)^[145], an **Outlook** group is automatically created in the **Directory** gadget.


To view the imported contacts:

- In the **Directory** gadget, click **Personal > Outlook**.




Note: You can update or delete the contact from the **Outlook** group. However, you cannot add a contact to the **Outlook** group.

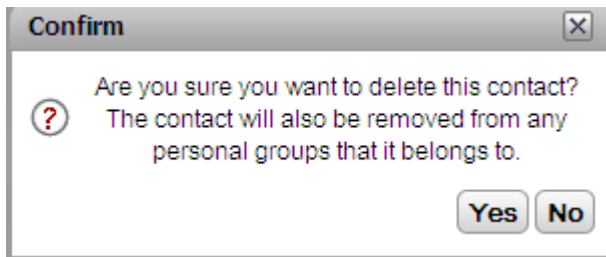
To update the details of a contact in the Outlook group:

1. Click **Edit** .
2. In the **Edit Contact** dialog box, change or update the details of the contact.
3. Click **Save**.

A screenshot of the 'Edit Contact' dialog box. It contains several input fields for contact information: Name (Mohan Mulbagal), Work phone, Work email, Mobile phone (453674), Personal email, Other phone, Other email, Gmail Id, OCS Id, Primary phone (Mobile), and Group (Outlook). There are 'Save' and 'Cancel' buttons at the bottom.

To delete a contact from the Outlook group:



1. Click **Delete** .
2. In the **Confirm** dialog box, click **Yes** to remove a contact from the list.

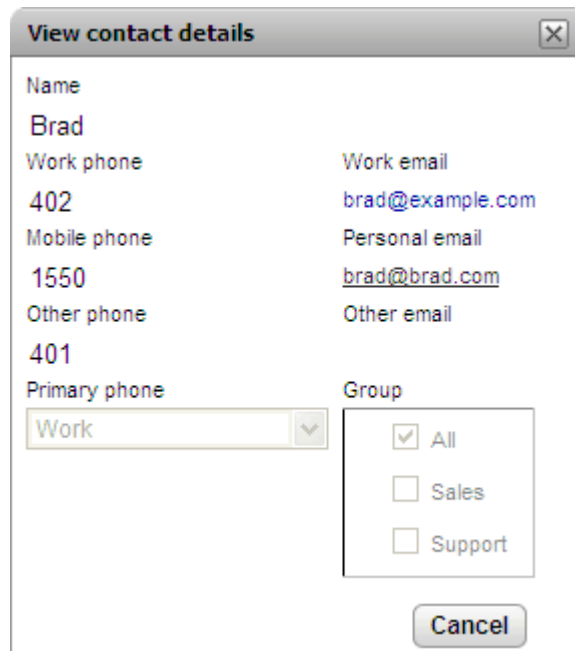


Note: All the aforementioned changes made to the contacts in the **Outlook** group will be overwritten during *resynchronization* from Microsoft® Outlook® to the one-X Portal for IP Office.

6.10 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 top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. Hover the cursor over the contact and click on the  details icon.



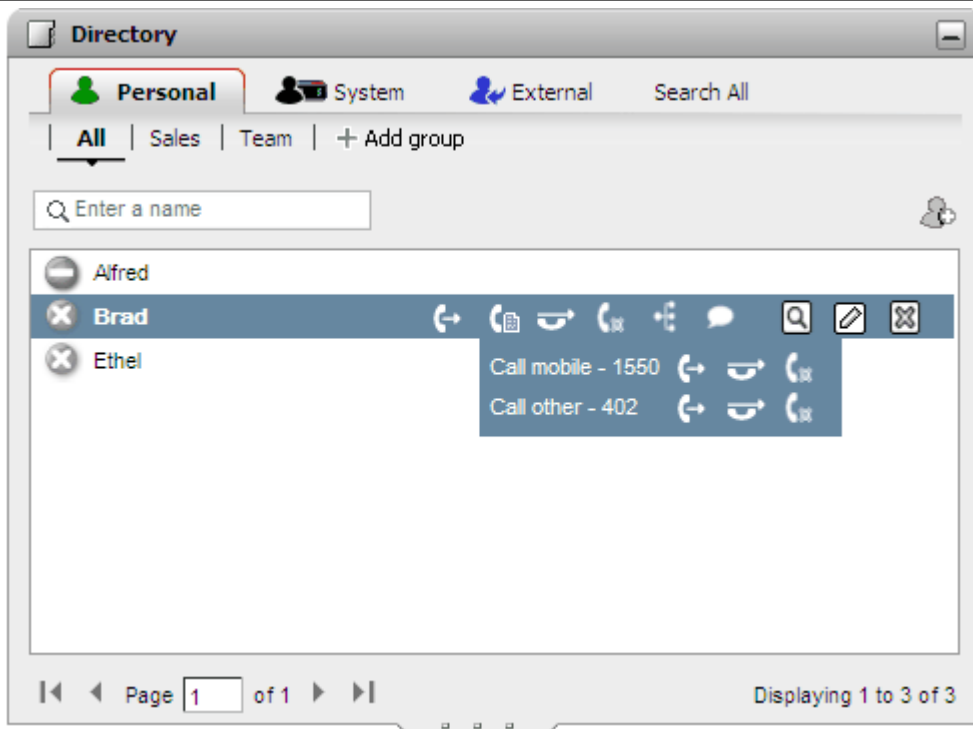
4. Click on the email address that you want to use. Some contacts can have more than one email address from which you can select.
5. A new email will be started using the computer's default email application, with the selected email address in the **To** field.



6.11 Instant Messaging a Contact

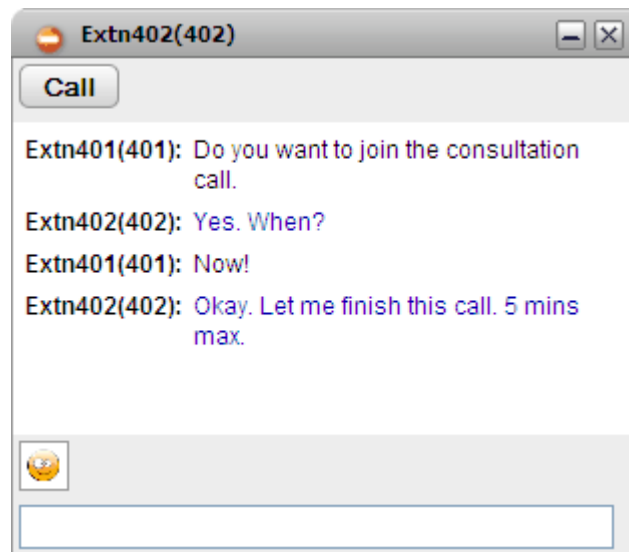
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

If you do not want other users to be able to start chat sessions with you while you are using one-X Portal for IP Office, [set your presence status](#) ^[14] to **Offline**.

1. Locate the other one-X Portal for IP Office user in your  **Directory** gadget.



2. With your cursor hovering over the contact, a  chat icon indicates that they are available to be chatted with. Click on the  chat icon to open a chat window.
3. The instant message popup window will appear in your one-X Portal for IP Office and in the other user's one-X Portal for IP Office.



4. You can start typing your messages and they can reply.
5. You can start instant messaging session with other one-X Portal for IP Office users at the same time. Each will appear in a separate popup.

Chapter 7.

Profiles

7. Profiles

one-X Portal for IP Office 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** ^[82] also appears. It is displayed when your current telephone system settings don't match any of your profiles.

Profile Settings	
Call Pickup ^[83]	<ul style="list-style-type: none"> • Call Pickup on/off.
Mobility ^[83]	<ul style="list-style-type: none"> • Default Deskphone ^[83] • Forward calls. ^[83] • Mobile Twinning. ^[84] • Telecommuter. ^[84]
Voicemail ^[85]	<ul style="list-style-type: none"> • 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.

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	<input checked="" type="radio"/>	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	<input type="radio"/>	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	<input type="radio"/>	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 for IP Office 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		
<ul style="list-style-type: none"> • Use the 'Detected' Profile ^[82] • Add a New Profile ^[82] 	<ul style="list-style-type: none"> • Select an Active Profile ^[82] • Configure the Profile ^[83] 	<ul style="list-style-type: none"> • Edit a Profile ^[82]

7.1 The Detected Profile

If your settings on the telephone system do not match any of your profiles, one-X Portal for IP Office 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	<input checked="" type="radio"/> View
Office	Mobile Twinned at :96775655, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> Edit
Mobile	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> Edit
Home	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> 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 for IP Office 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 for IP Office can be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

7.2 Selecting Your Profile

Your currently active profile is shown in the [status line](#) ¹⁴ at the top-right of the one-X Portal for IP Office screen.

1. In the **Configure** tab select **Profiles**. The list of profiles appears.
2. In the list of profiles, select the profile that you want the phone to use.

Note: 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.

7.3 Editing a Profile

You can edit the default profiles and the profiles that you created.

To edit a profile do the following:

1. In the **Configure** tab select **Profiles**. The list of profiles appears.
2. In the list of profiles, click **Edit** next to the profile that you want to edit.
3. Select the different settings that are available to use within your profiles.
4. When you have set the profile as required, click **OK**.
5. Click **Save**.

Note: 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.

7.4 Adding a Profile

In addition to the three default profiles, you can add four more.

1. In the **Configure** tab select **Profiles**. The list of profiles appears.
2. Click **Add a new profile definition**.
3. Enter a name for the profile.
4. Select the different settings that are available to use within your profiles.
5. After you have set the profile as required, click on **OK**.
6. Click **Save**.

Note: You cannot delete the default profiles you can only edit them. However, you can edit and delete the additional profiles that you created.

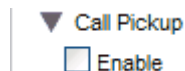
7.5 Profile Settings


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

Profile Settings	
Call Pickup ⁸³	<ul style="list-style-type: none"> • Call Pickup on/off.
Mobility ⁸³	<ul style="list-style-type: none"> • Default Deskphone ⁸³ • Forward calls. ⁸³ • Mobile Twinning. ⁸⁴ • Telecommuter. ⁸⁴
Voicemail ⁸⁵	<ul style="list-style-type: none"> • 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.

7.5.1 Call Pickup

This option allows you to set whether other one-X Portal for IP Office users to be able to [pickup your calls](#) ³⁵ when this profile is your active profile.

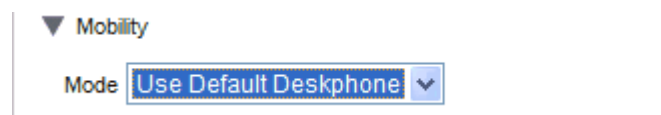


In other one-X Portal for IP Office users'  **Directory** gadget, your contact will indicate when you have calls waiting to be answered and allow them to pickup the call.



7.5.2 Mobility - Use Default Deskphone

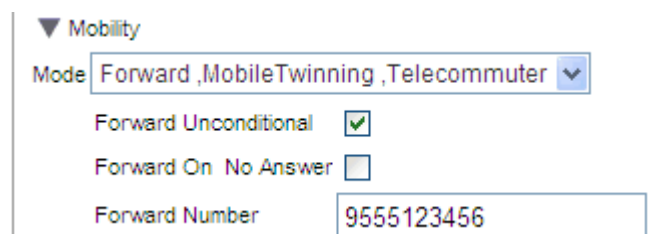
In this mode, your calls simply ring at the IP Office extension which you are using. This mode has no additional mobility settings.



7.5.3 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 Unconditional**
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 On No Answer**

If this option is selected, calls are only forwarded if your phone is busy or if the call has rung unanswered for a period of time.

- **Forward 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 for IP Office will change your profile to **Detected**.

7.5.4 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.

The screenshot shows the 'Mobility' settings section. At the top, there is a dropdown menu for 'Mode' with the current selection being 'Forward ,MobileTwinning ,Telecommuter'. Below this are four checkboxes: 'Forward Unconditional' (unchecked), 'Forward On No Answer' (unchecked), 'Enable MobileTwinning' (checked), and 'Number' (with a text input field containing '955567890').

- **Enable Mobile Twinning**

Selecting this option switches the use of mobile twinning for calls on and displays the current twinning number. It also enables the twinned call buttons in your **Calls** gadget. You can use those buttons to [transfer twinned calls](#)^[48] between your normal extension and your twinning number and vice versa.

- **Number**

This sets the number to which your twinned calls will be sent in addition to ringing at your desk extension.

7.5.5 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 for IP Office server. This mode is not available to all users.

- You make calls using one-X Portal for IP Office 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 for IP Office.
- 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](#)^[18] 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.

The screenshot shows the 'Mobility' settings section. At the top, there is a dropdown menu for 'Mode' with the current selection being 'Forward ,MobileTwinning ,Telecommuter'. Below this are six checkboxes: 'Forward Unconditional' (unchecked), 'Forward On No Answer' (unchecked), 'Enable MobileTwinning' (unchecked), 'Enable Telecommuter' (checked), 'Number' (with a text input field containing '9555126748'), 'Make a Test Call' (unchecked), and 'Hold the Line' (checked).

Enable Telecommuter

Selecting this option switches the use of telecommuter mode on and displays the current telecommute settings.

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 for IP Office 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 for IP Office, 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 for IP Office. You can end the call through either using one-X Portal for IP Office 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 for IP Office.
- 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).
- Page 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 for IP Office 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 includes 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 for IP Office to unhold Or unpark the calls do not always work.

7.5.6 Voicemail

The following profile settings can be used to alter your voicemail operation. Note that some option can only be used if your voicemail server is a Voicemail Pro system, they are disabled if your system uses embedded voicemail.

▼ Voicemail

Active Greeting: At Home

Voicemail:

Voicemail Ringback:

Voicemail Outcalling:

Listen to messages on: Browser Phone

Active Greeting *(Voicemail Pro only)*

If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have [recorded](#)⁹³. Within each of your one-X Portal for IP Office profiles, you can use the **Active Greeting** setting to select which greeting should be used for your mailbox when the profile is active.

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 use your phone extension, after that call the voicemail server will call you to alert you to the messages.



Voicemail Outcalling *(Voicemail Pro only)*

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 for IP Office should playback your messages to your phone or to your browser.

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

-
- A handset  icon is shown on your messages gadget when you are set for playback to your phone.
 - A headset  icon is shown on your messages gadget when you are set for playback to your browser. Playback to your browser is only supported for Voicemail Pro.


Changing Voicemail Settings Using Other Interfaces

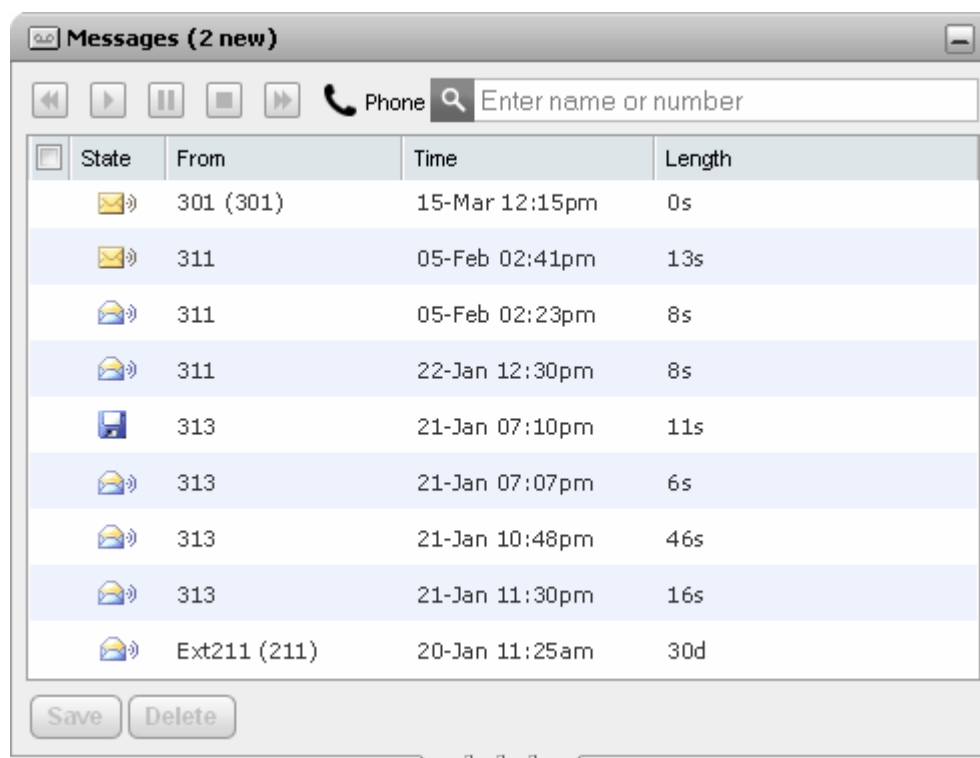
one-X Portal for IP Office loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal for IP Office can be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

Chapter 8.

Voicemail

8. Voicemail

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



Access and Use Voicemail		
<ul style="list-style-type: none"> • Enable/Disable Voicemail screening ⁸⁹ • Switch between Phone and PC playback ⁹² • Record Mailbox Greetings ⁹³ 	<ul style="list-style-type: none"> • Check Voicemail messages ⁹¹ • Add a Voicemail caller to my Directory ⁹³ • Select Mailbox Greetings ⁹³ 	<ul style="list-style-type: none"> • Call someone who left a message ⁹² • Change my Voicemail Mailbox Code ⁹³

Changing Voicemail Settings Using Other Interfaces

one-X Portal for IP Office 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 for IP Office can be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

8.1 Voicemail screening

You use the one-X Portal for IP Office interface to control the desk phone in order to screen calls. You can enable or disable voicemail screening through the one-X Portal for IP Office interface.

By default, the voicemail screening option is disabled.

To enable the voicemail screening option:

1. In the one-X Portal for IP Office interface, click on **Configure > Voicemail**.
2. In the **Voicemail** tab, go to **Voicemail Screening Configuration**.
3. Check *Enable voicemail pickup/listen*.

Main ***Configure** 'Add Tab' Save

Profiles Telephony DND Exceptions **Voicemail** Desktop Integration IM/Presence

Voicemail Passcode

Configure your voicemail access passcode for use when dialing into voicemail to retrieve your messages.

Passcode

Confirm Passcode

Note: Only numbers are allowed. Voicemail Code should not have repeated numbers, consecutive numbers and it should not be same as the extension number.

Edit Personalized Greetings

Set up and configure your personalized greetings.

1	<input type="text"/>	▶	•	■	📎	✖
2	<input type="text"/>	▶	•	■	📎	✖
3	<input type="text"/>	▶	•	■	📎	✖
4	<input type="text"/>	▶	•	■	📎	✖
5	<input type="text"/>	▶	•	■	📎	✖
6	<input type="text"/>	▶	•	■	📎	✖
7	<input type="text"/>	▶	•	■	📎	✖
8	<input type="text"/>	▶	•	■	📎	✖
9	<input type="text"/>	▶	•	■	📎	✖

Voicemail Screening Configuration

Use voicemail screening to enable voicemail pickup/listen

Enable voicemail pickup/listen

Now, if you are currently on a call and receive another incoming call, then the second call will be screened. The second call will go to your voicemail. You have the option to *listen* to the voicemail message or to *pickup* the call in an active state. Through the **Call gadget** interface, you can change from listen only mode to a two way conversation with the *pickup* option. If you choose to *ignore*, then the voicemail notification will be removed or not displayed in the **Call gadget** interface. The *Listen*, *Pickup* or *Ignore* options will be displayed to the top right corner of the **Call gadget** interface.

Calls

Enter name or number More...

1 2 3 4


Extn105(105) 📞 Extn105


00:00:03

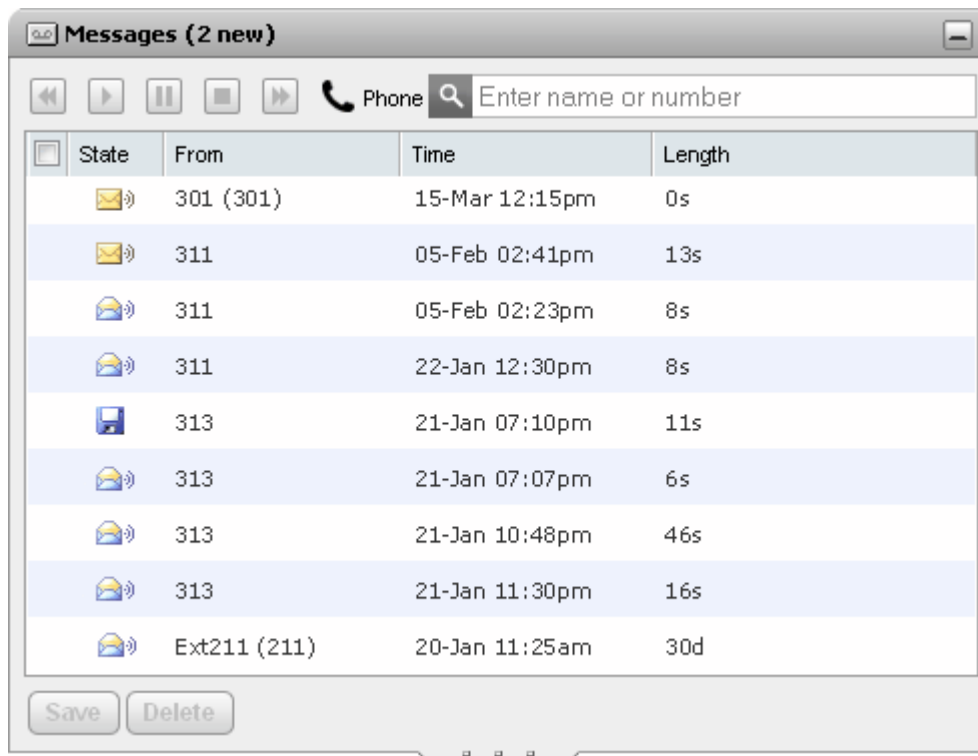
For example, Extn 106 is currently on a call with Extn 104. Now, if Extn 105 calls Extn 106, then the call goes on to the voicemail of Extn 106. Extn 106 will receive a *message in progress* notification in the **Calls gadget**.

- **Listen:** Clicking this option allows the voicemail message left by Extn 105 to be played on the desk phone of Extn 106.
- **Pickup:** Clicking this option establishes a call between Extn 105 and Extn 106.
- **Ignore:** Clicking this option removes the voicemail notification left by Extn 105 from Call gadget interface of Extn 106.

8.2 Checking Voicemail Messages


Your 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 [profile](#)^[81] is set to playback messages to your phone extension.
-  This icon indicates that your current [profile](#)^[81] is set to playback messages through your PC.

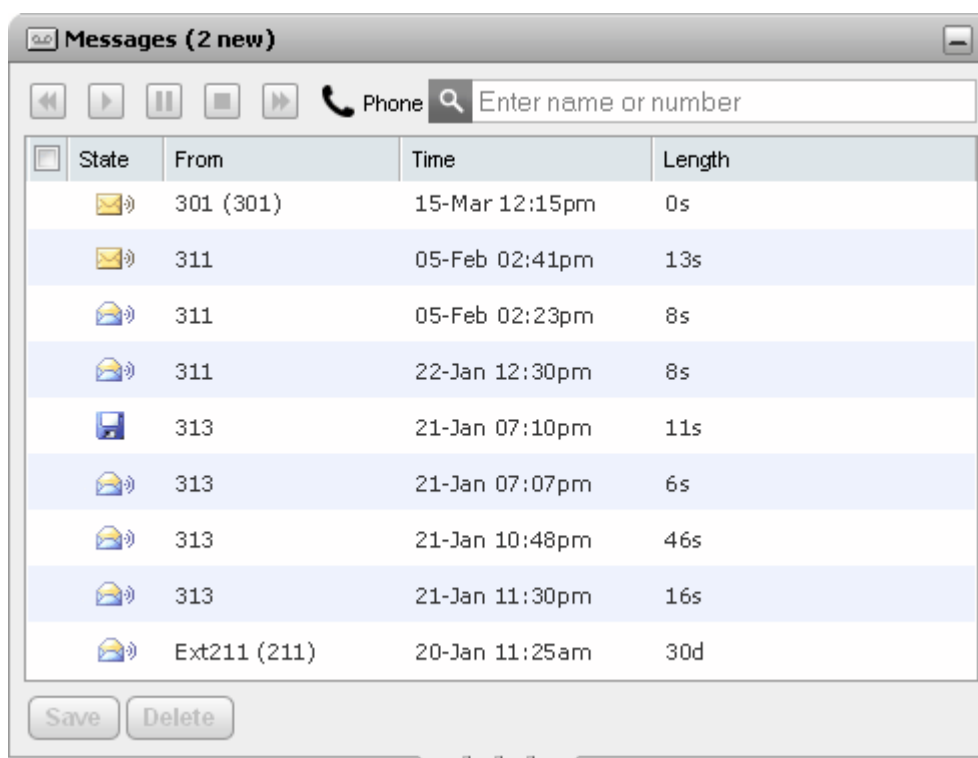
Message Icons


-  **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.
-  **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.

8.3 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.





2. Click on the name or number details of the caller to make a return call.
 - The progress of the call is displayed on a tab in the  **Calls** gadget.

8.4 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](#)^[81] voicemail options.

8.5 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** gadget.
3. Click the add  icon in the message details.
 - Type the details of the contact in the **Add New Contact** window.
 - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the [user status](#)^[69] of the user. This applies even if another number is currently selected as the [Primary phone](#)^[167].
 - You can use the **Group** list to select which of your personal [contacts tabs](#)^[75] the contact should appear on.
 - You can add the gmail address and the Office Communications Server (OCS) address of the contact. After you add the addresses you can [start an email](#)^[77] or initiate a chat from the one-X Portal for IP Office directory.
 - When finished, click **Save**.

8.6 Changing Your Voicemail Code

Using the  **Messages** gadget you can [access your voicemail messages](#)^[91] without needing any special code as you have logged into one-X Portal for IP Office 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 for IP Office to set and change your voicemail code.

1. In the **Configure** tab, select **Voicemail**. The **Voicemail Passcode** section appears.
2. Enter the new code that you want to use and confirm the code.

The voicemail code is always a numerical code.

3. Click **Save**.

Changing Voicemail Settings Using Other Interfaces

one-X Portal for IP Office 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 for IP Office can be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

8.7 Recording Voicemail Greetings







You can use one-X Portal for IP Office to record up to 9 greeting files for use with your voicemail mailbox. You can then use the [Active Greeting](#)^[88] setting within your profiles to select which of the greetings should be used by each profile.

Voicemail Pro Only

This option is only supported if your system uses a Voicemail Pro voicemail server. It is not supported if your telephone system uses embedded voicemail.

Changing Voicemail Settings Using Other Interfaces

one-X Portal for IP Office 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 for IP Office can be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

1. In the **Configure** tab, select **Voicemail**.
2. Click **Edit Personalized Greetings**. A call is made to your extension.
3. In the name field enter a name for the greeting.
4. Use the  **Record** icon to start recording and the  **Stop** icon to finish recording.
5. After 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.
6. To save the recording click on the  save icon. You will hear a tone when the file has been saved.

8.8 Select Your Voicemail Greeting

If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have [recorded](#)^[93]. Within each of your one-X Portal for IP Office [profiles](#)^[81], you can use the **Active Greeting** setting to select which greeting should be used for your mailbox when that profile is active.

Voicemail Pro Only

This option is only supported if your system uses a Voicemail Pro voicemail server. It is not supported if your telephone system uses embedded voicemail.

Chapter 9.

MyBuddy


9. MyBuddy

MyBuddy is an interactive feature of one-X Portal for IP Office that acts as a virtual assistant and responds to the commands that you type.

MyBuddy works in conjunction with any XMPP-based messaging client. MyBuddy can be used on a PC, Tablet, or Smartphone where one-X Portal for IP Office is not running. For example, with Google federation, a user can add *mybuddy@<domain>* as a Google Talk contact or friend on such devices.

You can use MyBuddy to perform a range of functions such as conference calls, receive notifications when callers are leaving messages in your voicemail inbox, send commands through MyBuddy to either listen to or intercept the message while the caller is leaving it.

To access MyBuddy:

1. In the **Directory** gadget, click **System** tab.
2. Click the Avaya  icon. The system displays the MyBuddy window.

Use MyBuddy		
• Use the Help command ⁽⁹⁷⁾	• Get Notifications ⁽⁹⁷⁾	• Manage calls ⁽⁹⁷⁾
• Follow another user ⁽⁹⁹⁾	• Control a conference ⁽¹⁰⁰⁾	

9.1 Help command

In MyBuddy chat window when you type help the system displays a list of commands for which help is available.

To get more information about the parameters that can be used with each command, type **help** followed by a command – for example, **help call**. MyBuddy displays a list of parameters relevant to the command and an overview of how the command works.

9.2 Notifications

MyBuddy notifies you of the voicemail and conference events when your IM client is open.

Note: MyBuddy notifies you of the events only if you have configured the IM/Presence status to notify you about the events. For more information about configuring the IM/Presence status see [IM/Presence](#) ⁽¹⁰⁵⁾.

Conference events are purely informational. The command *@conf* is used in the context of chat room only. For example, if a user types *@conf* in the IM and sends it to you, MyBuddy informs you that you have been invited to a conference call. If you are the [Conference Manager](#) ⁽¹⁰⁶⁾, then MyBuddy informs you of the arrival and departure of the participant during the call.

Voicemail events: You can listen to the voicemail messages when you receive a message and you can also intercept the caller and pick up the call when a caller is leaving a voicemail message.

To listen to the voicemail messages:

1. In the MyBuddy conversation window, type *listen*.
2. Press **Enter**.

The phone that is configured to your one-X Portal for IP Office rings.

3. Answer the phone and listen to the voicemail message.

If you choose to pickup the call when a caller is leaving a voicemail message, the system does not forward the message to your mail box and initiates a call between you and the caller.

To pickup the call:

1. In the MyBuddy conversation window, type *pickup*.
2. Press **Enter**.

The phone that is configured to your one-X Portal for IP Office rings.

3. Answer the phone and listen to the voicemail message.

9.3 Call management

MyBuddy supports call management commands. You can track a missed call, find a contact, set the call location, initiate a phone call, and record a call.

Tracking a missed call

You can track missed calls or calls that are transferred to the voicemail in your absence. The system displays a list of missed calls, the caller, time of the call, and presence status of the caller.

To track missed calls:

-
1. In the MyBuddy conversation window, type *missed*.
 - a. For example, type *missed 2*, to track the missed calls for the past 2 days
 2. Press **Enter**.

Finding a contact

You can look for a contact in the IP Office directory list with the first or last name. If the contact is in the directory list, the system displays the first or last name, contact number or extension, and the presence status of the contact.

To find a contact:

1. In the MyBuddy conversation window, type *find* followed by the *name*
 - a. For example, if you want to find John, type *find John*
2. Press **Enter**.

Setting the call location

You can specify your location. The system initially calls your location and then connects the call to the specified number. The *at* command only sets a default number for calls initiated by MyBuddy. It does not affect the routing of incoming calls or affects how calls outside of MyBuddy are initiated.

To set the call location:

1. In the MyBuddy conversation window, type *at* followed by the *number or location*.
 - a. For example, type *at home*, if you are working from home.
2. Press **Enter**.

The system responds with the message: *The call, conference, listen and pickup commands will call you at home.*

Initiating a phone call

To initiate a phone call:

1. In the MyBuddy conversation window, type *call "number or name" from "number or name."*
 - a. For example, type *call 800-555-0100 from 800-555-0101*
2. Press **Enter**.

The system initiates a phone call to 800-555-0101 and then transfers the call to specified number, that is, 800-555-0100.

Through the *call* command, the call will be initiated from the number or location that was set via the *at* command.

Recording a phone call

You can record and stop recording your phone calls. By default, the system saves the recording in your mailbox.

To record a phone call:

1. In the MyBuddy conversation window, type *record*.
2. Press **Enter**.

To stop recording a phone call:

1. In the MyBuddy conversation window, type *stop*.
2. Press **Enter**.

9.3.1 Storing home and mobile numbers

You can set your home and mobile phone numbers on the one-X Portal for IP Office.

For example, when you are at home, type *at home* in the MyBuddy window. The system responds with the message: *The call, conference, listen and pickup commands will call you at home.*

Now, you can call a contact from home. In the MyBuddy Window, type the specified name or contact number. The system initially calls your home number and then connects the call to the specified number.

The home and mobile phone numbers are stored in the **Personal Numbers** section.

To store home and mobile phone numbers:

1. Click **Configure > Telephony** tab.

Office | one-X Portal for IP Office | Extn315(315) |

Main *Configure Add Tab

Save

Profiles **Telephony** DND Exceptions Voicemail Desktop Integration IM/Presence

Keyboard Shortcuts
Define which key presses to be use for common actions.

Answer CTRL+ALT+A
Call CTRL+ALT+C
Hold CTRL+ALT+H
Drop CTRL+ALT+D

Park Slots
Customize your park slot labels.

1
2
3
4

Personal Numbers
Enter your Home and Mobile Numbers

Home Phone Number
[]

Mobile Phone Number
[]

These numbers will be used in association with the Mybuddy "at home" & "at cell" commands respectively
Note: Changes to these numbers takes some time before they can be used in MyBuddy 'at' commands.

Conference Bridge Number
Enter your own personal conference bridge

[]

Sound Configuration
Use sound notifications to announce
 Enable sound notifications

2. In the **Personal Numbers** section, enter the number in the home and mobile phone number fields.

By default, both the fields are blank. If you do not want to list your number, you have an option to leave the fields blank.

3. Click **Save**.

Note: User has to add a dialling prefix to the home and mobile phone numbers. For example, dialing prefix 9.

9.4 Following another user

You can *follow* another one-X Portal user in one-X Portal for IP Office using the MyBuddy window.

In the MyBuddy window, type *follow* to get a list of contacts you are currently following. The system sends a notification whenever the availability of the *followed* contact improves. Availability is influenced by the presence, phone status and calendar status of the *followed* contact.

The system sends you a notification whenever the contact:

- Concludes a meeting or an appointment
- Disconnects an ongoing phone call
- Changes the presence from *Away*, *DND*, or *Offline* to *Available*.

Note: If the contact that you are following does not choose to publish the calendar or telephony presence information, then the system does not send you any notification.

To follow a contact:

1. In the MyBuddy conversation window, type *follow* followed by a *name* or *extension number*.
 - a. For example, *follow John*

2. Press **Enter**.

Whenever the availability of John improves, the system send you a notification.

To unfollow a contact:

1. In the MyBuddy conversation window, type *unfollow* followed by a *name* or *extension number*.
 - a. For example, *unfollow John*

2. Press **Enter**.

Now, even if the availability of John improves, the system does not send you any notification.

9.5 Controlling a conference

You can initiate a [Meet Me conference](#)^[167] and control the actions of each of the participants in the conference.

As each participant enters your conference, the system displays the participant entry IMs and the participant number.

For example, if John Smith joins the conference, the system displays:

(11:00:01) MyBuddy: John Smith (200) entered your conference as participant [1] Thursday, July 14, 2011 11:00 AM

The system assigns a participant number to each participant - in square brackets.

Initiating a conference

To initiate a conference on a:

- Cell phone, type *conference cell*
- Home number, type *conference home*
- Phone number, type *conference <phone number>*.

Refer to [Storing home and mobile numbers](#)^[98] for instructions on setting your home and cell phone numbers on the one-X Portal for IP Office.

To initiate and join a conference:

1. In the MyBuddy conversation window, type *conference* followed by *cell*, *work*, *home* or *phone number*.
2. Press **Enter**.

The system initiates a call and adds you to the conference when you answer the call.

Through the *conference* command, the conference will be initiated from the number or location that was set via the *at* command.

Note: The call fails if the external number and the one-X Portal for IP Office use a trunk without answer supervision.

Using mute, unmute or disconnecting a participant

To mute a participant in a conference call:

1. In the MyBuddy conversation window, type *mute* followed by the *participant number*.

For example, if there are 4 participants in your conference. To mute participant number 3, type *mute 3*.

2. Press **Enter**.

Participant number 3 is muted.

To unmute a participant in a conference call:

1. In the MyBuddy conversation window, type *unmute* followed by the *participant number*.

For example, if there are 4 participants in your conference and participant number 3 is on mute. To unmute participant number 3, type *unmute 3*.

2. Press **Enter**.

Participant number 3 is unmuted.

To disconnect a participant in a conference call:

1. In MyBuddy conversation window, type *disconnect* followed by the *participant number*.

For example, there are 4 participants in your conference. To disconnect participant number 3 from the conference call, type *disconnect 3*.

2. Press **Enter**.

Participant number 3 is disconnected.

Using mute all, unmute all or disconnect all participants

To mute all participants in a conference call:

1. In the MyBuddy conversation window, type *mute all*.
2. Press **Enter**.

Now, if there are 4 participants in your conference, all the 4 participants will be muted.

To unmute all participants in a conference call:

1. In the MyBuddy conversation window, type *unmute all*.
2. Press **Enter**.

Now, if there are 4 participants in your conference who were on mute, then all the 4 participants will be unmuted.

To disconnect all participants in a conference call:

1. In MyBuddy conversation window, type *disconnect all*.
2. Press **Enter**.

Now, if there are 4 participants in your conference, then all the 4 participants will be disconnected.

Note: The *mute all*, *unmute all*, or *disconnect all* functionality acts on all participants in a conference, except the conference owner.

Locking and unlocking a participant from the conference

You can also lock the conference to restrict other participants from joining in. To include new participants, you can unlock the conference.

To lock a conference call:

1. In the MyBuddy conversation window, type *lock*.
2. Press **Enter**.

You can restrict new callers from joining the conference call.

To unlock a conference call:

1. In the MyBuddy conversation window, type *unlock*.
2. Press **Enter**.

You can grant new callers access to the conference call.

You can view a list of participants in the conference call. The system displays the calling name or number and the participant number. The system also displays who is currently speaking.

To view participants in a conference call:

1. In the MyBuddy conversation window, type *who*.
2. Press **Enter**.



Chapter 10.

Configuration

10. Configuration

The **Configure** tab is used to setup and control a range of one-X Portal for IP Office settings. The **Save** buttons are grayed 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 for IP Office		
<ul style="list-style-type: none">• Change My Keyboard Shortcuts ⁽¹⁰⁴⁾• Configure IM/Presence ⁽¹⁰⁵⁾• Select my Language ⁽¹⁰⁶⁾	<ul style="list-style-type: none">• Configure Park Slots ⁽¹⁰⁴⁾• Set Do Not Disturb Exceptions ⁽¹⁰⁷⁾	<ul style="list-style-type: none">• Enable Sounds ⁽¹⁰⁴⁾• Configure the World Clock ⁽¹⁰⁷⁾

10.1 Keyboard Shortcuts

You can use the following default keyboard short cuts within one-X Portal for IP Office. 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 IP Office. 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. In the **Configure** tab select **Telephony**.
2. In the **Keyboard Shortcuts** section, click 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**.

10.2 Park Slots

one-X Portal for IP Office provides four park slot buttons. You can configure the phone system park slots to the buttons. If the numbers or names you use match those used by other users, you can view the calls that are parked in those park slots by others. You can use the buttons to unpark those calls. Similarly other users can view and unpark calls that you park.

1. In the **Configure** tab select **Telephony**.
2. In the **Park Slots** section enter the park slot number or name of the park slot. By default the park slots are named from 1 to 4.

Note: Ensure that the name of the park slot does not exceed nine characters. The name of the park slot can be alpha numeric and include special characters.

3. Click **Save**.

10.3 Sound Configuration

If your computer and browser are configured for audio, one-X Portal for IP Office 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 [Windows Media Player](#)⁽¹⁾ or [Quick Time](#).

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

10.3.1 Proxy Server Exceptions

The playback of voicemail messages on your computer requires 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.

10.3.2 Implementing audio branding

one-X Portal for IP Office supports a sound logo feature. When you log in to the one-X Portal for IP Office, the system plays the Avaya brand name.

To configure the sound option:

1. In the **Configure** tab, select **Telephony**.
2. Select **Enable sound notifications**.
3. Click **Save**.

The next time, you log into the one-X Portal for IP Office, the Avaya sound logo greets you.

10.4 IM/Presence

You can configure your IM/Presence in one-X Portal for IP Office.

1. Click the **IM/Presence**, in the **Configure** tab.
2. Set the various options such as **Send conference entry IM**, **Send conference exit IM**, **Voice message begin IM**, **Voice message end IM**, **Alternate IM ID**, [Advertise on call status](#)⁽¹⁰⁶⁾, and **Advertise calendar status**.

Note: You can set the **Advertise on call status** and **Advertize calendar status** to reflect the **Message Only**, **Presence and Message**, or **None**.

3. After making the the changes click **Save**.

Field	Options	Description
IM/Presence	Send conference entry IM	MyBuddy sends an IM to you when someone joins your <i>MeetMe</i> conference.
	Send conference exit IM	MyBuddy sends an IM to you when someone leaves your Meet Me conference.
	Voice message begin IM	MyBuddy sends an IM to you when someone begins to leave a message in your voice mailbox.
	Voice message end IM	MyBuddy sends an IM to you after someone leaves a message in your voice mailbox.
	Alternate IM ID	MyBuddy sends the notifications about your Send conference entry IM , Send conference exit IM , Voice message begin IM , and Voice message end IM to the alternate IM ID that you set in this field. If IM server to server federation has been set up then this ID could be an external ID such as a Google Talk ID. In this way, you can get a notification on your google talk client. Notifications to the Alternate IM ID are in addition to notifications to MyBuddy via the one-X Portal for IP Office. After defining the alternate IM ID, the Google Talk user has to add or invite MyBuddy to the Google Talk friends or buddy list. That is, on Google Talk client the user has to click the +Add button and enter <i>mybuddy@<XMPP_Domain></i> (for example, <i>mybuddy@talk.acme.com</i>) and follow the prompts.

Field	Options	Description
	Advertise on call status	<p>You can set the status of this field to reflect your call status:</p> <ul style="list-style-type: none"> • If you set the status of this field to Presence and Message, your presence will be changed to DND and your status message set to indicate you are on a call. • If you set the status of this field to Message Only, the system will update your status message to indicate you are on the phone. You cannot set or edit the <i>on the phone</i> status message. • If you set the status of this field to None, the system does not alter your status message or presence indicator while you are on the phone.
	Advertise calendar status	<p>You can set the status of this field to reflect your calendar status:</p> <ul style="list-style-type: none"> • If you set the status of this field to Presence and Message, the system updates your status message to indicate you are in a meeting or at an appointment. Additionally, the system sets your presence to DND. • If you set the status of this field as Message Only, the system displays only your calendar message. • If you set the status of this field to None, the system does not alter your status message or presence indicator while you are in a meeting or at an appointment.

10.4.1 Advertise on Call status

You can advertise your XMPP presence status displaying that you are on a call.

1. Navigate to **Configure > IM/Presence > IM/Presence Configuration**.
2. Under **Advertise on Call Status**, select the *Presence and Message* option. This option is set by default.

The screenshot shows the 'one-X Portal for IP Office' interface. The top navigation bar includes 'Main', 'Configure' (highlighted with a red box), and 'Add Tab'. Below this, there are tabs for 'Profiles', 'Telephony', 'DND Exceptions', 'Voicemail', 'Desktop Integration', and 'IM/Presence' (highlighted with a red box). The main content area is titled 'IM/Presence Configuration' (highlighted with a red box). It contains several configuration options with checkboxes: 'Send conference entry IM' (checked), 'Send conference exit IM' (checked), 'Voice message begin IM' (checked), and 'Voice message end IM' (checked). There is an 'Alternate IM ID' text input field. Below that, the 'Advertise on call status' dropdown menu is set to 'Presence and Message' (highlighted with a red box). The 'Advertise calendar status' dropdown menu is also set to 'Presence and Message'. A note at the bottom states: 'Note : Changes to the below configuration will take approximately some time to get reflected in system.'

Now, if you are on a call, the XMPP presence status is displayed as *Busy* and *On the phone* to all the other contacts.

Note: If you have set **Advertise on Call Status** as *Presence and Message*, then you will not see the *Busy* presence status in the top left corner or the **System Directory** of the one-X Portal for IP Office. However, when you are on a call, your status will be reflected as *Busy* and *On the phone* to other users.

10.5 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**^[47]. This only applies for calls direct to your extension number; it does not apply for calls to any [hunt group](#)^[166] 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 for IP Office 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 for IP Office.

1. In the **Configure** tab, select **DND Exceptions**.
2. The list of exceptions appear 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 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](#)^[167] number that is added.

- **To Remove a Number**

To remove a number from the list of exceptions, click **X** next to the number.

3. 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 for IP Office matching numbers in the exceptions list to the [primary phone](#)^[167] 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 for IP Office 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](#)^[167].

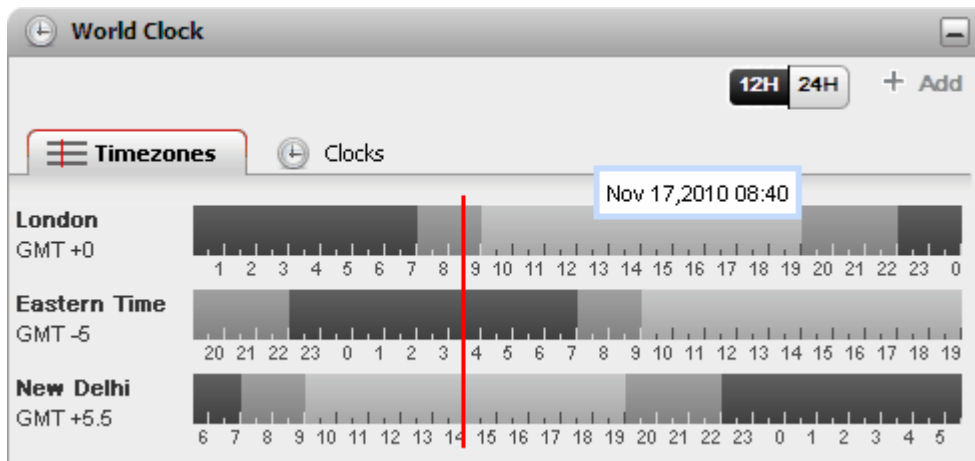
10.6 The World Clock Gadget

The **World Clock** gadget displays the time in selected time zones that you have added to the gadget. You can add up to 5 timezones to your world clock.

The clock display can be viewed in either of two modes, **Time zones** or **Clocks**, selected by clicking on the appropriate tab.

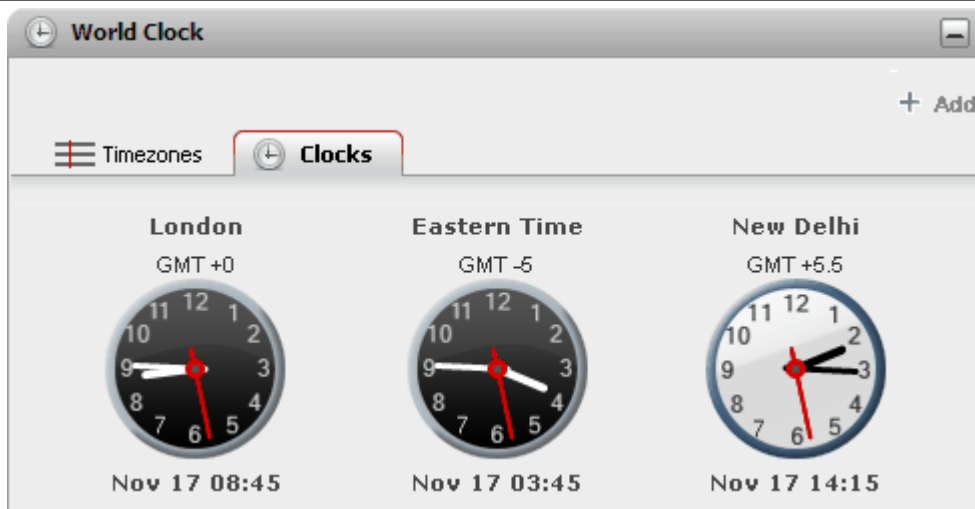
- **Timezones**

In this view, each time zone is indicated as a band that indicates the current time and the daylight hours. Hovering your cursor over any of the time bands displays the current date and time in that time zone.



- **Clock**

In this view, each timezone is shown as a clock.

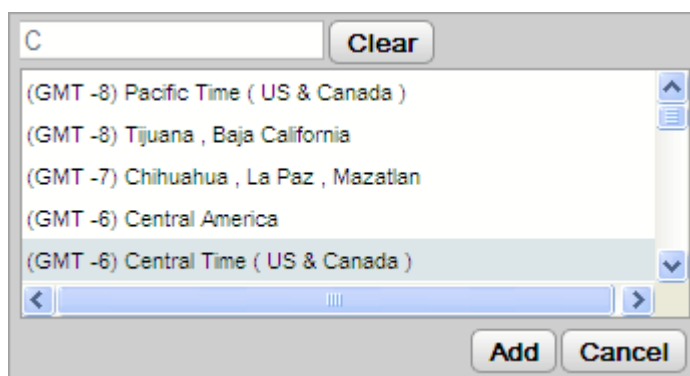


- 12H
 24H
 12/24 Hour

This option is shown in the **Timezones** view. Click on these buttons to switch it between 24 hour and 12 hour display. This affects both the time span shown by the bands and the clock format used beneath each band.

- + Add**

Click on the **+ Add** icon to add another time zone band to the display. The list of world time zones is displayed from which you can select the time zone required for the new band. Use the box at the top to filter the list of time zones by name. You can add up to 5 timezones to your world clock.



- Replace/Delete**

Hovering your cursor over the name of a timezone displays icons for replacing or deleting that time zone.

10.7 Language

one-X Portal for IP Office 8.0 supports **English(US and UK), French, German, Italian, Dutch, Brazilian Portuguese, Latin Spanish, Russian** and **Simplified Chinese**. You can set the language in the login page as an **Administrator** or as a **User**. Set the language only when you are accessing the one X portal for the first time on a browser. To set the language of your preference do the following:

1. Log in as a User.
2. Choose the language listed under **Language**.
3. Click **Login**.

Note: The language that you set is applicable only to the one X Portal. This setting does not affect the language of other websites that you access using the browser.

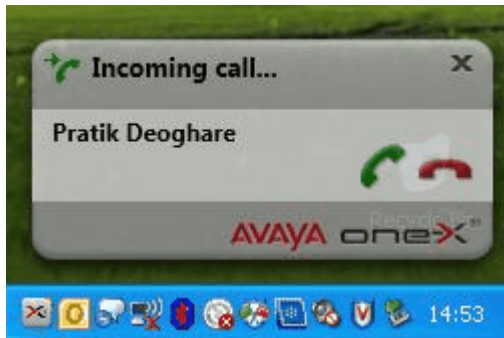
Chapter 11.

one-X Call Assistant

11. one-X Call Assistant

You can use the one-X Call Assistant application to perform a range of call control functions without logging into the one-X Portal for IP Office.

When you make and receive calls the one-X Call Assistant displays messages on your Windows desktop even if you do not have one-X Portal for IP Office running.



You can use one-X Call Assistant to:

- Pop up details of calls.
- Show the corresponding contact in Microsoft Outlook if you run Outlook at the same time as the one-X Call Assistant.
- Select and dial a number that another Windows application displays.
- Start the one-X Portal for IP Office.

Use the one-X Call Assistant (Windows PCs Only)

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Check the one-X Call Assistant system requirements ^[117] • Start the one-X Call Assistant ^[117] • Use the one-X Call Assistant additional features ^[122] | <ul style="list-style-type: none"> • View the one-X Call Assistant icons ^[112] • Start the one-X Portal for IP Office ^[118] | <ul style="list-style-type: none"> • Install the one-X Call Assistant ^[113] • Configure the one-X Call Assistant ^[118] |
|---|---|--|

11.1 one-X Call Assistant System Requirements

Ensure that the following system requirements are met before you install the <%TOASTER%>:

- [Hardware Requirements](#) ^[117]
- [Software Requirements](#) ^[117]

11.1.1 Hardware Requirements

The following are the hardware requirements:

- 1 GHz processor
- 1GB RAM
- 1 GB + free disk space for 32 bit Operating system or 2GB+ free disk space for 64 bit Operating system.

11.1.2 Software Requirements

The following are the supported client operating systems:

- Windows 7 Ultimate x86
- Windows 7 Ultimate N
- Windows 7 Ultimate x64
- Windows 7 Enterprise x86
- Windows 7 Enterprise N
- Windows 7 Enterprise x64
- Windows 7 Professional x86
- Windows 7 Professional N
- Windows 7 Professional x64

-
- Windows 7 Home Premium x86
 - Windows 7 Home Premium N
 - Windows 7 Home Premium x64
 - Windows7 Home Basic x86
 - Windows 7 Home Basic N
 - Windows 7 Starter x86
 - Windows 7 Starter N
 - Windows Vista R2 Enterprise (x64)
 - Windows Vista R2 Enterprise
 - Windows Vista R2 Business (x64)
 - Windows Vista R2 Business
 - Windows Vista R2 Ultimate (x64)
 - Windows Vista R2 Ultimate
 - Windows Vista R2 Home Premium (x64)
 - Windows Vista R2 Home Premium
 - Windows Vista R2 Home Basic
 - Windows Vista R2 Starter Ed. Digital Boost (x64)
 - Windows Vista R2 Starter Ed. Digital Boost
 - Windows Vista R2 Starter
 - Windows Vista Ultimate
 - Windows Vista Ultimate x64 Edition
 - Windows Vista Enterprise
 - Windows Vista Enterprise x64 Edition
 - Windows Vista Business
 - Windows Vista Business x64 Edition
 - Windows Vista Home Premium
 - Windows Vista Home Premium x64 Edition
 - Windows Vista Home Basic
 - Windows Vista Starter Ed. Digital Boost
 - Windows Vista Starter Ed. Digital Boost (x64)
 - Windows Vista Starter
 - Windows XP Professional with SP3
 - Windows XP Professional x64 Edition with SP3
 - Windows XP Home Edition with SP3.

Additional Software Requirements

- Microsoft Internet Explorer 6.0/7.0/8.0.
- Windows Installer 3.1 or later.

11.2 one-X Call Assistant icons

The system displays the one-X Call Assistant icons in the Windows system tray (normally at the lower right corner of the screen). You can right-click the icon to view the available commands and any other additional information.

When you hover the mouse over the one-X Call Assistant icon the system displays the status and the number of voicemail messages that you have received.

-  **Not Connected**

A large red dot indicates that the one-X Call Assistant is not connected to the one-X Portal for IP Office server. The system displays this icon only while the one-X Call Assistant software is starting. If the icon remains in this state, check the [settings](#)¹¹⁸.

-  **Connected**

A large green dot indicates that the one-X Call Assistant is connected to your one-X Portal for IP Office sever.

-  **Missed Calls**

Exclamation marks in the icon indicate that you have missed calls in your call log. When you hover the mouse over the icon the system displays the number of missed calls.

-  **New Voicemail Messages**

A small red dot indicates that you have new voicemail message. When you hover the mouse over the icon the system displays the number of new messages.

-  **New Voicemail Messages**

The indicators for missed calls and new voicemail messages can appear at the same time. When you hover the mouse over the icon the system displays additional details.

11.3 Installing one-X Call Assistant

You can install one-X Call Assistant R8.0 application from the one-X Portal for IP Office server.

Note: If one-X Call Assistant R7.0 is already installed, you must manually uninstall the one-X Call Assistant application. The one-X Call Assistant R8.0 installation does not upgrade or remove the previous installation.

1. Log in to one-X Portal for IP Office.
2. In the **Configuration** tab, select **Desktop Integration**.
3. Click **Install One-X Desktop Clients**.
4. The next steps vary depending on the browser:

- **Internet Explorer or Safari**

The file download menu prompts you with options to perform on the file setup.exe. Select **Run**.

- **Google Chrome or Firefox**

- a. When the browser prompts you, select **Save**. The browser downloads the installation file.
- b. When the download is complete, double click the downloaded file and select **Run**.

The system unpacks the installer prepares to install the one-X Call Assistant software.

5. In the welcome screen, click **Next**.
 - If you have already installed one-X Call Assistant the system displays the following options **Modify**, **Repair** and **Remove**. Select **Modify** to install this version over the existing one. Similarly, if you have a different version already installed the system prompts you to upgrade.
6. Select **I accept the terms in the license agreement**.
7. Click **Next**.
8. Enter your name and the organization that you work for.

The system displays **Setup Type** dialog box.


- a. Select **Complete**, to install both one-X Call Assistant and Avaya IP Office Plug-in.
- b. Select Custom, to install only one of the desktop clients.

9. Click **Next**.
10. Select the program features you want to install.
11. Select a folder where the software should be installed and accept the default prompts.
12. Click **Install**.

The system displays the progress of the installation.

13. Click **Finish**.

Note: Depending on the environment that the one-X Desktop Clients are installed the installation wizard prompts you to restart the system.

14. In the notification area, click  one-X Call Assistant.

The system displays the **General Settings** dialog box.


15. In the **Server Information** section

a. Type the IP address of one-X Portal for IP Office in the **Application Server** field.

b. Type the server port for one-X Portal for IP Office in the **Server Port** field. By default, the server port is 8080.

16. In the **Logon Information** section, type the user name and password that you use to log in to one-X Portal for IP Office.

17. Click **OK**.

The system displays  **Connected** in the notification area and a message when it connects to one-X Portal for IP Office.

If the system is unable to connect to one-X Portal for IP Office, then the system displays  **Not connected**. To check the connection settings right-click the icon and select **Settings**.

11.3.1 Configuring Windows Firewall for one-X Call Assistant

You have to configure the Windows Firewall to establish a communication between the **one-X Call Assistant** client and the server.

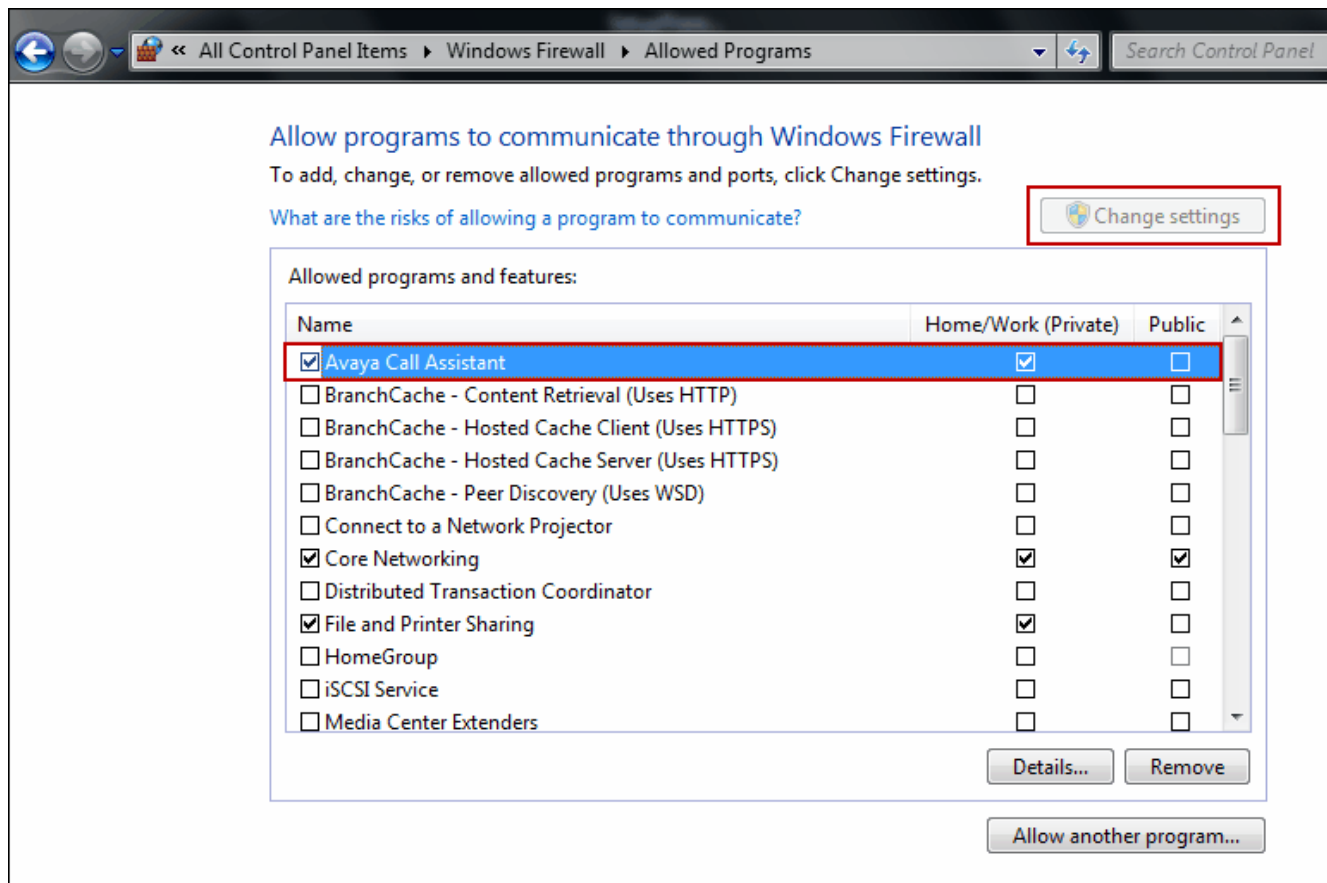
If a firewall is enabled on the computer of the user, the incoming traffic from the server is blocked.

You will receive an error message or notification stating that *Server unable to reach client*.

Perform the following procedures to allow incoming traffic from the server and use the **one-X Call Assistant** even if the Windows Firewall is turned on.

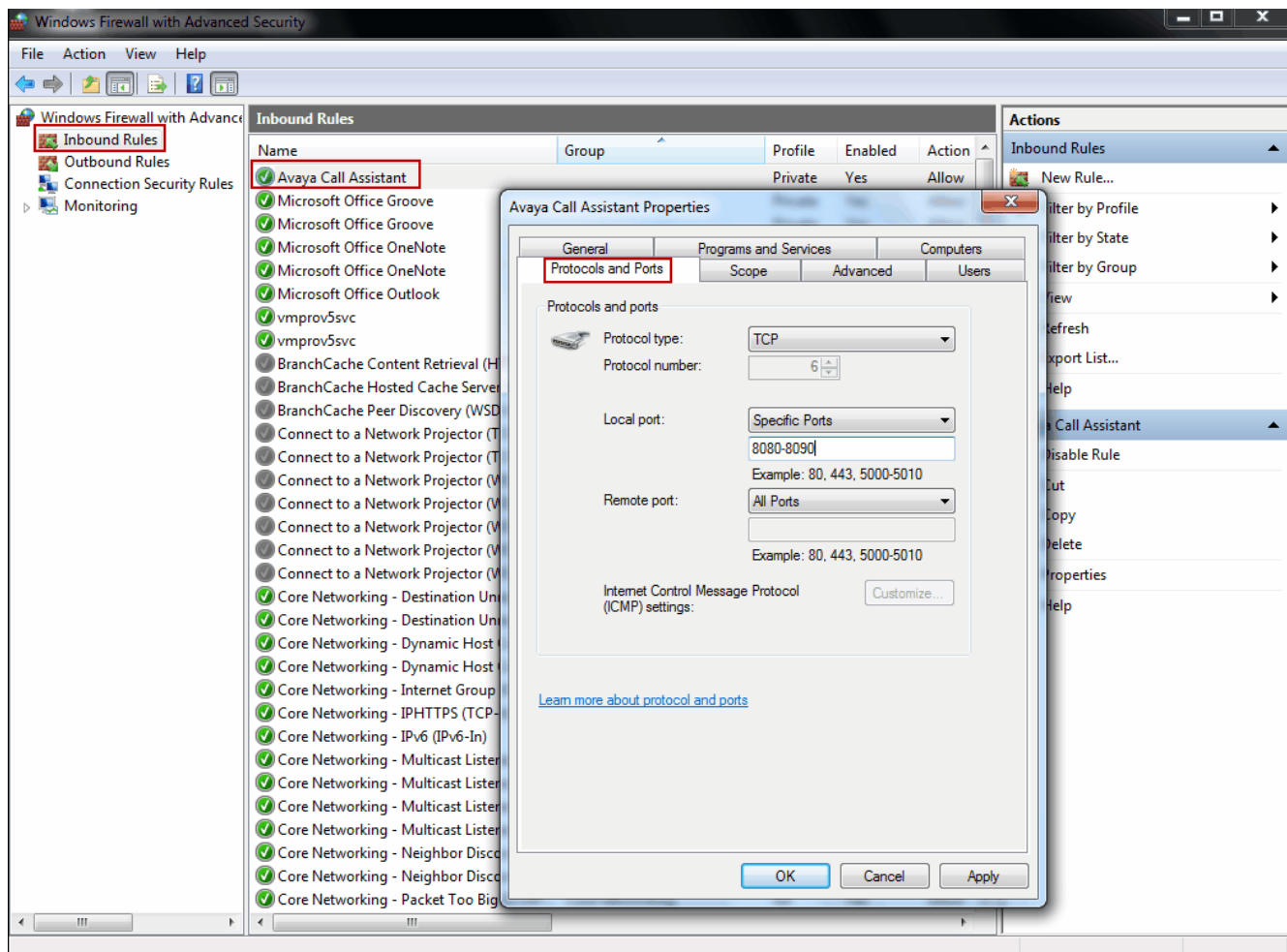
To allow the one-X Call Assistant to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Allowed Programs**.
3. In the **Allow programs to communicate through Windows Firewall**, click **Change settings**.
4. Select **Avaya Call Assistant**.



To allow the one-X Call Assistant to communicate through a specific TCP port (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the right pane, select Avaya Call Assistant.
5. Right-click **Avaya Call Assistant**.
6. Select **Properties**.
7. In the **Avaya Call Assistant Properties** dialog, click the **Protocols and Ports** tab.
8. In **Protocol type** section, select **TCP**.
9. In **Local port** section, select **Specific Ports**.
10. Set the TCP range from 8080 to 8090.

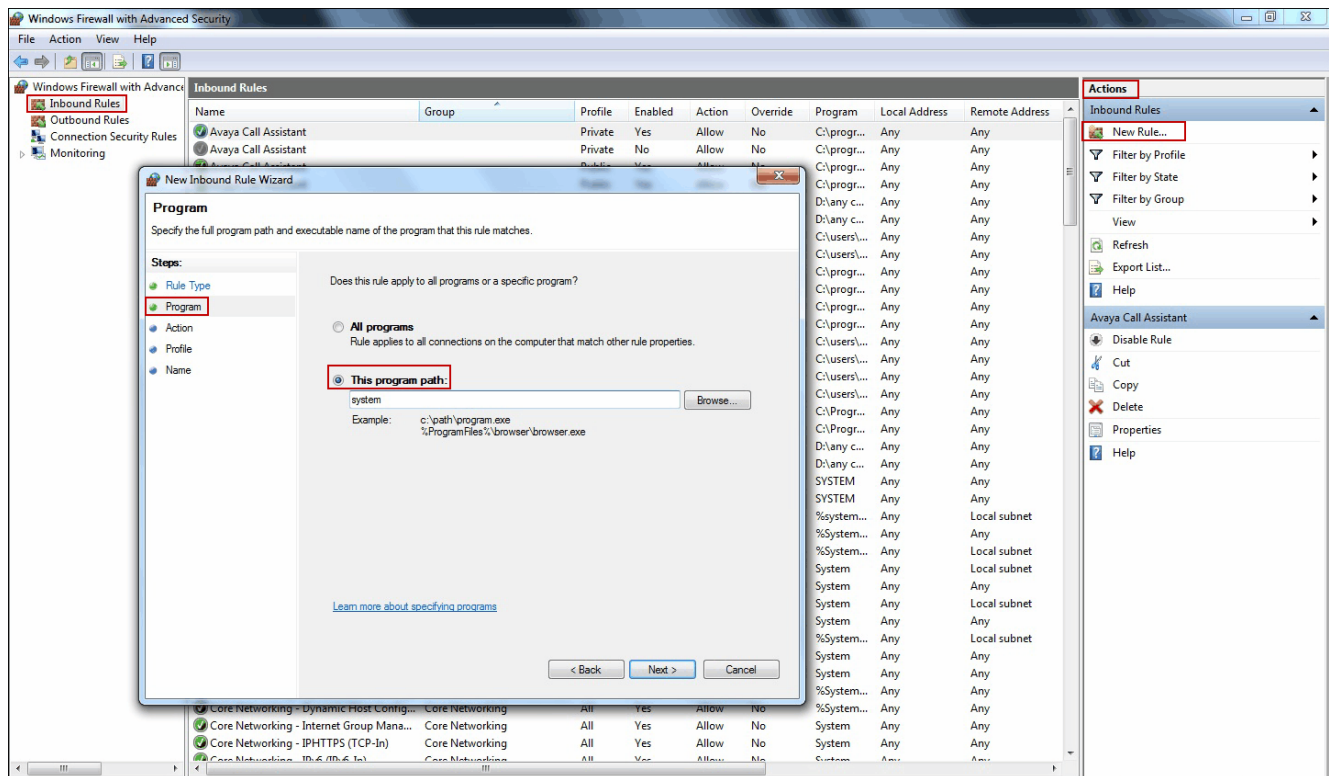


To create an inbound rule to allow the one-X Call Assistant to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the **Actions** pane to the right, click on **New Rule**.

The system displays the **New Inbound Rule Wizard** dialog.

5. In the **Steps** pane to the left, select **Program**.
6. In the right pane, select **This program path**.
7. In the **This program path** section, type *system*.
8. Click **Next** option for the rest of the screens.
9. Name the service. For example, *WCF Service Rule*.



Note: Window XP will have similar steps that allows you to configure the firewall.

11.4 Starting one-X Call Assistant

By default the one-X Call Assistant automatically starts when you start your computer. However, you can also start it manually.

To start one-X Call Assistant manually:

1. Click **Start**.
2. Select **Programs**.
3. Select **IP Office**.
4. Click **one-X Desktop Clients**.

When you start the one-X Call Assistant for the first time the system displays the **General Settings** dialog box.





Note: if you have not updated the following fields software installation, then update the fields.

- a. In the **Server Information** section:
 - i. Type the IP address of one-X Portal for IP Office server in the **Application Server** field.
 - ii. Type the server port for one-X Portal for IP Office in the **Server Port** field. By default, the server port is 8080.

b. In the **Logon Information** section:

- i. Type the user name that is set for one-X Portal for IP Office in the **User Name** field.
- ii. Type the password set for one-X Portal for IP Office in the **Password** field.


c. Click **OK**.

- If one-X Call Assistant is not connected to one-X Portal for IP Office server, then the system displays  **Not Connected** in the notification area. After a few seconds the system displays a message that indicates whether one-X Call Assistant is connected to one-X Portal for IP Office or not.
- If the one-X Call Assistant is connected to the one-X Portal for IP Office server, then the system displays  **Connected** or  **Missed calls**, if you have any missed calls. When you hover the mouse over the icon in the notification area the system displays the number of missed calls you have and also the number of voicemail messages.
- If the one-X Call Assistant is not connected to the one-X Portal for IP Office server, it is because the one-X Call Assistant settings are incorrect. Right-click  **Not Connected** and select **Settings**.

11.5 Starting one-X Portal for IP Office

When you have one-X Call Assistant running, you can use the one-X Call Assistant to start one-X Portal for IP Office, and log in to the portal.

- If you already have one-X Portal for IP Office running in a browser window, and if that browser session is logged out. See the **Tip** below.

1. To log in using the one-X Call Assistant, right-click  **Connected**.
2. Select **Open one-X Portal**.

Tip: Use the one-X Call Assistant to log in

If you enable one-X Call Assistant pop-ups, use the [one-X Call Assistant icon to log in](#)^[118] to the one-X Portal for IP Office rather than logging in through the browser. The one-X Call Assistant caches information that ensure the subsequent logins during the Windows session much faster (almost immediate).

1. After logging in to the one-X Call Assistant, when you answer a call by using the screen pop message:
 - a. If the existing one-X Portal for IP Office window is minimized, then the system restores it immediately.
 - b. If you have logged out, the system logs you in again immediately using the cached session.
2. If you use a browser to log in to the one-X Portal for IP Office, and answer calls using screen pop-ups messages the system logs you out of the current session and you in on a new window. However this can take up to 20 seconds.

The browser pop-up window needs a one-X Portal for IP Office supported web browser installed on the computer of the user having **Microsoft Internet Explorer 9** or **Microsoft Internet Explorer 10**.


The one-X Portal for IP Office supported web browser should be set as the default browser to navigate to the one-X Portal for IP Office web client.

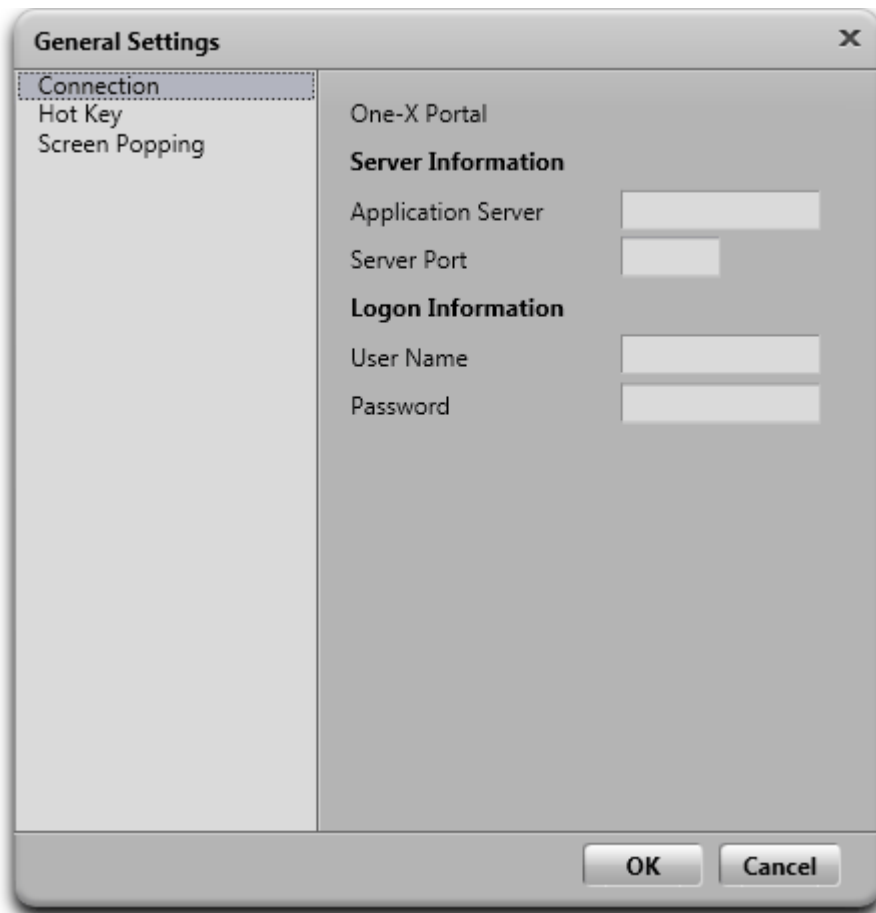
11.6 one-X Call Assistant settings

You can set the [Connection](#)^[119], [Hot Key](#)^[119], and [Screen Popping](#)^[120] for one-X Call Assistant.

11.6.1 Connection

To set the connection details for one-X Call Assistant:

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Connection**.




4. In the **Server Information** section:
 - a. Type the IP address of one-X Portal for IP Office server in the **Application Server** field.
 - b. Type the server port for one-X Portal for IP Office in the **Server Port** field. By default, the server port is 8080.
5. In the **Logon Information** section:
 - a. Type the user name that is set for one-X Portal for IP Office in the **User Name** field.
 - b. Type the password set for one-X Portal for IP Office in the **Password** field.
6. Click **OK**.

11.6.2 Hot Key Dialing

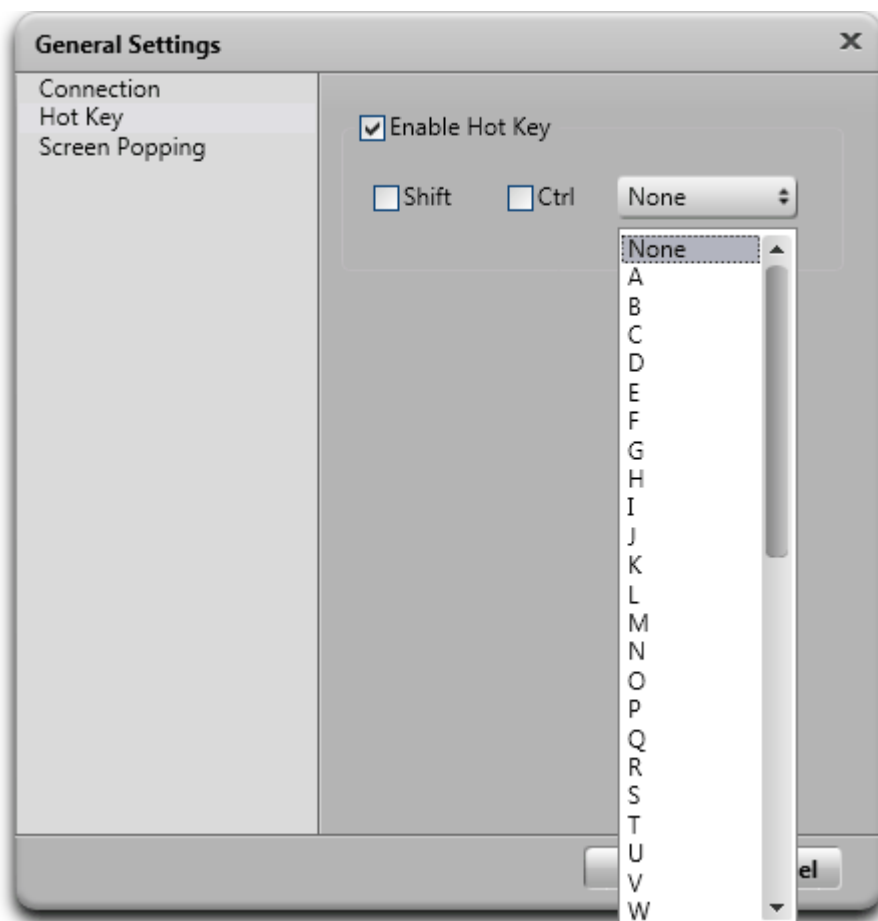
You can make a call by dialing a number in a the Windows application.

1. Select or highlight the number in the Windows application.
2. Press the one-X Call Assistant hot key combination.
 - The number should be appropriate for dialing. For example, if your phone system uses an external dialing prefix then it must be present in the number. You cannot edit the number before you dial it.
 - You cannot predict the hot key combination that always works. For example, if the hot key combination that you use for one-X Call Assistant is same as the number used by a function in the application, then the function set in the application takes precedence over the hot key dialing that you set in one-X Call Assistant.

To set the one-X Call Assistant dialing Hot Key combination

1. In the notification area, right-click  **Connected** and
2. Select **Settings**.

3. In the navigation pane of the **General Settings** dialog box, select **Hot Key**.



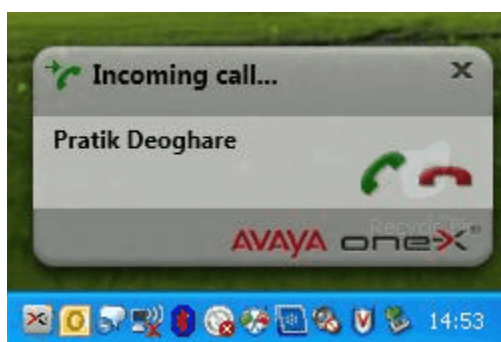
4. Select **Enable Hot Key**.

5. Select the hot key combination that you want to use.

6. Click **OK**.

11.6.3 Screen Popping

You can set the one-X Call Assistant to display information about the calls. The system displays this information as a [popup message](#)^[122] which includes links for actions that you can perform such as answer the call, drop the call, and others. If you answer a call using the popup message, the one-X Call Assistant [displays the one-X Portal for IP Office](#)^[118].



The one-X Call Assistant looks for contacts in your Microsoft Outlook 2003 or 2007 and displays the contact based on the call information. You can set the Outlook screen popping based on the calls that you receive and or based on the calls that you make. The system displays this information only if Outlook is running.

Tip: Use the one-X Call Assistant to log in


If you enable one-X Call Assistant pop-ups, use the [one-X Call Assistant icon to log in](#)^[118] to the one-X Portal for IP Office rather than logging in through the browser. The one-X Call Assistant caches information that ensure the subsequent logins during the Windows session much faster (almost immediate).

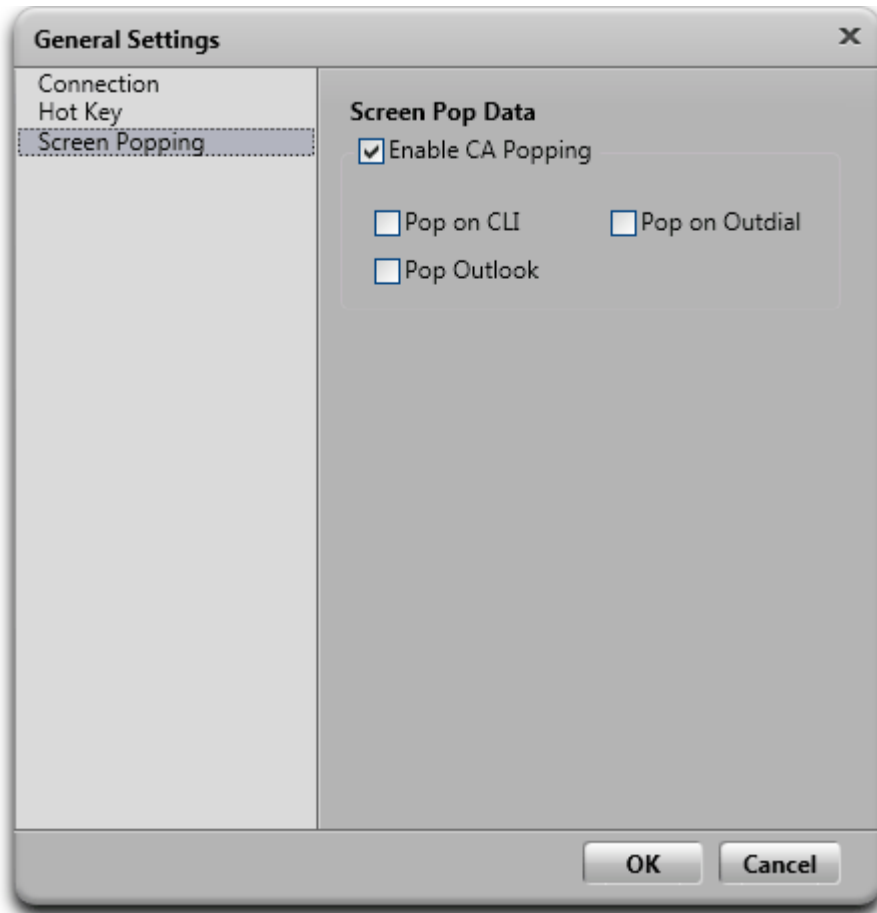
1. After logging in to the one-X Call Assistant, when you answer a call by using the screen pop message:

- a. If the existing one-X Portal for IP Office window is minimized, then the system restores it immediately.

- b. If you have logged out, the system logs you in again immediately using the cached session.
- 2. If you use a browser to log in to the one-X Portal for IP Office, and answer calls using screen pop-ups messages the system logs you out of the current session and you in on a new window. However this can take up to 20 seconds.

Screen Pop Settings

1. In the task bar, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Screen Popping**.



4. Enable the settings that you would like to set.
5. Click **OK**.

Fields	Description
Enable CA Popping	The one-X Call Assistant enables the screen pop-ups based on the fields that you select and the one-X Call Assistant system messages ⁽¹²²⁾ . Ensure that you select this option only if you are launching one-X Portal for IP Office using the one-X Call Assistant icon, see the Tip for more information.
Pop on CLI	The one-X Call Assistant pops the incoming calls with the caller ID number of the call, in the application that you select.
Pop on Outdial	The one-X Call Assistant pops the outgoing calls that you dial with the caller ID number of the call, in the application that you select.
Pop Outlook	The one-X Call Assistant pops the information about the calls for the contacts in the Address Book of your Outlook.

11.7 one-X Call Assistant additional features

There are various features supported by the one-X Call Assistant application.

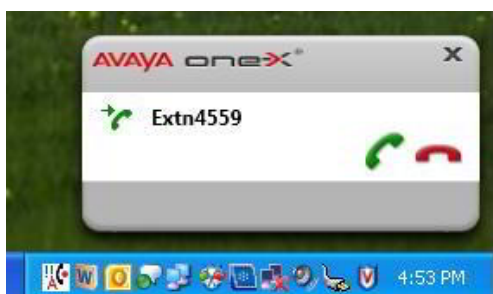
- [one-X Call Assistant messages](#) ^[122]
- [Voicemail messages](#) ^[124]
- [Missed calls](#) ^[124]
- [Multiple language support](#) ^[124]
- [Help menu](#) ^[125]
- [New version available notification](#) ^[125]

11.7.1 one-X Call Assistant Messages

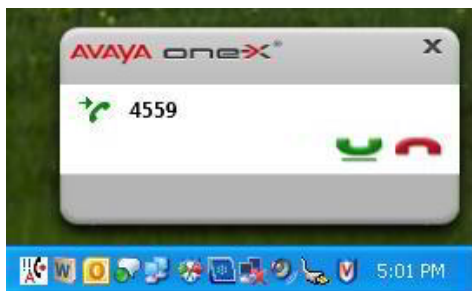
When you select the [Enable CA Popping](#) ^[126], one-X Call Assistant displays the system messages and the details of the calls you make and receive.

When you make and receive calls, the one-X Call Assistant displays the call progress. The system displays the name or only the number of the party at the other end of the call.

Incoming Call Message

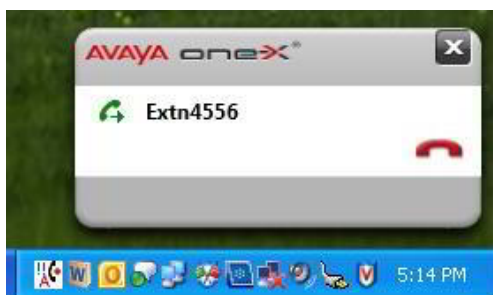


- When you have a call waiting to be answered, the one-X Call Assistant displays the details of the caller. Click **Answer** to answer the call. When you answer a call the system [restores or starts a one-X Portal for IP Office session](#) ^[118].



- The system displays this message when the call is connected.

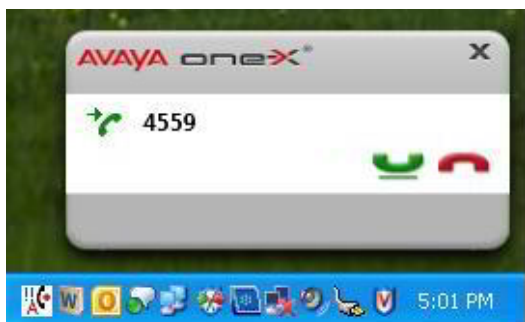
Outgoing Call Messages



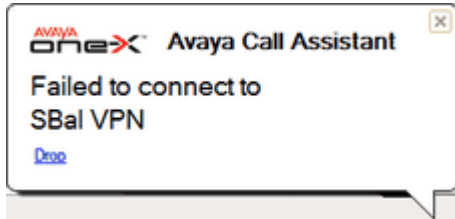
When you make a call, using your phone, one-X Portal for IP Office or [one-X Call Assistant](#) ^[119], the system displays the details of the call that you make and the progress of the call. You can use the **Drop** option to end the call.

- The system displays this message when you make a call that is yet to be answered.

For some types of external calls, for example analog phone lines, the system does not detect the progress of the call and displays the call as connected even though the call is still ringing.

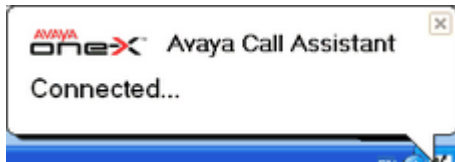


- The system displays this message when the call is connected.

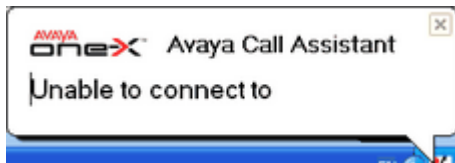



- This message indicates that the call attempt failed for some reason.

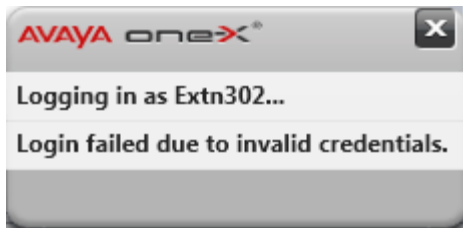
one-X Call Assistant Operation Messages




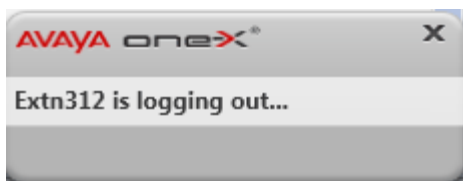
- The system displays this message when one-X Call Assistant starts and is logging in to the one-X Portal for IP Office server to send and receive information about your calls.




- The system displays this message if one-X Call Assistant is not connected to one-X Portal for IP Office.
- If this happens, check that you can log in to one-X Portal for IP Office using your web browser. If successful, right-click  **Connected** and select **Settings**. Verify that the details in the **Connection** dialog box are correct and click **OK**.




- The system displays this message if one-X Call Assistant can connect to the one-X Portal for IP Office server but the user name or password details do not match your settings for a one-X Portal for IP Office login.
- Right-click  **Connected** and select **Settings**. Verify details in the **Connection** dialog box are correct and click **OK**.




- The system displays this message if you right-click  **Connected** and select **Logout**.

11.7.2 Voicemail Messages

When you have any new voicemail messages in your mailbox, the system displays  **New Voicemail Messages** . If you hover the mouse over the icon, the system displays information about the number of new voicemail messages.

11.7.3 Missed Calls

When you have any missed calls in your one-X Portal for IP Office call log, the system displays  **Missed Calls** in the notification area. If you hover the mouse over the icon, the system displays information about the number of missed calls.

To clear the missed calls from your one-X Portal for IP Office call log. In the notification area, right-click  **Missed Calls** and select **Clear Missed Calls**.

11.7.4 Multiple language support

The one-X Call Assistant supports multiple languages. The appropriate language is selected for the one-X Call Assistant application depending on the language set in the **Regional Settings** of your computer.

Note: If the language in the **Regional Settings** is not supported by the one-X Call Assistant, then **English** (by default) is selected as the display language.

one-X Call Assistant supports the following languages:

1. English (US)
2. Chinese
3. Dutch
4. English (UK)
5. French
6. German
7. Italian
8. Portuguese (Brazil)
9. Russian
10. Spanish

11.7.5 Help menu

A help menu is added to the context menu of one-X Call Assistant.

1. Right-click on the **context menu**.
2. Click on the **help menu**.

A browser pop-up window is displayed that explains about the functionality of CA.

Note: English is the only supported language for the help file.

11.7.6 New version available notification

When you login to the one-X Portal for IP Office, you will receive a notification if a new server version is detected. The one-X Call Assistant automatically notifies you of the availability of the new version. You need to manually download the new version from the one-X Portal for IP Office and install it.



Chapter 12.

Avaya IP Office Plug-in for Microsoft® Outlook®

12. Avaya IP Office Plug-in for Microsoft® Outlook®

You can use the Avaya IP Office Plug-in with Microsoft® Outlook®. When you have a meeting scheduled in your Outlook calendar and if you need to call in, you can directly log in to one-X Portal for IP Office and make a call, answer a call, transfer a call. You don't have to open one-X Portal for IP Office using a browser and then make a call.

Use the Avaya IP Office Plug-in for Microsoft® Outlook®

- | | | |
|--|--|--|
| <ul style="list-style-type: none">• Check the Avaya IP Office Plug-in system requirements ^[126]• Log out of the Avaya IP Office Plug-in ^[134]• Use the Avaya IP Office Plug-in call functions ^[137] | <ul style="list-style-type: none">• Install the Avaya IP Office Plug-in ^[129]• Configure the Avaya IP Office Plug-in ^[134]• Use the Avaya IP Office Plug-in additional features ^[143] | <ul style="list-style-type: none">• Log into the Avaya IP Office Plug-in ^[134]• Make a call using the Avaya IP Office Plug-in ^[136] |
|--|--|--|

12.1 Avaya IP Office Plug-in System Requirements

Ensure that the following system requirements are met before you install the Avaya IP Office Plug-in:

- [Hardware Requirements](#) ^[128]
- [Software Requirements](#) ^[128]
- [Microsoft® Outlook® versions](#) ^[129]

12.1.1 Hardware Requirements

The following are the hardware requirements:

- 1 GHz processor
- 1GB RAM
- 1 GB + free disk space for 32 bit Operating system or 2GB+ free disk space for 64 bit Operating system.

12.1.2 Software Requirements

The following are the supported client operating systems:

- Windows 7 Ultimate x86
- Windows 7 Ultimate N
- Windows 7 Ultimate x64
- Windows 7 Enterprise x86
- Windows 7 Enterprise N
- Windows 7 Enterprise x64
- Windows 7 Professional x86
- Windows 7 Professional N
- Windows 7 Professional x64
- Windows 7 Home Premium x86
- Windows 7 Home Premium N
- Windows 7 Home Premium x64
- Windows7 Home Basic x86
- Windows 7 Home Basic N
- Windows 7 Starter x86
- Windows 7 Starter N
- Windows Vista R2 Enterprise (x64)
- Windows Vista R2 Enterprise
- Windows Vista R2 Business (x64)
- Windows Vista R2 Business
- Windows Vista R2 Ultimate (x64)
- Windows Vista R2 Ultimate

- Windows Vista R2 Home Premium (x64)
- Windows Vista R2 Home Premium
- Windows Vista R2 Home Basic
- Windows Vista R2 Starter Ed. Digital Boost (x64)
- Windows Vista R2 Starter Ed. Digital Boost
- Windows Vista R2 Starter
- Windows Vista Ultimate
- Windows Vista Ultimate x64 Edition
- Windows Vista Enterprise
- Windows Vista Enterprise x64 Edition
- Windows Vista Business
- Windows Vista Business x64 Edition
- Windows Vista Home Premium
- Windows Vista Home Premium x64 Edition
- Windows Vista Home Basic
- Windows Vista Starter Ed. Digital Boost
- Windows Vista Starter Ed. Digital Boost (x64)
- Windows Vista Starter
- Windows XP Professional with SP3
- Windows XP Professional x64 Edition with SP3
- Windows XP Home Edition with SP3.

Additional software requirements:

- Microsoft Internet Explorer 6.0/7.0/8.0.
- Windows Installer 3.1 or later.

12.1.3 Microsoft® Outlook® versions

The following are the supported Microsoft® Outlook® versions:

- Microsoft® Outlook® 2003
- Microsoft® Outlook® 2007
- Microsoft® Outlook® 2010

12.2 Installing Avaya IP Office Plug-in

You can install Avaya IP Office Plug-in from the one-X Portal for IP Office server.

1. Log in to one-X Portal for IP Office.
2. In the **Configuration** tab, select **Desktop Integration**.
3. Click **Download One-X Desktop Clients**.
4. The next steps vary depending on the browser:
 - **Internet Explorer or Safari**
The file download menu prompts you with options to perform on the file setup.exe. Select **Run**.
 - **Google Chrome or Firefox**
 - a. When the browser prompts you, select **Save**. The browser downloads the installation file.
 - b. When the download is complete, double click the downloaded file and select **Run**.

The system unpacks the installer and prepares to install the Avaya IP Office Plug-in software.

5. On the welcome screen, click **Next**.

If you have already installed one-X Call Assistant the system displays the following options **Modify**, **Repair** and **Remove**

- a. Select **Modify** to install this version over the existing one.

If you have a different version already installed the system prompts you to upgrade.

6. Select **I accept the terms in the license agreement**.

7. Click **Next**.

8. Enter your name and the organization that you work for.

The system displays **Setup Type** dialog box.

- Select **Complete**, to install both one-X Call Assistant and Avaya IP Office Plug-in.
- Select Custom, to install only one of the desktop clients.

9. Click **Next**.

10. Select the program features you want to install.

11. Select a folder where the software should be installed and accept the default prompts.

12. Click **Install**.

The system displays the progress of the installation.

13. Click **Finish**.

Note: Depending on the environment of the one-X Desktop Clients the installation wizard prompts you to restart the system.

14. Log in to Microsoft Outlook.

15. In the tool bar, click **Avaya IP Office Plug-in**.

12.2.1 Configuring Windows Firewall for Avaya IP Office Plug-in

You have to configure the Windows Firewall to establish a communication between the Avaya IP Office Plug-in client and the server.

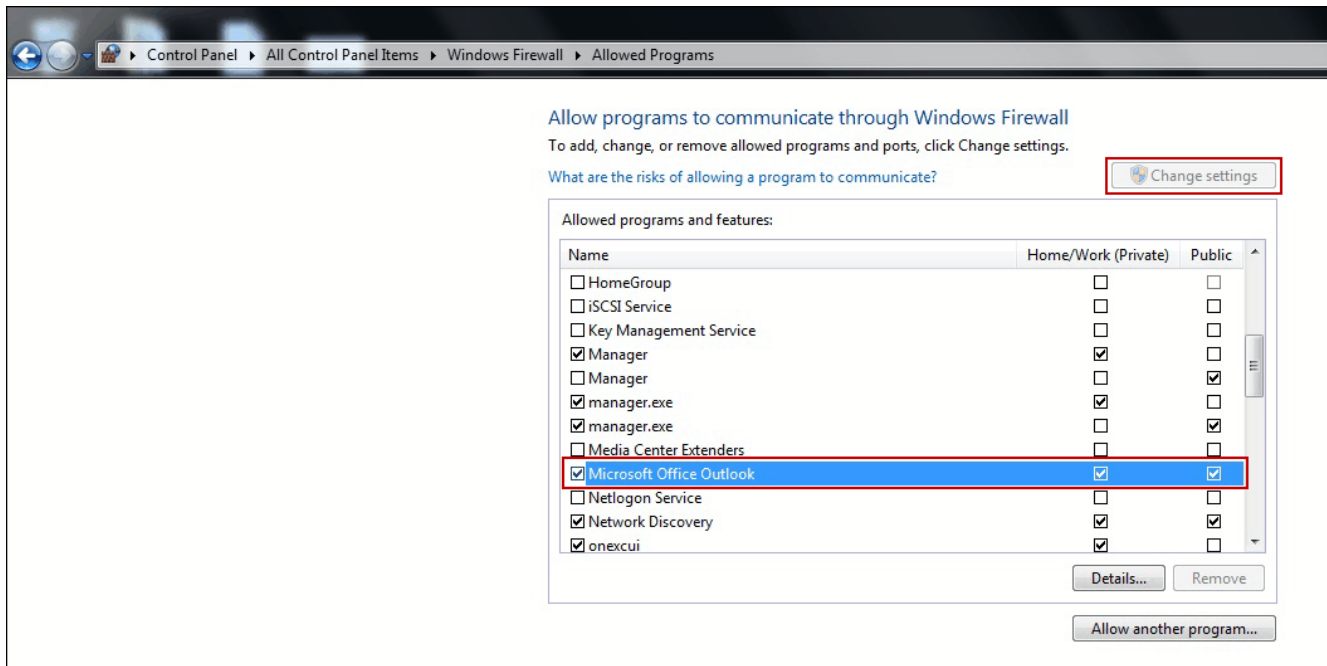
If a firewall is enabled on the computer of the user, the incoming traffic from the server is blocked.

You will receive an error message or notification stating that *Server unable to reach client*.

Perform the following procedures to allow incoming traffic from the server and use the Avaya IP Office Plug-in even if the Windows Firewall is turned on.

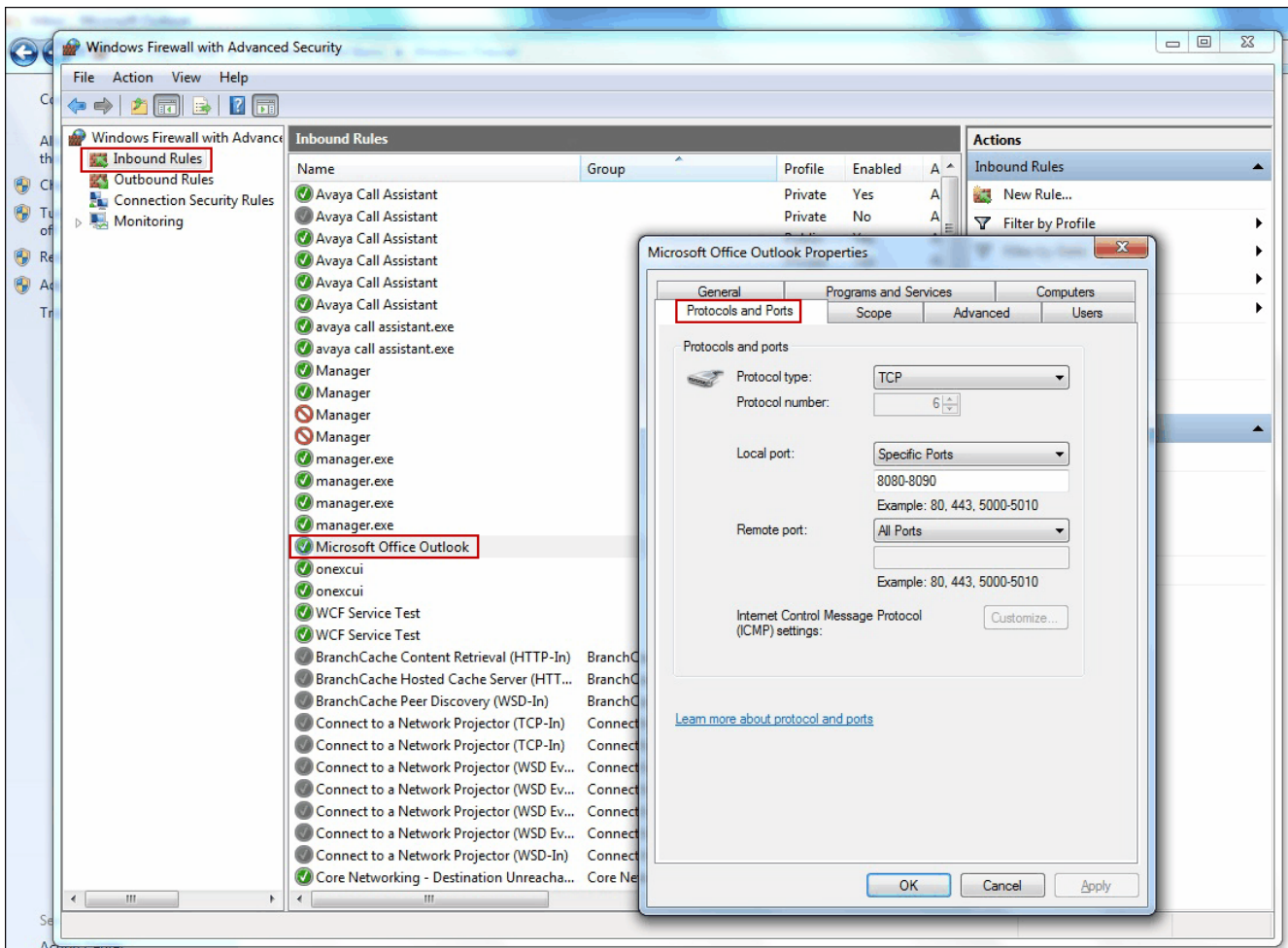
To allow the Avaya IP Office Plug-in to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Allowed Programs**
3. In the **Allow programs to communicate through Windows Firewall**, Click **Change settings**.
4. Select **Microsoft Office Outlook**.



To allow the Avaya IP Office Plug-in to communicate through a specific TCP port (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the right pane, select **Microsoft Office Outlook**.
5. Right-click **Microsoft Office Outlook**.
6. Select **Properties**.
7. In the **Microsoft Office Outlook Properties** dialog, click the **Protocols and Ports** tab.
8. In **Protocol type** section, select **TCP**.
9. In **Local port** section, select **Specific Ports**.
10. Set the TCP range from 8080 to 8090.

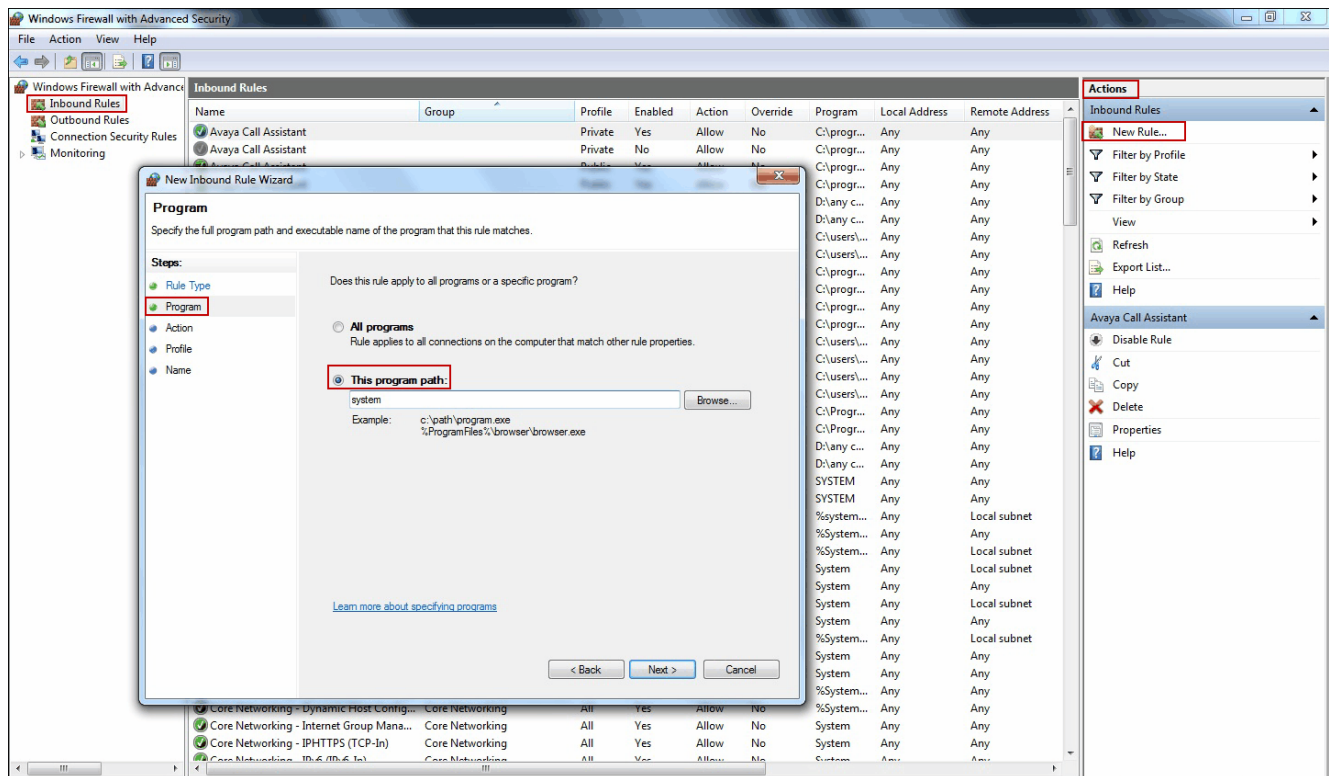


To create an inbound rule to allow the Avaya IP Office Plug-in to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the **Actions** pane to the right, click on **New Rule**.

The system displays the **New Inbound Rule Wizard** dialog.

5. In the **Steps** pane to the left, select **Program**.
6. In the right pane, select **This program path**.
7. In the **This program path** section, type *system*.
8. Click **Next** option for the rest of the screens.
9. Name the service. For example, *WCF Service Rule*.



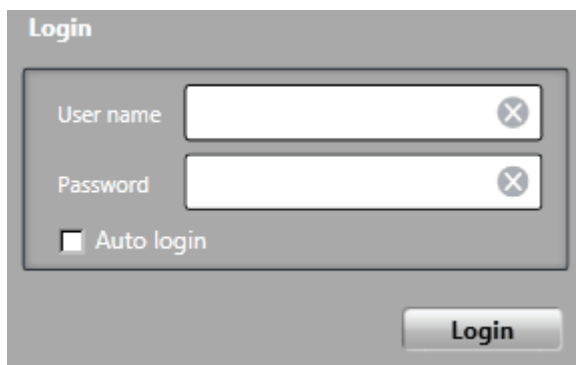
Note: Window XP will have similar steps that allows you to configure the firewall.

12.3 Logging in

You can log in to one-X Portal for IP Office using Avaya IP Office Plug-in.

To log in to one-X Portal for IP Office:

1. Log in to Microsoft Outlook.
2. In the toolbar, click **Avaya IP Office Plug-in**. The system displays the **Login** dialog box.





3. In the **Login** section:
 - a. Type the user name of the one-X Portal for IP Office that you would like to connect as in the **User Name** field.
 - b. Type the password of the user name set on one-X Portal for IP Office in the **Password** field.

Note: If **Auto login** is enabled, then Avaya IP Office Plug-in automatically logs into the one-X Portal for IP Office server at the launch of Microsoft Outlook. You can also select this option from the **Settings**.

4. Click **Login**.

12.4 Logging out

To log out of one-X Portal for IP Office:

1. In the top right corner of the **Avaya IP Office Plug-in** window, right-click  **Options**.
2. Select **Logout** . The system displays the **Logout** dialog box.




3. Click **Logout**.

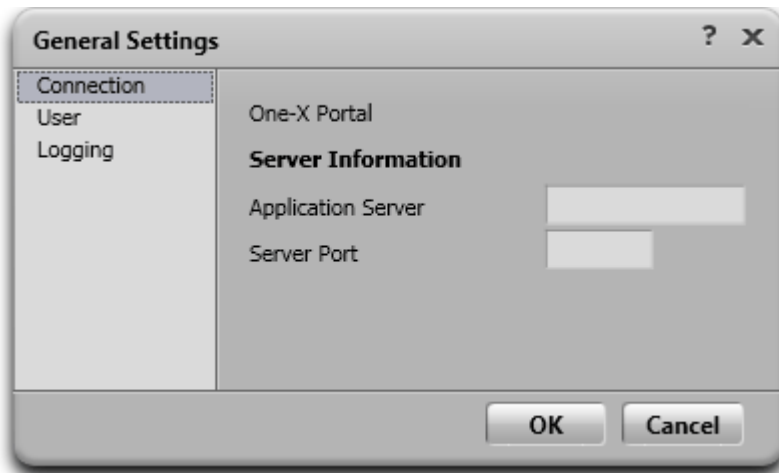
12.5 Avaya IP Office Plug-in settings

You can set the [Connection](#) ^[135], [User](#) ^[135], and [Logging](#) ^[136] settings for Avaya IP Office Plug-in.

12.5.1 Connection

To set the connection details for Avaya IP Office Plug-in:


1. Click the Avaya IP Office Plug-in . The system displays the **Avaya IP Office Plug-in** to the right of the outlook application.
2. To the top right corner, click . The drop-down menu displays a *Minimize* and *Settings* option.
3. Click on **Settings**.
4. In the navigation pane, select **Connection**.

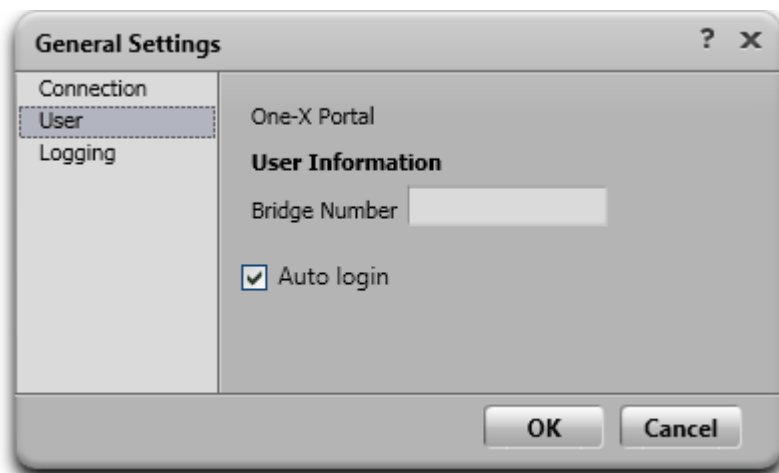


5. In the **Server Information** section:
 - a. Type the IP address of the one-X Portal for IP Office that you would like to connect to in the **Application Server** field.
 - b. Type the server port for one-X Portal for IP Office in the **Server Port** field. By default, the server port is 8080.
6. Click **OK**.

12.5.2 User

To configure the User settings:

1. Click the Avaya IP Office Plug-in . The system displays the **Avaya IP Office Plug-in** to the right of the outlook application.
2. To the top right corner, click . The drop-down menu displays a *Minimize* and *Settings* option.
3. Click on **Settings**.
4. In the navigation pane, select **User**.



5. In the **User Information** section:
 - a. Type the Bridge Number of the one-X Portal for IP Office that you would like to connect to when you want to use a MeetMe conferencing bridge to host a meeting.


Note: If **Auto login** is enabled, then Avaya IP Office Plug-in automatically logs into the one-X Portal for IP Office server at the launch of Microsoft Outlook. You can also select this option from the **Settings**.

6. Click **OK**.

12.5.3 Logging

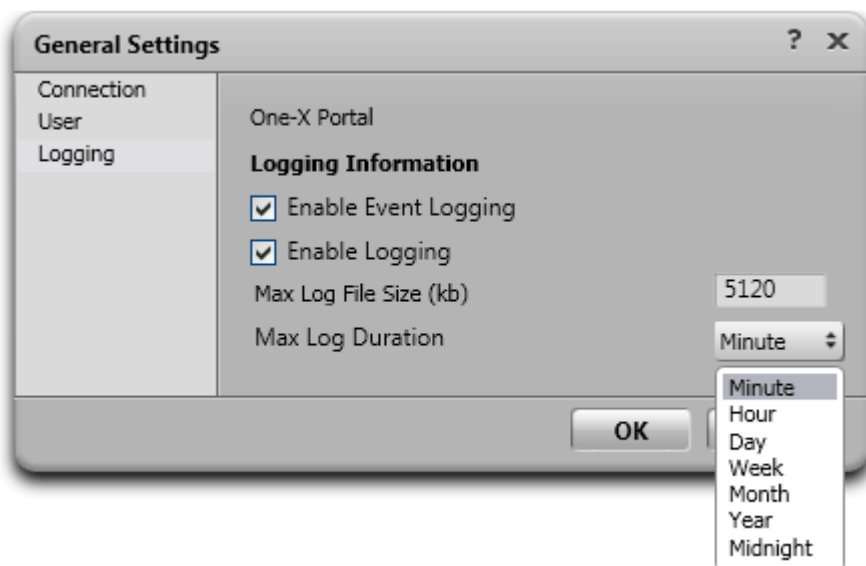
To configure the Logging settings:

1. Click the Avaya IP Office Plug-in . The system displays the **Avaya IP Office Plug-in** to the right of the outlook application.

2. To the top right corner, click . The drop-down menu displays a *Minimize* and *Settings* option.

3. Click on **Settings**.

4. In the navigation pane, select **Logging**.



5. In the **Logging Information** section, you can

- a. select the Enable Event logging option.
- b. Select the Enable Logging option.
- c. Specify the **Max Log File Size (KB)** to be allowed.
- d. Specify the **Max Log Duration** in minute, hour, day, week, month, year and midnight from the drop-down menu

6. Click **OK**.

The log files are created at *C:\Documents and Settings\Current User\Application Data\Avaya\IP Office\Avaya IP Office Plug-In for Microsoft® Outlook\Logging*.

Note: *Current User* is the name of the user who is currently logged into Windows.

To access the log files that are created:

1. Click **Start > Run**.
2. In the **Run** dialog box, type *%appdata%\Avaya\IP Office\Avaya IP Office Plug-In for Microsoft® Outlook\Logging*
3. Click **OK**.

12.6 Making a call using Avaya IP Office Plug-in

You can make calls directly using Avaya IP Office Plug-in by:

- [Typing name or number](#)^[136]
- [Using the dial pad](#)^[137]
- [Adding an account code and subject](#)^[137]


Note: You need to add the external dialing prefix used by your telephone system to the number while making an external call.

12.6.1 Typing name or number

You call a contact by typing the name or number of a person in Avaya IP Office Plug-in.

To make a call:

1. Type the name or the number of the contact in the **Enter name or number** field.

2. Press **Enter** or click  **Call**.

For more information on adding an account code and a subject to a call see [Adding an account code and a subject](#) ^[137]

12.6.2 Using the dial pad

You can call a contact by using the dial pad in Avaya IP Office Plug-in.

To make a call:

1. Click  **dial pad**.

2. Type the number of the contact you want to call.

3. Click  **Call**.

For more information on adding an account code and a subject to a call see [Adding an account code and a subject](#) ^[137]

12.6.3 Adding an account code and a subject

You can also add the account code and subject to a call.

Prerequisites:

You need a valid account code to make external calls.

To add the subject and account code for a call:

1. Click  **More**.

2. Type the subject in the **Subject of call** field.

The system displays the subject in the call details section. If you are calling an internal contact, the system displays the subject on the phone or in the one-X Portal for IP Office call display.

3. Type the account code in the **Account Code** field.

The system adds the account code in the **Call log** after the call.

4. Click **OK**.

12.7 Avaya IP Office Plug-in call functions

The Avaya IP Office Plug-in for Microsoft® Outlook® provides various call functions.

- [Integrating a call](#) ^[137]
- [Answering a call](#) ^[138]
- [Placing a call on mute](#) ^[138]
- [Holding or unholding a call](#) ^[138]
- [Transferring a call](#) ^[138]
- [Ending a call](#) ^[139]
- [Starting a conference call](#) ^[139]

12.7.1 Integrating call with Outlook Features

The call functionality is available in the outlook plug-in pane. You can initiate a call from the context menu. The call functionality is available in Outlook 2007 and Outlook 2010.

Note: Outlook 2003 does not provide the call function.

Calling from Contact cards:

1. Right-click the contact. The contact numbers displays in the menu.
2. Click **IP Office - Call**.
3. Click the preferred number from the menu to initiate a call.

Calling the Email recipients:


1. Right-click the The contact numbers must be present on the exchange server.
2. Click **IP Office - Call**.
3. Click the preferred number from the menu to initiate a call.

Note: This feature is available in Outlook 2010.

Calling from meeting request:

1. Right-click the meeting request. The meeting request subject must contain the contact numbers.
2. Click **IP Office - Call**.
3. Click the preferred number from the menu to initiate a call.

12.7.2 Answering a call using Avaya IP Office Plug-in

- To answer an incoming call, click  .

After you answer an incoming call, a Call window pops up displaying the call as an active call in **Avaya IP Office Plug-in** .

When you are on a call and if you receive another call then the system places the first call on hold.

12.7.3 Placing a call on mute

Placing a user of one-X Portal in an active call on mute:

You can place a user of one-X Portal in all types of active calls, such as a transferred active call and a consulted active call, on mute.

- To place a user on mute, click **Mute**.
- To unmute a user, click **Unmute**.

Note: When a user places a call on mute only the user is on mute and not the other party.

Call on Hold:

If you place a user on mute and then put the call on hold later, the system does not retain the user on the mute mode when you retrieve the call. However, if the other party places the call on hold the user of one-X Portal for IP Office can place the call on mute and the system retains the mute status even after the call is retrieved.

Note: When you press the mute button on the phone, the system does not reflect the status of the call as muted.

12.7.4 Holding or unholding a call

You can place a call on hold and later retrieve the call placed on hold. When a call is placed on hold the system plays music on hold or regular hold reminder tunes to the caller.

After a call is established between you and the contact, the system displays the call details.

To place a call on hold:

1. In the call details screen, click  .

To unhold or retrieve a call:

When you place a call on hold, the system does not display the call details.

1. To retrieve a call that you place on hold, click  **Unhold**.

12.7.5 Transferring a call using Avaya IP Office Plug-in

You can transfer an incoming call to other person using Avaya IP Office Plug-in.

- [Making a supervised transfer](#) ^[138]
- [Making an unsupervised transfer](#) ^[139]

12.7.5.1 Making a supervised transfer

When you talk to a contact before transferring the call it is called as a supervised transfer. Your initial call to the contact is called as a consultation call or an enquiry call.

In a supervised transfer you can confirm if the contact is present and wants to accept the call.

To make a supervised transfer:

1. Answer the incoming call.

2. Click  **Consult**.

The **Enter name or number** field lists all the users configured in your one-X Portal for IP Office **System** and **Personal** directories.

3. Select the contact or type the name or number that you would like to consult in the **Enter name or number** field.

4. Click  **Go**.

The system places the incoming call on hold when you consult a person.

After you consult the person and if they want to accept the call.

5. Click  **Complete Transfer**.

For more information on adding an account code and a subject to a call see [Adding an account code and a subject](#) ^[137]

12.7.5.2 Making an unsupervised transfer

When you dial the number of the contact and transfer a call even without waiting for the call to be answered it is called as an unsupervised transfer.

To make an unsupervised transfer:

1. Answer the incoming call.

2. Click  **Transfer**.

The **Enter name or number** field lists all the users configured in your one-X Portal for IP Office **System** and **Personal** directories.

3. Select the contact or type the name or number that you would like to consult in the **Enter name or number** field.

4. Click  **Go**.

For more information on adding an account code and a subject to a call see [Adding an account code and a subject](#) ^[137]

12.7.6 Ending a call

After a call is established between you and the contact, the system displays the call details.


- To end a call, click  **End Call**.

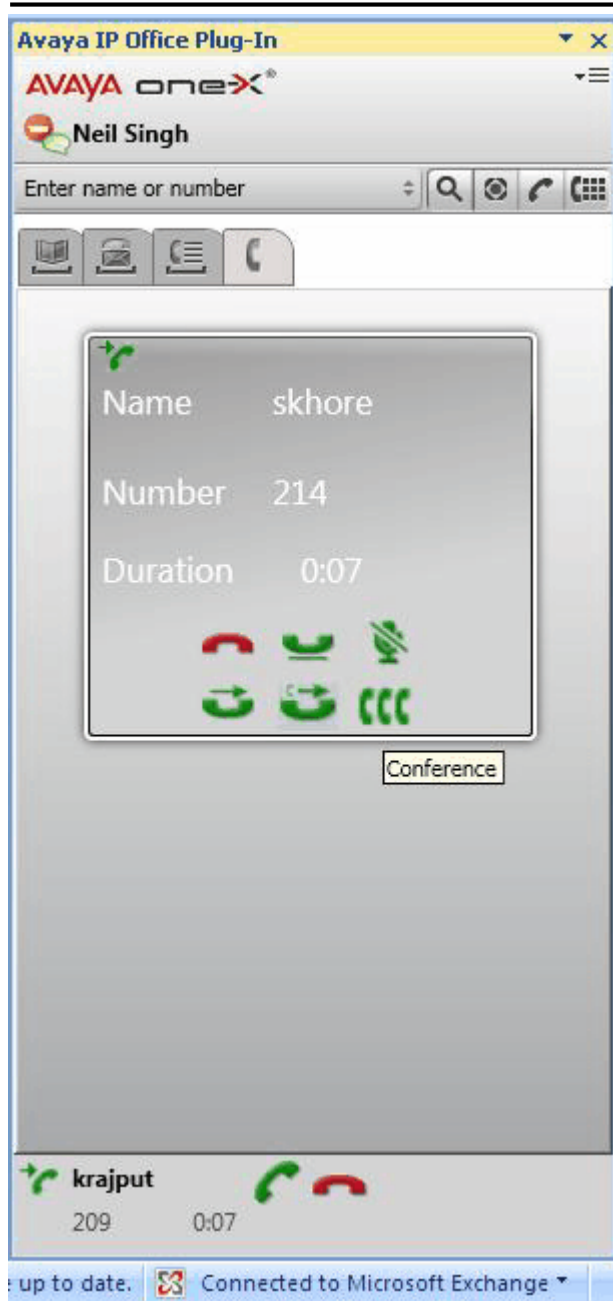
12.7.7 Starting a conference call

You can use the Avaya IP Office Plug-in to select and call the parties that you want to include in the conference call and then start the conference.

There are two types of conference calls that can be initiated via the Avaya IP Office Plug-in:

- [Ad hoc conference call](#) ^[140]
- [Meet Me conference call](#) ^[141]

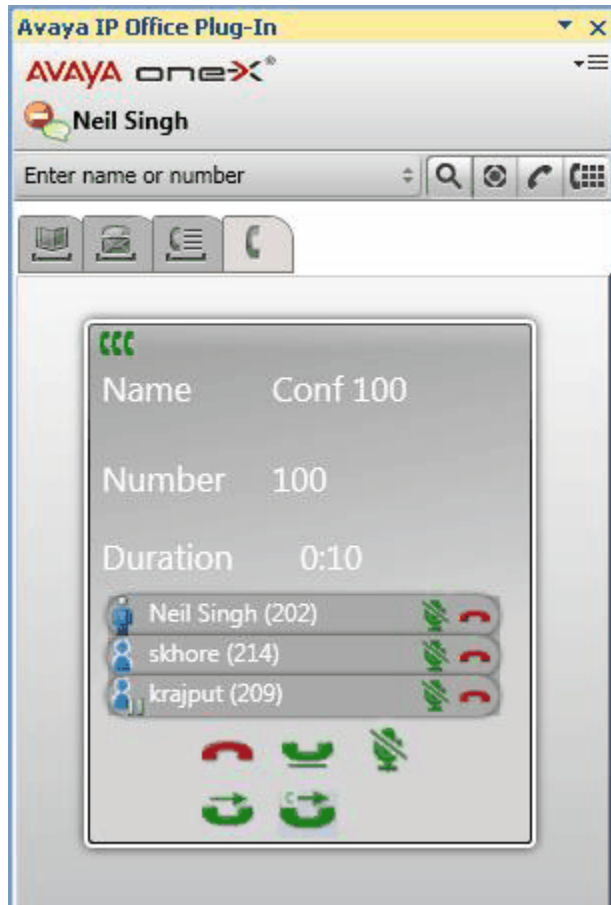
To initiate a conference, click on the  icon.



12.7.7.1 Ad hoc conference call

In an Ad hoc conference, a user calls the different participants and then sets the call on a conference mode.

The initiator of the Ad hoc conference call is the conference manager.



There are two types of users in an Ad hoc conference, namely the conference manager and the other participants in the conference.

As a Conference owner:

- You can view all the participants in a conference. Since you have initiated the conference, you can choose to *Drop* a participant or *Drop All* participants in the conference.
- You can place a participant or all participants on *Mute* as well as *Unmute* the participants.
- You can choose to place the conference on *Hold* as well as *Unhold* or *Retrieve* a conference call placed on hold. You can view the Hold or Retrieve status of all participants.
- You can *Transfer* the conference call to another party. You can consult with the other party and then complete Transfer of the conference call.

As a participant:

- You can view all the other participants in the conference. You can view the active or dropped, mute or unmute, and hold or retrieve status of the other participants in the conference.
- You can place the conference call on *Hold* or *Unhold*.
- You can *Transfer* the conference call to another party. You can consult with the other party and then complete Transfer of the conference call.

12.7.7.2 Meet Me conference call

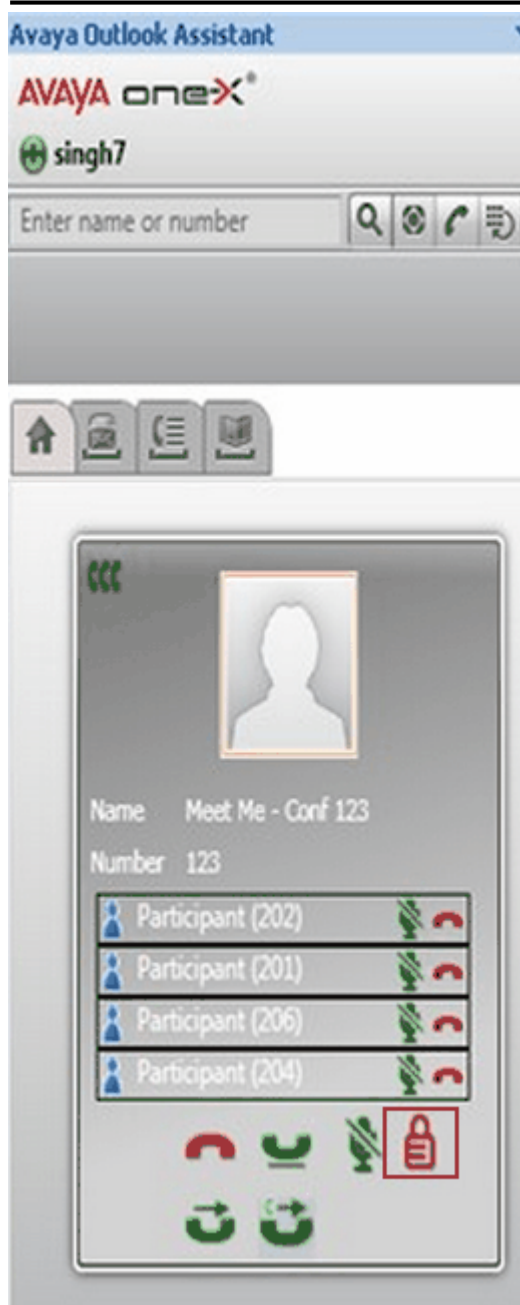
In a Meet Me conference, all participants dial into a particular bridge number at a particular time.

The owner of the conference bridge number in a Meet Me conference call is the conference manager.

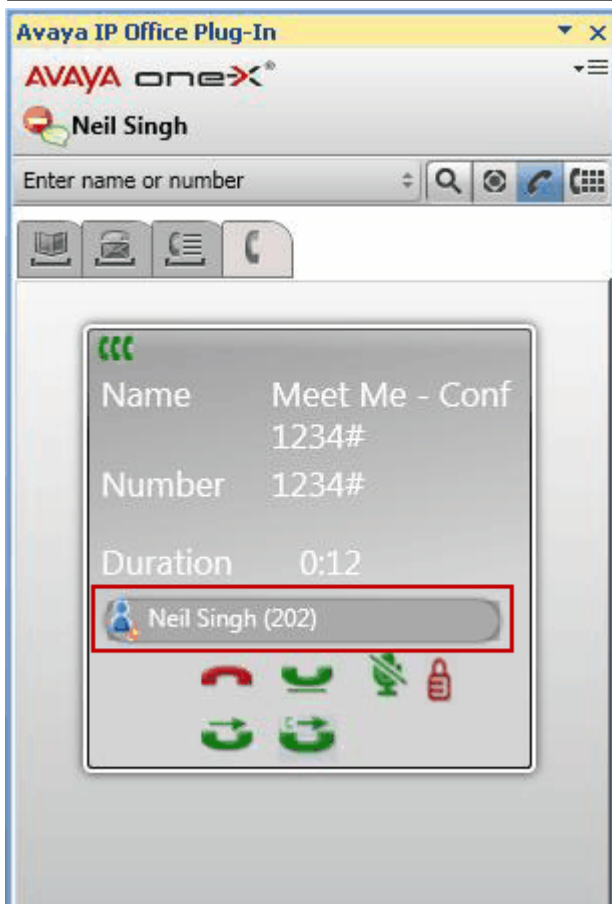
A Meet Me conference call provides features similar to an Ad hoc conference call.

However, there are two additional features provided in a Meet Me conference call.

1. As a conference manager, you can **Lock** or **Unlock** the conference.



2. The active speaker is displayed in a Meet Me conference



12.8 Avaya IP Office Plug-in additional features

There are various features supported by the Avaya IP Office Plug-in application.

- [Call log](#) ^[143]
- [Contact directory](#) ^[144]
- [Outlook contact synchronization](#) ^[145]
- [Presence information](#) ^[146]
- [Voice mail options](#) ^[147]
- [Multiple language support](#) ^[148]

12.8.1 Call Log

The Avaya IP Office Plug-in call log displays and categorizes the entries of the calls based on *All*, *Incoming*, *Outgoing*, and *Missed* call type. In the call log, you can:

1. View the entries of the calls and the details.
2. Clear the entries of the calls.
3. Add an unknown number as a personal contact into the directory from the entries of calls.
4. Call a number from the entries of calls.
5. Sort the entries of the calls according to the call, name, number, duration, time of the call by clicking the header in ascending or descending manner.

12.8.2 Contact Directory

Operations:

1. You can get the details of the contact from the System and Personal contact directory. The following information is available from the one-X Portal for IP Office server.
 - Name, Work Phone, Mobile Phone, Other Phone, Work Email, Personal Email, Other Email, Gmail ID, OCS ID, and Primary Phone type.



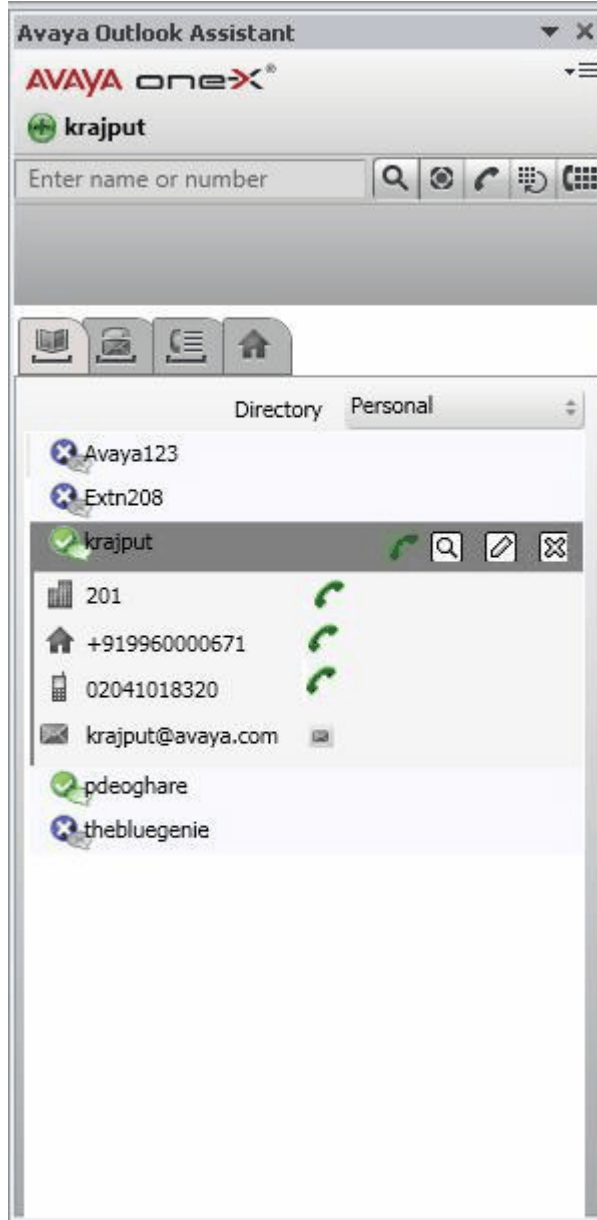
The screenshot shows a 'Contact Details' dialog box with the following fields and controls:

- Name:** A single-line text input field.
- Work Phone:** A single-line text input field.
- Mobile Phone:** A single-line text input field.
- Other Phone:** A single-line text input field.
- Gmail Id:** A single-line text input field.
- Work Email:** A single-line text input field.
- Personal Email:** A single-line text input field.
- Other Email:** A single-line text input field.
- OCS Id:** A single-line text input field.
- Primary Phone:** A dropdown menu currently showing 'Work'.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom right.

2. You can add, edit, and delete the contact.

Note: The contact entry cannot be edited from the outlook plug-in.

3. You can call a contact from the outlook plug-in. When you hover the mouse cursor over the contact, the email ID and phone number is displayed in a collapsible pane.



4. You can add a contact from the **System** directory to the **Personal** directory.
5. If the contact directory is updated on the one-X Portal for IP Office, then you can synchronize and update the Avaya IP Office Plug-in contact list.
6. You can view the contact information when you select or read an email. The contact information is highlighted in the directory.
7. You can view the [presence](#)^[146] of the contacts, in the Avaya IP Office Plug-in.

12.8.3 Outlook contact synchronization

You can upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office contact directory. The system lists the contacts in the **Directory** gadget > **Personal** > [Outlook group](#)^[76].

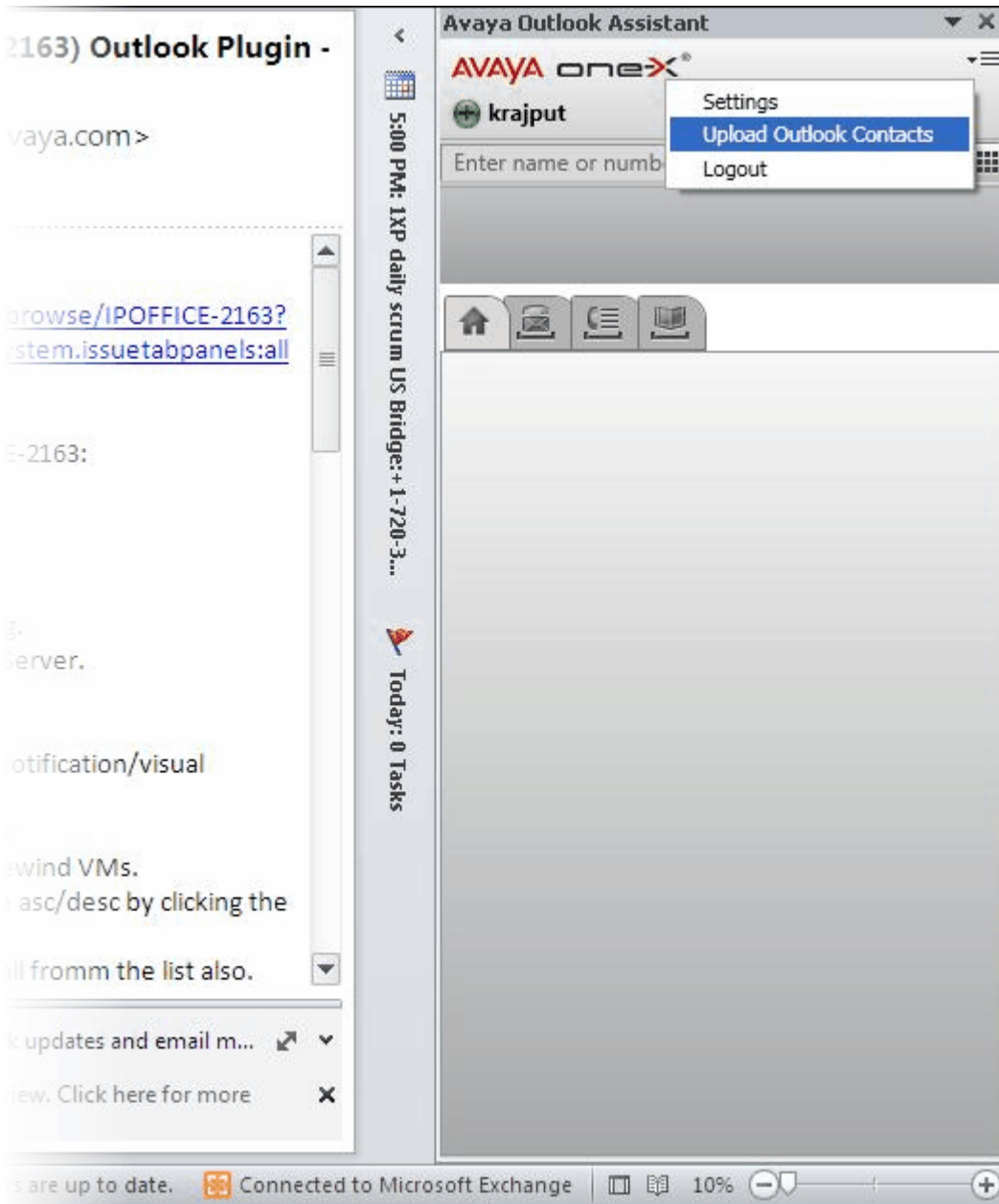
The mapping table list the fields in outlook contact and their corresponding fields in one-X Portal for IP Office contact details.

Outlook	one-X Portal for IP Office
Full Name	Name
E-mail	Work email
E-mail 2	Personal email
E-mail 3	Other email
Business phone number	Work phone
Home phone number	Other phone

Outlook	one-X Portal for IP Office
Mobile phone number	Mobile phone

To upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office:

1. In the top right corner of the **Avaya IP Office Plug-in** window, right-click  **Options**.



2. Click **Upload Outlook Contacts**. The system displays a message that reads: *Outlook contacts uploaded to one-X Portal*.

3. Click **OK**.

one-X Portal for IP Office creates, synchronizes and uploads the contacts from Microsoft® Outlook® in the Outlook group.




Note: The Avaya IP Office Plug-in does not initiate contact synchronization automatically when you add, delete or modify a contact in Microsoft® Outlook®.

12.8.4 Presence information

You can get the presence information from the one-X Portal for IP Office server. The presence information is displayed in the context of the contacts in the directory. You can also view the telephony presence of users in the directory. You can set the presence status from the one-X Portal for IP Office server.







User Presence

The user presence indicates your current presence in the one-X Portal for IP Office interface. This presence is visible to you on the one-X Portal for IP Office interface. The presence changes as you use your phone, log in or out. The icons are similar to those shown in the directory gadget for other users.

Presence Icon	Description
	This icon shows that you are available on the desk phone as well as for chat.
	This icon shows that you are available on the desk phone but not available for chat. While in this state, you cannot be instant messaged ^[46] by other one-X Portal for IP Office users.
	This icon shows that you are logged out from the desk phone, but logged into the IM.






Telephony Presence

The telephony presence is associated with an extension on the IP Office.

Presence Icon	Presence Status	Description
	Available	The status indicates that you are available and can be called.
	Busy	The status indicates that you have a call in progress.
	Do Not Disturb	The status indicates that you have enabled <i>Do No Disturb</i> on the phone system. Calls to you are redirected to voicemail if available. Otherwise, the callers receive a busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions ^[107] .
	Logged Out	The status indicates that you have not logged into the extension on the phone system. Calls to you are redirected to voicemail if available. Otherwise, the callers receive a busy tone. You cannot make calls. However you can still use one-X Portal for IP Office to alter your configuration settings.
	Ringing	This status indicates that the phone is ringing and you have an incoming call.
	Unknown	This status indicates that your presence on the phone system is unknown. The presence cannot be determined as the phone number is not an extension on the IP Office.

XMPP Presence

The XMPP presence indicates the status of an entry in the directory.

Presence Icon	Presence Status	Description
	Available/ Online	The status indicates that you are logged into the IM server and available for chat.
	Do not disturb	The status indicates that you have enabled <i>Do No Disturb</i> on the IM.
	Offline	The status indicates that you have not logged into the server. You want to continue using the one-X Portal for IP Office. If you choose to enable <i>Offline</i> , then other one-X Portal for IP Office users will not be able to send you instant messages ^[46] using the one-X Portal for IP Office.
	Away	The status indicates that you are logged in to the IM but currently away from your desk.
	Unknown	This status indicates that your presence on the IM is unknown.

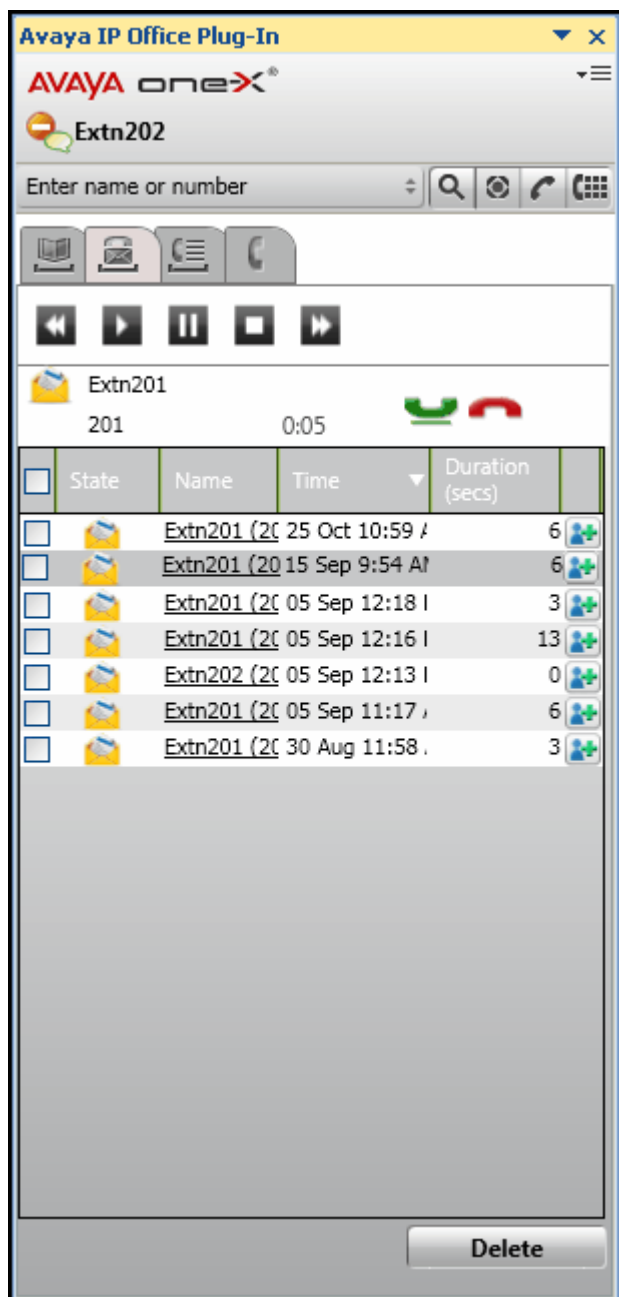
12.8.5 Voice mail options

Avaya IP Office Plug-in voice messages functionality:

1. You receive a list of all voice messages.
2. You have the option to listen, delete, pause, forward, and rewind voice messages.
3. You can sort the voice messages in ascending or descending order by clicking the header of the each column.

For example, you can arrange the voice messages according to the state, name, time or duration.

4. You can initiate a call by clicking on the name of the contact who left you a voice message.
5. You can add the contact who left you a voice message to the **Personal Directory**.



Note: The voice messages are played on the desk phone only.

12.8.6 Multiple language support

The Avaya IP Office Plug-in supports multiple languages. The appropriate language is selected for the Avaya IP Office Plug-in application depending on the language set in the **Regional Settings** of your computer.

Note: If the language in the **Regional Settings** is not supported by the Avaya IP Office Plug-in, then **English** (by default) is selected as the display language.

Avaya IP Office Plug-in supports the following languages:

1. English (US)
2. Chinese
3. Dutch
4. English (UK)
5. French
6. German
7. Italian

- 8. Portuguese (Brazil)
- 9. Russian
- 10. Spanish



Chapter 13.

Avaya IP Office Plug-in for Salesforce.com

13. Avaya IP Office Plug-in for Salesforce.com

You can integrate Salesforce to your telephony system as a Softphone within the one-X Portal for IP Office. The system displays records to the call events as screen popups or you can directly call the contacts using Salesforce.

If you are using IP office for your telephone applications, then you can use the **Avaya IPO Adapter for Salesforce** to control the call from the Salesforce portal.

Use the Avaya IP Office Plug-in for Salesforce.com		
<ul style="list-style-type: none">• Check the Avaya IP Office Plug-in for Salesforce.com system requirements ^[153]• Integrate Avaya IP Office Plug-in for Salesforce.com with the one-X Portal for IP Office ^[156]• Log out of one-X Portal for IP Office using Avaya IP Office Plug-in for Salesforce.com ^[161]	<ul style="list-style-type: none">• Install the Avaya IP Office Plug-in for Salesforce.com ^[153]• Use Screen pop functionality ^[157]• Make a call ^[161]	<ul style="list-style-type: none">• Start Avaya IP Office Plug-in for Salesforce.com ^[156]• Log into one-X Portal for IP Office using Avaya IP Office Plug-in for Salesforce.com ^[160]• Use the Avaya IP Office Plug-in for Salesforce.com call functions ^[162]

13.1 Avaya IP Office Plug-in for Salesforce.com system requirements

- **Operating System:** Windows XP or Windows 7 (32-bit and 64-bit).
- *Salesforce.com CTI toolkit 3.0.*
- *Microsoft .NET 4.0 framework.*
- **Supported web browser for:**
 - a. Windows XP: Internet Explorer 7 or Internet Explorer 8 (32-bit).
 - b. Windows 7 (32-bit): Internet Explorer 8 (32-bit).
 - c. Windows 7 (64-bit): Internet Explorer 8 (64-bit).

Note: The only supported web browser for using **Avaya IP Office Plug-in for Salesforce.com** is *Internet Explorer 7 or Internet Explorer 8 (32-bit and 64-bit)*.

You can download the **Avaya IP Office Plug-in for Salesforce.com** from the **one-X Portal for IP Office** server.

13.2 Installing Avaya IP Office Plug-in for Salesforce.com

1. Log in to one-X Portal for IP Office.
2. In the **Configuration** tab, select **Desktop Integration**.
3. Click **Install One-X Desktop Clients**.
4. The next steps vary depending on the browser:

- **Internet Explorer or Safari**

The file download menu prompts you with options to perform on the file setup.exe. Select **Run**.

- **Google Chrome or Firefox**

- a. When the browser prompts you, select **Save**. The browser downloads the installation file.
- b. When the download is complete, double click the downloaded file and select **Run**.

The system unpacks the installer and prepares to install Avaya IP Office Plug-in for Salesforce.com software.

5. On the welcome screen, click **Next**.

If you have already installed Avaya IP Office Plug-in for Salesforce.com the system displays the following options **Modify**, **Repair** and **Remove**.

- a. Select **Modify** to install this version over the existing one.

If you have a different version already installed the system prompts you to upgrade.

6. Select a folder where the software should be installed and accept the default prompts.
7. Click **Next**.
8. In the **Confirm Installation** screen, click **Next**.

The system displays the progress of the installation.

9. Click **Close**.

Note: Depending on the environment of the one-X Desktop Clients the installation wizard prompts you to restart the system.

13.2.1 Configuring Windows Firewall for Avaya IP Office Plug-in for Salesforce.com

You have to configure the Windows Firewall to establish a communication between the **Avaya IP Office Plug-in for Salesforce.com** client and the server.

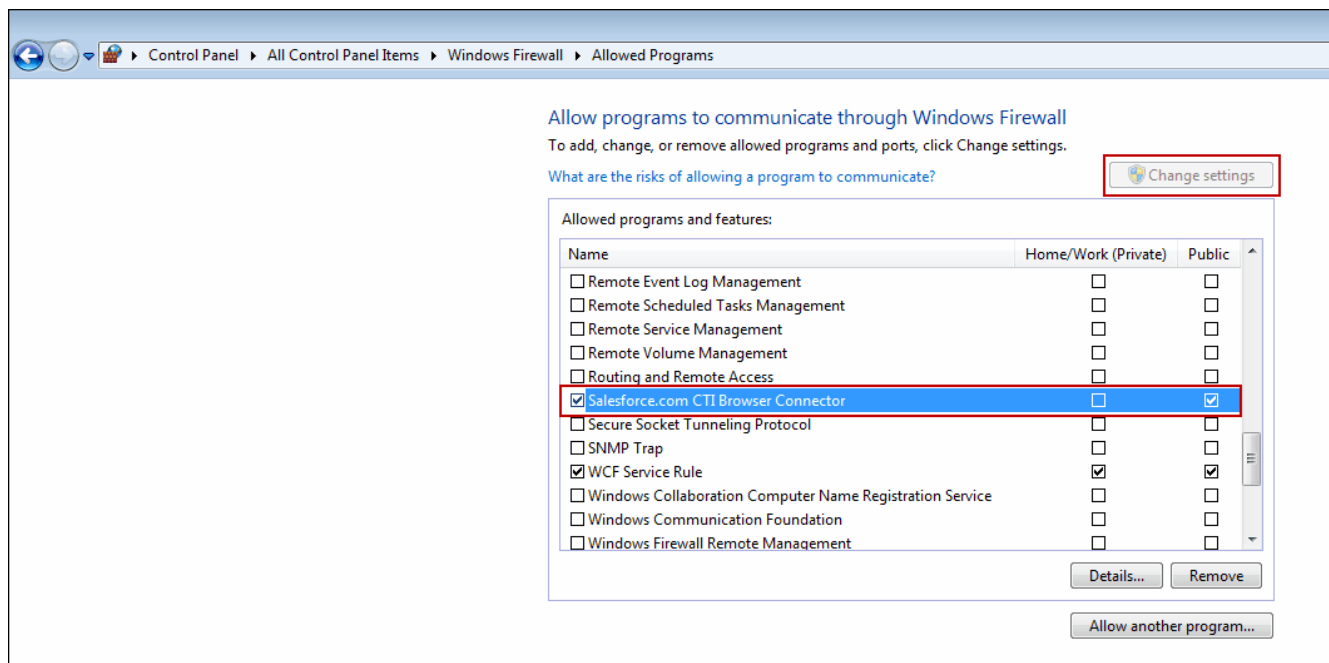
If a firewall is enabled on the computer of the user, the incoming traffic from the server is blocked.

You will receive an error message or notification stating that *Server unable to reach client*.

Perform the following procedures to allow incoming traffic from the server and use the **Avaya IP Office Plug-in for Salesforce.com** even if the Windows Firewall is turned on.

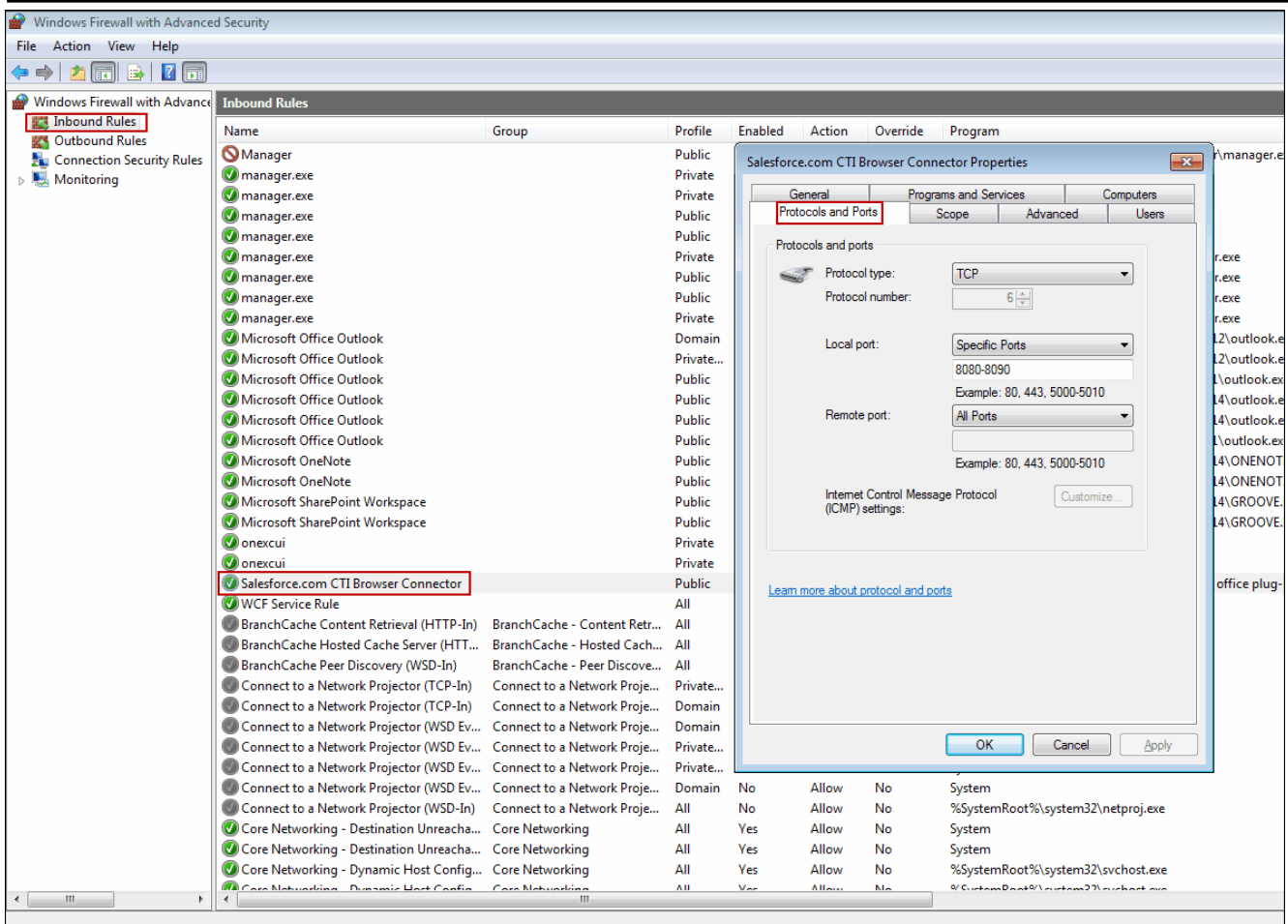
To allow the Avaya IP Office Plug-in for Salesforce.com to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Allowed Programs**
3. In the **Allow programs to communicate through Windows Firewall**, Click **Change settings**.
4. Select **Salesforce.com CTI Browser Connector**.



To allow the Avaya IP Office Plug-in for Salesforce.com to communicate through a specific TCP port (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the right pane, select **Salesforce.com CTI Browser Connector**.
5. Right-click **Salesforce.com CTI Browser Connector**.
6. Select **Properties**.
7. In the **Salesforce.com CTI Browser Connector Properties** dialog, click the **Protocols and Ports** tab.
8. In **Protocol type** section, select **TCP**.
9. In **Local port** section, select **Specific Ports**.
10. Set the TCP range from 8080 to 8090.

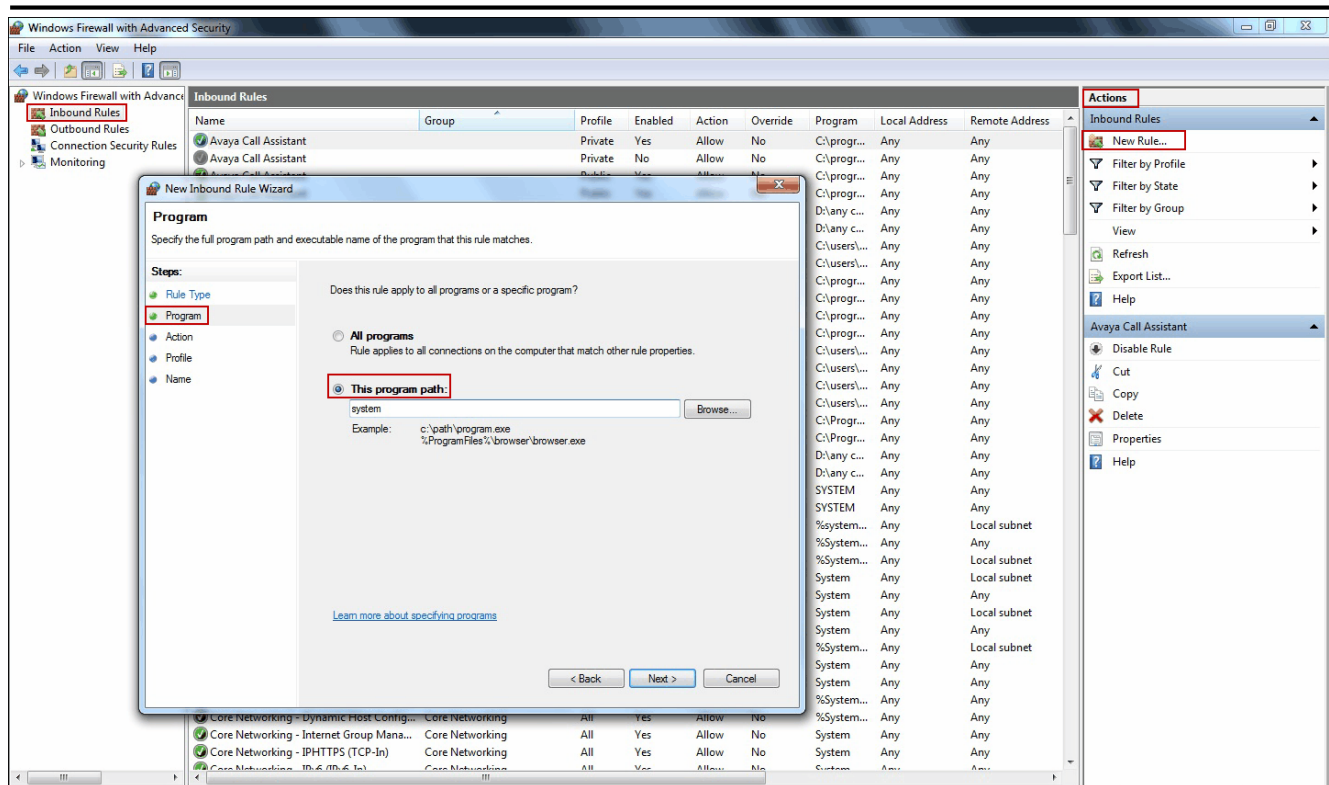


To create an inbound rule to allow the Avaya IP Office Plug-in for Salesforce.com to communicate through Windows Firewall (Windows 7):

1. Navigate to the **Control Panel**.
2. Click **Windows Firewall > Advanced Settings**
3. In the **Windows Firewall with Advanced Security** dialog, click **Inbound Rules** from the left pane.
4. In the **Actions** pane to the right, click on **New Rule**.

The system displays the **New Inbound Rule Wizard** dialog.

5. In the **Steps** pane to the left, select **Program**.
6. In the right pane, select **This program path**.
7. In the **This program path** section, type *system*.
8. Click **Next** option for the rest of the screens.
9. Name the service. For example, *WCF Service Rule*.



Note: Window XP will have similar steps that allows you to configure the firewall.

13.3 Starting Avaya IP Office Plug-in for Salesforce.com

To start Avaya Salesforce CTI Adapter:

1. Click **Start**.
2. Select **Programs**.
3. Select **Avaya IP Office Plug-in for Salesforce.com**.
4. Click **SalesforceCTI.exe**.

The system displays  **Salesforce** in the notification area.

13.4 Integrating Avaya IP Office Plug-in for Salesforce.com

Note: You need to integrate the Avaya IP Office Plug-in for Salesforce.com with one-X Portal for IP Office to use the Salesforce softphone only the first time you log in.

Prerequisites:

- User account in <http://www.salesforce.com>.
- Avaya IP Office CTI Adapter for Salesforce installation path.

To integrate the Avaya IP Office Plug-in for Salesforce.com with one-X Portal for IP Office:

1. Log in to <https://login.salesforce.com>
2. In the Links bar, click <username>, where <username> is your Salesforce login name.
3. Click **Setup**.
4. In the navigation pane, click **Customize** listed under **App Setup**.
5. Click **Call Center**.
6. Select **Call Centers**.

If the Introducing Salesforce CRM Call Center web page appears, click **Continue**.

7. In the **All Call Centers** screen, click **Import**.
8. Browse to the path where Avaya IP Office CTI Adapter for Salesforce is installed.
9. Select *Avaya one-X Portal IPOffice Settings.xml*.
10. Click **Import**.

The system displays the Avaya IP Office Adapter for Salesforce screen.

11. Click **Edit**.
12. In the Avaya one-X Portal for IP Office Server Information section, type the IP address of your one-X Portal for IP Office in the **Server IP Address** text box.
13. Click **Save**.

To manage the call center users, click **Manage Call Center Users**.

13.4.1 Managing Call Center Users

1. Click **Manage Call Center Users**.
2. Click **Add More Users** or **Remove Users**.
3. In the *Avaya IP Office Adapter for Salesforce: Search for New Users* page, enter your name.
4. Click **Find**.
5. Select the record that is displayed.
6. Click **Add to Call Center** to be added to the Call Center.

13.5 Screen Pop functionality

The screen pop for *Avaya IP Office Plugin for Salesforce.com* displays the details for an incoming call to a Salesforce CRM Call Center. On receiving the incoming call, the contact details are displayed in an adjacent screen if the Automatic Number Identification (ANI, that is, the phone number from which the caller is calling) of the incoming call matches the phone number of an existing Salesforce record.

To configure the screen pop for Avaya IP Office Plugin for Salesforce.com:

1. Login to the Salesforce web page
2. Click your **Name**.
3. In the drop-down menu, select **Setup**.
4. In **Apps Setup**, click **Customize**.
5. Click **Call Center > Call Centers**.
6. In the **All Call Centers** page, click **Edit** on the existing account.
7. In the **Call Center Edit** page, navigate to the **ScreenPop** section.

ScreenPop

Pop on Transfer and Conference? (Y/N/D)	Y
ANI	Phone
DNIS	
Digits	
Show Digits? (Y/N)	N
Digits Label	Digits
UUI 1	Account.AccountNumber
UUI 2	
UUI 3	
UUI Separator	:
UUI Data	:
Show UUI Data? (Y/N)	Y
Show Full UUI? (Y/N)	N
UUI Label	IVR Data

Save Cancel

8. In the **ScreenPop** section, type the following for each field:

- Pop on Transfer and Conference - **Y**.
- ANI - **Phone**.
- Show Digits - **N**.
- UUI 1 - **Account.AccountNumber**.
- UUI Separator - **:** (that is, a colon)
- UUI Data - **:** (that is, a colon)
- Show UUI Data - **Y**.
- Show Full UUI - **N**.
- UUI Label - **IVR Data**.

The rest of the fields can be left blank.

9. Click **Save**.

10. Then navigate to **Call Center > SoftPhone Layouts**.

11. In the **SoftPhone Layouts**, click **Edit** if an account already exists.

12. If not, click **New**.

13. Navigate to the **Screen Pop Settings** section.

13.5.1 Screen Pop settings

You can configure the Screen Pop settings according to your preference.

In the **Screen Pop Settings** section (for inbound call types), click **Edit** next to each type of record-matching row to specify which screens should display when the details of an inbound call match or don't match existing record(s) in Salesforce.

Screen Pop Settings:

Screen pops open within Existing browser window Collapse

Existing browser window
 New browser window or tab

No matching records Don't pop any screen Collapse

Don't pop any screen
 Pop to new --None--
 Pop to Visualforce page

Single-matching record Pop detail page Collapse

Don't pop any screen
 Pop detail page
 Pop to Visualforce page

Multiple-matching records Don't pop any screen Collapse

Don't pop any screen
 Pop to search page
 Pop to Visualforce page

Following are the screen pop options for each record-matching row:

Screen pops open within

You can set where the screen pops display.

1. **Existing browser window:** Select to display screen pops in open browser windows.
2. **New browser window or tab:** Select to display screen pops in new browser windows or tabs.

Exceptions

- Internet Explorer 7 displays screen pops based on what the user selects in the tab settings of the browser.

No matching records

You can set the screen pop options when details of an inbound call do not match any existing Salesforce records.

1. **Don't pop any screen:** Select if you do not want any screen pop to display.
2. **Pop to new:** Select to display a new record page. You specify if it is account, campaign, case, or so on from the drop-down list.
3. **Pop to Visualforce page:** Select to display a specific Visualforce page.

Note: The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least ANI (the caller ID) and DNIS (the number that the caller dialed). The URL can pass additional data to the Visualforce page if necessary

Single-matching record

You can set the screen pop options when details of an inbound call match one existing Salesforce record.

1. **Don't pop any screen:** Select if you do not want any screen pop to display.
2. **Pop detail page:** Select to display the matching record's detailed page.
3. **Pop to Visualforce page:** Select to display a specific Visualforce page.

Multiple-matching records

You can set the screen pop options when details of an inbound call match more than one existing Salesforce record.

1. **Don't pop any screen:** Select if you do not want any screen pop to display.
2. **Pop to search page:** Select to display a search page
3. **Pop to Visualforce page:** Select to display a specific Visualforce page.

13.5.2 Screen Pop

Following are the examples of the screen pop functionality for Avaya IP Office Plug-in for Salesforce.com:

Screen Pop for incoming call

The screen pop displays the **Account Detail** for the incoming call, that is, caller ID 2041018000. In case, there is no existing record for the incoming call, then a new account creation window is displayed.

The screenshot shows the Salesforce interface with the 'Accounts' tab selected. The main content area displays the 'Account Detail' for 'Avaya India Pvt. Ltd.'. The account owner is 'Sunil Reddy (Change)'. The account name is 'Avaya India Pvt. Ltd.' with a 'View Hierarchy' link. The account number is '125689'. The account site is 'Customer - Direct'. The billing address is 'Level-5, Tower 11, Magarpatta City, Hadapsar Pune, Maharashtra 411013 India'. The shipping address is 'Level-5, Tower 11, Magarpatta City, Hadapsar Pune, Maharashtra 411013 India'. The account was created by 'Sunil Reddy' on '9/27/2011 4:48 AM' and last modified by 'Sunil Reddy' on '9/27/2011 4:53 AM'. The account is active and has a 'Billing' custom link. The left sidebar shows the 'On a Call' window with the caller ID '2041018000' and the account 'Avaya India Pvt. Ltd.'. The 'Recent Items' list includes 'Avaya India Pvt. Ltd.', 'Vinit Rewalkar', 'Sunil Reddy', 'Kiran Rajput', 'Kumar Reddy', 'Neil Singh', 'Mute Button', and 'Sunil Reddy'.

Screen Pop for incoming call matching multiple criteria

The screen pop displays the matching **Contact** and **Account** for the incoming call, that is, from caller ID 2041018000. You can choose to open either the Contact or Account.

The screenshot shows the Salesforce 'Advanced Search Results' screen for the caller ID '2041018000'. The search results are displayed in two sections: 'Accounts [1]' and 'Contacts [1]'. The 'Accounts [1]' section shows one result: 'Avaya India Pvt. Ltd.' with account site 'Customer - Direct', phone '(204) 101-8000', and owner alias 'SReddy'. The 'Contacts [1]' section shows one result: 'Avaya India Pvt. Ltd.' with account name 'Avaya India Pvt. Ltd.', account site 'Customer - Direct', phone '(204) 101-8000', email, and contact owner alias 'SReddy'. The bottom of the screen displays the message: 'There are no matching: Leads, Opportunities, Cases, Case Comments, Campaigns, Contracts, Assets, Activities, Notes, Attachments, Ideas, Reports, Users'. The left sidebar shows the 'On a Call' window with the caller ID '2041018000' and the account 'Avaya India Pvt. Ltd.'. The 'Recent Items' list includes 'Avaya India Pvt. Ltd.', 'Avaya India Pvt. Ltd.', and 'Vinit Rewalkar'.

13.6 Logging into one-X Portal for IP Office

You can log into the **one-X Portal for IP Office** using **Avaya IP Office Plug-in for Salesforce.com**.

Prerequisites:

- User account <http://www.salesforce.com>.
- Ensure that Avaya IP Office CTI Adapter for Salesforce is running on the desktop.

To log in to **one-X Portal for IP Office** using **Avaya IP Office Plug-in for Salesforce.com**:

1. Log in to <http://login.salesforce.com>.

The system initializes the soft phone and the system displays the login screen for one-X Portal for IP Office.

2. Type your one-X Portal for IP Office username in the **Username** field.
3. Type your one-X Portal for IP Office password in the **Password** field.

4. Click **Log In**.

The system displays the soft phone in an idle state.

13.7 Logging out of one-X Portal for IP Office

To log out of **one-X Portal for IP Office** using **Avaya IP Office Plug-in for Salesforce.com**:

1. Click the **Home** tab.
2. Select **Log Out** in the drop down list of the Salesforce soft phone.

The system logs you out of one-X Portal for IP Office.

13.8 Making a call

You can make a call using the Salesforce soft phone by:

- [Using the dial pad](#) ^[16]
- [Searching the contacts](#) ^[16]
- [Typing the number](#) ^[16]

13.8.1 Using the dial pad

You can call a contact using the dial pad in Salesforce soft phone.

Before you begin

- Add the external dialing prefix used by your telephone system to the number while making an external call.

To make a call:

1. Select the line you would like to use to make the call.

The system displays the line dialog box.

2. Dial the number that you want to call using the dial pad.

3. Click .

13.8.2 Searching the contacts

You can search for the contacts listed in your one-X Portal for IP Office **System** or **Personal** directories and make a call using the Salesforce soft phone.

1. Select the line you would like to use to make the call.

The system displays the line dialog box.

2. Click  **Search**.

The system displays a list of all the contacts in your one-X Portal for IP Office **System** or **Personal** directories and their phone numbers.

3. Click the phone number listed against a contact.

13.8.3 Typing the number

You can call a contact by typing the number of a contact in the Salesforce soft phone.

Before you begin

- Add the external dialing prefix used by your telephone system to the number while making an external call.

To make a call:

1. Select the line you would like to use to make the call.

The system displays the line dialog box.

2. Type the number of the contact in the **Enter phone number to dial** field.

3. Click  or press **Enter**.

13.9 Avaya IP Office Plug-in for Salesforce.com call functions

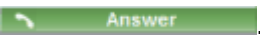

You can use the Avaya IP Office Plug-in for Salesforce.com soft phone to

- [Answering a call](#) ^[162]
- [Muting or unmuting a call](#) ^[162]
- [Holding or retrieving a call](#) ^[162]
- [Ending a call](#) ^[162]
- [Transferring a call](#) ^[162]

13.9.1 Answering a call

The system alerts you about the calls that are made to your one-X Portal for IP Office. You can answer or reject the calls using the Avaya IP Office Plug-in for Salesforce.com soft phone.

The system displays the details of the caller in the Avaya IP Office Plug-in for Salesforce.com soft phone

1. To answer the call, click .
2. If you do not want to answer the call, click .

When you are on a call and if you receive another call on a different line, then the system places the first call on hold.

13.9.2 Mute or unmute a call

The Salesforce soft phone enables the user to place a call on mute during an active call.

Note: When a user places a call on mute only the user is on mute and not the other party.

To mute or unmute:


1. To place a user on mute, click *Mute*. When an active call is placed on mute, the *Unmute* button is visible.
2. To unmute a user, click *Unmute*.

13.9.3 Hold or unhold a call

You can place a call on hold and later retrieve the call placed on hold. When a call is placed on hold the system plays music on hold or regular hold reminder tunes to the caller.


To put a call on hold:

After a call is established between you and the contact, the system displays the call details.

1. To place a call on hold, click  **Hold**.

To retrieve a call from hold:

When you place a call on hold, the system displays the call details.

1. To retrieve a call that you placed on hold, click .

13.9.4 Ending a call

After a call is established between you and the contact, the system displays the call details.

To end a call, click .

13.9.5 Transferring a call

You can transfer an incoming call to other person using Salesforce soft phone.



- [Making a supervised transfer](#) ^[162]
- [Making an unsupervised transfer](#) ^[163]

13.9.5.1 Making a supervised transfer

When you talk to a contact before transferring the call it is called as a supervised transfer. Your initial call to the contact is called as a consultation call or an enquiry call.

In a supervised transfer, you can confirm if the contact is present and wants to accept the call.

To make a supervised transfer:



1. Click  **Transfer**.
2. Type the number of the person you want to consult in **Enter phone number to transfer to** field.
3. Click  or press **Enter**. The call is transferred to the specified number.

4. Click  to establish the call.

13.9.5.2 Making an unsupervised transfer

When you dial the number of the contact and transfer a call even without waiting for the call to be answered it is called as an unsupervised transfer.

To make an unsupervised transfer:

1. Click  **Transfer**.
2. Type the number of the person you want to transfer in **Enter phone number to transfer to** field.
3. Click  or press **Enter**. The call is directly transferred to the specified number.



Chapter 14.

Glossary

14. Glossary

14.1 Ad hoc conference

In an Ad hoc conference a user calls the different participants and then sets the call on a conference mode.

14.2 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.

14.3 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.

14.4 Busy

Both the phone system and one-X Portal for IP Office 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 happens to the incoming call, in order of priority of use:

1. If you have a [Forward on Busy](#) ^[166] 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.

14.5 Conference Manager

In a Meet Me conference the owner of the conference bridge number is the conference manager.

In an Ad hoc conference the initiator of the conference call is the conference manager.

14.6 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](#) ^[107]. 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.

14.7 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](#) ^[166] to any further calls, it will be forwarded to that number. The number can be internal or external.

14.8 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.

14.9 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 for IP Office.

14.10 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.

14.11 Hunt Group

A hunt group is a set of telephone users. The hunt 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).

14.12 IP Office

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

14.13 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](#) ^[160].

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

14.14 Meet Me conference

In a Meet Me conference all participants dial into a particular bridge number at a particular time.

14.15 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 for IP Office 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.

14.16 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 for IP Office when that contact is selected for a function.

14.17 System Administrator

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

14.18 Small Community Network

Your telephone system can actually be several telephone systems connected together in a network (called a Small Community Network). While most telephone and one-X Portal for IP Office 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. Your system administrator will advise you if there are any other restrictions in your network.

14.19 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.

14.20 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.

Index

1

1400 Series 17, 63, 69, 73

1600 Series 17, 63, 69, 73

9

9600 Series 17, 63, 69, 73

A

Account code 31

Add

 Contacts Tab 75

 Personal directory contact 73

Add to Personal Directory

 From Call Log 65, 74

 From the System Directory 73

 From voicemail messages 74, 93

Adding a Caller to Your Directory 65

Agent 47

Alerting 30

All 64

Analog 17

Answer 29, 34

 Shortcut 104

Appearance buttons 17, 39

Application Server 118

Assigned 9

Audio 104

Auto Hold 37

Available 14, 47

B

Balloon Tips 122

Brazilian Portuguese 9, 108

Browser 9

Busy 14

Busy Not Available 47

Busy on Held 37

Button

 To Desk 48

 To Mobile 48

Buttons 27

C

Call 31

 From the Call Log 33

 From the Directory 32

 From Voicemail 34

 Icons 27

 Record 40

 Swap 39

 Toggle 39

Call Assistant 111

 Start 117

Call Log 11, 17, 63, 64

 Add to personal directory 65, 74

 Make a call 33, 65

Call progress 31, 32, 33, 34, 65, 71, 92

Call recording warning 40

Call redirection settings 14

Call Waiting Indicator 14

Call Waiting On 17, 39

Calls 11

Centralized call log 64

Chat with 46, 77

Checking Voicemail Messages 91

Chrome 9, 104

Clear Tab 64

Clock 11, 107

Color 82

Complete Transfer 29, 41

Conference 29, 30, 41, 55, 60

 Transfer 40

Conferencing Calls 55

Configuration 104

 Sounds 104

Configure 43, 104, 107

Connected 30

Consult 29, 41, 42, 72

Consultation call 41, 55

Contact 65, 73, 74, 93

 Email 77

 Primary phone 17, 69, 73

Credentials 9

Customer Call Reporter 47

D

Default Deskphone 83

Delete

 Call log 64

 Personal directory contact 74

 Voicemail messages 91

Deskphone 83

Detected 82

Directories 69

Directory 11

 Add tab 75

 Icons 27, 69

 Make a call 32, 71

Do Not Disturb 14, 47, 69, 104, 107

 Exceptions 104, 107

Drop 29, 36, 55, 57, 58, 59

 Shortcut 104

Dutch 9, 108

E

Edit

 Personal directory 65, 73, 74, 93

 Personal directory contact 74

Email 65, 73, 74, 77, 93

Enable

 Sound Notifications 104

Enable Hot Key 118, 119

Enbloc 17

English 9, 108

Enquiry call 41, 55

Exceptions 107

Explorer 9

Extension 9

External 11

External directory 69

F

Failed 30

Firefox 9, 104

Format 93

Forward

 Immediate 83

Forward on No Answer 34, 36

Forwarding 69

French 9, 108

G

Gadget

 World Clock 107

- Gadgets 11
- German 9, 108
- Google Chrome 9, 104
- Green background 82
- Greetings 93
- Group Tab 75
- H**
- Held 30
- Hold 29, 36
 - Shortcut 104
- Hold the Line 84
- Hold Timeout 37
- Home 81
- Hot desking 18, 166
- Hot Key 118, 119
- hunt groups 64
- I**
- Icons
 - Call 27
 - Directory 27, 69
 - Messages 91
 - User 69
- Ignore 89
- Immediate 83
- Incoming 64
- Indicator 14
- Initial Test Call 84
- Install
 - Screen Pop Application 113
- Instant Message 46, 77
- Internet Explorer 9
- Invalid 9
- Italian 9, 108
- J**
- JavaScript 9
- K**
- Keyboard shortcuts 104
- L**
- Language 9, 108
- LDAP 69
- Less... 31
- License 9
- Licensed 9
- Listen 89
- Listen on 85
- Logged in 9
- Logged out 14, 69, 167
- Login 9
- Login code 167
- Logon Information 118
- Logout 11
- M**
- Mailbox 91
- Main 11
- Make a call 31
 - From Messages 34, 92
 - From the Call Log 33, 65
 - From the Directory 32, 71
 - From Voicemail 34
 - Shortcut 104
- Making a Supervised Transfer 41
- Making an Unsupervised Transfer 41
- Media player 104
- Message 46, 77
- Message Icons 91
- Messages 11, 91, 122
 - Make a call 34, 92
- Messages Indicator 14
- Missed 64
- Missed call 36
- Missed hunt group calls 64
- Mobile 81
- Mobile Twin 48
- Mobile twinning 84
- Mobility
 - Forward 83
 - Mobile twinning 84
 - Telecommuter Mode 84
 - Use Default Deskphone 83
- More... 31
- Mozilla Firefox 9, 104
- Music on hold 36
- Mute 57, 58, 59
- Mute All 57, 58, 59
- N**
- Network 167
- New
 - Personal directory contact 73
- No Answer 36, 83
- Normal 69
- Number 27
- O**
- Off Hook 30, 69
- Office 81
- Offline 14
- On Hook 69
- Orange background 82
- Outcalling 85
- Outgoing 64
- P**
- Park 43, 167
 - Recall 43, 44
 - Return 43
- Park Slot Numbers 43
- Park Slots 43, 104
- Parking Calls 43
- Passcode 93
- Password 9, 118
- Pause 91
- Personal directory 11, 69
 - Add from Call Log 65, 74
 - Add from System Directory 73
 - Add from voicemail 74, 93
 - Capacity 17, 69, 73
 - Edit 65, 73, 74, 93
- Personalized Greetings 93
- Phones 9
 - Analog 17
 - SIP 17
- Pickup 83, 89
- Play the message 91
- Playback 11
- Pop on CLI 120
- Pop on Outdial 120
- Popup Window 46, 77
- Portuguese 9, 108
- Prefix 31

Presence 14, 104, 107
Primary phone 17, 65, 69, 73, 74, 93, 167
Priority message 91
Private message 91
Profile
 Color 82
 Detected 82
Progress 31, 32, 33, 34, 65, 71, 92
Proxy server exceptions 105

Q

Queues 47
Quick Time 104

R

Read message 91
Reason Code 47
Recall 43, 44
Received 64
Record 29, 40
 Warning 40
Recording 30
Remember me 9
Retrieve 29, 41, 55
 Parked Call 43
Return
 Park 43
Return Time 40, 41
Ringback 85
Ringing 104
Russian 9, 108

S

Safari 104
Save 91
Saved message 91
Screen Pop To 120
Screen Popping 113, 118
Searching
 Directories 70
 Messages 91
Server Information 118
Server Port 118
Shortcuts 104
SIP 17
Skip
 Backwards 91
 Forwards 91
Slot number 43, 167
Small Community Network 43, 167
Softphone 9
Sound Configuration 104
Sounds 104
Start
 Call Assistant 117
Status 14, 69
Stop 91
 Recording 40
Stop Rec 29
Subject 31
supervised transfer 40, 41, 167
Swap Calls 39
Switching Between Calls 39
System directory 11, 69
 Add to Personal Directory 73

T

T3 Series 17, 69, 73

Tabs 11
Tag 31
Taskbar 111
Telecommuter Mode 84
Telephones 9
Test Call 84
Time Zones 107
To Desk 48
To Mobile 48
Toggle Calls 39
transfer 29, 40, 41, 42, 72, 167
 Complete 41
 Return Time 40, 41
 Supervised 41
 To Desk 48
 To Mobile 48
 Unsupervised 41
Transferring Calls
 Unsupervised 40
Transfers Using the Directory 42
Twinning 48, 84

U

Unconditional 83
Unknown 69
Unmute 57, 58, 59
Unmute All 57, 58, 59
Unpark 43, 167
Unread message 91
unsupervised transfer 40, 41, 167
Upload Personalized Greeting 93
URL 9
Use Default Deskphone 83
User
 Icons 69
 Name 9
 Password 9
User Name 118
User Status 69

V

Voicemail 34
 Add to personal directory 74, 93
 Listen on 85
 Messages 91
 Outcalling 85
 Ringback 85
Voicemail code 93
Voicemail Messages Indicator 14
Voicemail Screening Configuration 89
Voicemail_screening 89

W

Warning
 Recording 40
Wav 93
Web
 Address 9
 Browser 9
Windows
 Safari 104
Windows Media Player 104
World Clock 11, 107

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