



# **IP Office 9.0.3**

Using one-X Portal for IP Office

#### Notice

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

For full support, please see the complete document, Avaya Support Notices for Hardware Documentation, document number 03–600759.

For full support, please see the complete document, Avaya Support Notices for Software Documentation, document number 03–600758.

To locate this document on our website, simply go to <http://www.avaya.com/support> and search for the document number in the search box.

#### Documentation disclaimer

“Documentation” means information published by Avaya in varying mediums which may include product information, operating instructions and performance specifications that Avaya generally makes available to users of its products. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of documentation unless such modifications, additions, or deletions were performed by Avaya. End User agrees to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation, to the extent made by End User.

#### Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

#### Warranty

Avaya provides a limited warranty on its hardware and Software (“Product(s)”). Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya's standard warranty language, as well as information regarding support for this Product while under warranty is available to Avaya customers and other parties through the Avaya Support website: <http://support.avaya.com>. Please note that if you acquired the Product(s) from an authorized Avaya Channel Partner outside of the United States and Canada, the warranty is provided to you by said Avaya Channel Partner and not by Avaya. “Software” means computer programs in object code, provided by Avaya or an Avaya Channel Partner, whether as stand-alone products or pre-installed on hardware products, and any upgrades, updates, bug fixes, or modified versions.

#### Licenses

THE SOFTWARE LICENSE TERMS AVAILABLE ON THE AVAYA WEBSITE, [HTTP://SUPPORT.AVAYA.COM/LICENSEINFO](http://SUPPORT.AVAYA.COM/LICENSEINFO) ARE APPLICABLE TO ANYONE WHO DOWNLOADS, USES AND/OR INSTALLS AVAYA SOFTWARE, PURCHASED FROM AVAYA INC., ANY AVAYA AFFILIATE, OR AN AUTHORIZED AVAYA CHANNEL PARTNER (AS APPLICABLE) UNDER A COMMERCIAL AGREEMENT WITH AVAYA OR AN AUTHORIZED AVAYA CHANNEL PARTNER. UNLESS OTHERWISE AGREED TO BY AVAYA IN WRITING, AVAYA DOES NOT EXTEND THIS LICENSE IF THE SOFTWARE WAS OBTAINED FROM ANYONE OTHER THAN AVAYA, AN AVAYA AFFILIATE OR AN AVAYA AUTHORIZED AVAYA CHANNEL PARTNER; AVAYA RESERVES THE RIGHT TO TAKE LEGAL ACTION AGAINST YOU AND ANYONE ELSE USING OR SELLING THE SOFTWARE WITHOUT A LICENSE. BY INSTALLING, DOWNLOADING OR USING THE SOFTWARE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE INSTALLING, DOWNLOADING OR USING THE SOFTWARE (HEREINAFTER REFERRED TO INTERCHANGEABLY AS “YOU” AND “END USER”), AGREE TO THESE TERMS AND CONDITIONS AND CREATE A BINDING CONTRACT BETWEEN YOU AND AVAYA INC. OR THE APPLICABLE AVAYA AFFILIATE (“AVAYA”).

Avaya grants you a license within the scope of the license types described below, with the exception of Heritage Nortel Software, for which the scope of the license is detailed below. Where the order documentation does not expressly identify a license type, the applicable license will be a Designated System License. The applicable number of licenses and units of capacity for which the license is granted will be one (1), unless a different number of licenses or units of capacity is specified in the documentation or other materials available to you. “Designated Processor” means a single stand-alone computing device. “Server” means a Designated Processor that hosts a software application to be accessed by multiple users.

#### License type(s)

**Designated System(s) License (DS).** End User may install and use each copy of the Software only on a number of Designated Processors up to the number indicated in the order. Avaya may require the Designated Processor(s) to be identified in the order by type, serial number, feature key, location or other specific designation, or to be provided by End User to Avaya through electronic means established by Avaya specifically for this purpose.

**Concurrent User License (CU).** End User may install and use the Software on multiple Designated Processors or one or more Servers, so long as only the licensed number of Units are accessing and using the Software at any given time. A “Unit” means the unit on which Avaya, at its sole discretion, bases the pricing of its licenses and can be, without limitation, an agent, port or user, an e-mail or voice mail account in the name of a person or corporate function (e.g., webmaster or helpdesk), or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software. Units may be linked to a specific, identified Server.

**Database License (DL).** End User may install and use each copy of the Software on one Server or on multiple Servers provided that each of the Servers on which the Software is installed communicates with no more than a single instance of the same database.

**CPU License (CP).** End User may install and use each copy of the Software on a number of Servers up to the number indicated in the order provided that the performance capacity of the Server(s) does not exceed the performance capacity specified for the Software. End User may not reinstall or operate the Software on Server(s) with a larger performance capacity without Avaya's prior consent and payment of an upgrade fee.

Named User License (NU). You may: (i) install and use the Software on a single Designated Processor or Server per authorized Named User (defined below); or (ii) install and use the Software on a Server so long as only authorized Named Users access and use the Software. "Named User", means a user or device that has been expressly authorized by Avaya to access and use the Software. At Avaya's sole discretion, a "Named User" may be, without limitation, designated by name, corporate function (e.g., webmaster or helpdesk), an e-mail or voice mail account in the name of a person or corporate function, or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software.

Shrinkwrap License (SR). You may install and use the Software in accordance with the terms and conditions of the applicable license agreements, such as "shrinkwrap" or "clickthrough" license accompanying or applicable to the Software ("Shrinkwrap License").

#### Heritage Nortel Software

"Heritage Nortel Software" means the software that was acquired by Avaya as part of its purchase of the Nortel Enterprise Solutions Business in December 2009. The Heritage Nortel Software currently available for license from Avaya is the software contained within the list of Heritage Nortel Products located at <http://support.avaya.com/LicenseInfo> under the link "Heritage Nortel Products". For Heritage Nortel Software, Avaya grants Customer a license to use Heritage Nortel Software provided hereunder solely to the extent of the authorized activation or authorized usage level, solely for the purpose specified in the Documentation, and solely as embedded in, for execution on, or (in the event the applicable Documentation permits installation on non-Avaya equipment) for communication with Avaya equipment. Charges for Heritage Nortel Software may be based on extent of activation or use authorized as specified in an order or invoice.

#### Copyright

Except where expressly stated otherwise, no use should be made of materials on this site, the Documentation, Software, or hardware provided by Avaya. All content on this site, the documentation and the Product provided by Avaya including the selection, arrangement and design of the content is owned either by Avaya or its licensors and is protected by copyright and other intellectual property laws including the sui generis rights relating to the protection of databases. You may not modify, copy, reproduce, republish, upload, post, transmit or distribute in any way any content, in whole or in part, including any code and software unless expressly authorized by Avaya. Unauthorized reproduction, transmission, dissemination, storage, and or use without the express written consent of Avaya can be a criminal, as well as a civil offense under the applicable law.

#### Virtualization

Each vAppliance will have its own ordering code. Note that each instance of a vAppliance must be separately ordered. If the end user customer or Avaya channel partner would like to install two of the same type of vAppliances, then two vAppliances of that type must be ordered.

Each Product has its own ordering code. Note that each instance of a Product must be separately licensed and ordered. "Instance" means one unique copy of the Software. For example, if the end user customer or Avaya channel partner would like to install two instances of the same type of Products, then two Products of that type must be ordered.

#### Third Party Components

"Third Party Components" mean certain software programs or portions thereof included in the Software that may contain software (including open source software) distributed under third party agreements ("Third Party Components"), which contain terms regarding the rights to use certain portions of the Software ("Third Party Terms"). Information regarding distributed Linux OS source code (for those Products that have distributed Linux OS source code) and identifying the copyright holders of the Third Party Components and the Third Party Terms that apply is available in the Documentation or on Avaya's website at: <http://support.avaya.com/Copyright>. You agree to the Third Party Terms for any such Third Party Components.

#### Note to Service Provider

The Product may use Third Party Components that have Third Party Terms that do not allow hosting and may need to be independently licensed for such purpose.

#### Preventing Toll Fraud

"Toll Fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or is not working on your company's behalf). Be aware that there can be a risk of Toll Fraud associated with your system and that, if Toll Fraud occurs, it can result in substantial additional charges for your telecommunications services.

#### Avaya Toll Fraud intervention

If you suspect that you are being victimized by Toll Fraud and you need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Support website: <http://support.avaya.com>. Suspected security vulnerabilities with Avaya products should be reported to Avaya by sending mail to: [securityalerts@avaya.com](mailto:securityalerts@avaya.com).

#### Trademarks

The trademarks, logos and service marks ("Marks") displayed in this site, the Documentation and Product(s) provided by Avaya are the registered or unregistered Marks of Avaya, its affiliates, or other third parties. Users are not permitted to use such Marks without prior written consent from Avaya or such third party which may own the Mark. Nothing contained in this site, the Documentation and Product(s) should be construed as granting, by implication, estoppel, or otherwise, any license or right in and to the Marks without the express written permission of Avaya or the applicable third party.

Avaya is a registered trademark of Avaya Inc.

All non-Avaya trademarks are the property of their respective owners. Linux® is the registered trademark of Linus Torvalds in the U.S. and other countries.

#### Downloading Documentation

For the most current versions of Documentation, see the Avaya Support website: <http://support.avaya.com>.

#### Contact Avaya Support

See the Avaya Support website: <http://support.avaya.com> for product notices and articles, or to report a problem with your Avaya product. For a list of support telephone numbers and contact addresses, go to the Avaya Support website: <http://support.avaya.com>, scroll to the bottom of the page, and select Contact Avaya Support.

# Contents

<b>1. one-X Portal for IP Office</b>	
1.1 How Do I.....	10
1.2 Logging In.....	13
1.2.1 Logging in using external clients.....	15
1.3 The Main Page.....	16
1.4 Logging Out.....	20
1.5 Your Presence and Status.....	21
1.5.1 Viewing Presence status.....	23
1.6 Phone Notes.....	24
1.7 Hot Desking.....	26
<b>2. Changing the Layout</b>	
2.1 Selecting a Skin.....	28
2.2 Changing the Column Widths.....	28
2.3 Show/Hide Gadgets.....	29
2.4 Maximizing a gadget.....	29
2.5 Add External gadgets.....	30
2.6 Resizing a Gadget.....	30
2.7 Moving Gadgets.....	30
2.8 Default Layout.....	30
2.9 Adding a custom tab.....	31
2.10 Deleting a custom tab.....	31
<b>3. Making and Answering Calls</b>	
3.1 Call Details.....	34
3.2 Call Buttons.....	36
3.3 Call Icons.....	37
3.4 Making a Call.....	39
3.4.1 ... from the Calls Gadget.....	39
3.4.2 ... using the Dial Pad.....	40
3.4.3 ... from the Directory.....	41
3.4.4 ... from the Call Log.....	41
3.4.5 ... from Voicemail.....	42
3.5 Answering a Call.....	43
3.6 Pickup a Call.....	44
3.7 Unanswered Calls.....	44
3.8 Ending a Call.....	44
3.9 Muting a call.....	45
3.10 Holding Calls.....	45
3.10.1 Holding a Call.....	45
3.10.2 Retrieving a Held Call.....	46
3.10.3 Ending a Held Call.....	47
3.11 Switching Between Calls.....	48
3.12 Recording a Call.....	50
3.13 Transferring Calls.....	51
3.13.1 Making an Unsupervised Transfer.....	51
3.13.2 Making a Supervised Transfer.....	52
3.13.3 Transferring Calls Using the Directory.....	53
3.14 Parking Calls.....	54
3.14.1 Configuring Your Park Slots.....	54
3.14.2 Parking a Call.....	55
3.14.3 Unparking a Call.....	56
3.15 Sending DTMF tones.....	57
3.16 Instant Messaging Other Users.....	58
3.16.1 Promoting from an IM to voice call.....	59
3.17 Do Not Disturb.....	59
3.18 Agent Controls.....	60
3.19 Twinned Call Control.....	61
<b>4. Conference Calls</b>	
4.1 Setup a Conference.....	64
4.2 Conference manager recognition.....	66
4.3 Conference speaker recognition.....	66
4.4 Turning Held Calls into a Conference.....	67
4.5 Adding another call to a conference.....	68
4.6 Muting Conference Parties.....	69
4.7 Dropping a participant in a conference.....	70
4.8 Dropping all the participants in a conference.....	70
4.9 Locking a Meet Me conference.....	70
4.10 Parking a conference call.....	70
4.11 Holding a Conference.....	71
4.12 Conference Call Controls.....	72
4.13 Group conference call.....	72
4.14 Configuring Your Conference Bridge Number.....	72
4.14.1 Personal Meet Me Conference.....	73
<b>5. Call Log</b>	
5.1 Using the Call Log.....	76
5.2 Making a Call from the Call Log.....	77
5.3 Adding a Caller to Your Directory.....	77
5.4 Searching for IM conversation.....	77
<b>6. Directories</b>	
6.1 Viewing the Directories.....	80
6.2 Directory Icons.....	81
6.3 Searching the Directories.....	82
6.4 Making a Call.....	83
6.5 Transferring a Call.....	84
6.6 Adding a new Personal directory contact.....	85
6.6.1 Adding a Contact from the System Directory.....	85
6.6.2 Adding a Caller from the Call Log.....	86
6.6.3 Adding a Voicemail Caller to the Directory.....	86
6.7 Editing a Personal Contact.....	87
6.8 Deleting a Personal Directory Contact.....	87
6.9 Adding A Personal Contacts Group.....	88
6.9.1 Outlook group.....	89
6.10 Exporting/Importing Personal directory.....	91
6.11 Emailing a Contact.....	92
6.12 Instant Messaging a Contact.....	93
6.13 Adding a contact to Meet Me conference bridge.....	94
<b>7. Profiles</b>	
7.1 The Detected Profile.....	97
7.2 Selecting Your Profile.....	97
7.3 Editing a Profile.....	98
7.4 Adding a Profile.....	98
7.5 Profile Settings.....	99
7.5.1 Call Pickup.....	99
7.5.2 Mobility - Use Default Deskphone.....	99
7.5.3 Mobility - Forward.....	100
7.5.4 Mobility - Mobile Twinning.....	100
7.5.5 Mobility - Telecommuter Mode.....	101
7.5.6 Voicemail.....	103
<b>8. Voicemail</b>	

8.1 Checking Voicemail Messages.....	106	11.7.3 Voicemail Messages.....	149
8.2 Call Someone Who Left a Message.....	107	11.7.4 Missed Calls.....	149
8.3 Switching Between Phone and PC Playback.....	107	11.7.5 Multiple language support.....	149
8.4 Adding a Caller to Your Personal Directory.....	107	11.7.6 Help menu.....	149
8.5 Changing Your Voicemail Code.....	108	11.7.7 New version available notification.....	149
8.6 Recording Voicemail Greetings.....	108	11.7.8 Terminal Services.....	150
8.7 Select Your Voicemail Greeting.....	108	11.7.9 Secure communications.....	150
8.8 Voicemail Call Screening.....	109		
<b>9. mybuddy</b>		<b>12. Avaya IP Office Plug-in for Microsoft® Outlook®</b>	
9.1 Help command.....	111	12.1 Avaya IP Office Plug-in System Requirements.....	152
9.2 mybuddy command language.....	111	12.1.1 Hardware Requirements.....	152
9.3 Notifications.....	112	12.1.2 Software Requirements.....	152
9.4 Call management.....	113	12.1.3 Microsoft® Outlook® versions.....	152
9.4.1 Storing home and mobile numbers.....	114	12.2 Installing Avaya IP Office Plug-in.....	153
9.5 Following another user.....	115	12.3 Logging in.....	155
9.6 Controlling a conference.....	116	12.4 Logging out.....	159
9.7 Finding the location of a contact.....	118	12.5 Avaya IP Office Plug-in settings.....	160
<b>10. Configuration</b>		12.5.1 Connection.....	160
10.1 Keyboard Shortcuts.....	120	12.5.2 User.....	160
10.2 Park Slots.....	120	12.5.3 Logging.....	161
10.3 Sound Configuration.....	121	12.5.4 Configuring dialing rules.....	161
10.3.1 Proxy Server Exceptions.....	121	12.5.5 Profiles.....	163
10.4 IM/Presence.....	122	12.6 Avaya IP Office Plug-in Directories.....	167
10.4.1 Advertise on Call status.....	124	12.6.1 Viewing Avaya IP Office Plug-in Directories...	167
10.4.2 Uploading an Avatar image.....	124	12.6.2 Avaya IP Office Plug-in Directory Icons.....	168
10.4.3 Configuring IM/Presence Federation with Google Talk.....	124	12.6.3 Searching Avaya IP Office Plug-in Directories.....	169
10.5 Do Not Disturb Exceptions.....	125	12.6.4 Making a Call from the Avaya IP Office Plug-in Directory.....	169
10.6 The World Clock Gadget.....	126	12.6.5 Instant Messaging a Contact in Avaya IP Office Plug-in.....	169
10.7 Language.....	128	12.6.6 Emailing a contact.....	170
10.8 Notifications.....	129	12.6.7 Viewing Recent communications.....	170
10.8.1 Enabling notifications in Google Chrome.....	129	12.6.8 Adding a new Personal directory contact in Avaya IP Office Plug-in.....	170
10.8.2 Enabling IM Desktop notifications in Firefox...	130	12.6.9 Editing a Personal Contact in Avaya IP Office Plug-in.....	171
10.8.3 Enabling IM Desktop notifications in Internet Explorer.....	131	12.6.10 Deleting a Personal Directory Contact in Avaya IP Office Plug-in.....	172
10.9 Security.....	132	12.6.11 Adding A Personal Contacts Group in Avaya IP Office Plug-in.....	172
10.10 Terminal Services.....	132	12.7 Making a call using Avaya IP Office Plug-in.....	173
<b>11. one-X Call Assistant</b>		12.7.1 Typing name or number.....	173
11.1 one-X Call Assistant System Requirements.....	135	12.7.2 Using the dial pad.....	173
11.1.1 Hardware Requirements.....	135	12.7.3 Adding an account code and a subject.....	173
11.1.2 Software Requirements.....	135	12.7.4 Calling a contact using click to dial.....	174
11.2 one-X Call Assistant icons.....	136	12.8 Avaya IP Office Plug-in call functions.....	174
11.3 Installing one-X Call Assistant.....	137	12.8.1 Integrating call with Outlook Features.....	175
11.4 Starting one-X Call Assistant.....	138	12.8.2 Answering a call using Avaya IP Office Plug-in.....	175
11.5 Starting one-X Portal for IP Office.....	139	12.8.3 Placing a call on mute.....	175
11.6 one-X Call Assistant settings.....	140	12.8.4 Holding or unholding a call.....	175
11.6.1 Connection.....	140	12.8.5 Transferring a call using Avaya IP Office Plug-in.....	176
11.6.2 Hot Key Dialing.....	140	12.8.6 Ending a call.....	176
11.6.3 Screen Popping.....	142	12.8.7 Starting a conference call.....	176
11.6.4 Logging.....	143	12.9 Avaya IP Office Plug-in additional features.....	178
11.6.5 Announcements settings.....	143	12.9.1 Click to dial.....	179
11.6.6 Announcements selection.....	144	12.9.2 Avatar.....	181
11.6.7 Configuring dialing rules.....	145		
11.7 one-X Call Assistant additional features.....	145		
11.7.1 one-X Call Assistant Accessibility.....	145		
11.7.2 one-X Call Assistant Messages.....	147		

12.9.3 Call Log.....	181	Index .....	202
12.9.4 Contact Directory.....	181		
12.9.5 Outlook contact synchronization.....	183		
12.9.6 Presence information.....	183		
12.9.7 Voice mail options.....	185		
12.9.8 Multiple language support.....	185		
12.9.9 Sending an instant message.....	187		
12.9.10 Terminal Services.....	187		
12.9.11 Secure communications.....	187		

### 13. Avaya IP Office Plug-in for Salesforce.com

13.1 Avaya IP Office Plug-in for Salesforce.com system requirements.....	189
13.2 Installing Avaya IP Office Plug-in for Salesforce.com.....	190
13.3 Starting Avaya IP Office Plug-in for Salesforce.com.....	190
13.4 Integrating Avaya IP Office Plug-in for Salesforce.com.....	191
13.4.1 Secure communications.....	191
13.4.2 Managing Call Center Users.....	191
13.5 Screen Pop functionality.....	192
13.5.1 Screen Pop settings.....	193
13.5.2 Screen Pop.....	194
13.6 Logging into one-X Portal for IP Office.....	195
13.7 Logging out of one-X Portal for IP Office.....	195
13.8 Making a call.....	196
13.8.1 Using the dial pad.....	196
13.8.2 Searching the contacts.....	196
13.8.3 Typing the number.....	196
13.9 Avaya IP Office Plug-in for Salesforce.com call functions .....	197
13.9.1 Answering a call.....	197
13.9.2 Mute or unmute a call.....	197
13.9.3 Hold or unhold a call.....	197
13.9.4 Ending a call.....	197
13.9.5 Transferring a call.....	197

### 14. Glossary

14.1 Ad hoc conference.....	200
14.2 Appearance Buttons.....	200
14.3 Auto Hold.....	200
14.4 Busy .....	200
14.5 Conference Manager.....	200
14.6 Do Not Disturb.....	200
14.7 Forward on No Answer.....	200
14.8 Forward on Busy.....	200
14.9 Forward To.....	200
14.10 Hot Desk.....	200
14.11 Hunt Group.....	200
14.12 IP Office.....	200
14.13 Log In/Log Out.....	200
14.14 Meet Me conference.....	201
14.15 Park .....	201
14.16 Primary Phone.....	201
14.17 System Administrator.....	201
14.18 Small Community Network.....	201
14.19 Supervised Transfer.....	201
14.20 Unsupervised Transfer.....	201

# 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](#) [200]. 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.
- Conference calls.

The screenshot displays the one-X Portal for IP Office interface. At the top, the navigation bar shows 'Office | one-X Portal for IP Office', user status 'Rajie(301) | Available', and system version 'Version: 9.0.0.0 build 314'. The main content area is divided into four panels:

- Calls:** Features a search bar 'Enter a name or number', four call buttons (1, 2, 3, 4), and a sidebar with options: Drop, Hold, Record, Mute, and Conference.
- Messages (New: 0):** Shows a search bar and a message 'You have no messages' with 'Save' and 'Delete' buttons.
- Directory:** Includes a search bar, tabs for 'Personal', 'System', and 'External', and a list of contacts, currently showing 'Rajie'.
- Conversation History:** Displays a table of call records with columns for Type, Name, Time, Length, and Calls.
 

Type	Name	Time	Length	Calls
Incoming	PP (303)	2013 Jun 25 01:25:26	0 s	1
Incoming	Rajie (301)	2013 Jun 25 01:23:04	0 s	8
Incoming	Rajie (301)	2013 May 14 04:27:19	0 s	6

This documentation covers the use of one-X Portal for IP Office version 9.0.

## 1.1 How Do I...

- [Login](#) <sup>[13]</sup> / [Logout](#) <sup>[20]</sup>

### Change the one-X Portal for IP Office Layout

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"><li>• <a href="#">Select a Skin</a> <sup>[28]</sup></li><li>• <a href="#">Add External gadgets</a> <sup>[30]</sup></li><li>• <a href="#">Move a Gadget</a> <sup>[30]</sup></li><li>• <a href="#">Delete a custom tab</a> <sup>[31]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Change the Column Widths</a> <sup>[28]</sup></li><li>• <a href="#">Maximize a gadget</a> <sup>[29]</sup></li><li>• <a href="#">Default the Layout</a> <sup>[30]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Show/Hide a Gadget</a> <sup>[29]</sup></li><li>• <a href="#">Resize a Gadget</a> <sup>[30]</sup></li><li>• <a href="#">Add a custom tab</a> <sup>[31]</sup></li></ul> |
|--|---|---|

### Make and Answer Calls

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"><li>• <a href="#">Make a call</a> <sup>[39]</sup></li><li>• <a href="#">Unanswered calls</a> <sup>[44]</sup></li><li>• <a href="#">Hold calls</a> <sup>[45]</sup></li><li>• <a href="#">Transfer calls</a> <sup>[51]</sup></li><li>• <a href="#">Instant message other users (Chat)</a> <sup>[58]</sup></li><li>• <a href="#">Enable Mobile Twinning</a> <sup>[61]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Answer a call</a> <sup>[43]</sup></li><li>• <a href="#">End a call</a> <sup>[44]</sup></li><li>• <a href="#">Switch between calls</a> <sup>[48]</sup></li><li>• <a href="#">Park calls</a> <sup>[55]</sup></li><li>• <a href="#">Select Do Not Disturb</a> <sup>[59]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Pick up a call</a> <sup>[44]</sup></li><li>• <a href="#">Mute a call</a> <sup>[45]</sup></li><li>• <a href="#">Record a call</a> <sup>[50]</sup></li><li>• <a href="#">Send DTMF tones</a> <sup>[57]</sup></li><li>• <a href="#">Use Agent controls</a> <sup>[60]</sup></li></ul> |
|--|--|---|

### Start and Manage Conference Calls

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"><li>• <a href="#">Set up a conference</a> <sup>[64]</sup></li><li>• <a href="#">Turn held calls into a conference call</a> <sup>[67]</sup></li><li>• <a href="#">Drop a participant in a conference</a> <sup>[70]</sup></li><li>• <a href="#">Park a conference call</a> <sup>[70]</sup></li><li>• <a href="#">Configure the Conference Bridge number</a> <sup>[72]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Recognize the Conference manager</a> <sup>[66]</sup></li><li>• <a href="#">Add another party to a conference</a> <sup>[68]</sup></li><li>• <a href="#">Drop all participants in a conference</a> <sup>[70]</sup></li><li>• <a href="#">Hold a conference call</a> <sup>[71]</sup></li><li>• <a href="#">Join a Personal Meet Me conference</a> <sup>[73]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Recognize the Conference speaker</a> <sup>[66]</sup></li><li>• <a href="#">Mute conference parties</a> <sup>[69]</sup></li><li>• <a href="#">Lock a Meet Me conference</a> <sup>[70]</sup></li><li>• <a href="#">Use Conference call controls</a> <sup>[72]</sup></li></ul> |
|---|--|---|

### Use My Call Log

- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"><li>• <a href="#">Use the Call Log</a> <sup>[76]</sup></li><li>• <a href="#">Search IM conversation</a> <sup>[77]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Make a call From the Call Log</a> <sup>[77]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Add a Call Log number to my Directory</a> <sup>[77]</sup></li></ul> |
|---|---|---|

### Use the Directories

- |   |   |   |
|---|---|---|
| <ul style="list-style-type: none"><li>• <a href="#">View the Directories</a> <sup>[80]</sup></li><li>• <a href="#">Make calls from the Directory</a> <sup>[83]</sup></li><li>• <a href="#">Edit a Directory Contact</a> <sup>[87]</sup></li><li>• <a href="#">Email a Contact</a> <sup>[92]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">View the user status in the Directory</a> <sup>[81]</sup></li><li>• <a href="#">Transfer a call from the Directory</a> <sup>[84]</sup></li><li>• <a href="#">Delete a Directory Contact</a> <sup>[87]</sup></li><li>• <a href="#">Instant Message a Contact</a> <sup>[93]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Search the Directories</a> <sup>[82]</sup></li><li>• <a href="#">Add a Directory Contact</a> <sup>[85]</sup></li><li>• <a href="#">Add a Contacts Group Tab</a> <sup>[88]</sup></li></ul> |
|---|---|---|

### Create and Use Profiles

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"><li>• <a href="#">Use the 'Detected' Profile</a> <sup>[97]</sup></li><li>• <a href="#">Add a New Profile</a> <sup>[98]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Select an Active Profile</a> <sup>[97]</sup></li><li>• <a href="#">Configure the Profile</a> <sup>[99]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Edit a Profile</a> <sup>[98]</sup></li></ul> |
|--|--|--|

Access and Use Voicemail		
<ul style="list-style-type: none"> <li>• <a href="#">Enable/Disable Voicemail screening</a> <sup>[109]</sup></li> <li>• <a href="#">Switch between Phone and PC playback</a> <sup>[107]</sup></li> <li>• <a href="#">Record Mailbox Greetings</a> <sup>[108]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Check Voicemail messages</a> <sup>[108]</sup></li> <li>• <a href="#">Add a Voicemail caller to my Directory</a> <sup>[107]</sup></li> <li>• <a href="#">Select Mailbox Greetings</a> <sup>[108]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Call someone who left a message</a> <sup>[107]</sup></li> <li>• <a href="#">Change my Voicemail Mailbox Code</a> <sup>[108]</sup></li> <li>• <a href="#">Call Screening</a> <sup>[109]</sup></li> </ul>

Use mybuddy		
<ul style="list-style-type: none"> <li>• <a href="#">Use the Help command</a> <sup>[111]</sup></li> <li>• <a href="#">Follow another user</a> <sup>[115]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Get Notifications</a> <sup>[112]</sup></li> <li>• <a href="#">Control a conference</a> <sup>[118]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Manage calls</a> <sup>[113]</sup></li> <li>• <a href="#">mybuddy command language</a> <sup>[111]</sup></li> </ul>

Configure my one-X Portal for IP Office		
<ul style="list-style-type: none"> <li>• <a href="#">Change My Keyboard Shortcuts</a> <sup>[120]</sup></li> <li>• <a href="#">Configure IM/Presence</a> <sup>[122]</sup></li> <li>• <a href="#">Select my Language</a> <sup>[128]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Configure Park Slots</a> <sup>[126]</sup></li> <li>• <a href="#">Set Do Not Disturb Exceptions</a> <sup>[125]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Enable Sounds</a> <sup>[121]</sup></li> <li>• <a href="#">Configure the World Clock</a> <sup>[126]</sup></li> </ul>

Use the one-X Call Assistant (Windows PCs Only)		
<ul style="list-style-type: none"> <li>• <a href="#">Check the one-X Call Assistant system requirements</a> <sup>[135]</sup></li> <li>• <a href="#">Start the one-X Call Assistant</a> <sup>[138]</sup></li> <li>• <a href="#">Use the one-X Call Assistant additional features</a> <sup>[145]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">View the one-X Call Assistant icons</a> <sup>[136]</sup></li> <li>• <a href="#">Start the one-X Portal for IP Office</a> <sup>[139]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Install the one-X Call Assistant</a> <sup>[137]</sup></li> <li>• <a href="#">Configure the one-X Call Assistant</a> <sup>[140]</sup></li> </ul>

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

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"><li>• <a href="#">Check the Avaya IP Office Plug-in system requirements</a> <sup>[152]</sup></li><li>• <a href="#">Log out of the Avaya IP Office Plug-in</a> <sup>[159]</sup></li><li>• <a href="#">Use the Avaya IP Office Plug-in call functions</a> <sup>[174]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Install the Avaya IP Office Plug-in</a> <sup>[155]</sup></li><li>• <a href="#">Configure the Avaya IP Office Plug-in</a> <sup>[160]</sup></li><li>• <a href="#">Use the Avaya IP Office Plug-in additional features</a> <sup>[178]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Log into the Avaya IP Office Plug-in</a> <sup>[155]</sup></li><li>• <a href="#">Make a call using the Avaya IP Office Plug-in</a> <sup>[173]</sup></li></ul> |
|--|--|--|

## Use the Avaya IP Office Plug-in for Salesforce.com

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"><li>• <a href="#">System requirements</a> <sup>[189]</sup></li><li>• <a href="#">Integrate</a> <sup>[191]</sup></li><li>• <a href="#">Log out</a> <sup>[195]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Install Avaya IP Office Plug-in for Salesforce.com</a> <sup>[190]</sup></li><li>• <a href="#">Use Screen pop functionality</a> <sup>[192]</sup></li><li>• <a href="#">Make a call</a> <sup>[196]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Start Avaya IP Office Plug-in for Salesforce.com</a> <sup>[190]</sup></li><li>• <a href="#">Login</a> <sup>[195]</sup></li><li>• <a href="#">Call functions</a> <sup>[197]</sup></li></ul> |
|--|--|--|

## 1.2 Logging In

one-X Portal for IP Office is a licensed through licenses entered by your [system administrator](#)<sup>[201]</sup> into the [IP Office system](#)<sup>[201]</sup>. 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 following web browsers:
  - **Google Chrome 23**
  - **Internet Explorer 8.0/9.0/10.0**
  - **Mozilla Firefox 16/17**
  - **Safari 6.0**
- 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.
- **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](#)<sup>[201]</sup> if you also have one of those.
- **IP Address**  
You need the IP address or the FDQN of the one-X Portal for IP Office server.

one-X Portal for IP Office 9.0 supports **Brazilian Portuguese, Dutch, English(US and UK), French, German, Italian, Latin Spanish, Polish, Russian, Simplified Chinese, Swedish, and Turkish**. You can set the language in the login page.

1. While logging in, choose the language listed under **Language**.
2. Click **Login**.

**Note:** The language that you set is applicable only to the one-X Portal for IP Office. 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.

The login page 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.

2. Enter your **User name** and **Password**.
  3. (Optional) If you want to save your user name and password on the computer, select the **Remember me on this computer** check box. Select this check box if you are the only person who uses the computer.
  4. If you want to use one-X Portal for IP Office to log into an extension on the phone system, or your home telephone or mobile telephone, click **Login to phone**.
- To log into an extension on the phone system, select the **Login my phone** check box and in the **Base Extension** field, enter the base extension number of the extension. For more information, see [Hot Desking](#)<sup>[26]</sup>.

- To log into your home or mobile telephone, select the **Login through Telecommuter** check box and in the **Telecommuter Number** field, enter the home telephone or mobile telephone number. For more information, see [Telecommuter](#).<sup>[10]</sup>



5. Click **Login**.

If login fails, the one-X Portal for IP Office displays one of the following messages:

- "Invalid user credentials" - indicates that either the user name or password is incorrect.
- "Your telephone is logged out. Please log your telephone in, then try again" - indicates that you are not currently logged into an IP Office phone.
- "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 one-X Portal for IP Office could not connect to the telephone system.
- "Csta Resource not available" - indicates that your browser does 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 a 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.

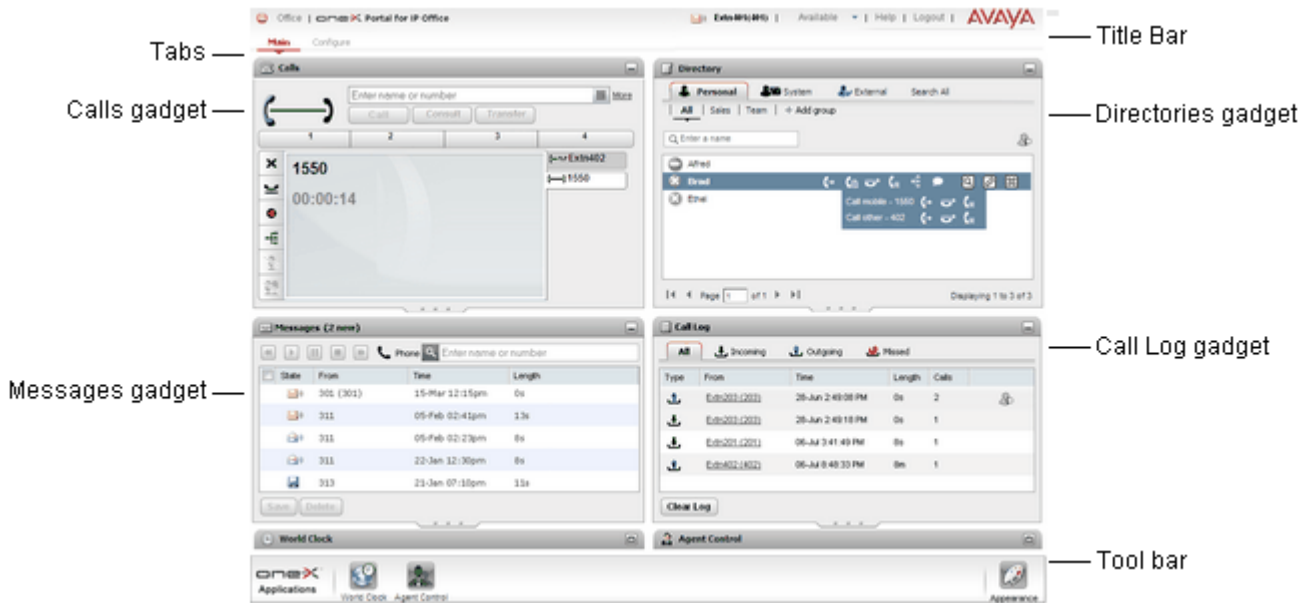
#### Exceptions for the login credentials on an external XMPP client

**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.

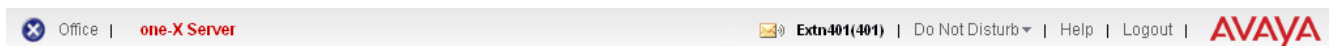
## 1.3 The Main Page

The one-X Portal for IP Office consists of two tabs or pages; **Main** and **Configure**<sup>[20]</sup>. The elements displayed on the **Main** tab are described below.



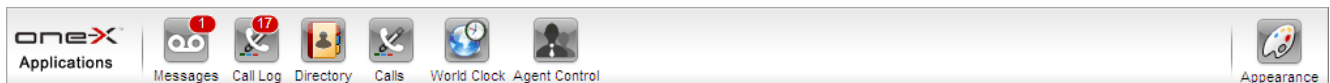
### Title Bar<sup>[21]</sup>

The title bar shows you information about yourself.



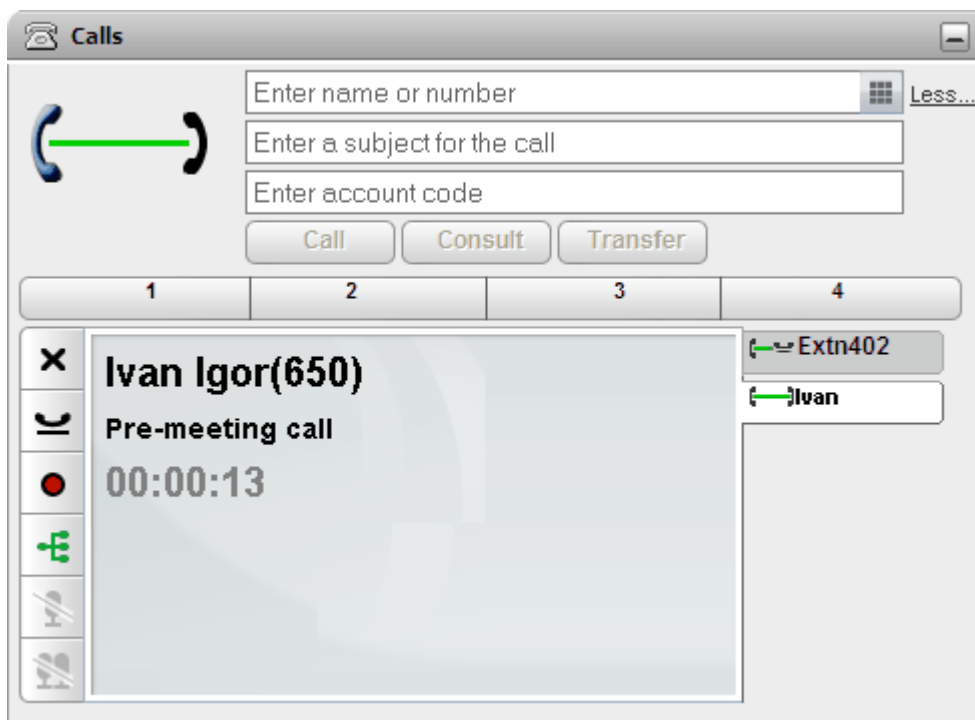
### Toolbar

The toolbar at the bottom is used to access controls for the one-X Portal for IP Office [appearance](#)<sup>[28]</sup> and to display icons for [minimized gadgets](#)<sup>[29]</sup>.



### Calls Gadget<sup>[33]</sup>

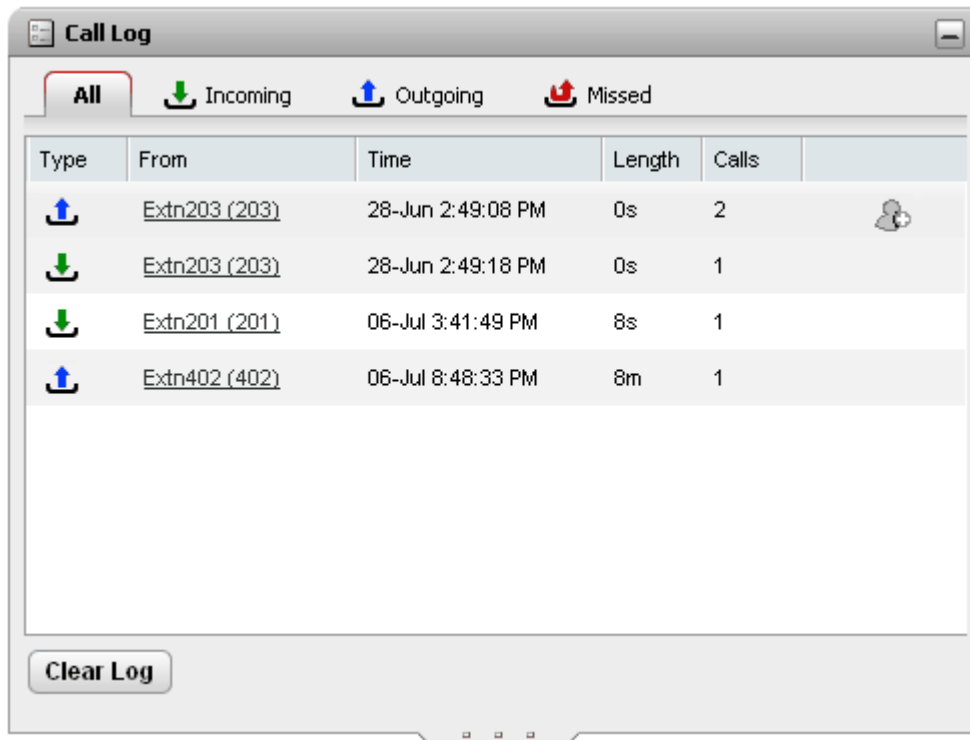
The **Calls** gadget shows details of your current calls, with a sub-tab for each call. The text boxes at the top of the gadget can be used to make new calls.





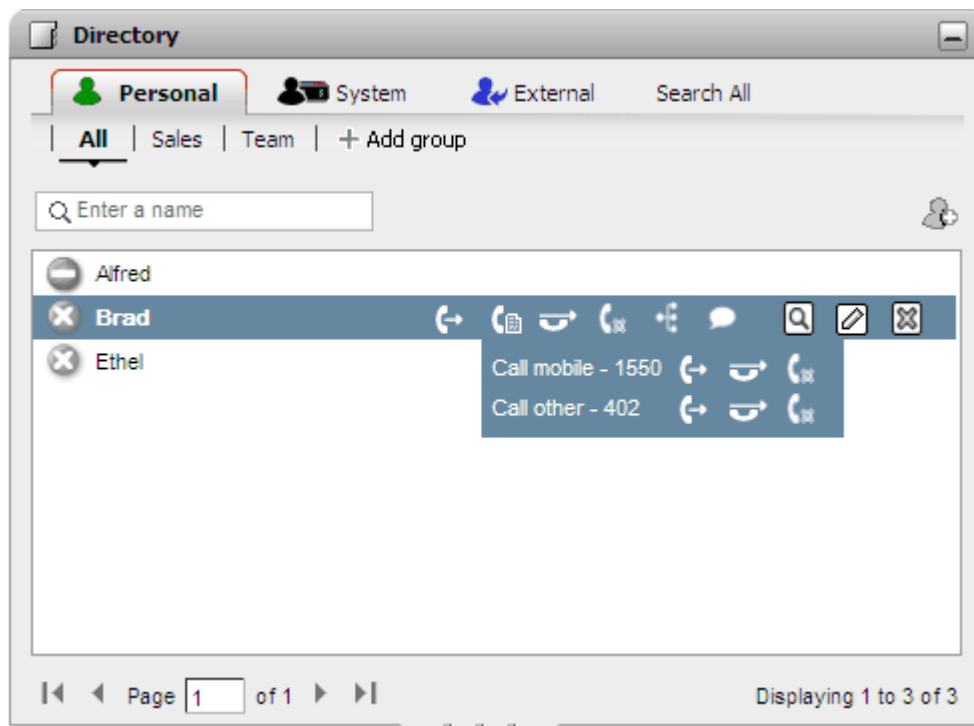
## [Call Log](#) <sup>76</sup>

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



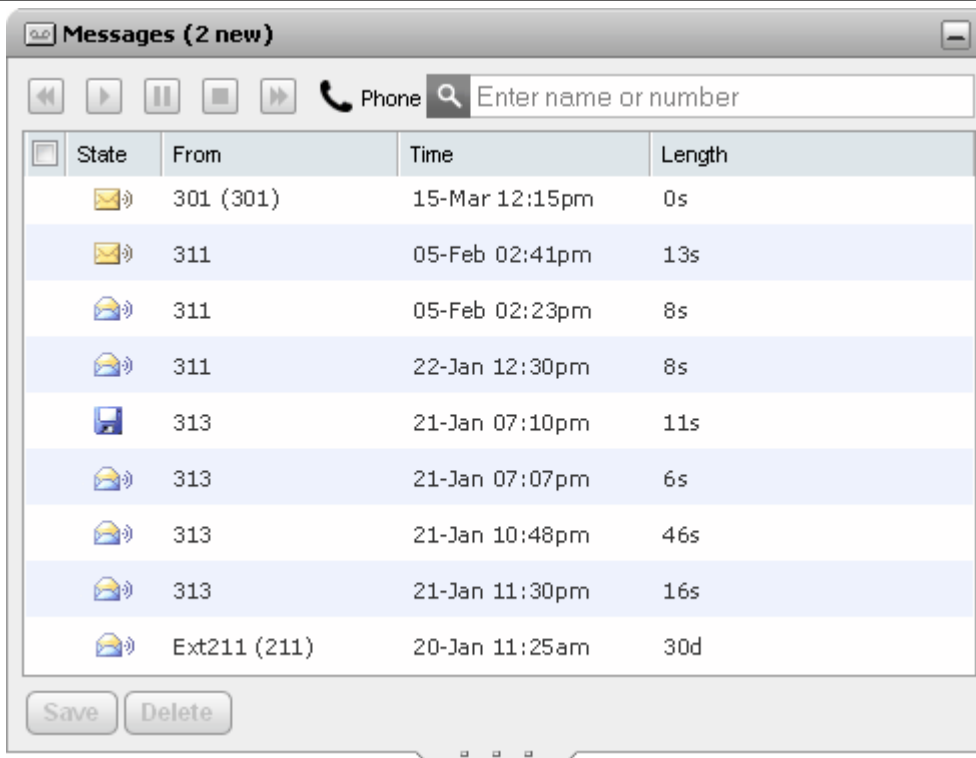
## [Directory](#) <sup>80</sup>

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](#) <sup>200</sup> on the phone system. The **External** directory allows you to search other directories, access to which has been configured by the [system administrator](#) <sup>201</sup>.



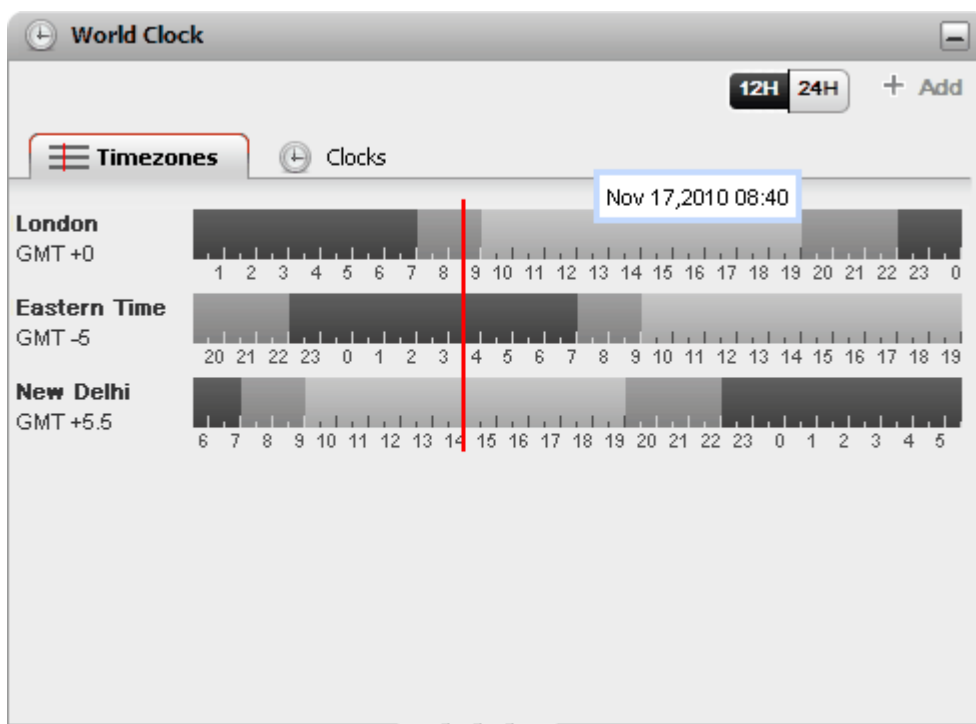
## [Messages](#) <sup>106</sup>

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](#) <sup>126</sup>

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](#) <sup>60</sup>

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.

The image shows a window titled "Agent Control" with a user icon and a close button. It contains three sections: "Agent State" with a "Busy Not Available" status and a dropdown arrow; "Reason Codes" with a "Meeting" dropdown; and "My Hunt Groups" which is a table with three rows: "Hunt Group Name", "Main B", and "Sales", each with a checked checkbox.

<input checked="" type="checkbox"/>	Hunt Group Name
<input checked="" type="checkbox"/>	Main B
<input checked="" type="checkbox"/>	Sales

---

## 1.4 Logging Out

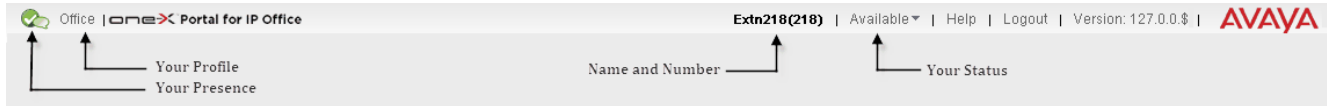
When you have finished using one-X Portal for IP Office, you should click on the **Logout** link shown in the top right. This will end your one-X Portal for IP Office session and return the browser to the [log in screen](#)<sup>[13]</sup>. It also frees up the license consumed by your one-X Portal for 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.

## 1.5 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
	<b>Available</b>	The status indicates that you are available and can be called.
	<b>Busy</b>	The status indicates that you have a call in progress.
	<b>Do Not Disturb</b>	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 <a href="#">Do Not Disturb Exceptions</a> [128].
	<b>Logged Out</b>	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.
	<b>Ringing</b>	This status indicates that the phone is ringing and you have an incoming call.
	<b>Unknown</b>	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
	<b>Available/ Online</b>	The status indicates that you are logged into the IM server and available for chat.
	<b>Do not disturb</b>	The status indicates that you have enabled <i>Do No Disturb</i> on the IM
	<b>Offline</b>	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 <a href="#">instant messages</a> [58] using the one-X Portal for IP Office.
	<b>Away</b>	The status indicates that you are logged into the IM but currently away from your desk.
	<b>Unknown</b>	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 <a href="#">instant messaged</a> <sup>[58]</sup> 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](#)<sup>[96]</sup>. 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](#)<sup>[96]</sup> 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
<b>Available</b>	This is the normal state in which you can make and receive calls.
<b>Do not disturb</b>	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 <a href="#">calls from numbers that you have added to your list of Do Not Disturb Exceptions</a> <sup>[125]</sup> . In this state, you can still make calls.
<b>Offline</b>	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 <a href="#">instant messages</a> <sup>[58]</sup> using the one-X Portal for IP Office.

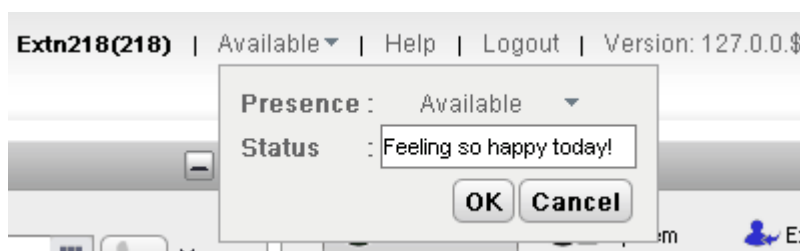
**Note:** The one-X Portal for IP Office client provides a presence selector in the status section. The presence the user selects will be reflected appropriately on the phone and XMPP server. For example, if the user selects *Do Not Disturb*, the phone and the IM will be switched to *DND* mode (no one 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](#)<sup>[20]</sup>  
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](#)<sup>[13]</sup>.
- **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](#)<sup>[75]</sup>, [Messages](#)<sup>[105]</sup>, and [Directory](#)<sup>[79]</sup> 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).
  - Any contacts uploaded from the IP Office Plug-in for Microsoft Office are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal for IP Office only, and are in addition to the maximum 100 Personal Directory contacts.
2. 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** 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](#)<sup>[20]</sup> as [appearance buttons](#)<sup>[20]</sup>. 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](#)<sup>[20]</sup> 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](#)<sup>[20]</sup>. 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](#)<sup>[20]</sup>. 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](#)<sup>[20]</sup> 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.

**Note:** The off-hook status of a 1100 series phones is not reflected in one-X Portal for IP Office.

## 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.



The screenshot shows the Avaya one-X Portal for IP Office login interface. At the top, there are links for "Administrator Login" and "AFA Login". The Avaya one-X logo is prominently displayed, along with the version number "Version: 9.0.0.0". The main heading is "Portal for IP Office". Below this, there are input fields for "User name" and "Password". A "Language" dropdown menu is set to "English". There are checkboxes for "Remember me on this computer" (unchecked) and "Login through Telecommuter" (unchecked). A "Login to phone" dropdown menu is set to "IP Office". A "Login my phone" checkbox is checked. Below this, there is a "Base extension" input field and a dropdown menu set to "OneX-Asha". A "Login" button is located to the right of these fields. At the bottom, there is a copyright notice: "© 2013 Avaya Inc. All Rights Reserved."

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"><li>• <a href="#">Select a Skin</a> <sup>[28]</sup></li><li>• <a href="#">Add External gadgets</a> <sup>[30]</sup></li><li>• <a href="#">Move a Gadget</a> <sup>[30]</sup></li><li>• <a href="#">Delete a custom tab</a> <sup>[31]</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Change the Column Widths</a> <sup>[28]</sup></li><li>• <a href="#">Maximize a gadget</a> <sup>[29]</sup></li><li>• <a href="#">Default the Layout</a> <sup>[30]</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Show/Hide a Gadget</a> <sup>[29]</sup></li><li>• <a href="#">Resize a Gadget</a> <sup>[30]</sup></li><li>• <a href="#">Add a custom tab</a> <sup>[31]</sup></li></ul>

### 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 can be changed in 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**  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**  This icon also shows the number of unread messages in your mailbox.




- **Call Log Gadget**  This icon also shows the number of missed calls in your call log.




- **Directory Gadget**  This icon displays directories of names and associated telephone numbers.




- **World Clock Gadget**  This gadget shows the current time in various selected time zones.



- **Agent Control Gadget**  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 gadget's title bar.


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




- **Call Log Gadget**  This icon displays the number of missed calls in your call log.




- **Directory Gadget**  This icon displays directories of names and associated telephone numbers.



- **World Clock Gadget**  This gadget displays the current time in various selected time zones.



- **Agent Control Gadget**  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.

## 2.5 Add External gadgets

one-X Portal for IP Office 9.0 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 for IP Office 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 for IP Office 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.

## 2.6 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.

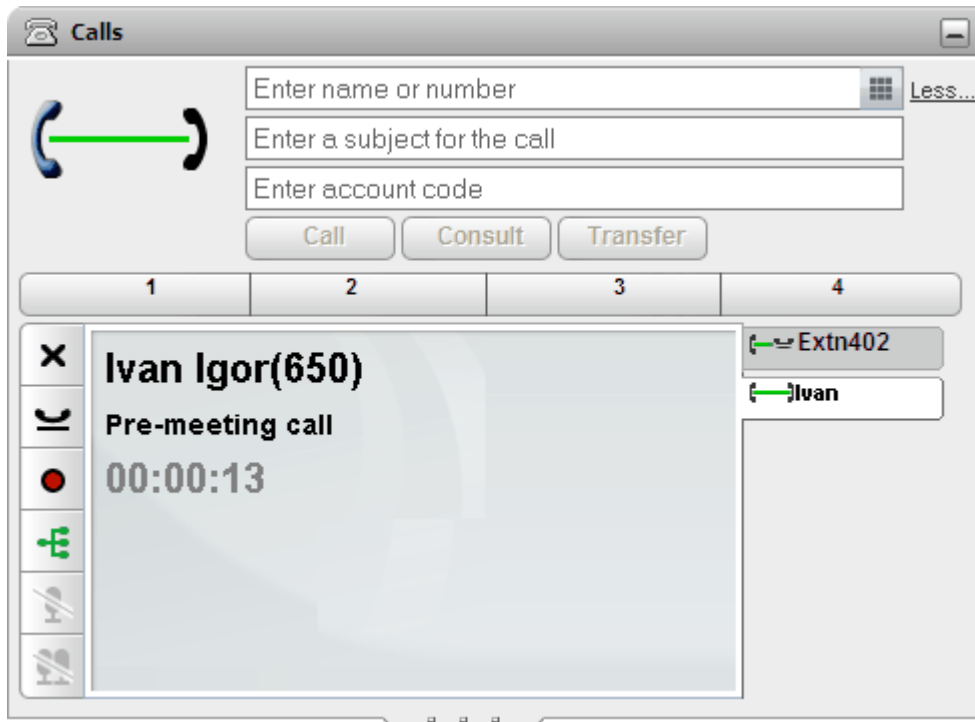
# **Chapter 3.**

# **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](#)<sup>[36]</sup> shown will vary but generally indicate actions that you can perform with the currently displayed call.

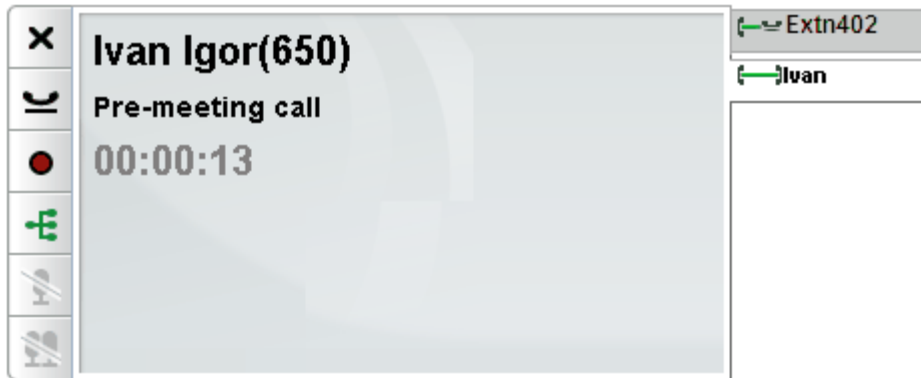


#### Make and Answer Calls

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• <a href="#">Make a call</a><sup>[39]</sup></li> <li>• <a href="#">Unanswered calls</a><sup>[44]</sup></li> <li>• <a href="#">Hold calls</a><sup>[45]</sup></li> <li>• <a href="#">Transfer calls</a><sup>[51]</sup></li> <li>• <a href="#">Instant message other users (Chat)</a><sup>[58]</sup></li> <li>• <a href="#">Enable Mobile Twinning</a><sup>[61]</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Answer a call</a><sup>[43]</sup></li> <li>• <a href="#">End a call</a><sup>[44]</sup></li> <li>• <a href="#">Switch between calls</a><sup>[48]</sup></li> <li>• <a href="#">Park calls</a><sup>[55]</sup></li> <li>• <a href="#">Select Do Not Disturb</a><sup>[59]</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Pick up a call</a><sup>[44]</sup></li> <li>• <a href="#">Mute a call</a><sup>[45]</sup></li> <li>• <a href="#">Record a call</a><sup>[50]</sup></li> <li>• <a href="#">Send DTMF tones</a><sup>[57]</sup></li> <li>• <a href="#">Use Agent controls</a><sup>[60]</sup></li> </ul> |
|---|---|--|

### 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](#)<sup>37)</sup> 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 calls arrives, its tab is automatically selected in order to show the new calls 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 grayed 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.

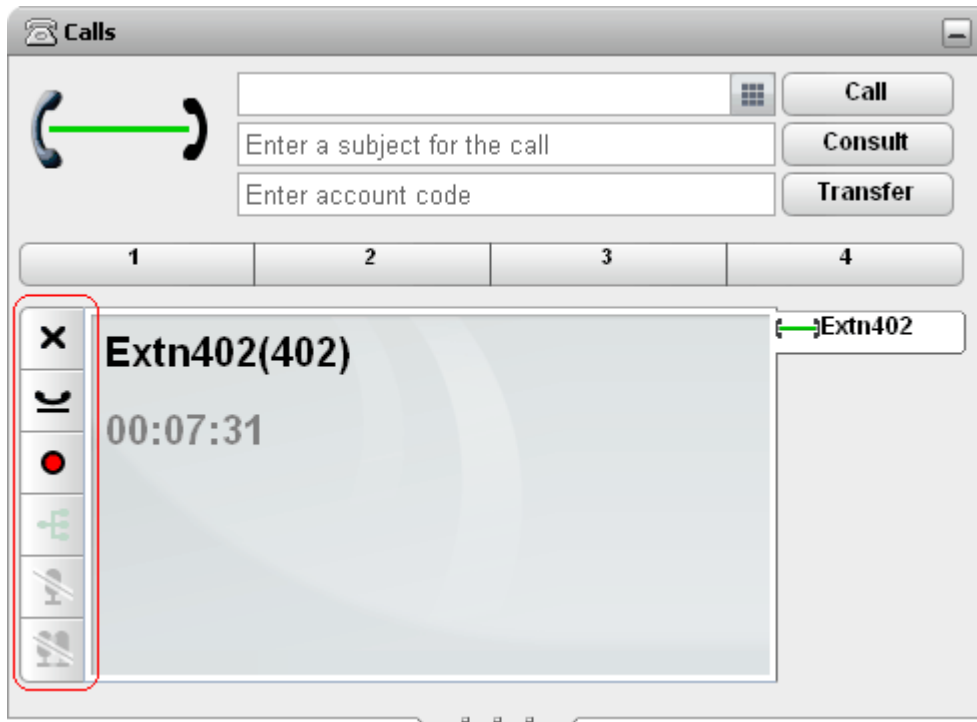
- If there is an account code associated with the call, the account code is displayed. Using one-X Portal for IP Office, an account code can be entered when [making a call](#)<sup>39)</sup> or, for incoming calls, the telephone system can automatically associate an account code based on the caller's 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 system displays the call timer in one-X Portal for IP Office for all phone types. When you make call the system starts the call timer from the time you initiate the call. When a user answers your call the system resets the call timer for that user after the user answers your call or in other words after the call is connected. The call timer continues to displays the time until you end the call or drop the call.

### 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 .

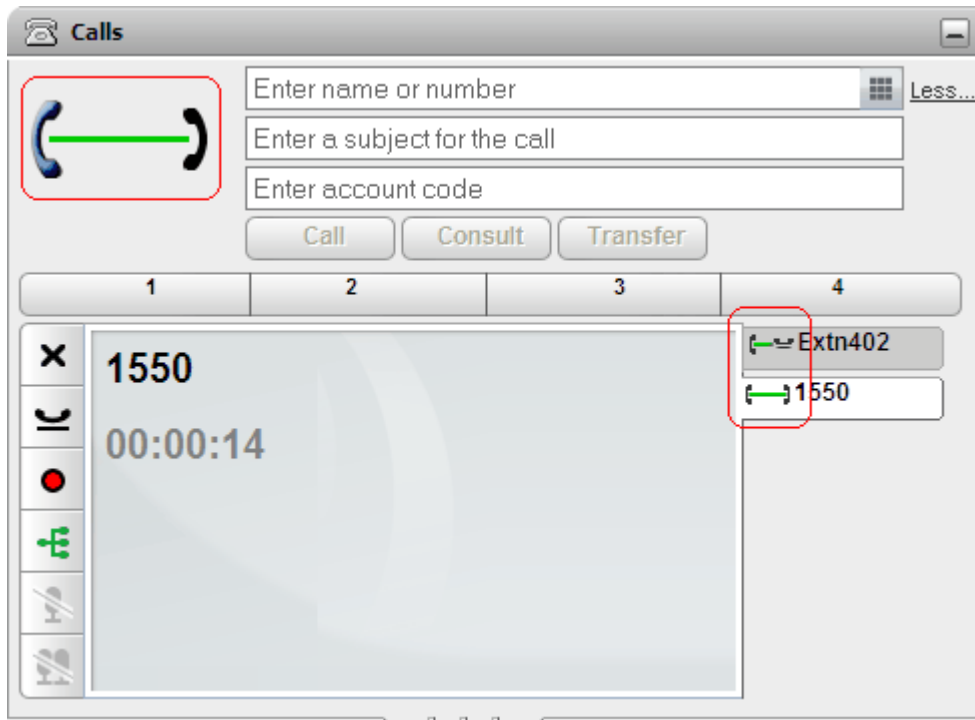












Icon	Action	Description
	<b>Answer Call</b>	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call.
	<b>Drop Call</b>	For a currently connected call, pressing <b>X</b> disconnects the call.
	<b>Redirect Call</b>	For an alerting call, pressing <b>X</b> 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.
	<b>Record Call</b>	Start recording the current call.
	<b>Stop Recording</b>	Stop recording the current call.
	<b>Hold Call</b>	Puts the call on hold.
	<b>Retrieve Held Call</b>	Take a call back from hold.
	<b>Complete Transfer</b>	With a call on hold and another call in progress, transfer the held call to the current connected party.
	<b>Conference Call</b>	With a call on hold and another call in progress, you can conference the calls.
	<b>Mute</b>	Mute your connection to a call.
	<b>Mute All</b>	For conferences which you initiate, this control allows you to mute all the other conference parties.
	<b>Unmute</b>	Unmute your connection to a call.
	<b>Unmute All</b>	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"> <li>• <b>Idle/On Hook</b> This icon indicates that you currently have no call connected.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Alerting/Ringing</b> This icon indicates a call being presented to you to be <a href="#">answered</a><sup>[43]</sup>. Depending on other phone settings your phone also gives an audible ring and flash its lamp or icons.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Dialing</b> 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.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Outgoing Call Ringing</b> 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.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Could Not Connect</b> The icon indicates that the call you were making could not be connected for some reason.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Connected</b> This icon indicates the call to which you are currently talking or listening.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Held Call</b> This icon indicates a call that you have been placed on hold.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>On Hold</b> This icon indicates a call that you placed on hold.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Conference</b> This icon is shown when you are in a conference call that you started.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Screened Call</b> This icon indicates a caller leaving a voicemail message. See <a href="#">Voicemail Call Screening</a><sup>[109]</sup>.</li> </ul>

## 3.4 Making a Call

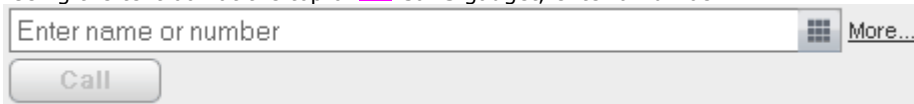
You can use the one-X Portal for IP Office in a number of ways to make calls:

- [From the Call Gadget](#) <sup>[39]</sup>
- [Using the Dial Pad](#) <sup>[173]</sup>
- [From the Directory](#) <sup>[41]</sup>
- [From the Call Log](#) <sup>[41]</sup>
- [From the Voicemail](#) <sup>[42]</sup>

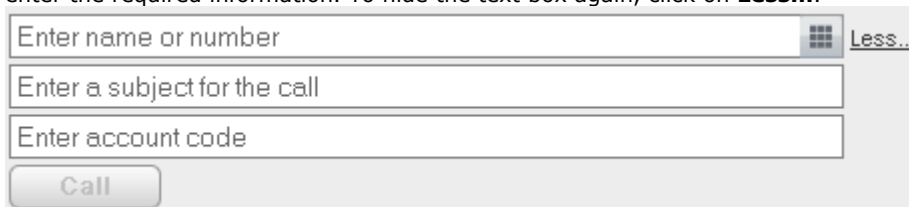
### 3.4.1 ... from the Calls Gadget


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](#) <sup>[201]</sup> 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....**

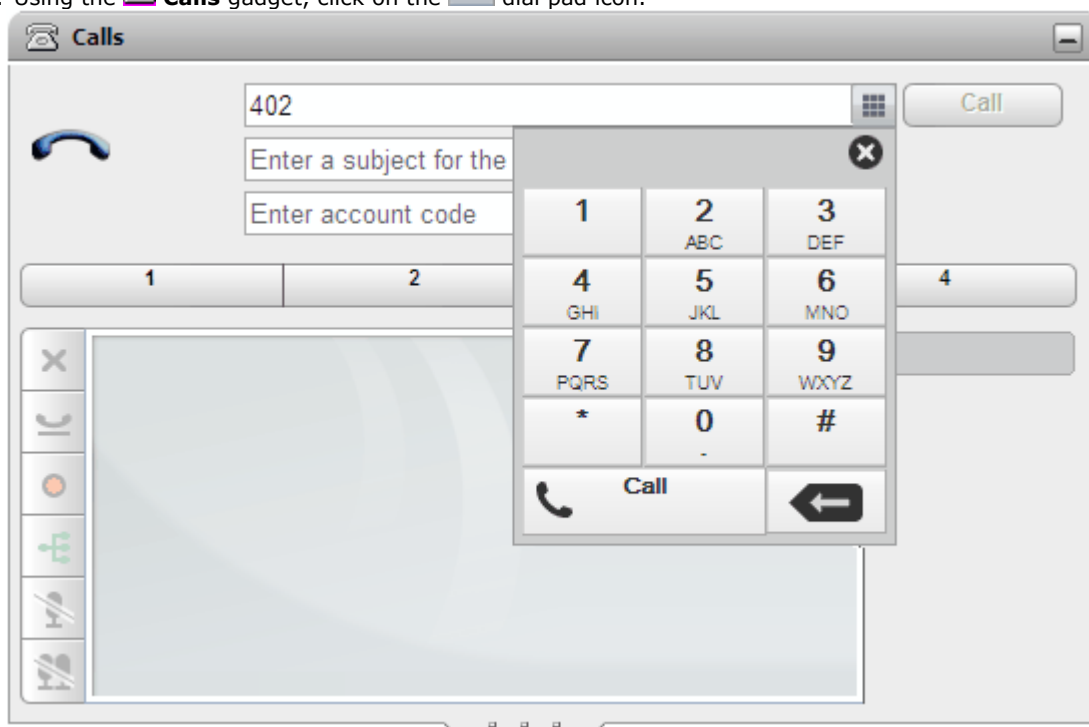




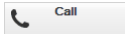

- If you enter a subject it will be added to the call details. If you are calling an internal user, it is displayed on their phone or in their one-X Portal for IP Office call display.
  - If you enter an account code, it will be included in the call log details output by the telephone system after the 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](#) <sup>[200]</sup>.
    - 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.


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

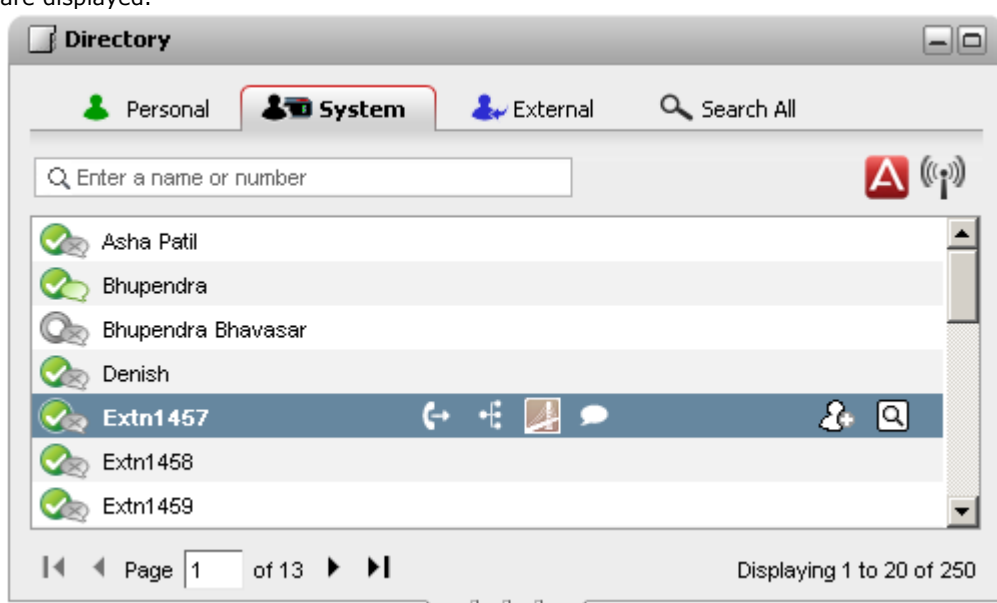





2. Using the dial pad enter the number you want to call. For external calls, remember to add any external dialing prefix used by your telephone system.
3. To delete the last digit entered, click on the  delete icon.
4. At any time you can exit the dial pad to continue entering call details into the other fields if required. Click the  dial pad icon to hide the dial pad.
5. 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](#) <sup>[2006]</sup>.
  - The progress of the call is displayed on a tab in the  **Calls** gadget.



### 3.4.3 ... from the Directory



1. Using the  **Directory** gadget on the **Main** tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the 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](#)<sup>81</sup> 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

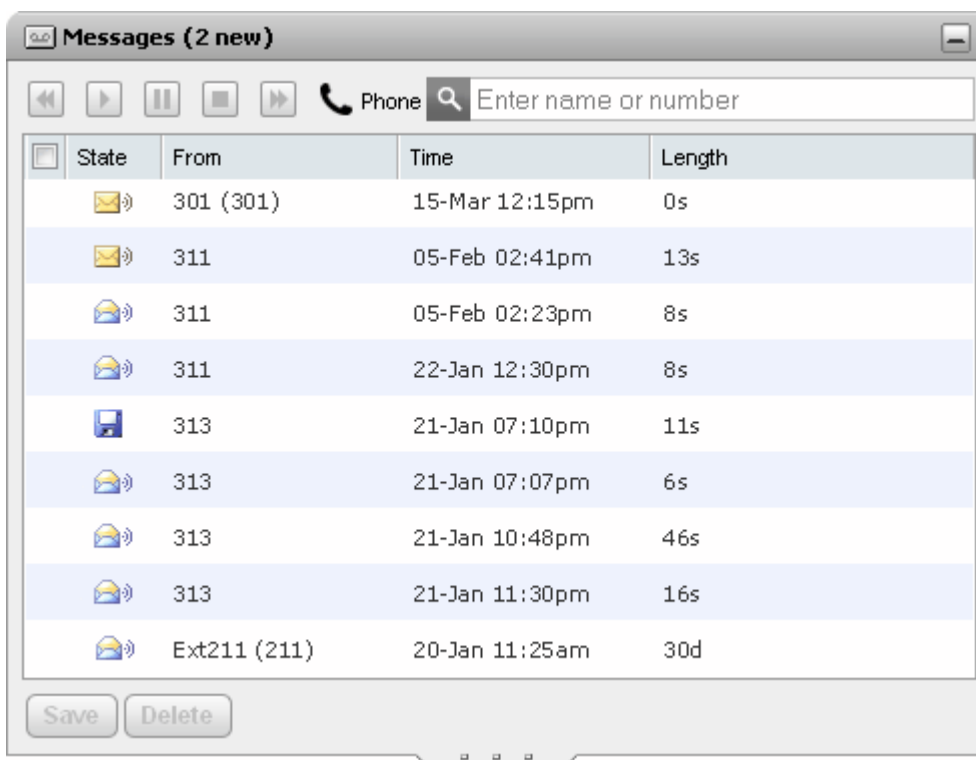
You can use the numbers in the call log to make a repeat or return call.


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.





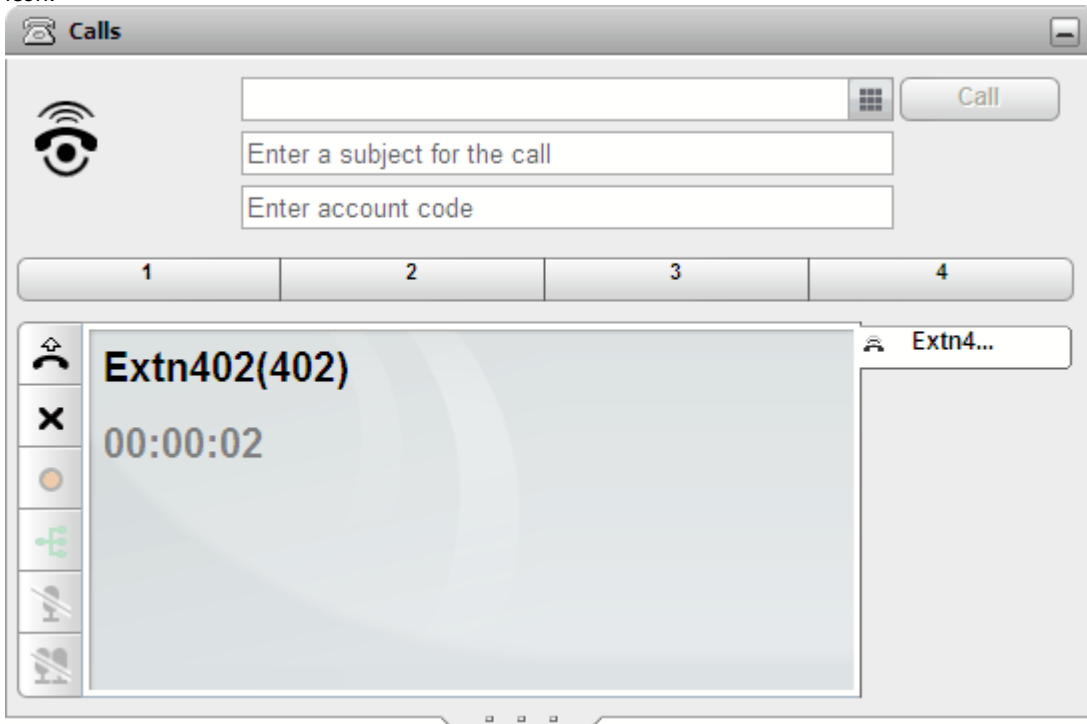
2. Click on the name or number details of the caller to make a return call.
  - The progress of the call is displayed on a tab in the  **Calls** gadget.


### 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](#)<sup>[206]</sup> 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](#)<sup>[46]</sup>.

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](#)<sup>[206]</sup>.
  - 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](#)<sup>[36]</sup> 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](#)<sup>[98]</sup> 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](#)<sup>[200]</sup> 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](#)<sup>[200]</sup> 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 possible in all cases.
- You can switch forwarding on/off and change the destination number using a one-X Portal for IP Office [profile](#)<sup>[98]</sup>.
- 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](#)<sup>[98]</sup>.
- 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](#)<sup>[76]</sup> as a missed call. <<<not by default>>>

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

[Hunt groups](#)<sup>[200]</sup> 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  button displayed with the call details in the  **Calls** gadget.

## 3.9 Muting a call

one-X Portal for IP Office 9.0 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 for IP Office in an active call on mute

You can place a user of one-X Portal for IP Office 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.

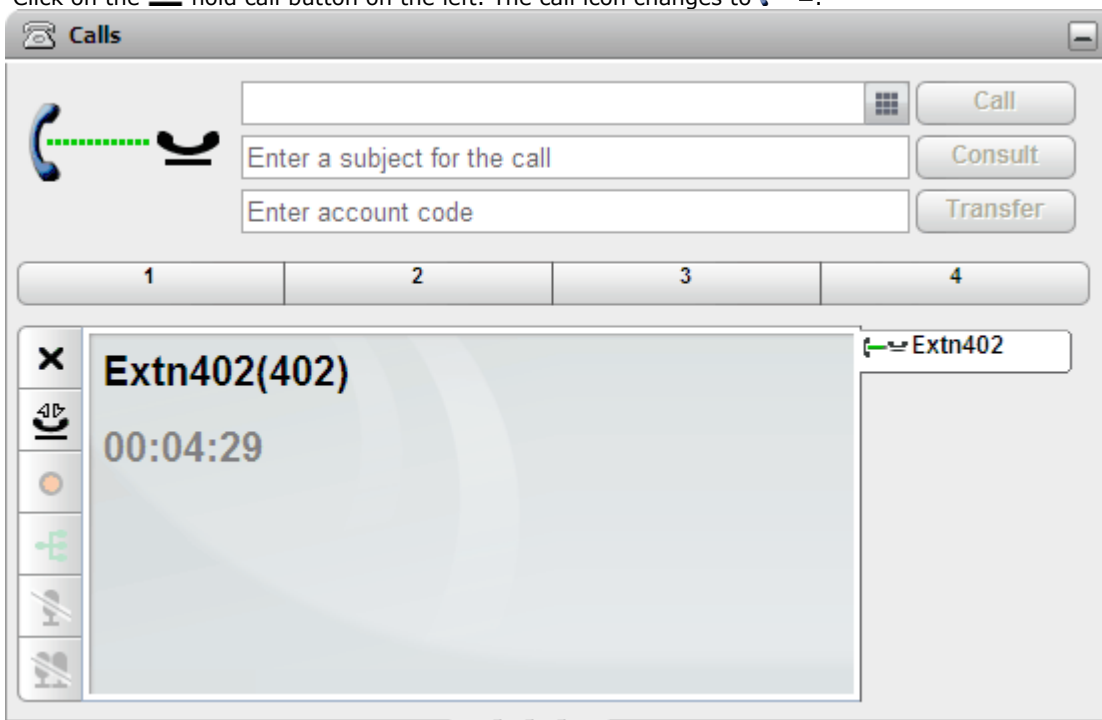
**Note:** When you press the mute button on the phone, the one-X Portal for IP Office 9.0 does not reflect the status of the call as muted.

## 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

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





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

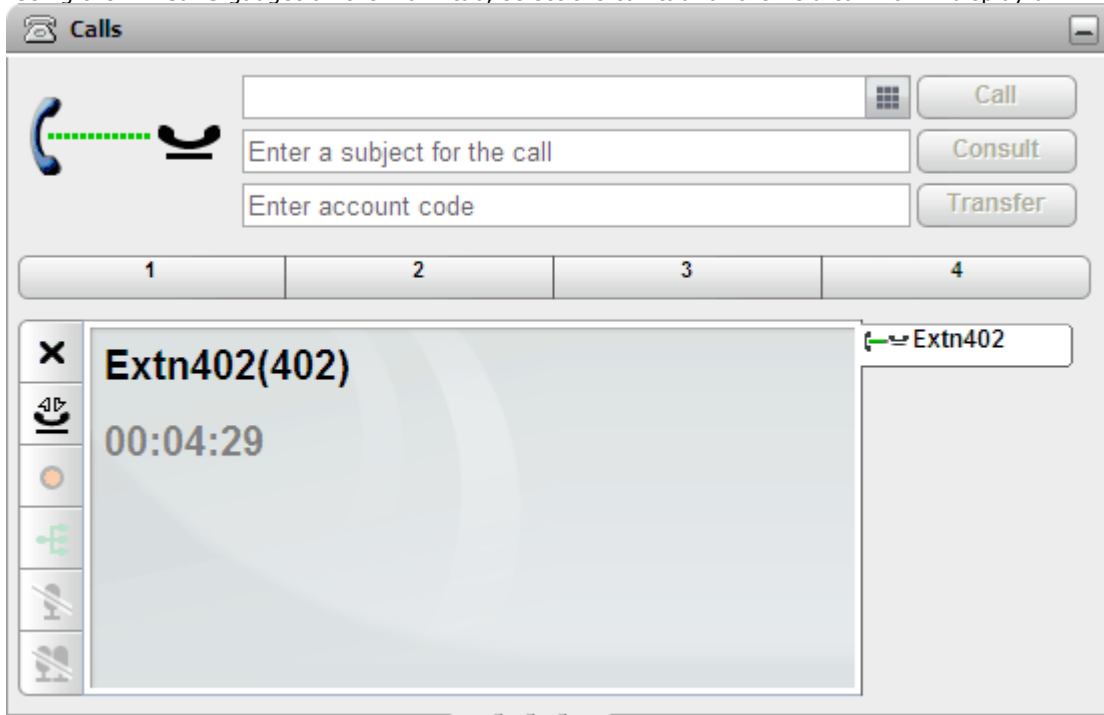
### Notes



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

- The **Hold Timeout** for all held calls is set by the [system administrator](#)<sup>[201]</sup>. 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](#)<sup>[200]</sup> 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](#)<sup>[200]</sup> to further incoming calls.



### 3.10.2 Retrieving a Held Call

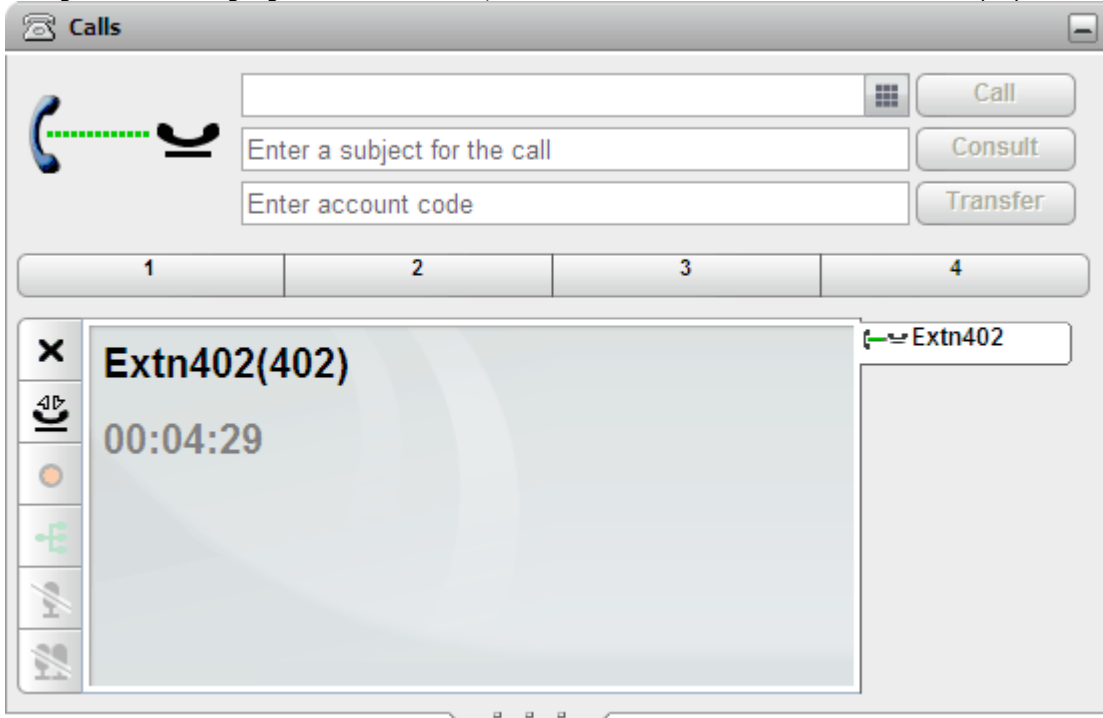
- Using the  **Calls** gadget on the **Main** tab, select the call tab for the held call. It will display a  icon.




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

### 3.10.3 Ending a Held Call

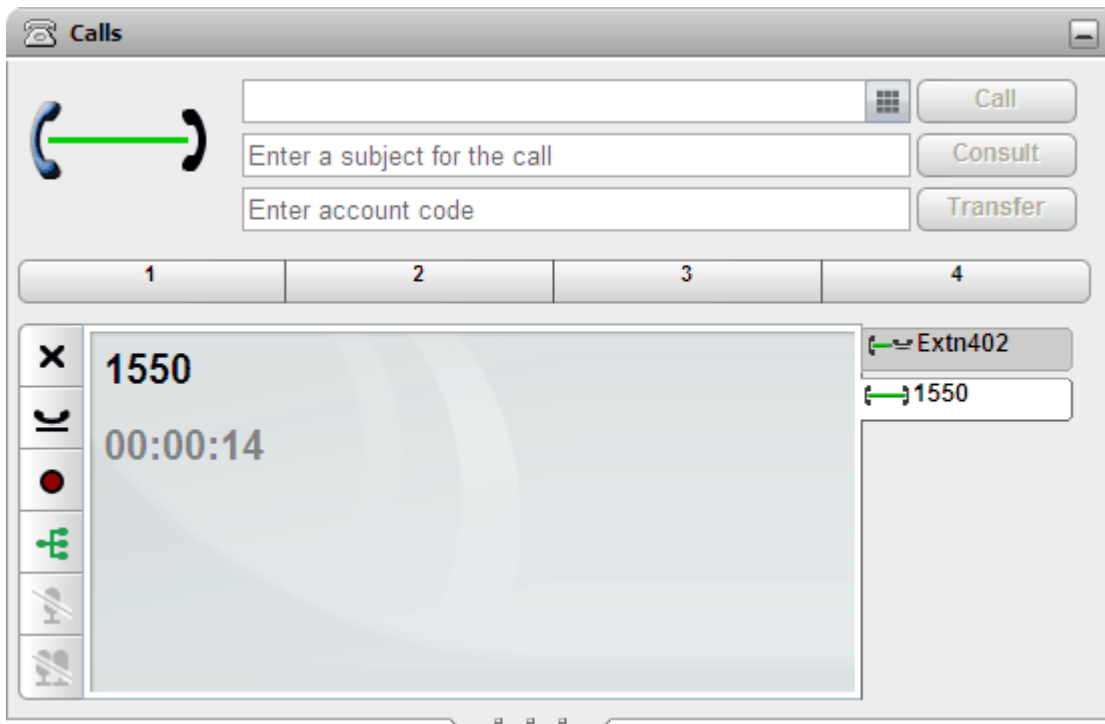
- Using the  **Calls** gadget on the **Main** tab, select the call tab for the held call. It will display a  icon.





- 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](#)<sup>[37]</sup> (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](#)<sup>[20b]</sup>.

### 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](#)<sup>[20a]</sup> as [appearance buttons](#)<sup>[20b]</sup>. 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](#)<sup>[20b]</sup> 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](#)<sup>[20b]</sup>. 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](#)<sup>[20b]</sup>. 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](#)<sup>[20a]</sup> 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.

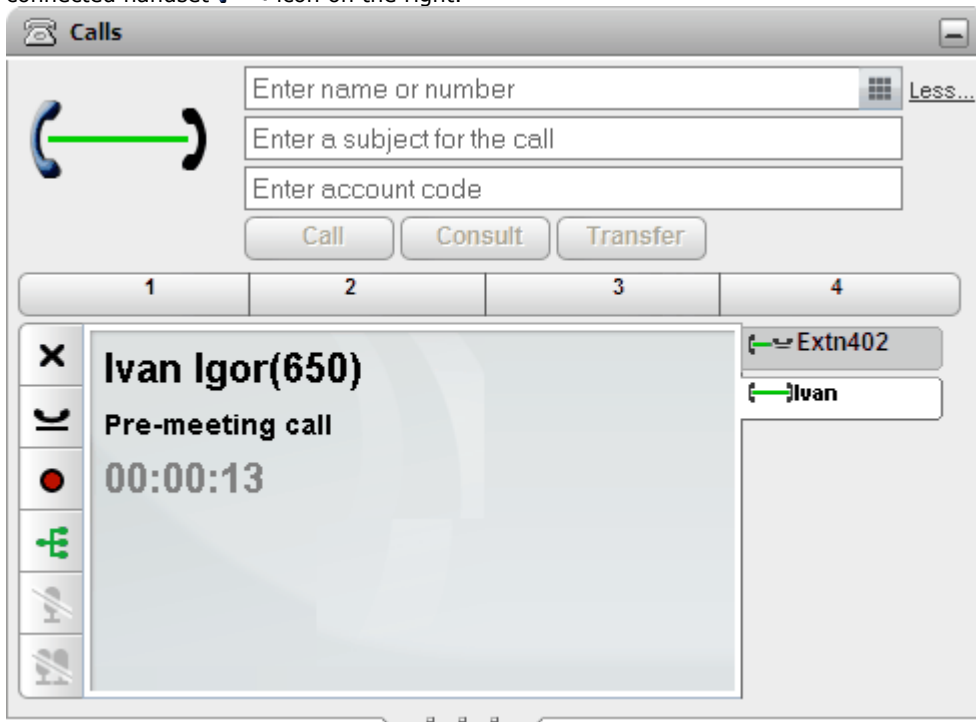
## 3.12 Recording a Call




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](#) 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:



<b>Unsupervised Transfer</b>	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.
<b>Supervised Transfer</b>	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.
<b>Conference Transfer</b>	You can also transfer a call by <a href="#">starting a conference</a> <sup>[67]</sup> between all the parties and then leaving the conference.

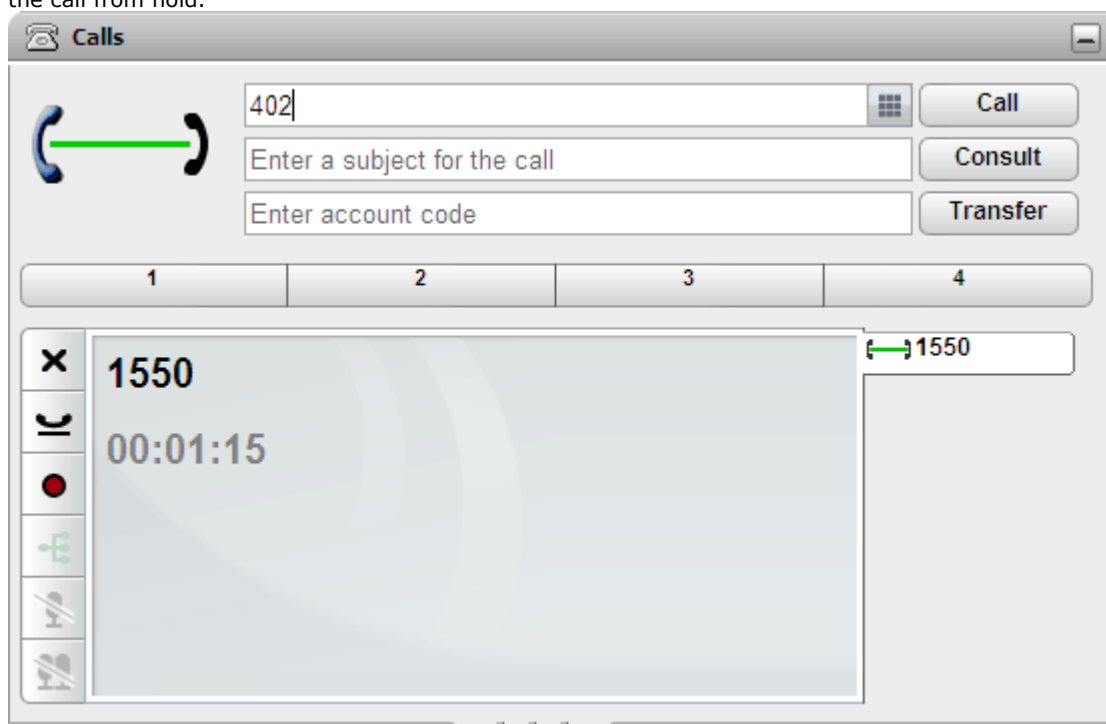
### Notes


1. Your [system administrator](#) <sup>[20]</sup> 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.

1. 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 **Transfer** button.
3. The call is transferred.



### Notes

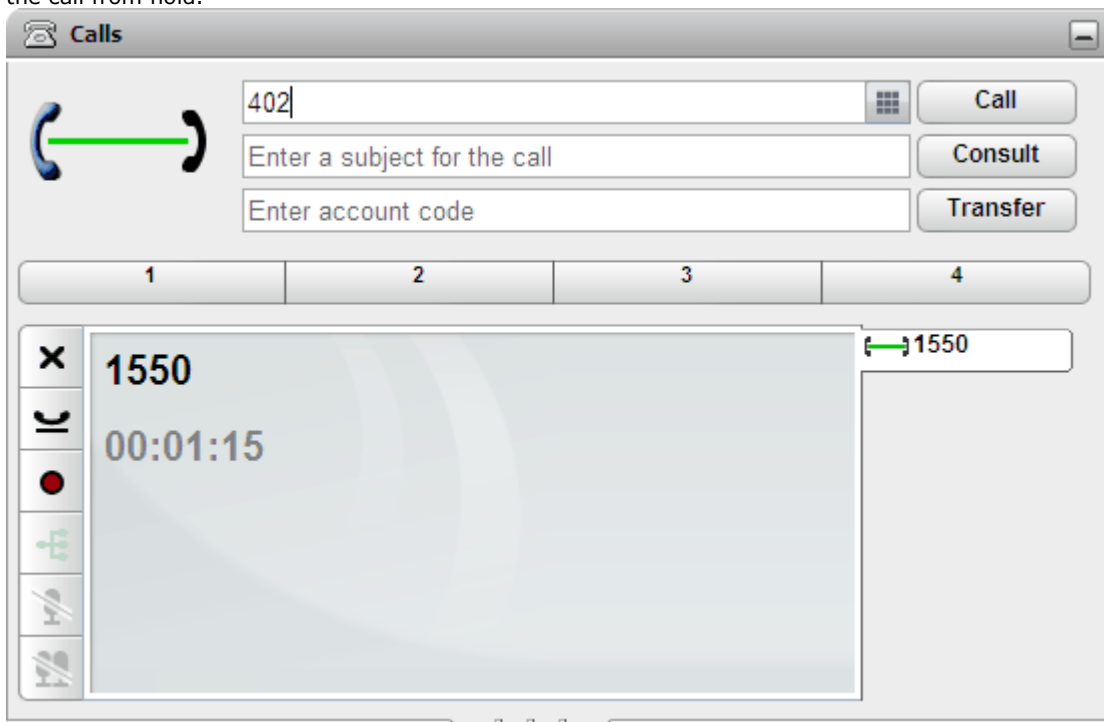
1. Your [system administrator](#) <sup>[20]</sup> can enable a **Transfer Return Time** for you. When set, if a transferred call is not answered within that time, it can recall to you.
2. The ability to transfer an external call to another external number can be restricted by your system administrator.








### 3.13.2 Making a Supervised Transfer

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

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

1. Using the  **Calls** gadget on the **Main** tab, select the call tab for the call you want to transfer. 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.

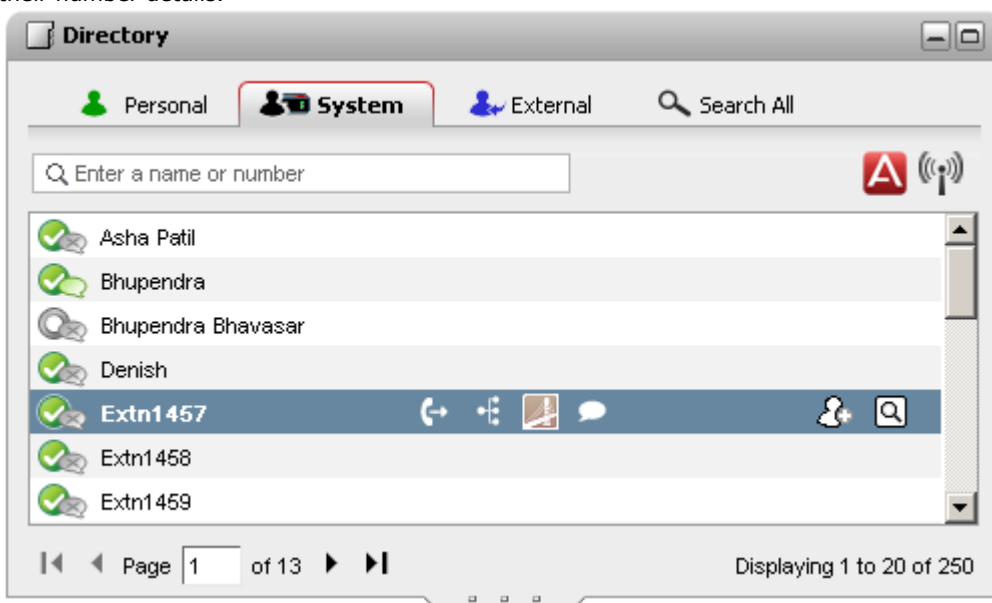
#### Notes

1. Your [system administrator](#) <sup>(201)</sup> 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](#) <sup>[51]</sup> to the contact's primary number.
- Use the  consult icon to start a [supervised transfer](#) <sup>[52]</sup> 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.

You can park and unpark a call on a multisite telephony network such as a Small Community Network.

For example, if you park a call in slot 1, then the users on the local telephony network and Small Community Network can unpark the call. The system displays the call that is parked on slot 1 for any user who is configured on a local telephony network or a Small Community Network has the same 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](#)<sup>[20]</sup> can adjust this. You cannot drop a parked call that recalls your phone.
2. You can Park and unpark between different phone systems in a [Small Community Network](#)<sup>[20]</sup>.

### 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.

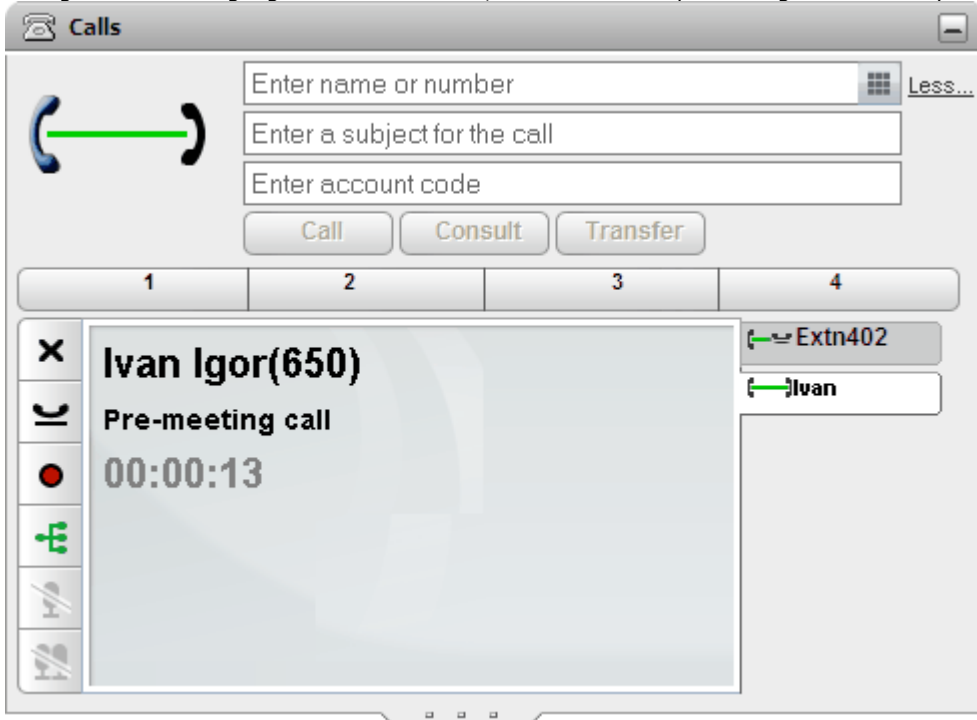
1. In the **Configure** tab select **Telephony**.
2. In the **Park Slots** section enter the park slot number or name of the park slot. By default the park slots are named from 1 to 4.


**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.

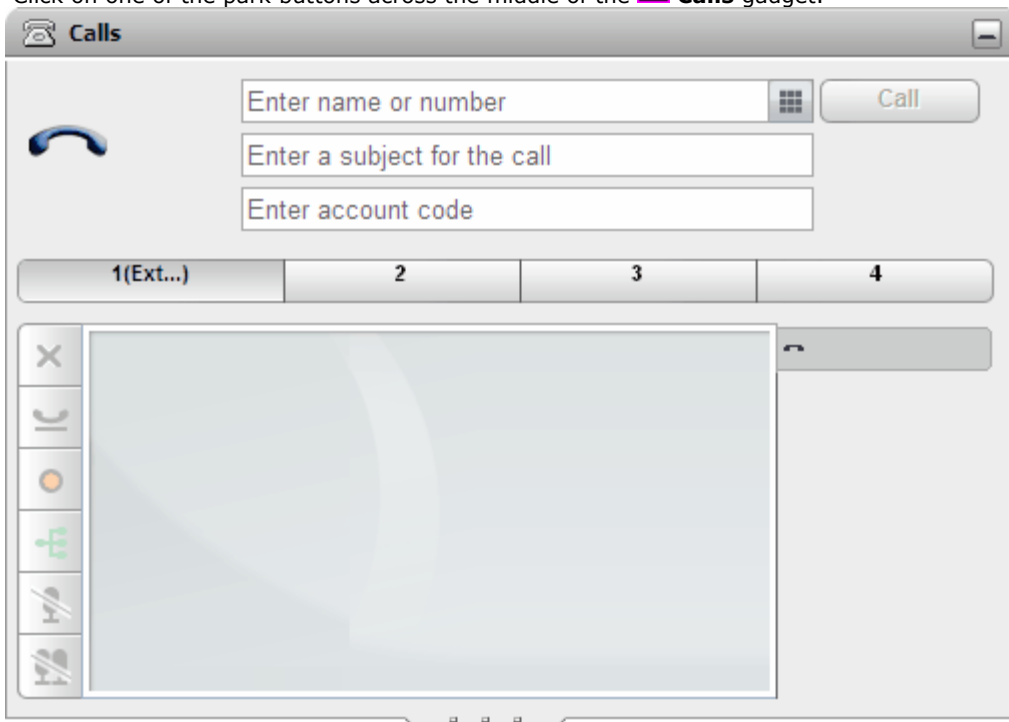
3. Click **Save**.

### 3.14.2 Parking a Call

- Using the  **Calls** gadget on the **Main** tab, select the tab representing the call that you want to park.



- Click on one of the park buttons across the middle of the  **Calls** gadget.



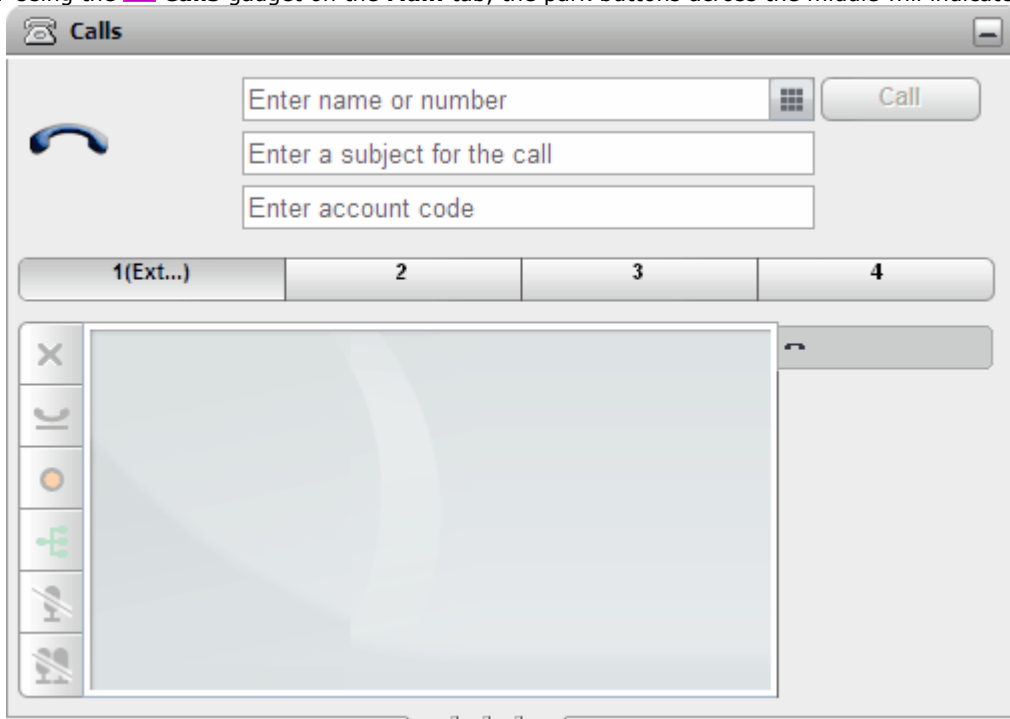
- The call is parked and the button now indicates that system park slot is in use.

#### Notes

- 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](#)<sup>[20]</sup> can adjust this. You cannot drop a parked call that recalls your phone.

### 3.14.3 Unparking a Call

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



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




### 3.15 Sending DTMF tones

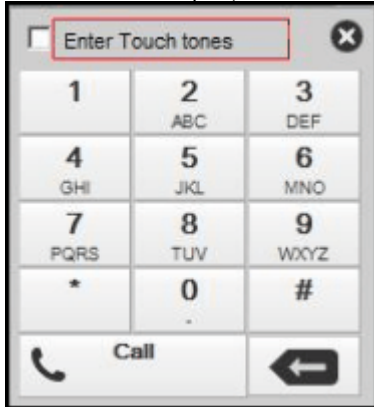
You can send DTMF (Dual Tone Multi-Frequency) signals using one-X Portal for IP Office.

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 and when the party you are calling is using a SIP terminal.

#### To enable the Touch tones option:

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




2. Select the **Enter Touch tones** option.
3. 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.

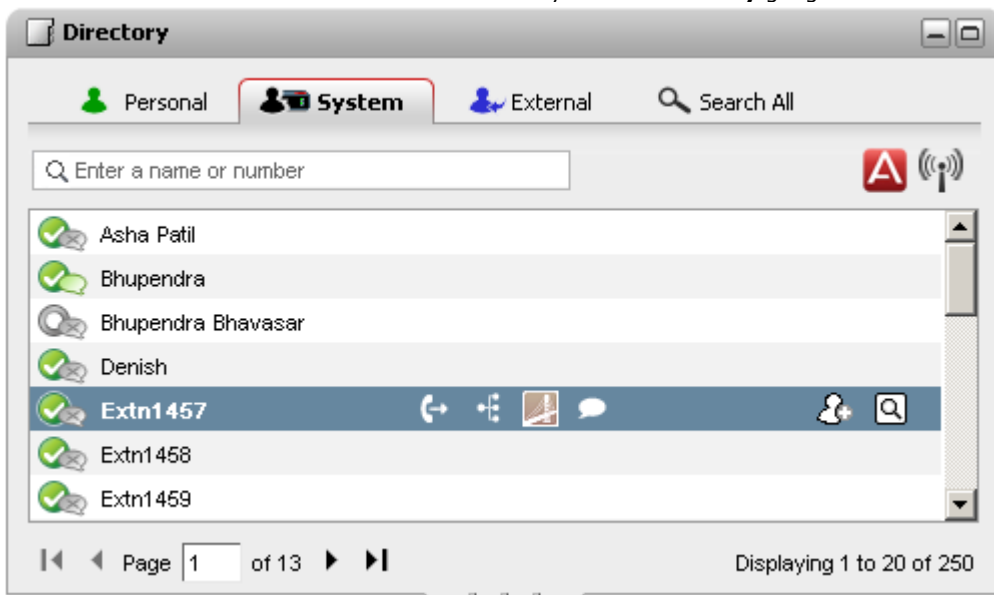
**Note:** The system does not display the dial pad when any activity occurs. For example, when you receive a call or when a call is dropped.



### 3.16 Instant Messaging Other Users

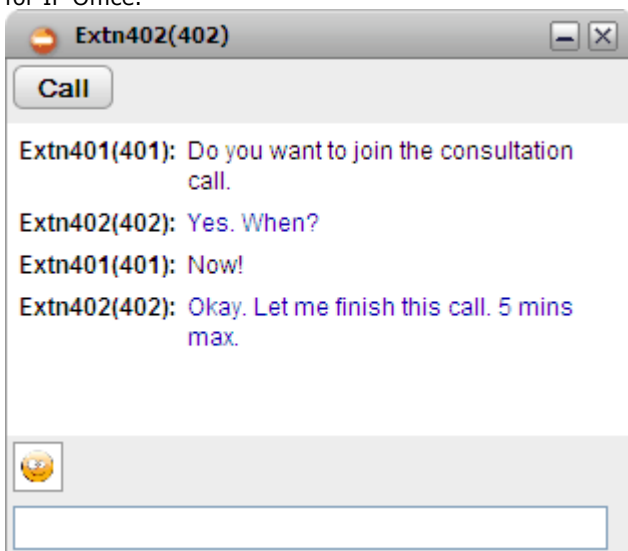
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

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](#) <sup>[21]</sup> 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**.

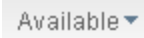

The system initiates a call between your phone and the other person. The system displays a message that reads: "<user name> wants to talk to you - your phone will ring shortly" where <user name> is the name or extension of the user who has initiated the call.

**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.

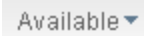


### 3.17 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your [Do Not Disturb Exceptions](#)<sup>125</sup>. 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.

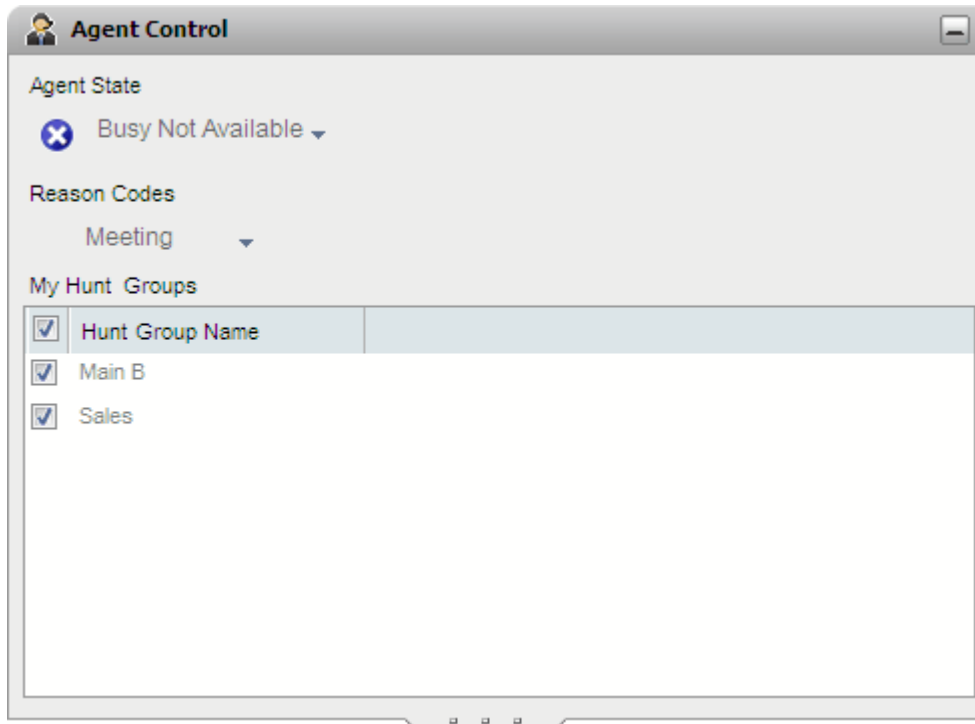
#### To switch Do Not Disturb Off

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 enabled/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**.

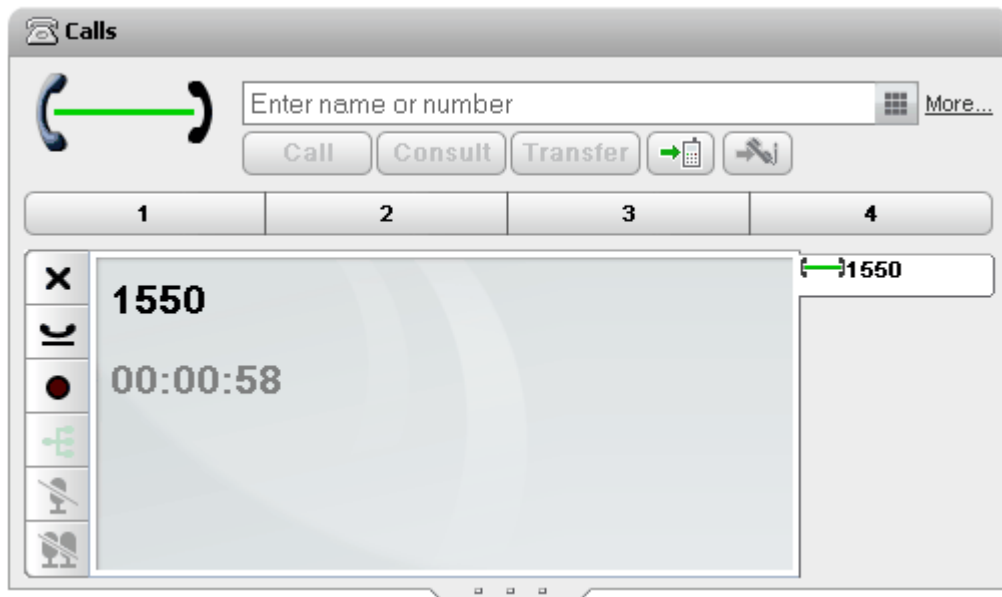
- **Which Queues Can I Control?**  
Your telephone system administrator is able to configure for which queues you can change your membership state, by default it is none. Refer to the one-X Portal for IP Office Installation Manual. The hunt group name is grayed out if you cannot control your membership 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](#)<sup>(100)</sup>. 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:



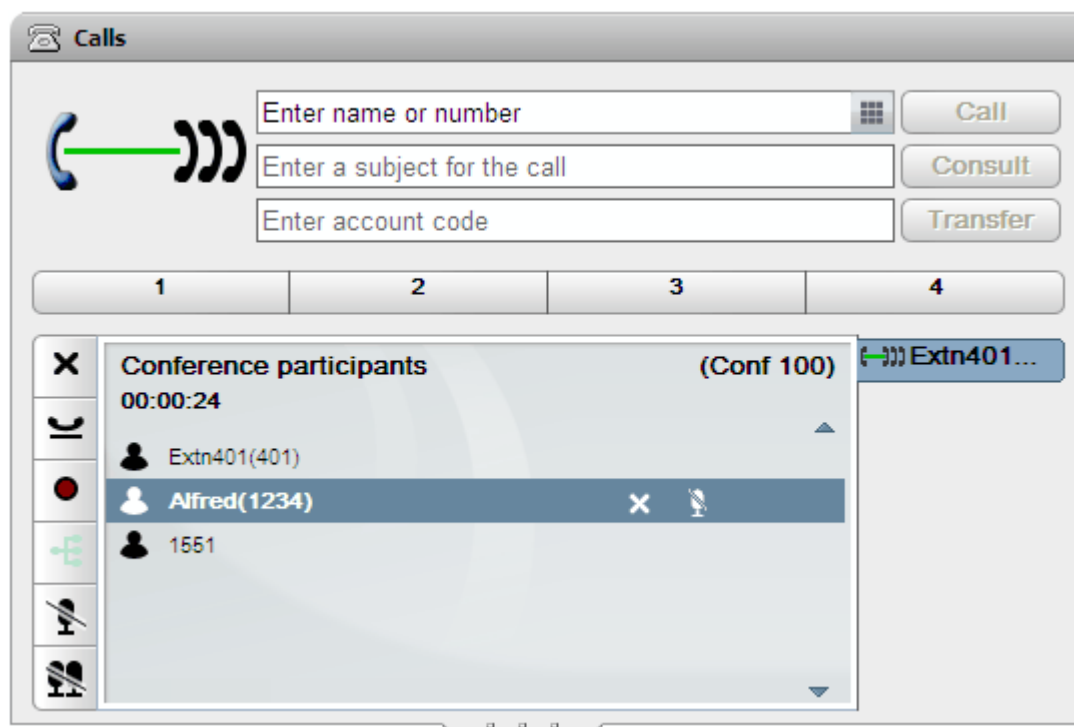
- 
**Transfer to Twin**  
 When you have answered a call on your normal extension, you can transfer it to your twinned number by clicking this button. The phone system will attempt to transfer the call to that number. If not answered the call will return, to your normal extension. It also returns if 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 user who is on another phone system than the one where the conference started.

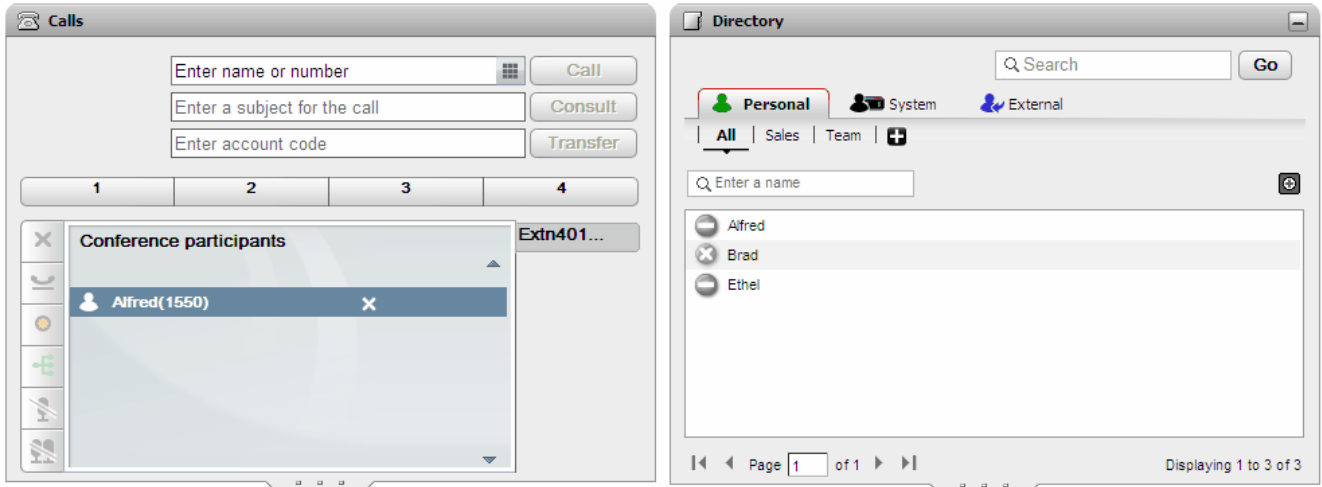
### Start and Manage Conference Calls


- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• <a href="#">Set up a conference</a>   64</li> <li>• <a href="#">Turn held calls into a conference call</a>   67</li> <li>• <a href="#">Drop a participant in a conference</a>   70</li> <li>• <a href="#">Park a conference call</a>   70</li> <li>• <a href="#">Configure the Conference Bridge number</a>   72</li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Recognize the Conference manager</a>   66</li> <li>• <a href="#">Add another party to a conference</a>   68</li> <li>• <a href="#">Drop all participants in a conference</a>   70</li> <li>• <a href="#">Hold a conference call</a>   71</li> <li>• <a href="#">Join a Personal Meet Me conference</a>   73</li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Recognize the Conference speaker</a>   66</li> <li>• <a href="#">Mute conference parties</a>   69</li> <li>• <a href="#">Lock a Meet Me conference</a>   70</li> <li>• <a href="#">Use Conference call controls</a>   72</li> </ul> |
|--|---|--|

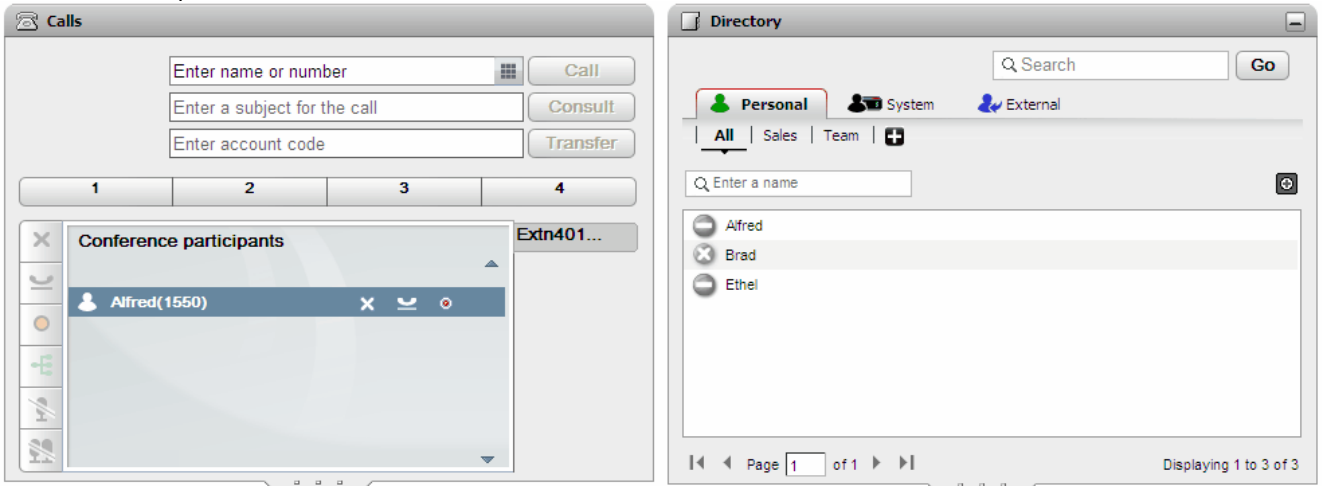
# 4.1 Setup a Conference


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.

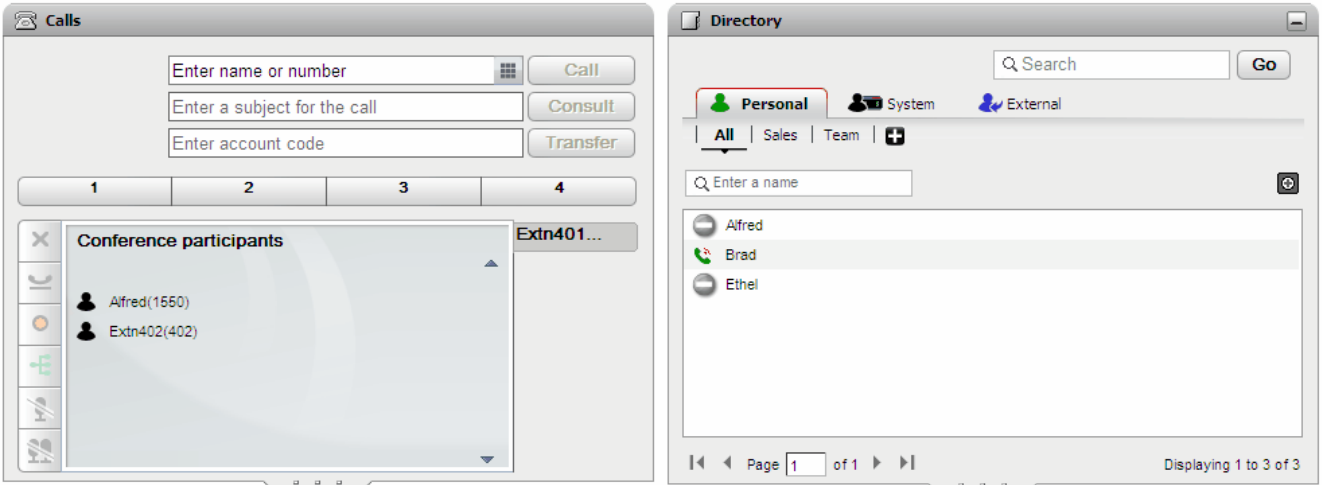
1. In the  directory gadget, locate and hover over the contact you want to add to start a conference with. Click on the  icon. This will start a call to that contact but with the calls gadget using the conference information display rather than the normal call information display.



2. When the party answers, inform 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  drop icon shown. The icons also allow you to hold the call or record the call.

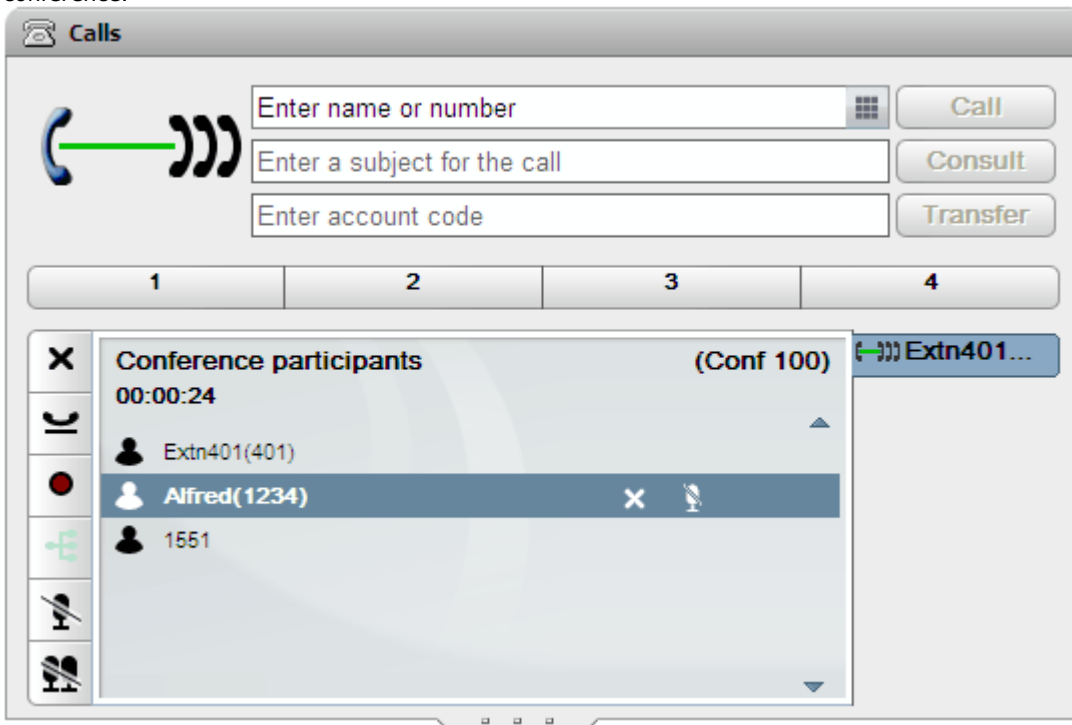


3. Locate and hover over the next contact you want to add to the conference. Click on the  icon. The previous party added is put on hold while you hear the progress of the call to the new contact.





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

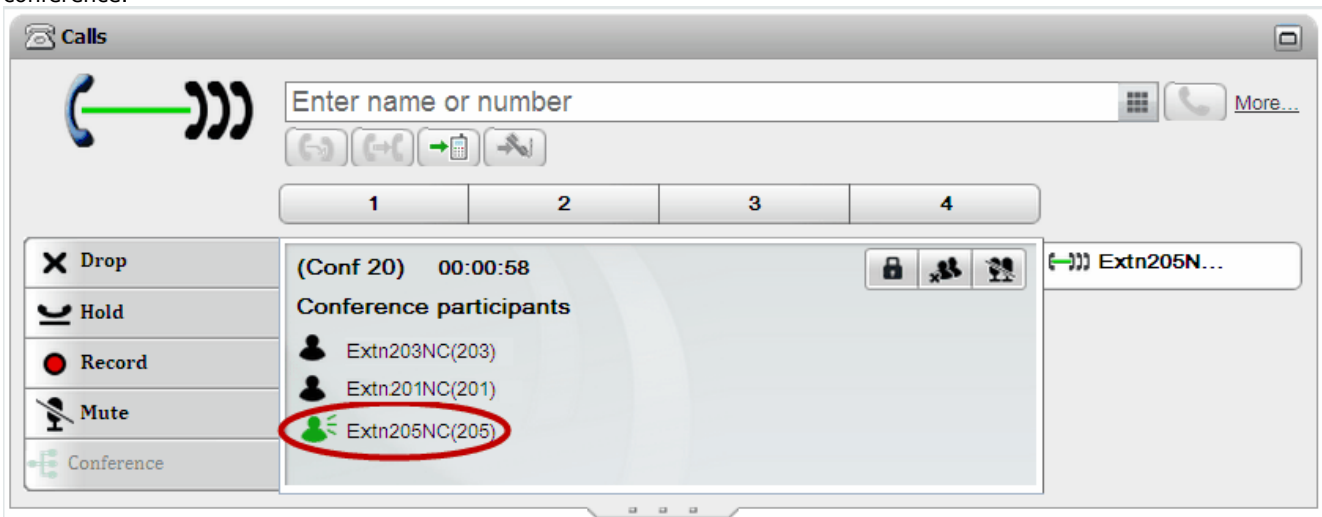
The one-X Portal for IP Office interface will display the loudest speaker in a conference with a green  icon. The  icon is visible only in a Meet Me Conference.


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.

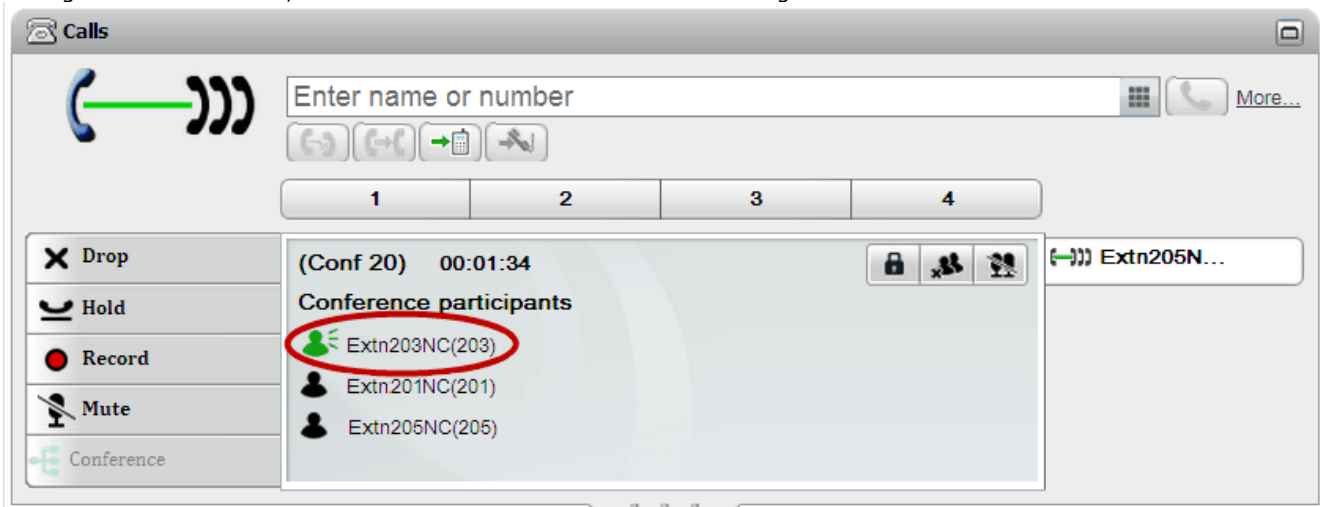
For example,

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.




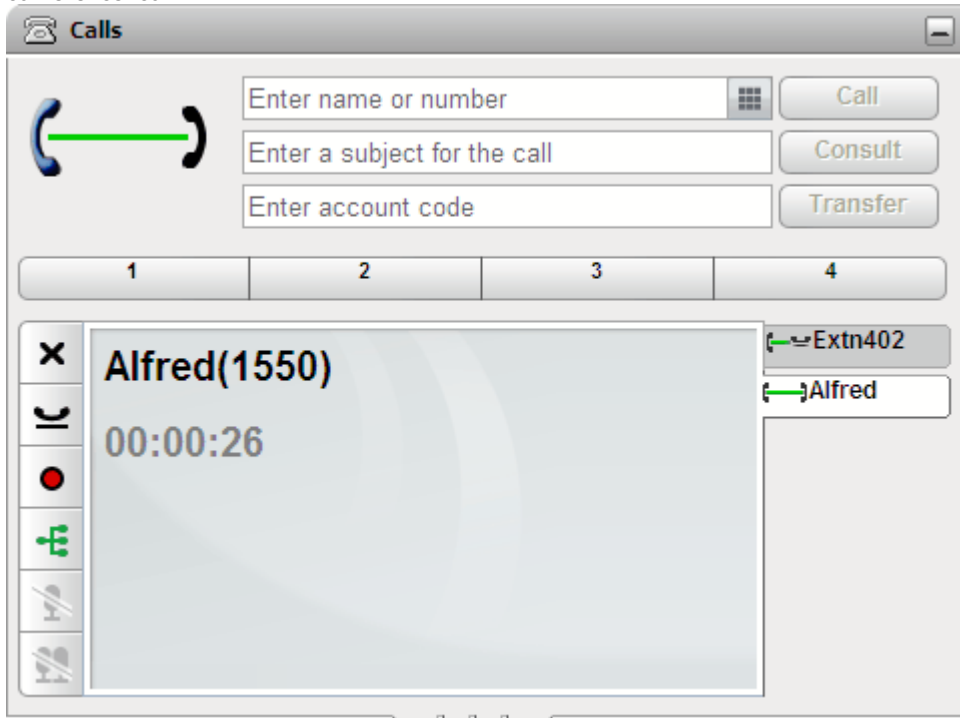
During the conference call, the  icon shifts to **Extn203NC** according to the level of loudness.




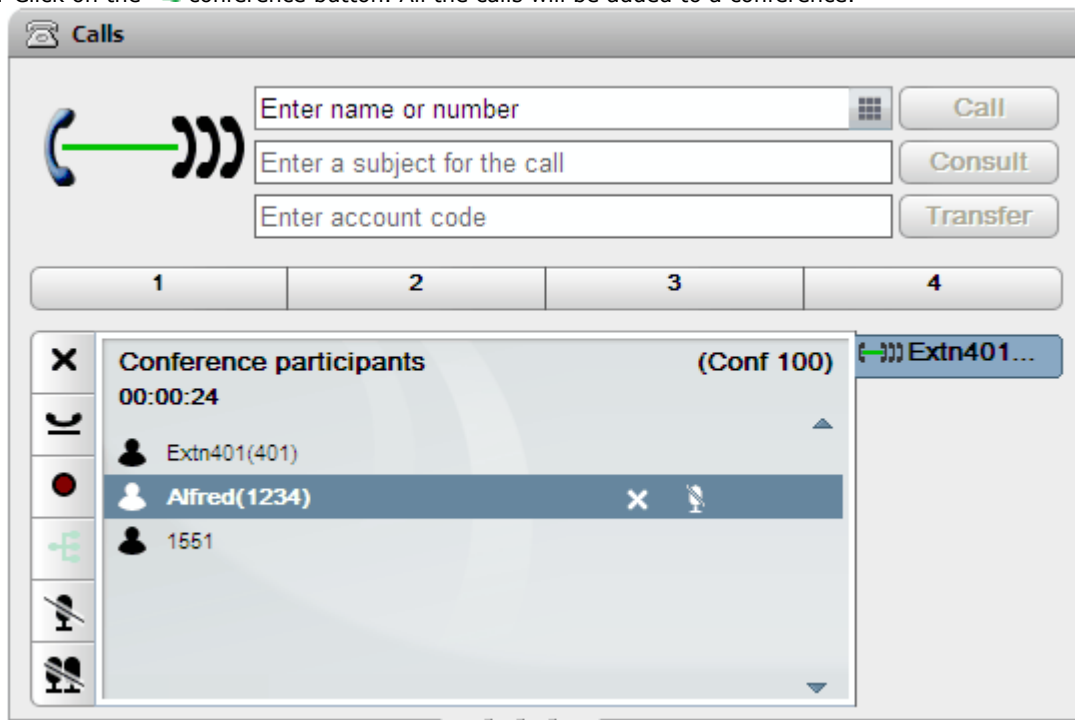
## 4.4 Turning Held Calls into a Conference

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.



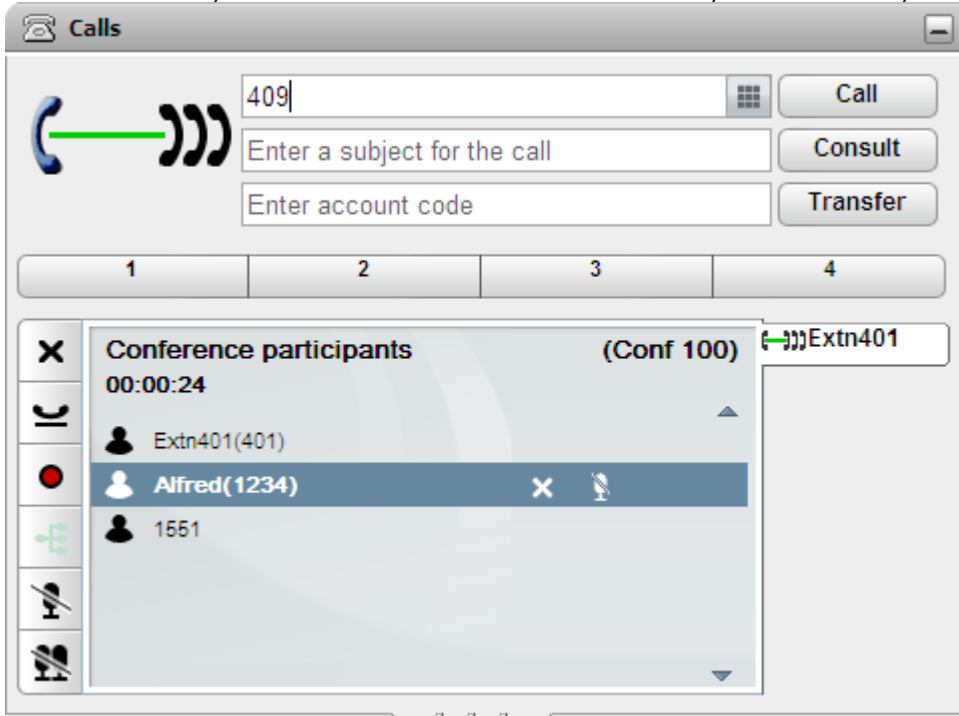
2. Click on the  conference button. All the calls will be added to a conference.



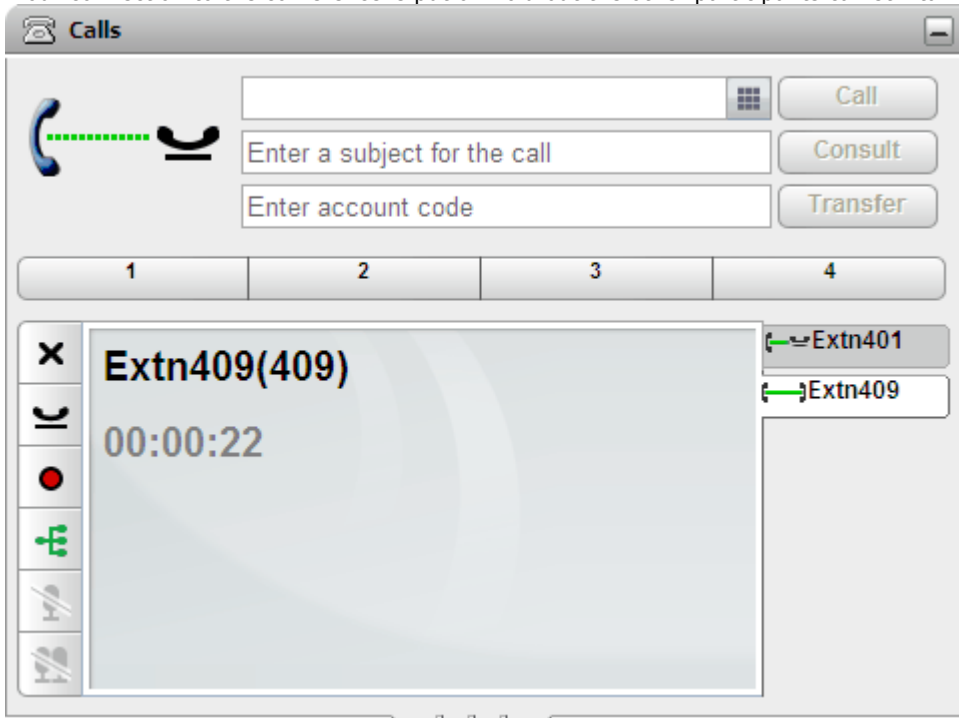
## 4.5 Adding another call to a conference




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](#)<sup>[200]</sup> 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](#)<sup>[200]</sup>. 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](#)<sup>[200]</sup> 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](#)<sup>[200]</sup> 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 9.0 you can drop all the participants in an [Ad hoc conference](#)<sup>[200]</sup> and [Meet Me conference](#)<sup>[201]</sup>.

The system displays the [conference manager](#)<sup>[200]</sup> 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](#)<sup>[200]</sup> 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](#)<sup>[201]</sup> as a [conference manager](#)<sup>[200]</sup>. 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](#)<sup>[200]</sup> exits from the conference.

## 4.10 Parking a conference call

You can park a conference call as a [conference manager](#)<sup>[200]</sup>.

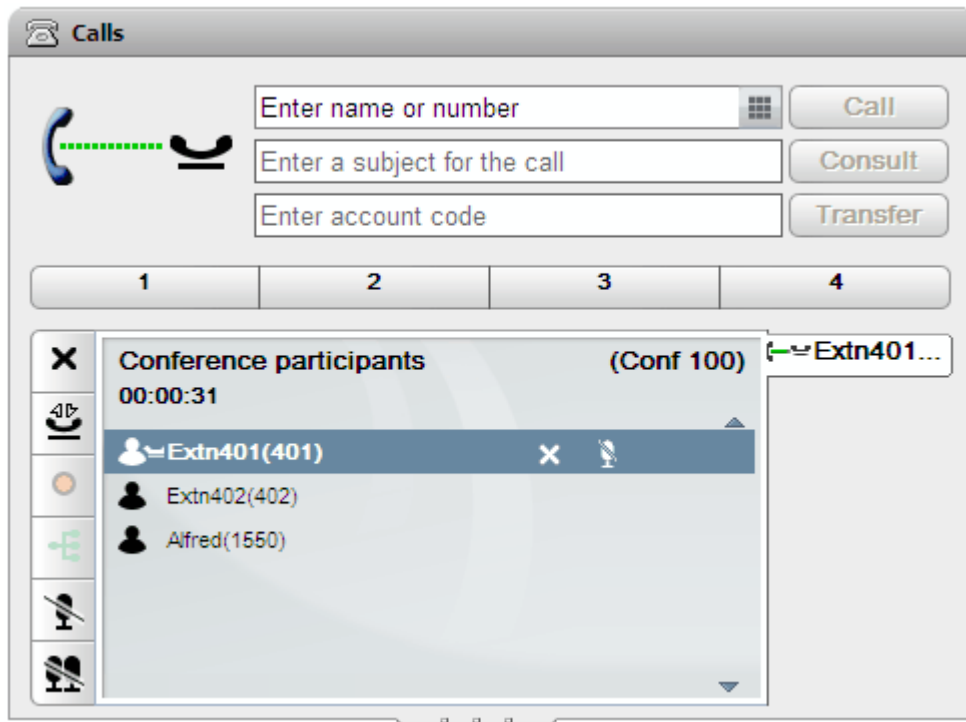
Only a conference manager can park a conference call in any of the available park slots. However, any participant can unpark a conference call that was parked.

**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 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
	<b>Drop Call</b>	For a currently connected call, pressing <b>X</b> disconnects the call.
	<b>Record Call</b>	Start recording the current call.
	<b>Stop Recording</b>	Stop recording the current call.
	<b>Hold Call</b>	Puts the call on hold.
	<b>Retrieve Held Call</b>	Take a call back from hold.
	<b>Mute</b>	Mute your connection to a call.
	<b>Mute All</b>	For conferences which you initiate, this control allows you to mute all the other conference parties.
	<b>Unmute</b>	Unmute your connection to a call.
	<b>Unmute All</b>	For conferences which you initiate, this control allows you to unmute all the other conference parties.
	<b>DropAll</b>	To drop all the participants in a conference call.
	<b>LockConference</b>	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](#)<sup>[200]</sup> 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 Group conference call

### Prerequisite

You must be a member of the group to initiate a group conference for that group.

### To initiate a group conference:

1. In the **System** tab of the Directory gadget, select the group from the drop down list.

**Note:** The system displays only the XMPP groups that the [system administrator](#)<sup>[201]</sup> for IP Office system has created.

2. Click **Initiate Group Conference** icon.

The system initiates a group conference on your Meet Me conference bridge.

## 4.14 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. By default, the system sets your extension number as the conference number. For example, if your extension is 201, the system sets your conference bridge as 201.
3. Click **Save**.

### 4.14.1 Personal Meet Me Conference

Personal Meet Me 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.

#### Dialling the Meet Me conference number of a user using short code:

1. In the  **Calls** gadget, click on the  dial pad icon. .

2. Type the short code that the your IP office administrator has setup in the IP Office Manager, using the dial pad.

For example, if the short code for *Conference Meet Me* is **\*#N#** where **N** is the Meet Me Conference number of the user.

3. Click the  icon.


#### Dialling into your Meet Me conference bridge:

To dial into your Meet Me conference bridge, click **Dial to my bridge** icon located in the header of one-X Portal for IP Office.

# Chapter 5.

## Call Log

## 5. Call Log

The  **Call Log** gadget displays details of calls all you have made, received and missed. The Call Log gadget also displays the history of the conversations with other contacts. The You can use the call log to [make a call](#)<sup>[39]</sup>, [add the caller's details to your Personal Directory](#)<sup>[77]</sup> or search IM conversation.

### 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		
<ul style="list-style-type: none"> <li>• <a href="#">Use the Call Log</a><sup>[76]</sup></li> <li>• <a href="#">Search IM conversation</a><sup>[77]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Make a call From the Call Log</a><sup>[77]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Add a Call Log number to my Directory</a><sup>[77]</sup></li> </ul>

## 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](#)<sup>[39]</sup> or [add the caller's details to your Personal directory](#)<sup>[77]</sup>.

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.
 IM	This tab enables you to search for conversations with the contacts.

- **Hunt Group Calls**

Your [system administrator](#)<sup>[20]</sup> can configure whether your missed calls call log includes missed calls for selected [hunt groups](#)<sup>[20]</sup>. 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](#)<sup>[77]</sup>

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

- **Clear Log**



Delete all records from the currently viewed tab.

- **Name**<sup>[77]</sup>

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.

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.

## 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.

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](#) <sup>[81]</sup> of the user. This applies even if another number is currently selected as the **Primary phone** <sup>[20]</sup>.
  - You can use the **Group** list to select which of your personal [contacts tabs](#) <sup>[88]</sup> 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](#) <sup>[92]</sup> or initiate a chat from the one-X Portal for IP Office directory.
  - When finished, click **Save**.

## 5.4 Searching for IM conversation

You can search for the IM conversations with other contacts.

**Note:** All the fields are optional.


Field	Description
<b>Participant</b>	Type the name of the contact in the IM conversation.
<b>Keywords</b>	Type the keywords in the IM conversation.
<b>Start</b>	Select the date from which the conversations need to be listed. If you do not select a date, the system displays from the earliest conversation that the system has retained.
<b>End</b>	Select the date until which the conversations need to be listed. If you do not select a date, the system displays until the latest conversation.

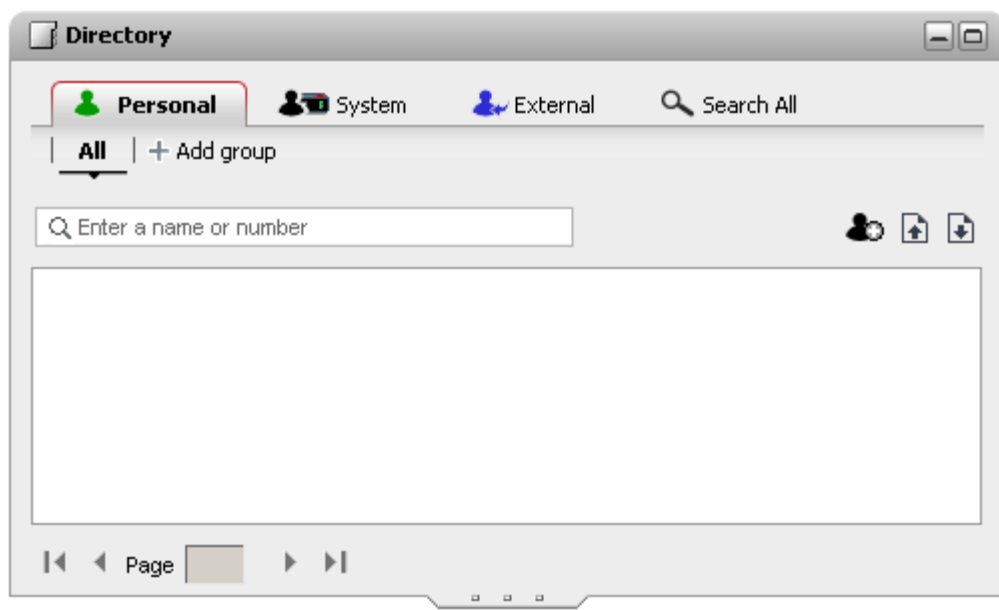
1. In the **Call Log** gadget, select the **IM** tab.
2. Click **Search**. The system displays the list of all conversations based on your search. If no conversations match your search criteria, the system displays a message that no conversations match your search criteria.
3. Click on the conversation that you want to open. The system opens the conversation.

# 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** <sup>39</sup> 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**

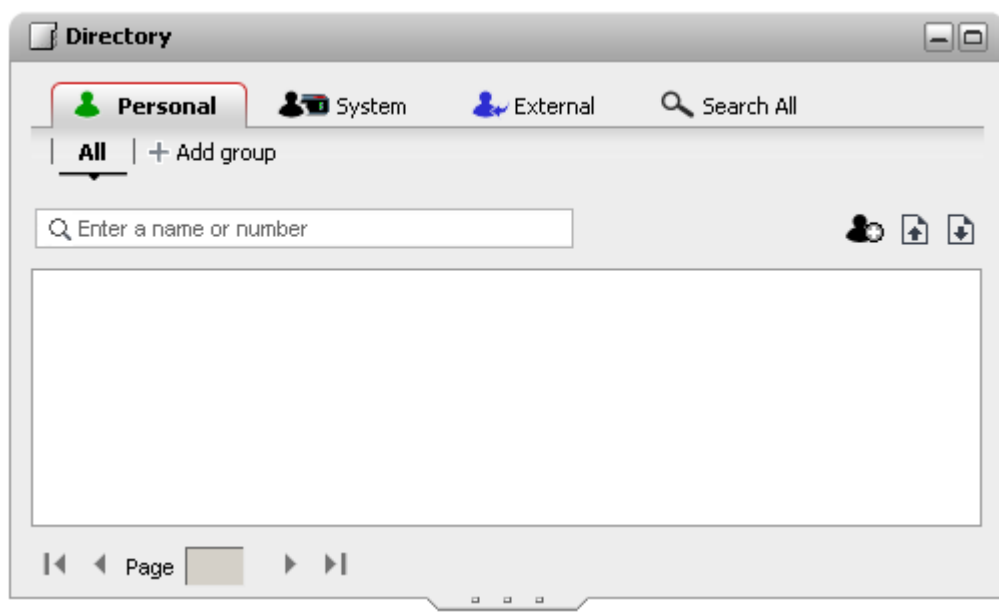
When receiving a call, if the number of the caller matches a contact in your **Personal** directory or the **System** directory, the name of the contact is displayed by your one-X Portal for IP Office.

### Use the Directories

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>• <a href="#">View the Directories</a> <sup>80</sup></li> <li>• <a href="#">Make calls from the Directory</a> <sup>83</sup></li> <li>• <a href="#">Edit a Directory Contact</a> <sup>87</sup></li> <li>• <a href="#">Email a Contact</a> <sup>92</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">View the user status in the Directory</a> <sup>81</sup></li> <li>• <a href="#">Transfer a call from the Directory</a> <sup>84</sup></li> <li>• <a href="#">Delete a Directory Contact</a> <sup>87</sup></li> <li>• <a href="#">Instant Message a Contact</a> <sup>93</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Search the Directories</a> <sup>82</sup></li> <li>• <a href="#">Add a Directory Contact</a> <sup>85</sup></li> <li>• <a href="#">Add a Contacts Group Tab</a> <sup>88</sup></li> </ul> |
|--|--|---|

## 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](#)<sup>[206]</sup> 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](#)<sup>[85]</sup>.

**Note:** By default, the system displays only Hunt groups such as CCR agent group and Centralized group that the [system administrator](#)<sup>[207]</sup> for IP Office system has created. The system does not display an XMPP Hunt group created by the [system administrator](#)<sup>[207]</sup> of IP Office system.

If the [system administrator](#)<sup>[207]</sup> has enabled the "Ex-directory" option for a Hunt group in IP Office Manager, then the system does not display those Hunt groups. The system displays the Hunt groups only if you are configured as a member of that Hunt group.

Your [system administrator](#)<sup>[207]</sup> 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.

- **Search All**

This additional option is used to display the results of a [cross directory search](#)<sup>[82]</sup>.

### 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).
  - Any contacts uploaded from the IP Office Plug-in for Microsoft Office are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal for IP Office only, and are in addition to the maximum 100 Personal Directory contacts.
2. 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** 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.
Dial to my bridge		Add the contact to your Meet Me Conference bridge.
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 Google Talk and OCS.

### Directory Actions

Action	Icon	Description
Add		Add a contact shown in the <b>System</b> or <b>External</b> directory to your <b>Personal</b> directory.
Details		View details of a directory contact.
Edit		For <b>Personal</b> directory contacts, edit the contact details.
Delete		For <b>Personal</b> 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		<p>The normal state for a user showing that their work extension is available and not in use.</p> <ul style="list-style-type: none"> <li>Grey is not using one-X Portal for IP Office or they have set their portal presence to offline.</li> <li>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).</li> </ul>
Busy		The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb		The user has set <b>Do Not Disturb</b> . Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's <b>Do Not Disturb exception list</b> .
Logged Out		The user has logged out 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.


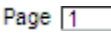

## 6.3 Searching the Directories

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.

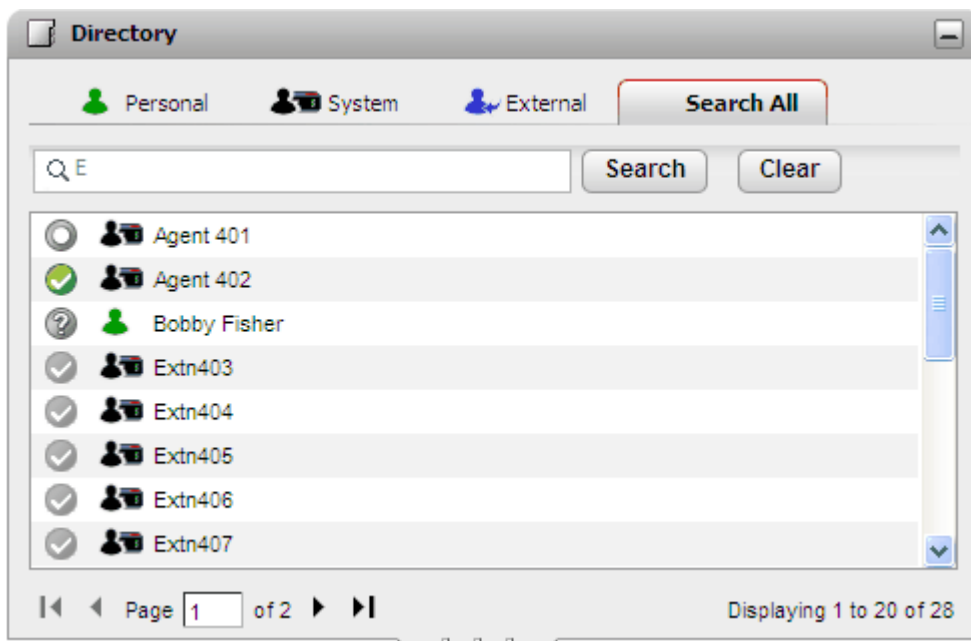
When there are multiple matches, you can use the    page icons at the bottom left to move between pages. Alternatively, add more details to the search term to improve the search matching and so reduce the number of contacts displayed.

### 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.

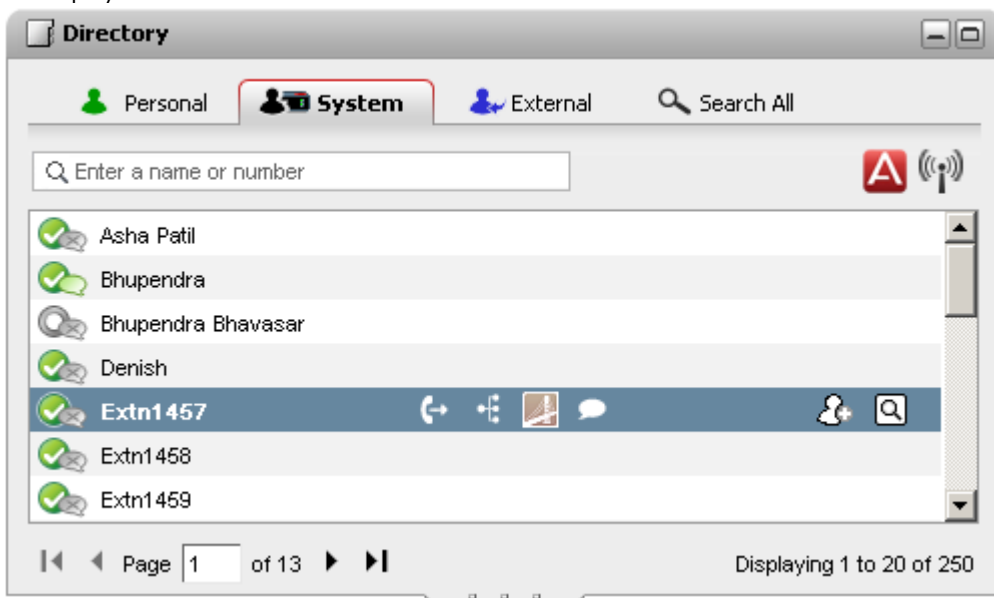
### Searching All the Directories




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](#) <sup>81</sup> for the directory functions you can perform are displayed.

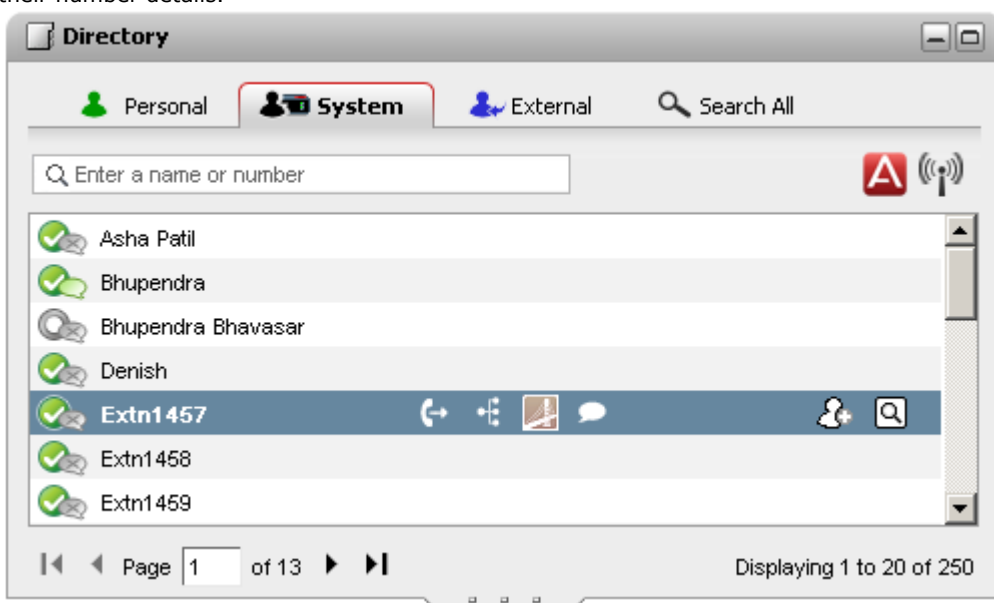


4. To make a call to the contacts primary number, click on the  call icon. If the  icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.
  - The progress of the call is displayed on a tab in the  **Calls** gadget.





## 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](#)<sup>51</sup> to the contact's primary number.
- Use the  consult icon to start a [supervised transfer](#)<sup>52</sup> 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](#)<sup>[107]</sup>, the [call log](#)<sup>[77]</sup> or the [System directory](#)<sup>[85]</sup> 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](#)<sup>[81]</sup> of the user. This applies even if another number is currently selected as the [Primary phone](#)<sup>[201]</sup>.
  - You can use the **Group** list to select which of your personal [contacts tabs](#)<sup>[88]</sup> 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](#)<sup>[92]</sup> 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).
  - Any contacts uploaded from the IP Office Plug-in for Microsoft Office are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal for IP Office only, and are in addition to the maximum 100 Personal Directory contacts.
2. 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** 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](#)<sup>[88]</sup> 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](#)<sup>[81]</sup> of the user. This applies even if another number is currently selected as the **Primary phone**<sup>[20]</sup>.
  - You can use the **Group** list to select which of your personal [contacts tabs](#)<sup>[88]</sup> 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](#)<sup>[92]</sup> 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](#)<sup>[81]</sup> of the user. This applies even if another number is currently selected as the **Primary phone**<sup>[20]</sup>.
  - You can use the **Group** list to select which of your personal [contacts tabs](#)<sup>[88]</sup> 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](#)<sup>[92]</sup> 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](#) of the user. This applies even if another number is currently selected as the [Primary phone](#).
- You can use the **Group** list to select which of your personal [contacts tabs](#) 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](#) 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

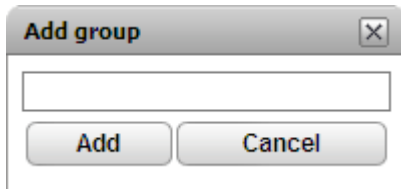
You can add up to five groups in your personal directory in addition to the default **All** group. personal contact can be listed in more than one groups.

When [editing the personal contact](#)<sup>[87]</sup> 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](#)<sup>[89]</sup> and [Outlook contact synchronization](#)<sup>[163]</sup>.

### 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.

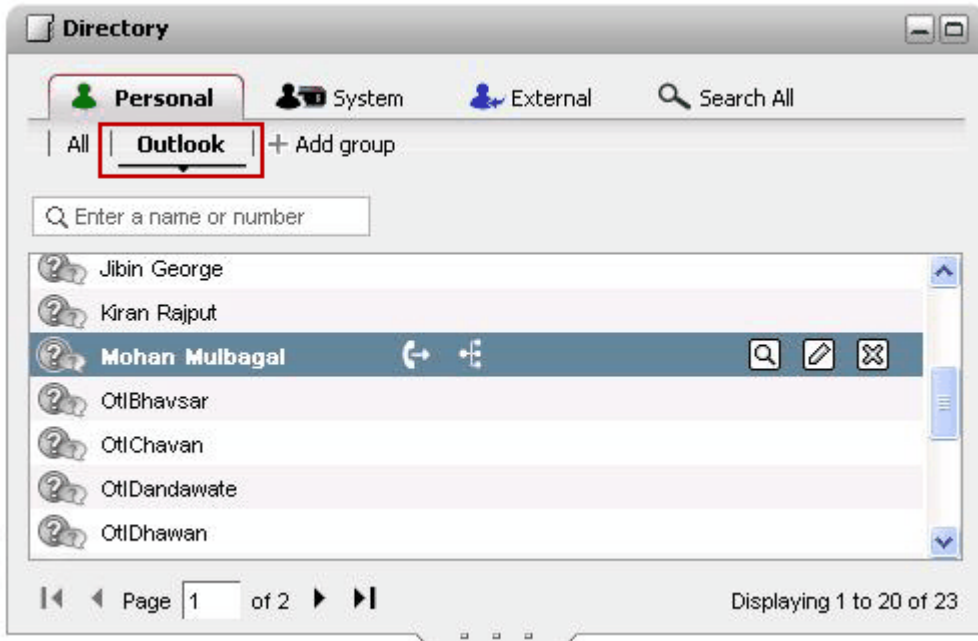


### 6.9.1 Outlook group

You can synchronize and upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office. After the Microsoft® Outlook® [contact synchronization](#)<sup>[183]</sup>, 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.

The "Edit Contact" dialog box is shown with the following fields and options:

- Name: Mohan Mulbagal
- Work phone: [empty]
- Work email: [empty]
- Mobile phone: 453674
- Personal email: [empty]
- Other phone: [empty]
- Other email: [empty]
- Gmail Id: [empty]
- OCS Id: [empty]
- Primary phone: Mobile (dropdown menu)
- Group: Outlook (checkbox checked)

Buttons: Save, Cancel

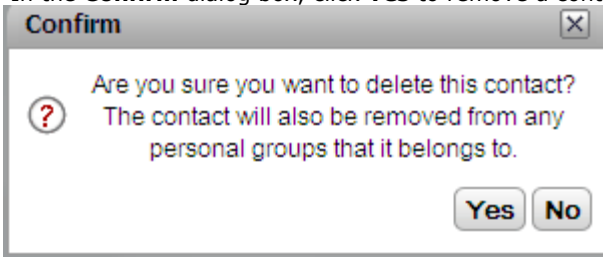
3. Click **Save**.

**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 Exporting/Importing Personal directory


You can export and import a personal directory using one-X Portal for IP Office.

### Prerequisites.

- You can export and import only .CSV files.
- Ensure that you disable the Pop-up blocker in the browser of one-X Portal for IP Office.

### To export a personal directory:

**Note:** You can export only the contacts in **All** group.

1. In the Personal directory tab click  **Export**.

The system exports the contacts in the Personal directory to the default download location of the browser. The system also displays the number of records that were exported. In the last column of every record in the .CSV file that is exported, the system appends the groups created in one-X Portal for IP Office.

### To import a personal directory:

**Note:** You cannot add more than 100 contacts to a Personal directory. If the total number of records exceeds 100 when you import the contacts, the system displays an error message.

**Note:** When the system imports the .CSV file and if one or more records do not meet the validations that the system sets, then the system displays an error message with the details such as the reason for failure. You can export the error list as an HTML document. However, you can continue import the rest of the records that the system has validated or cancel importing the records.

**Note:** When you import the .CSV file that is in Outlook format for example, files created by exporting contacts from Gmail, Yahoo, Outlook, and others then, the system adds all contacts to **All** group only.

1. In the Personal directory tab click  **Import**.



The system displays **Select File to Import** window.

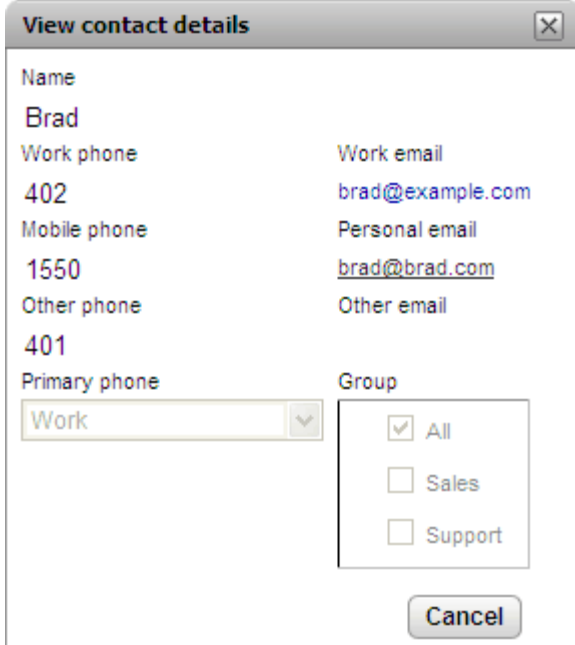
2. Click **Browse** to select the .CSV file that you want to import.
3. Click **Import**.

The system displays the contacts that you imported in the Personal directory.

## 6.11 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.




The screenshot shows a dialog box titled "View contact details" with a close button (X) in the top right corner. The dialog contains the following information:

Name	Brad
Work phone	402
Mobile phone	1550
Other phone	401
Primary phone	Work
Work email	<a href="mailto:brad@example.com">brad@example.com</a>
Personal email	<a href="mailto:brad@brad.com">brad@brad.com</a>
Other email	
Group	<input checked="" type="checkbox"/> All <input type="checkbox"/> Sales <input type="checkbox"/> Support


At the bottom of the dialog is a "Cancel" button.

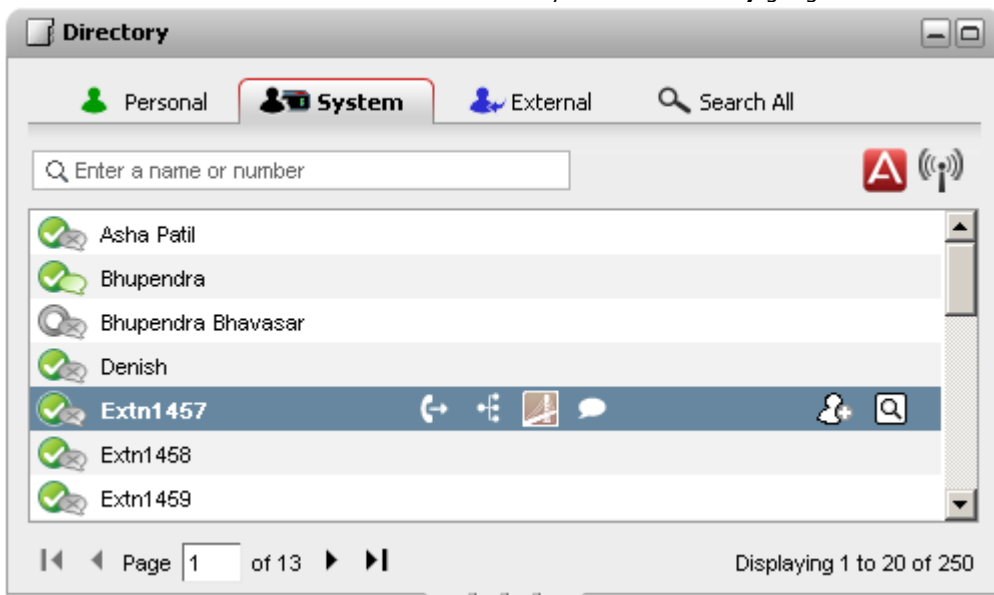
4. Click on the email address that you want to use. Some contacts can have more than one email address from which you can select.
5. A new email will be started using the computer's default email application, with the selected email address in the **To** field.



## 6.12 Instant Messaging a Contact

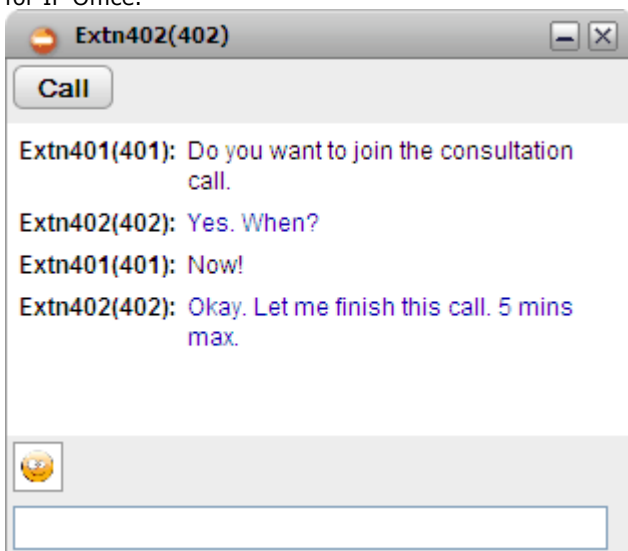
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

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](#) <sup>[21]</sup> 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.

---

## 6.13 Adding a contact to Meet Me conference bridge

You can add a contact to your *Meet Me* conference using one-X Portal for IP Office.

1. In the  **Directory** gadget, locate the one-X Portal for IP Office contact, you want to add to your *Meet Me* conference.
2. Click on the **Dial to my bridge** icon. The system adds the contact to your *Meet Me* conference when the contact answers the call.

The system displays **mybuddy** popup window, when the contact joins or leaves your *Meet Me* conference. You can also add a contact to your *Meet Me* conference using **mybuddy**. For more information, see [Controlling a conference](#)<sup>[116]</sup>.

# 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** also appears. It is displayed when your current telephone system settings don't match any of your profiles.

Profile Settings	
<a href="#">Call Pickup</a>	<ul style="list-style-type: none"> <li>• Call Pickup on/off.</li> </ul>
<a href="#">Mobility</a>	<ul style="list-style-type: none"> <li>• <a href="#">Default Deskphone</a></li> <li>• <a href="#">Forward calls.</a></li> <li>• <a href="#">Mobile Twinning.</a></li> <li>• <a href="#">Telecommuter.</a></li> </ul>
<a href="#">Voicemail</a>	<ul style="list-style-type: none"> <li>• Voicemail on/off.</li> <li>• Voicemail Ringback on/off.</li> <li>• Voicemail Outcalling on/off.</li> <li>• Listen on your phone/Listen on your PC.</li> <li>• Select which voicemail greeting to use.</li> </ul>

### 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"/>	<a href="#">Edit</a>
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	<input type="radio"/>	<a href="#">Edit</a>
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>
<a href="#">Add a new profile definition</a>			

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"> <li>• <a href="#">Use the 'Detected' Profile</a></li> <li>• <a href="#">Add a New Profile</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Select an Active Profile</a></li> <li>• <a href="#">Configure the Profile</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Edit a Profile</a></li> </ul>



## 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"/> <a href="#">View</a>
Office	Mobile Twinned at :96775655, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> <a href="#">Edit</a>
Mobile	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> <a href="#">Edit</a>
Home	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/> <a href="#">Edit</a>

[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](#) <sup>[21]</sup> 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.

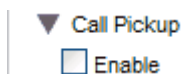
## 7.5 Profile Settings

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

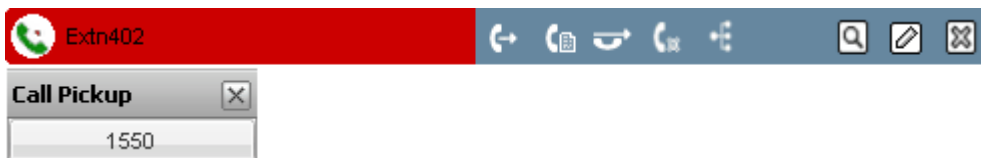
Profile Settings	
<a href="#">Call Pickup</a>	<ul style="list-style-type: none"> <li>• Call Pickup on/off.</li> </ul>
<a href="#">Mobility</a>	<ul style="list-style-type: none"> <li>• <a href="#">Default Deskphone</a></li> <li>• <a href="#">Forward calls.</a></li> <li>• <a href="#">Mobile Twinning.</a></li> <li>• <a href="#">Telecommuter.</a></li> </ul>
<a href="#">Voicemail</a>	<ul style="list-style-type: none"> <li>• Voicemail on/off.</li> <li>• Voicemail Ringback on/off.</li> <li>• Voicemail Outcalling on/off.</li> <li>• Listen on your phone/Listen on your PC.</li> <li>• Select which voicemail greeting to use.</li> </ul>

### 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](#) 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

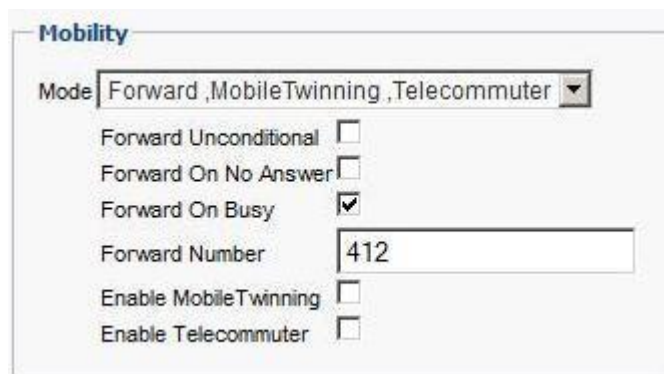
In this mode, your calls simply ring at the IP Office extension which you are using. This mode has no additional mobility settings.



### 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.

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



Mobility

Mode: Forward ,MobileTwinning ,Telecommuter

Forward Unconditional

Forward On No Answer

Forward On Busy

Forward Number: 412

Enable MobileTwinning

Enable Telecommuter

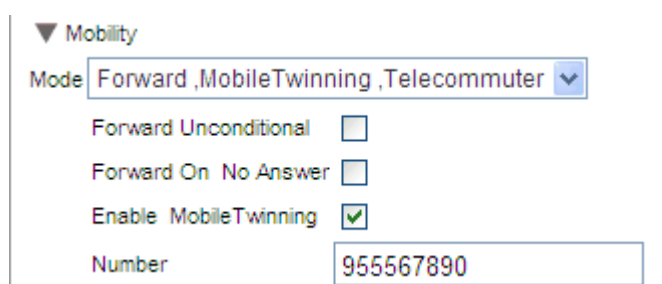
These options control when your calls are forwarded while the profile is active:

- **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, the incoming calls are only forwarded if the call has rung unanswered for a period of time. For more information, see [Unanswered Calls](#)<sup>[44]</sup>.
- **Forward On Busy**  
When you set a number and enable this option, if you are busy on a call or when all the call appearances are busy, the system forwards the call to your Forward on Busy number. The number can be internal or external..
- **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.



Mobility

Mode: Forward ,MobileTwinning ,Telecommuter

Forward Unconditional

Forward On No Answer

Enable MobileTwinning

Number: 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](#)<sup>[61]</sup> 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, home telephone, or mobile. 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](#) 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.
- If you log into your internal extension and mobile, and then you change your presence and status message using either of the clients, the change is synchronized with the other client.
- 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.

▼ Mobility

Mode: Forward , MobileTwinning , Telecommuter ▼

Forward Unconditional

Forward On No Answer

Enable MobileTwinning

Enable Telecommuter

Number: 9555126748

Make a Test Call

Hold the Line

- 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  ▼

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](#) [108]. 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.

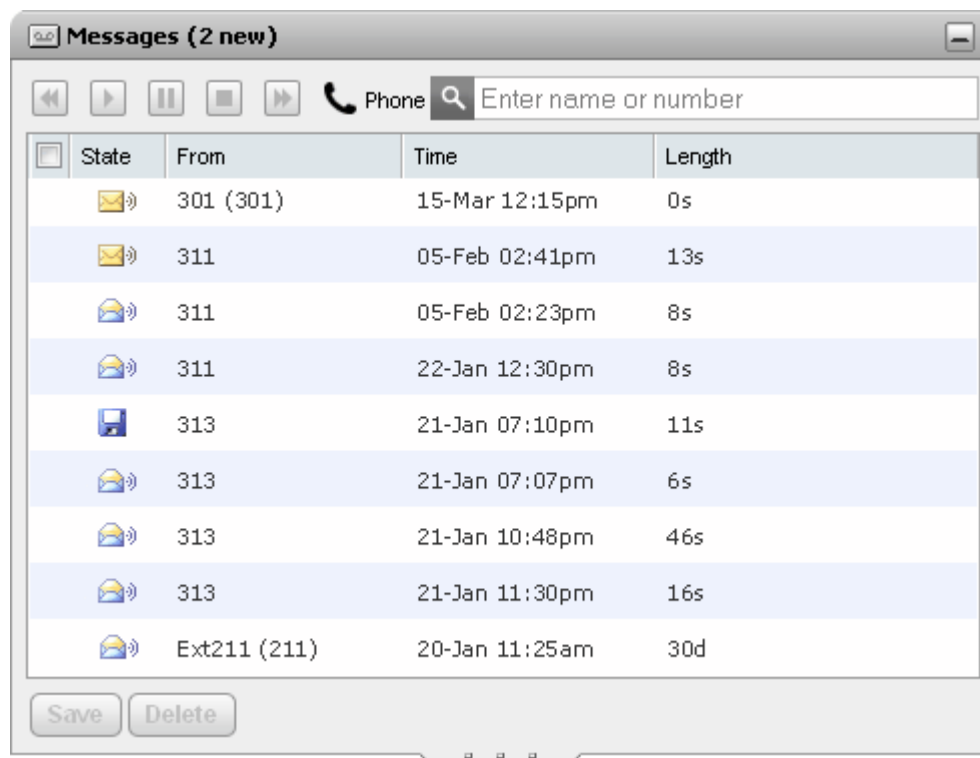
# Chapter 8.








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

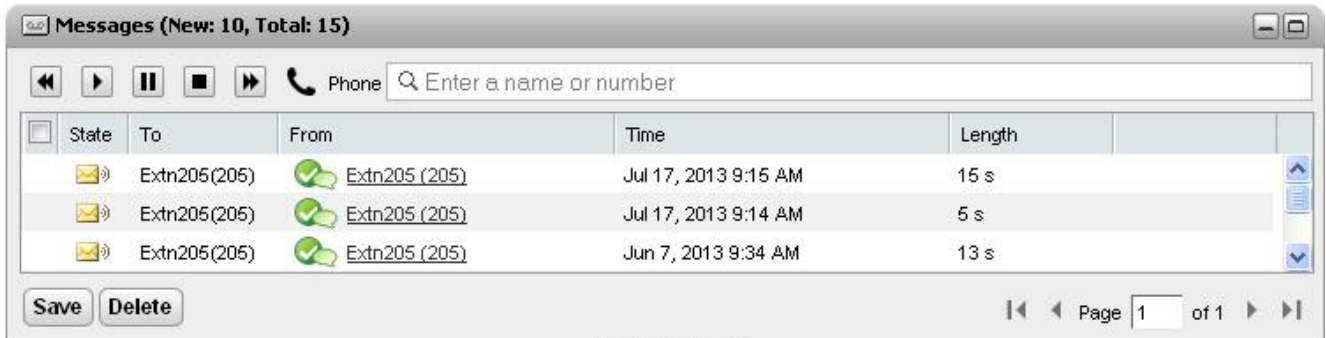
### Changing Voicemail Settings Using Other Interfaces

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 Checking Voicemail Messages

Your messages can be viewed and accessed using the  **Messages** gadget.












1. On the **Main** tab, the  **Messages** gadget displays the number of new or unread voicemail messages in your mailbox.








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

**Note:** you can sort the messages to your extension and to your hunt group mailbox using the **To** header.

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:


- Click **Save**  
To mark the messages as saved. The messages' icon (see below) changes to a computer disk  icon.
- Click **Delete**  
To 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**
-  **Fast Forward**
-  **Rewind**
-  This icon indicates that your current [profile](#)<sup>96</sup> is set to playback messages to your phone extension.
-  This icon indicates that your current [profile](#)<sup>96</sup> is set to playback messages through your PC.

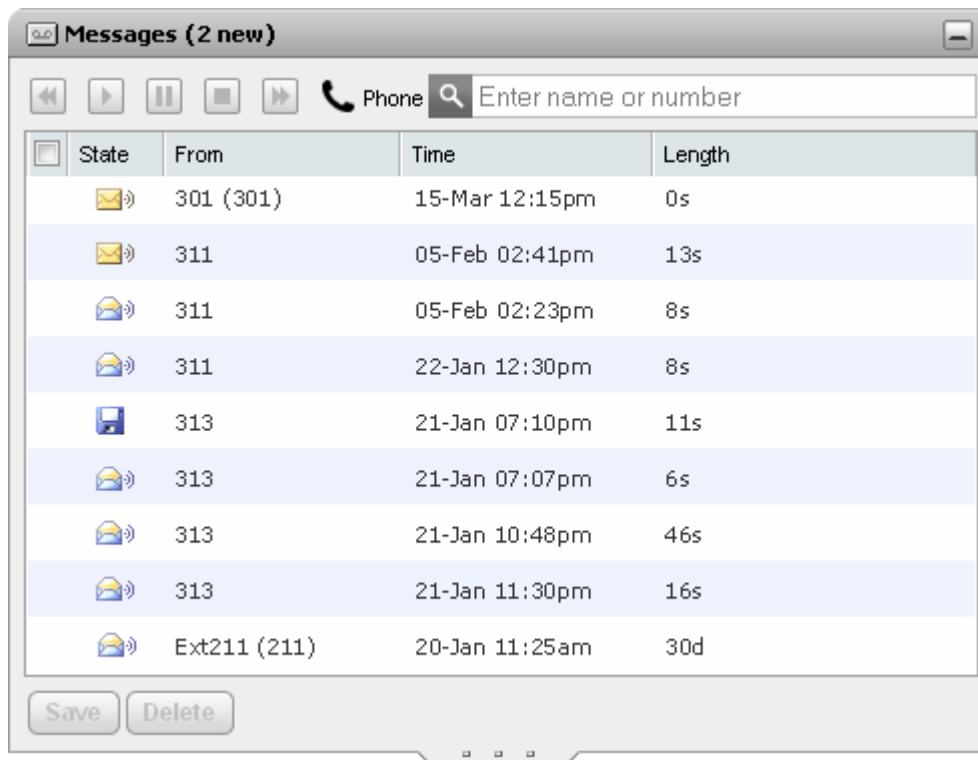
### Message Icons


-  **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 to 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.

## 8.2 Call Someone Who Left a Message


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

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





- 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.

## 8.3 Switching Between Phone and PC Playback

You can have the  **Messages** gadget playback your messages to your phone or to your computer. The setting used is part of your currently active [profiles](#) voicemail options.


## 8.4 Adding a Caller to Your Personal Directory

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

- Click on **Main**.
- View the  **Messages** gadget.
- 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](#) of the user. This applies even if another number is currently selected as the **Primary phone**.
  - You can use the **Group** list to select which of your personal [contacts tabs](#) 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](#) or initiate a chat from the one-X Portal for IP Office directory.
  - When finished, click **Save**.

---

## 8.5 Changing Your Voicemail Code

Using the  **Messages** gadget you can [access your voicemail messages](#)<sup>[106]</sup> 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.

## 8.6 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](#)<sup>[107]</sup> 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.

## 8.7 Select Your Voicemail Greeting

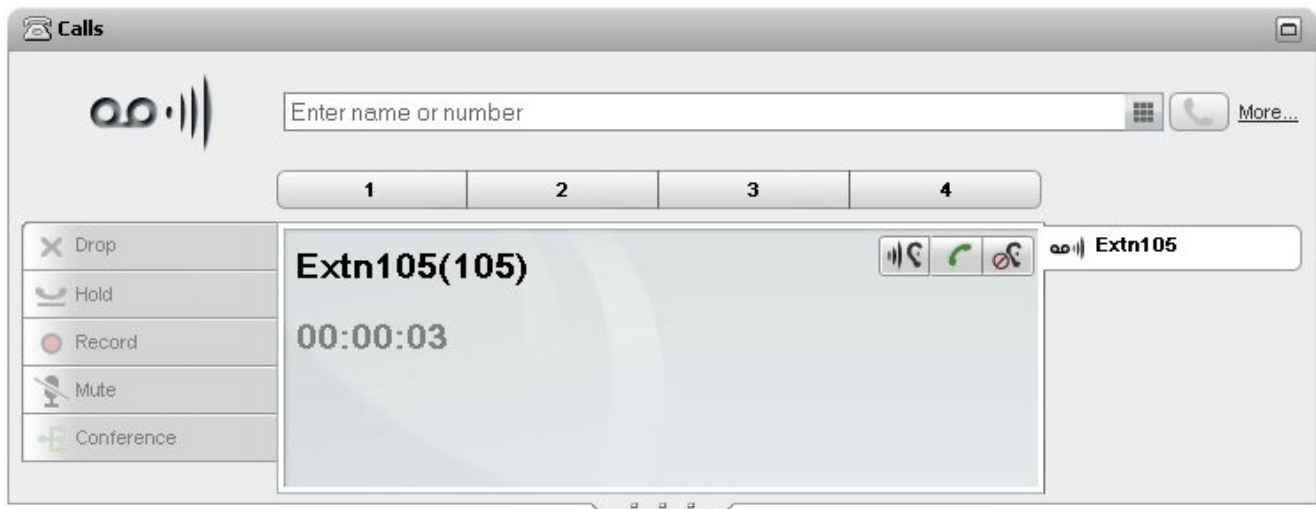
If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have [recorded](#)<sup>[108]</sup>. Within each of your one-X Portal for IP Office [profiles](#)<sup>[98]</sup>, you can use the **Active Greeting** setting to select which greeting should be used for 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.

## 8.8 Voicemail Call Screening

You can use the one-X Portal for IP Office to screen calls. When enabled, you can choose to listen to the caller leaving a message for you in voicemail and to then either answer that call or ignore it.



In the example above, Extn 105 has called and the call has gone to voicemail. With call screening enabled, the **Calls gadget** displays details of the call whilst the caller is recording a message. The **Calls gadget** allows you to perform various actions on the screened call.

- **Listen:** Clicking this option allows you to hear the caller leaving the message.
- **Pickup:** Clicking this option establishes a answers the caller.
- **Ignore:** Clicking this option removes the call details from the Calls gadget.

### 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**.

# 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		
• <a href="#">Use the Help command</a> 	• <a href="#">Get Notifications</a> 	• <a href="#">Manage calls</a> 
• <a href="#">Follow another user</a> 	• <a href="#">Control a conference</a> 	• <a href="#">mybuddy command language</a> 

### 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. You can also type the short-form of a command to execute the command. For example, instead of typing “conference”, you can just type “conf”, “confer”, or any related short form of the command.

### 9.2 mybuddy command language

The mybuddy command language is based on the language configured for a specific user by the administrator in IP Office Manager.

---

## 9.3 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](#)<sup>[122]</sup>.

**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](#)<sup>[200]</sup>, 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.



## 9.4 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.*

**Note:** A **Basic** user who has set an external number as the home or mobile phone number cannot make a call to another external number from mybuddy. This functionality is available to **Power** and **Mobile** users only.

### 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**.

## 9.4.1 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.

The screenshot shows the 'one-X Portal for IP Office' interface. At the top, there's a navigation bar with 'Main', '\*Configure', and 'Add Tab'. A 'Save' button is visible in the top right. Below the navigation bar, there are tabs for 'Profiles', 'Telephony', 'DND Exceptions', 'Voicemail', 'Desktop Integration', and 'IM/Presence'. The 'Telephony' tab is selected. The main content area is divided into several sections: 'Keyboard Shortcuts', 'Park Slots', 'Personal Numbers', 'Conference Bridge Number', and 'Sound Configuration'. The 'Personal Numbers' section is highlighted with a red background. It contains the following text and fields:

**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.

Other sections include 'Keyboard Shortcuts' with fields for Answer (CTRL+ALT+A), Call (CTRL+ALT+C), Hold (CTRL+ALT+H), and Drop (CTRL+ALT+D). 'Park Slots' has four input fields numbered 1 to 4. 'Conference Bridge Number' has an input field with the value 0. 'Sound Configuration' has a checked checkbox for '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.

## 9.5 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*. For example, *follow John*
2. Press **Enter**. Whenever the availability of John improves, the system sends you a notification.

### To unfollow a contact:

1. In the mybuddy conversation window, type *unfollow* followed by a *name* or *extension number*. For example, *unfollow John*
2. Press **Enter**. Now, even if the availability of John improves, the system does not send you any notification.

---

## 9.6 Controlling a conference

You can initiate a [Meet Me conference](#)<sup>[201]</sup> 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](#)<sup>[114]</sup> 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**.

#### **To unlock a conference call:**

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

#### **To view participants in a conference call:**

1. In the mybuddy conversation window, type *who*.
2. Press **Enter**. The system displays the calling name or number and the number of participants. The system also displays who is currently speaking.

---

## 9.7 Finding the location of a contact

You can *locate* another contact in one-X Portal for IP Office using the mybuddy window.

In the mybuddy window, type *locate* to get the location of the contact. The system displays the date and time associated with the Global Positioning System (GPS) location of the contact's phone. The system also displays the URL of the map where the user is located. The system displays the address in the language that the contact has set on the phone.

**Note:** The user must set the location to a maximum GPS precision in an Android phone for the system to display the marker. The color of the marker indicates the presence state of the user, when you hover the mouse over the marker the system displays the name and extension of the user.

**Note:** If the contact that you want to locate has not published the GPS location, then the system displays the following message: *No Published GPS location*.

### To locate a contact:

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

2. Press **Enter**. The system displays the address and the URL of the contact in the following format:

23 Rocky Point Rd,Ottawa,Ottawa Divison, Canada: Wednesday, April 3, 2013, EST10:03

<https://<IP address of the server> :8444/IM/maps/scsimbot.201-136034432225>

# 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"><li>• <a href="#">Change My Keyboard Shortcuts</a> <sup>(120)</sup></li><li>• <a href="#">Configure IM/Presence</a> <sup>(122)</sup></li><li>• <a href="#">Select my Language</a> <sup>(128)</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Configure Park Slots</a> <sup>(126)</sup></li><li>• <a href="#">Set Do Not Disturb Exceptions</a> <sup>(125)</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Enable Sounds</a> <sup>(121)</sup></li><li>• <a href="#">Configure the World Clock</a> <sup>(129)</sup></li></ul>

### 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 sound notifications for events such as call ringing or a new voicemail message. This requires the browser to support a media player such as [Windows Media Player](#)<sup>[1]</sup> 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.

## 10.4 IM/Presence

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

**Note:** If you are configured as an IP Office user and your user name is *Admin*, then you cannot configure your IM/Presence in one-X Portal for IP Office. The user name *Admin* is a reserved name for the IM/Presence server.

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](#)<sup>[124]</sup>, 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 changes click **Save**.

**Note:** If you log into your internal extension and mobile, and then you change your presence and status message using either of the clients, the change is synchronized with the other client.

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	<p>mybuddy sends the notifications about your <b>Send conference entry IM</b>, <b>Send conference exit IM</b>, <b>Voice message begin IM</b>, and <b>Voice message end IM</b> 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.</p> <p>After defining the alternate IM ID, the Google Talk user has to add or invite mybuddy to the Google Talk friends or buddy list.</p> <p>That is, on Google Talk client the user has to click the <b>+Add</b> button and enter <i>mybuddy@&lt;XMPP_Domain&gt;</i> (for example, <i>mybuddy@talk.acme.com</i>) and follow the prompts.</p>
	<a href="#">Advertise on call status</a> <sup>[124]</sup>	<p>You can set the status of this field to reflect your call status:</p> <ul style="list-style-type: none"> <li>• If you set the status of this field to <b>Presence and Message</b>, your presence will be changed to DND and your status message set to indicate you are on a call.</li> <li>• If you set the status of this field to <b>Message Only</b>, 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.</li> <li>• If you set the status of this field to <b>None</b>, the system does not alter your status message or presence indicator while you are on the phone.</li> </ul> <p><b>Note:</b> When you set the <i>Absent text</i> using a phone or other interface, the system also updates the <i>Absent text</i> in one-X Portal for IP Office IM status. However, one-X Portal for IP Office displays only the first 16 characters of the <i>Absent text</i> that you set.</p>
Advertise calendar status	<p>You can set the status of this field to reflect your calendar status:</p> <ul style="list-style-type: none"> <li>• If you set the status of this field to <b>Presence and Message</b>, 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.</li> <li>• If you set the status of this field as <b>Message Only</b>, the system displays only your calendar message.</li> </ul>	

Field	Options	Description
		<ul style="list-style-type: none"><li>If you set the status of this field to <b>None</b>, the system does not alter your status message or presence indicator while you are in a meeting or at an appointment.</li></ul>
	Avatar	<ul style="list-style-type: none"><li>You can <a href="#">upload an Avatar image</a><sup>[124]</sup> on the Openfire server. The Avatar image for a contact is visible only when it is uploaded on the Openfire server and you login using XMPP clients such as Pidgin or Flare Experience.</li><li>The maximum image size is 20 KB.</li><li>The supported images types are bmp, gif, jpeg and png.</li></ul>

---

## 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.
3. 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.

## 10.4.2 Uploading an Avatar image

### Adding an Avatar image

1. Click **IM/Presence Configuration**.
2. Navigate to the **Avatar** section.
3. Click **Browse** to search the Avatar image from your computer.
4. Select the image and click **Open**. The system displays the image path in the **Browse** box.
5. Click **Change Avatar**. The system uploads the selected image.

### Deleting an Avatar image

1. Click **Reset Avatar**. The system loads the default image on the Openfire server.

### Changing an existing Avatar image

1. Click **Browse** to search the new Avatar image from your computer.
2. Select the image and click **Open**.
3. Click **Change Avatar**. The system uploads the new image.

## 10.4.3 Configuring IM/Presence Federation with Google Talk

To initiate a chat communication between a Google Talk user and one-X Portal for IP Office contact, perform the following procedures:

### Add Google Talk user in one-X Portal for IP Office

1. Log into one-X Portal for IP Office.
2. Navigate to **Directory**, and under **Personal** tab, click the **Add Contact** icon. The Add New Contact dialog box is displayed.
3. In the **Gmail Id** field, type the valid Gmail address of the Google Talk user. Also, in the other fields, enter the contact details of the Google Talk user.
4. Click **Add**. A subscription request is sent to the Google Talk user.
5. The Google Talk user must accept the subscription request.
6. The Google Talk user is added to one-X Portal for IP Office and you can view the presence of the Google Talk user in one-X Portal for IP Office.

### Add one-X Portal for IP Office contact in Google Talk

1. Log into Google Talk using the Gmail credentials.
2. Add one-X Portal for IP Office contact in the following format: <[xmpp\\_extension\\_number](#)>@<[xmppdomainname](#)>.
3. The one-X Portal for IP Office contact is added to Google Talk and you can view the presence of the one-X Portal for IP Office contact in Google Talk.

**Note:** You cannot view the presence of one-X Portal for IP Office contact in Google Talk if you do not add the Google Talk user in one-X Portal for IP Office.

## 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**<sup>[59]</sup>. This only applies for calls direct to your extension number; it does not apply for calls to any [hunt group](#)<sup>[206]</sup> 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](#)<sup>[207]</sup> 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 mapped by the one-X Portal for IP Office matching numbers in the exceptions list according to the [primary phone](#)<sup>[207]</sup> 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](#)<sup>[207]</sup>.

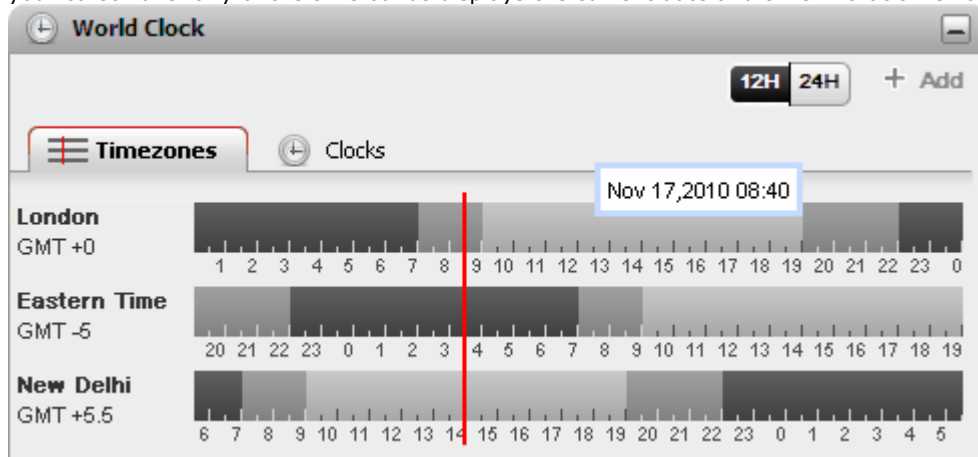
## 10.6 The World Clock Gadget

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

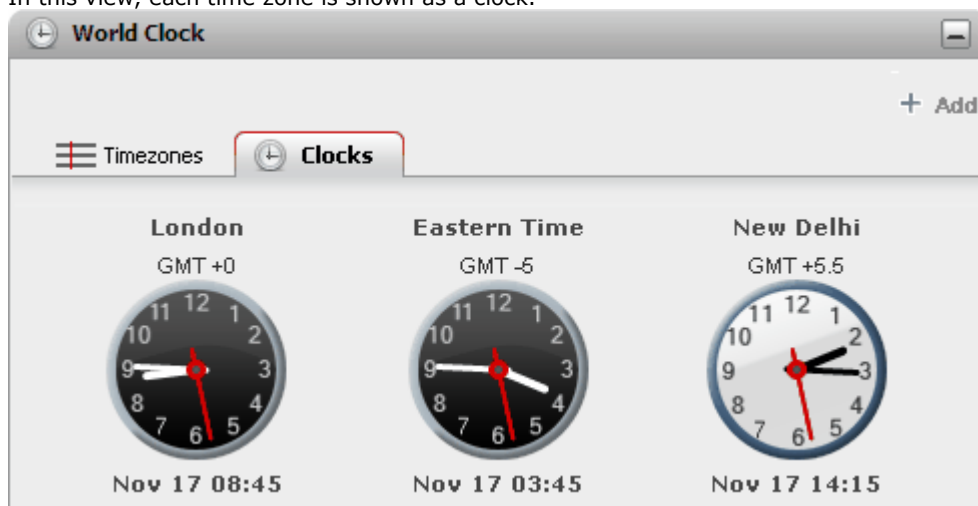
- **Timezones**

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 time zone is shown as a clock.

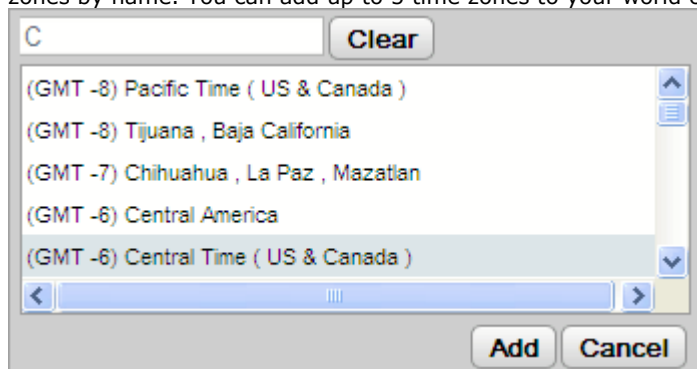


- **12H 24H 12/24 Hour**

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 time zones to your world clock.



-   **Replace/Delete**

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

---

## 10.7 Language

one-X Portal for IP Office 9.0 supports **Brazilian Portuguese, Dutch, English(US and UK), French, German, Italian, Latin Spanish, Polish, Russian, Simplified Chinese, Swedish, and Turkish**. You can set the language in the login page.

1. While logging in, choose the language listed under **Language**.
2. Click **Login**.

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



## 10.8 Notifications

one-X Portal for IP Office notifies you of the instant messages that you receive in the desktop clients. one-X Portal for IP Office supports IM notifications in the following browsers and operating systems:

Browsers	Operating systems
Google Chrome version 10 or later	Windows XP and Windows 7
Firefox version 4.0 or later	Windows XP and Windows 7
Internet Explorer version 9 or later	Windows 7

**Note:** If you are not using a browser or operating systems that is not supported then, the system displays a list supported browsers, and operating systems.

**Note:** The notification settings are browser specific and you have to enable the settings whenever you use a different browser or clear the cache.

### 10.8.1 Enabling notifications in Google Chrome

To enable IM desktop notifications in Google Chrome:

1. In the **Configure** tab, click **Notifications** tab.
2. Select **Enable IM Desktop Notifications**. The system displays a popup window that requests the user to allow permission for desktop IM notifications in one-X Portal for IP Office domain.
3. Click **Allow**. The system displays a welcome message and sends you desktop IM notifications.

**Note:** If you deny the permission for desktop notifications, then the system retains the existing settings and does not send you the IM notifications even if you have selected the **Enable IM Desktop Notifications**. However, later if you would like to allow desktop IM notifications in one-X Portal for IP Office domain do the following:

1. In chrome browser type *chrome://chrome/settings/contentExceptions#notifications*.
2. Select the IP address of the one-X Portal for IP Office domain. For example, *http://148.147.206.147:8080*.
3. Click on the **X** located at the right end in for the selected row.
4. Click **OK**.
5. Log in to one-X Portal for IP Office
6. Select **Configure > Notifications** tab.
7. Select **Enable IM Desktop Notifications**. The system displays a popup window that requests the user to allow permission for desktop IM notifications in one-X Portal for IP Office domain.
8. Click **Allow**. The system displays a welcome message and send you desktop IM notifications.

#### Result

If you receive an IM when you have minimized the one-X Portal for IP Office, the system displays a notification window.

**Note:** The system displays the avatar of the contact who has sent you an IM in the notification window. When you click on the notification window, the system displays one-X Portal for IP Office window.

---

## 10.8.2 Enabling IM Desktop notifications in Firefox

If you have not installed a plugin, the system displays the following message:

*You will require to download and install a third party plug-in to enable desktop notifications for Firefox. Please install plug-in from <link>here</link>. After installing the plug-in, select the checkbox and click on Allow button to allow the notifications.*

After you install the plugin you need to restart the browser and then login to one-X Portal for IP Office.

### To enable IM desktop notifications in Google Chrome:

1. In the **Configure** tab, click **Notifications** tab.
2. Select **Enable IM Desktop Notifications**. The system displays a popup window that requests the user to allow permission for desktop IM notifications in one-X Portal for IP Office domain.
3. Click **Allow**. The system displays a welcome message and sends you desktop IM notifications.

**Note:** If you deny the permission for desktop notifications, then the system retains the existing settings and does not send you the IM notifications even if you have selected the **Enable IM Desktop Notifications**. However, later if you would like to allow desktop IM notifications in one-X Portal for IP Office domain do the following:

1. In Firefox chrome browser, Select **Tools > Add-ons**. The system displays a list of all add-ons.
2. Select **Extensions** in the left panel.
3. Select **Tab Notifier 2.1**.
4. In the **Tab Notifier 2.1**, click **Options**.
5. Select the **Exceptions** tab. The system lists a list of exceptions and the notification permissions.
6. Select the IP address of the one-X Portal for IP Office domain. For example, *http://148.147.206.147:8080*.
7. Click **Remove Selected**.
8. Click **Close**.
9. Log in to one-X Portal for IP Office
10. Select **Configure > Notifications** tab.
11. Select **Enable IM Desktop Notifications**. The system displays a popup window that requests the user to allow permission for desktop IM notifications in one-X Portal for IP Office domain.
12. Click **Allow**. The system displays a welcome message and send you desktop IM notifications.

### Result

If you receive an IM when you have minimized one-X Portal for IP Office window, the system displays a notification window.

**Note:** The system displays the avatar of the contact who has sent you an IM in the notification window. When you click on the notification window, the system displays one-X Portal for IP Office window.

### 10.8.3 Enabling IM Desktop notifications in Internet Explorer

**Note:** You cannot pin one-X Portal for IP Office in a secure HTTPS mode.

#### Procedure

To enable IM desktop notifications in Internet Explorer:

1. In the **Configure** tab, click **Notifications** tab.
2. Do one of the following:
  - If you have not already pinned one-X Portal for IP Office in Internet Explorer, the system displays the instructions to pin one-X Portal for IP Office.
  - If you have already pinned one-X Portal for IP Office in Internet Explorer, select **Enable IM Desktop Notifications**.

#### Result

If you receive an IM when you have minimized the one-X Portal for IP Office in the pinned browser then, the system

displays  in the task bar.

---

## 10.9 Security

When the administrator of IP Office sets the status of the password for you as *Force New Password* in IP Office Manager, when you login, the system prompts you to first change the password and then login again.

**Note:** Even basic users who are not configured as users of one-X Portal for IP Office can change the password by clicking on the **Change Password** link in the login page. The basic users cannot login to one-X Portal for IP Office, they can only change the password.

You can change the password using one-X Portal for IP Office.

### To change the password:

1. Click **Security**.
2. Type the current password in **Current password** field.
3. Type the new password in **New password** field.
4. Retype the new password in **Confirm new password** field.
5. Click **Confirm**. The system changes the password.

**Note:** If the new password that you set does not meet the password complexity rules set by your administrator, the system displays a message that reads: *Current password does not match or new password supplied does not match the complexity criteria. Please try again.*

Contact your administrator for password complexity criteria.

After you change the password the system prompts you to login again.

## 10.10 Terminal Services

one-X Portal for IP Office supports terminal services using Citrix and Microsoft Terminal services clients.

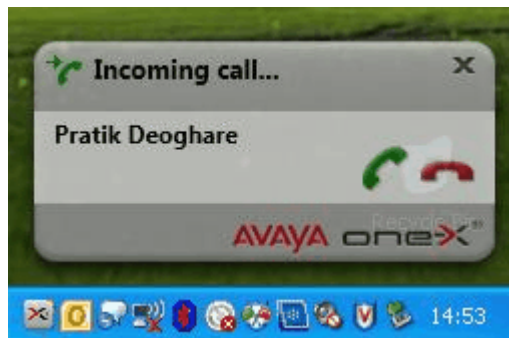
# **Chapter 11.**

# **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"><li>• <a href="#">Check the one-X Call Assistant system requirements</a> <sup>[135]</sup></li><li>• <a href="#">Start the one-X Call Assistant</a> <sup>[138]</sup></li><li>• <a href="#">Use the one-X Call Assistant additional features</a> <sup>[145]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">View the one-X Call Assistant icons</a> <sup>[136]</sup></li><li>• <a href="#">Start the one-X Portal for IP Office</a> <sup>[139]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Install the one-X Call Assistant</a> <sup>[137]</sup></li><li>• <a href="#">Configure the one-X Call Assistant</a> <sup>[140]</sup></li></ul> |
|---|--|---|

---

## 11.1 one-X Call Assistant System Requirements

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

- [Hardware Requirements](#)<sup>[135]</sup>
- [Software Requirements](#)<sup>[135]</sup>

### 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 x32
- Windows 7 Ultimate x64
- Windows 7 Enterprise x32
- Windows 7 Enterprise x64
- Windows 7 Professional x32
- Windows 7 Professional x64
- Windows 8 x32
- Windows 8 x64
- Windows XP Professional x32

#### Additional Software Requirements






- Microsoft Internet Explorer 8.0/9.0/10.
- Fire Fox 16/17
- Chrome 23
- Safari 6.0
- Windows Installer 3.1 or later.
- Microsoft speech platform
- Microsoft speech engine (specific to the locale)

---

## 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](#) <sup>[140]</sup>.
-  **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 without missed calls**  
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 with missed calls**  
The indicators for missed calls and new voicemail messages for missed calls 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 version 9.0 application from the one-X Portal for IP Office server.

**Note:** If one-X Call Assistant version 7.0 is already installed, you must manually uninstall the one-X Call Assistant application. The one-X Call Assistant version 9.0 installation does not upgrade or remove the previous installation.

### To install one-X Call Assistant:

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**  
When the browser prompts you, select **Save**. The browser downloads the installation file. When the download is complete, double click the downloaded file and select **Run**.
5. The system unpacks the installer prepares to install the one-X Call Assistant software. 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**. Enter your name and the organization that you work for.
8. 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**. Select the program features you want to install.
10. Select a folder where the software should be installed and accept the default prompts.
11. Click **Install**. The system displays the progress of the installation.
12. Click **Finish**.
  - **Note:** Depending on the environment that the one-X Desktop Clients are installed the installation wizard prompts you to restart the system.

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**.

1. 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.
2. In the **Logon Information** section, type the user name and password that you use to log in to one-X Portal for IP Office.
3. Click **OK**.

---

## 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**.





**Note:** To ensure that you receive the notifications from the server you need to have administrator privileges. If you are using Windows 7 or Windows Vista OS then, right click **one-X Desktop Clients** and select **Run as administrator**. To run the one-X Portal for IP Office as an administrator every time you start one-X Portal for IP Office do the following:

- a. Right click **one-X Desktop Clients** and select **Properties**.
- b. In the **one-X Desktop Clients Properties** window, select **Compatibility** tab.
- c. In the **Privilege Level** section, select **Run this program as an administrator**.
- d. Click **OK**.

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

**Note:** If you have enabled the screen pop up the system does the following:

1. After logging in to the one-X Call Assistant, when you answer a call using the [one-X Call Assistant Messages](#)<sup>[147]</sup> :
  - a. If one-X Portal for IP Office is open, the system closes the existing window and opens one-X Portal for IP Office in a new window.
  - b. If you have logged out, the system logs you in again immediately using the login credentials that are cached.

**Note:** When you make an incoming or outgoing call and if the number matches the number of a contact in the address book of your outlook, the system displays the outlook contact card in addition to the [one-X Call Assistant Messages](#)<sup>[147]</sup>.


2. If you use a browser to log in to the one-X Portal for IP Office, and answer calls using [one-X Call Assistant Messages](#)<sup>[147]</sup> the system logs you out of the current session and opens a new window.

## 11.6 one-X Call Assistant settings

You can set the [Connection](#)<sup>[140]</sup>, [Hot Key](#)<sup>[140]</sup>, and [Screen Popping](#)<sup>[142]</sup> 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.

**Note:** If you select **Use secure communication** check box, then set the port number for the server in secure mode. For more information, see [Secure communications](#)<sup>[150]</sup>.

When you select **Use secure communication**, the browser pop up feature that opens one-X Portal for IP Office web client will also use secure mode (HTTPS).
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 customize a hot key combination for various functions such as making calls, playing the last announcements, muting the announcements, setting the Phone status, announcing all hot keys, opening the settings, opening one-X Portal for IP Office, exiting, logging in and logging out of one-X Call Assistant, answering a call, placing a call on hold, and dropping a call.

The default hot key combination for the functions are:

Function	Description	Hot key combination
<b>Make a call</b>	Dials the number copied in the clipboard.	Ctrl+Shift+C
<b>Play the last announcement</b>	Plays the last announcement after playing the current announcement.	Ctrl+Shift+P
<b>Mute announcement</b>	Mutes the announcements.	Ctrl+Shift+M
<b>Show active notifications</b>	Plays the notifications that are active	Ctrl+Shift+N
<b>Call status</b>	Plays the status of the call	Ctrl+Shift+None
<b>Phone status</b>	Plays all the Phone status values that you have selected.	Ctrl+Shift+S
<b>Announce all Hot keys</b>	Plays all the hot key combinations that you have set.	Ctrl+Shift+K
<b>Open the settings window</b>	Displays the <b>Settings</b> window.	Ctrl+Shift+O
<b>Exit one-X Call Assistant</b>	Closes one-X Call Assistant.	Ctrl+Shift+E
<b>Open one-X Portal for IP Office</b>	Opens one-X Portal for IP Office.	Ctrl+Shift+X
<b>Logout or Login</b>	Logs out or logs you in to one-X Call Assistant.	Ctrl+Shift+L

<b>Answer a call</b>	Answers the call that the system displays in <b>Incoming Call Message</b> .	Ctrl+Shift+A
<b>Place a call on hold or retrieve a call on hold</b>	Places the call on hold or retrieves a call on a hold	Ctrl+Shift+H
<b>Drop a call</b>	Drops the call.	Ctrl+Shift+Q


**Note:** After you install one-X Call Assistant the system does not display the default Hot key combination for *Play the last announcement, Mute announcement, Phone status, and Announce all Hot keys* until you enable announcements in [Announcements settings](#)<sup>[143]</sup>. However, after you have enable announcements and later disable the announcements option the system retains the default hot key combinations for announcements.

**Example:**

If you have not enabled announcements in [Announcements settings](#)<sup>[143]</sup> and set the default hot key combination set for *Play the last announcement, Mute announcement, Phone status, and Announce all Hot keys* to a different function and later when you enable announcements, then the system process the hot key combination that you set for a different function. The system does not process the default hot key combination for *Play the last announcement, Mute announcement, Phone status, and Announce all Hot keys*.

**Note:** You cannot set the same hot key combination for two functions. The system displays a pop up message that reads: *Hot key with specified value already exists*.

**To customize the one-X Call Assistant dialing Hot Key combination**

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Hot Key**.
4. Select the hot key combination that you want to use.
5. Click **Update hot key**.
6. Click **OK**.

**Using hot keys**

To answer, hold, retrieve, and drop a call in the [one-X Call Assistant Messages](#)<sup>[147]</sup> using hot keys you need to ensure that the answer, hold, retrieve, or drop button is in focus.

**Note:** To get the focus on the button press the **Tab** key until the system highlights button. Example of a drop button



that is in focus,

**Dialing using the hot key combination:**

1. Select or highlight the number in the Windows application.
2. Press the one-X Call Assistant hot key combination to make a call.

**Note:**

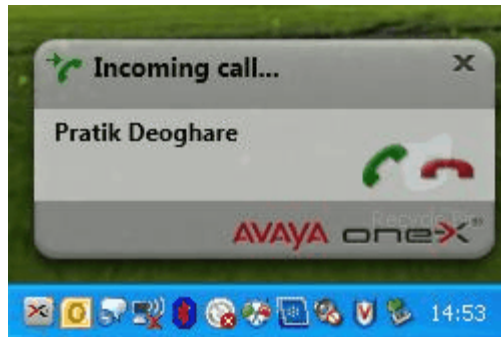
- If the phone system uses an external dialing prefix then, ensure that the prefix is present in the number. You cannot edit the number before you dial.
- If the hot key combination that you set for one-X Call Assistant is same as the number that a function in the application uses, then the function set in the application takes precedence over the hot key dialing that you set in one-X Call Assistant.

## 11.6.3 Screen Popping

You can use this feature to pop one-X Portal for IP Office client in a native window so that you can carry out further actions on the call or get additional information. You can also set the system to pop the outlook contact card depending on the caller line identity or the number that you dial.


The system supports the Outlook contact pop feature for the following platforms:

- Outlook versions (32 bit only) - Outlook 2003, Outlook 2007, Outlook 2010
- Operating Systems - Windows XP, Windows 7 (32 bit and 64 bit), Windows 8 (32 bit)



The one-X Call Assistant looks for contacts in your Microsoft Outlook and displays the contact card 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 the contact card only if Outlook is running.

### 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
<b>Enable CA Popping</b>	The one-X Call Assistant enables the screen pop-ups based on the fields that you select. You need to enable this to select the pop-ups that the system should display.
<b>Pop on caller line identity</b>	The one-X Call Assistant pops the one-X Portal for IP Office window for incoming calls with the caller ID number of the call. <b>Note:</b> The system also pops the contact card only if the caller ID number of the call matches a contact in the Address Book of your Outlook and if you have enabled <b>Pop Outlook</b> option.
<b>Pop on Outdial</b>	The one-X Call Assistant pops the one-X Portal for IP Office window for outgoing calls that you dial with the caller ID number of the call. <b>Note:</b> The system also pops the contact card only if the number that you dial matches the number of a contact in the Address Book of your Outlook and if you have enabled <b>Pop Outlook</b> option.
<b>Pop Outlook</b>	The system pops the contact card in the Address Book of your Outlook, based on the <b>Pop on caller line identity</b> or <b>Pop on Outdial</b> option that you select.


## 11.6.4 Logging

The system creates the logs of all the events that occur in one-X Call Assistant. The system also logs the debugging information in the log files. The log files are time stamped and can be used to troubleshoot issues.

### Logging Information

Field	Description
<b>Enable event logging</b>	Creates the log files for the events that occur in one-X Call Assistant and you can view the log files in <b>Event Viewer</b> using the <b>Administrative Tools</b> option in windows.  <b>Note:</b> In IP Office release 9.0 even if you enable this option, you cannot view the log files in <b>Event Viewer</b> using the <b>Administrative Tools</b> option in windows.
<b>Enable logging</b>	Logs all the events that occur in one-X Call Assistant.
<b>Enable event logging for announcements</b>	Creates the log files for the events that occur in one-X Call Assistant .  <b>Note:</b> In IP Office release 9.0 even if you enable this option, you cannot view the log files in <b>Event Viewer</b> using the <b>Administrative Tools</b> option in windows.
<b>Enable logging for announcements</b>	Logs all the events that occurs in one-X Call Assistant.
<b>Max Log File Size (kb)</b>	Specifies the maximum size of the log file. The system displays this option only if you have selected <b>Enable logging</b> .
<b>Max log duration</b>	Specifies the maximum duration of the logs. The system displays this option only if you have selected <b>Enable logging</b> .


### To configure the Logging settings:

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Logging**.
4. In the **Logging Information** section, select the options to create the log files.
5. Click **OK**.

The system creates the log files at *C:\Documents and Settings\\Application Data\Avaya\IP Office\Avaya Call Assistant\Logging*.

**Note:** <user> is the name of the user who is logged into Windows.

### To access the log files that are created:

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

## 11.6.5 Announcements settings

You can set the voice, speed of the voice, and volume of the announcements.


Field	Description
<b>Enable announcements</b>	announces the various events such as system, phone, screen navigation, phone, and call events that you select.
<b>Select voice</b>	you can select the voice you want the system to announce the various events in the drop down list.  <b>Note:</b> You can select only the Microsoft voices that one-X Call Assistant supports in the 13 languages.
<b>Voice speed</b>	you can set the speed of voice.  <b>Note:</b> The system displays the value when you move the slider.
<b>Volume</b>	you can set the volume of the announcements.

**Sample**

plays the sample announcement based on the settings that you select.

**Tip:** Helps you determine how the announcement sounds based on the settings that you select.

### To configure the Announcement settings:

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Announcements settings**.
4. Select **Enable announcements**.
5. Select the settings for the announcements.
6. Click **OK**.

## 11.6.6 Announcements selection

You can select the various events such as system status, call events, screen navigation, and phone status.


Field	Description
<b>System status</b>	Announces system status events that you select such as <i>System errors</i> , and <i>System notifications</i> .
<b>Phone status</b>	announces phone status that you select such as <i>Phone extension</i> , <i>Forward on busy</i> , <i>Forward on no answer</i> , <i>Forward all</i> , <i>Forward hunt group calls</i> , <i>Forward number</i> , <i>Redirected number</i> , <i>Do not disturb</i> , <i>Do not disturb overrides</i> , <i>Voicemail enabled</i> , <i>Voicemail ring back enabled</i> , <i>Number of unread messages</i> , <i>External calls prohibited</i> , <i>Absent message ID</i> , <i>Absent message displayed</i> , <i>Absent text</i> , <i>Ring time before no answer</i> , <i>Log in code configured</i> .
<b>Call events</b>	Announces call events that you select such as <i>New incoming call</i> , <i>Call from</i> , <i>On hold</i> , <i>Retrieve</i> , <i>Call Answered</i> , <i>Hangup</i> , <i>Outgoing call</i> , <i>Line is idle</i> , <i>Call transferred</i> , <i>Conference started</i> , and <i>Call status</i> .
<b>Screen navigation</b>	Announces screen navigation actions such as <i>Entering exiting screens and menu</i> , and <i>Check box focus and value change</i> .

### Priority of Announcements

- System status: High
- Call events: High
- Phone status: Medium
- Screen navigation: Low

For example, if one-X Call Assistant is playing phone status message and if a system error occurs, then one-X Call Assistant will complete announcing the phone status message and then play the system error message. After one-X Call Assistant plays the system error message one-X Call Assistant resumes playing the phone status message.

### To configure Announcements selection:

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Announcements selection**.
4. Select the options that you want to the system to announce.
5. Click **OK**.




## 11.6.7 Configuring dialing rules

You need to configure dialing rules to route the outgoing calls. The system applies the dialing rules automatically when you make a call using one-X Call Assistant.

Field	Description
<b>None</b>	The system does not apply any of the dialing rules that you set.
<b>Use System Dialing rules (TAPI)</b>	The system does applies the default system dialing rules.
<b>Use Custom Dialing rules</b>	The system applies the custom dialing rules that you set. The system sets the prefix for an outbound call automatically.
<b>Number to dial access an outside line</b>	The digits that you need to dial to access an outside line.
<b>Your country code</b>	The country code of the country.
<b>Your area/city code</b>	The area code or the city code of the telephone server.
<b>PBX main prefix</b>	The main prefix of the PBX or the telephone server.
<b>Number to dial for long distance calls</b>	The digits that you need to dial to make a long distance call.
<b>Number to dial for international calls</b>	The digits that you need to dial to call an international telephone number.
<b>Length of internal extensions</b>	The number of digits in an internal extension.
<b>Length of national phone numbers (including area/city code)</b>	The number of digits that you need to dial including area or city code for a call within the country. <b>Note:</b> For countries with with multiple telephone numbers, you can separate it by a comma.
<b>Remove area/city code when making a local call</b>	The system removes the are or city call when you make a local call. <b>Note:</b> This field is enabled only when you set the <b>Your area/city code</b> field.

### Procedure

1. In the notification area, right-click  **Connected**.
2. Select **Settings**.
3. In the navigation pane of the **General Settings** dialog box, select **Dialing Rules**.
4. In the **Dialing Rules** dialog box, set the dialing rules.
5. Click **OK** , after you have set the dialing rules.

## 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](#) <sup>[147]</sup>
- [Voicemail messages](#) <sup>[149]</sup>
- [Missed calls](#) <sup>[149]</sup>
- [Multiple language support](#) <sup>[149]</sup>
- [Help menu](#) <sup>[149]</sup>
- [New version available notification](#) <sup>[149]</sup>
- [Terminal Services](#) <sup>[150]</sup>

### 11.7.1 one-X Call Assistant Accessibility

one-X Call Assistant Accessibility feature provides information about the system status, phone status, call events, and screen navigation of a user through the PC speakers, or headset of the user. You can navigate the user interface of one-X Call Assistant using the keyboard. You can choose between audio and visual notification for specific telephone events such as an incoming call. The capability provided is determined by the type of notification you set up when you configure the application.

When you use the tab in the call toast to select buttons such as *Answer*, *Hangup*, *Close*, *Hold*, and *Retrieve*, the system announces the actions. Also when you use the tab to select the caller name or number in call toast, the buttons are highlighted and you can copy paste the caller name or number.

---

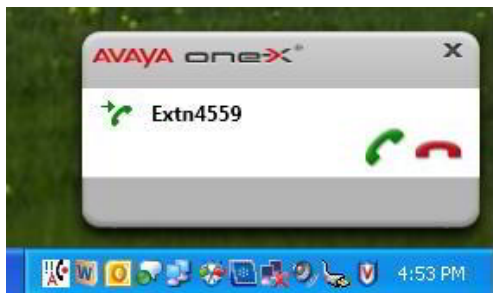
To configure Audio notification mode and set the priority of announcements, see [Announcements settings](#)<sup>[143]</sup> and [Announcements selection](#)<sup>[144]</sup>.

Alternately, or in addition, you can setup “hot keys” on their computer keyboard to perform the same functions. “Hot keys” are predefined computer keyboard sequences that provide “short cuts” to frequently used operations. For more information see, [Hot Key Dialing](#)<sup>[145]</sup>.

## 11.7.2 one-X Call Assistant Messages

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.

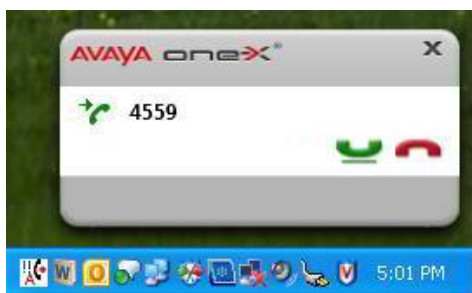
### Incoming Call Message



- 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, if you enable screen pop up the system closes the existing one-X Portal for IP Office window and opens a new one.


- To dial using the hot keys, press the **Tab** key, until the system

highlights the answer button , then press the hot key combination **Ctrl+Shift+A**.

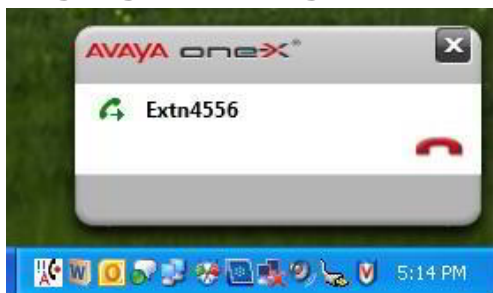


- The system displays this message when the call is connected.

- To place a call on hold or to retrieve a call on hold using the hot key, press the **Tab** key, until the system highlights the hold/retrieve button

, then press the hot key combination **Ctrl+Shift+U**.

### Outgoing Call Messages



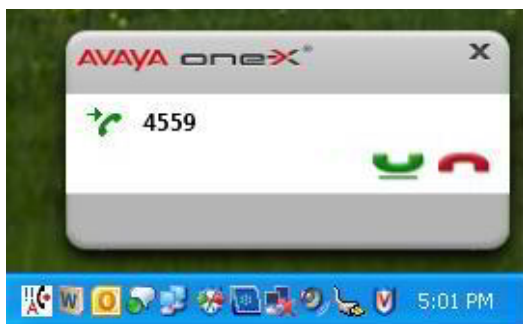
When you make a call, using your phone, one-X Portal for IP Office or [one-X Call Assistant](#) <sup>[140]</sup>, the system displays the details of the call that you make and the progress of the call. You can use the **Drop** option to end the call.

- To drop the call using hot keys, press the **Tab** key, until the system

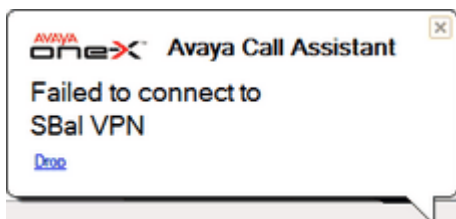
highlights the drop button , then press the hot key combination **Ctrl+Shift+D**.

- 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.

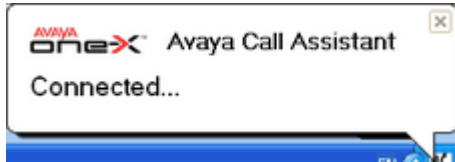


- The system displays this message when the call is connected.

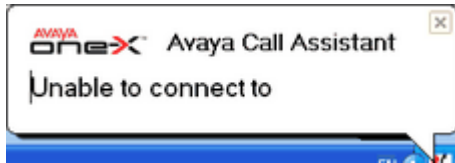



- This message indicates that the call attempt failed for some reason.

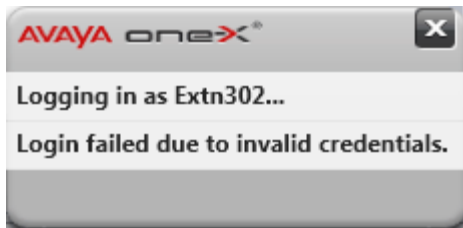
## one-X Call Assistant Operation Messages




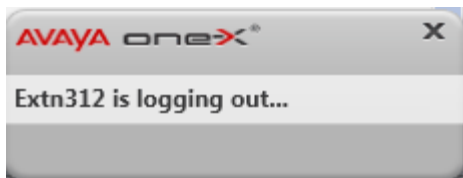
- The system displays this message when one-X Call Assistant starts and is logging in to the one-X Portal for IP Office server to send and receive information about your calls.




- 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**.

### 11.7.3 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.

**Note:** one-X Call Assistant does not display any voicemail messages for Hunt Groups.

### 11.7.4 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**.

**Note:** one-X Call Assistant does not display any missed calls for Hunt Groups.

### 11.7.5 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:

- **English (US)**
- **Chinese**
- **Dutch**
- **English (UK)**
- **French**
- **German**
- **Italian**
- **Portuguese (Brazil)**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**
- **Turkish**

### 11.7.6 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.

### 11.7.7 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.

---

## 11.7.8 Terminal Services

one-X Call Assistant supports terminal services using Citrix and Microsoft Terminal services clients.

## 11.7.9 Secure communications

The system encrypts all the information that you send or receive between one-X Portal for IP Office and one-X Call Assistant using the secure port.

**Note:** The secure port number for one-X Portal for IP Office on Windows platform is 8443 and the secure port number for one-X Portal for IP Office on Linux platform is 9443.

You can configure the system to use secure mode. For more information see, [Connection](#)<sup>[146]</sup>.

# 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"><li>• <a href="#">Check the Avaya IP Office Plug-in system requirements</a> <sup>[152]</sup></li><li>• <a href="#">Log out of the Avaya IP Office Plug-in</a> <sup>[159]</sup></li><li>• <a href="#">Use the Avaya IP Office Plug-in call functions</a> <sup>[174]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Install the Avaya IP Office Plug-in</a> <sup>[153]</sup></li><li>• <a href="#">Configure the Avaya IP Office Plug-in</a> <sup>[160]</sup></li><li>• <a href="#">Use the Avaya IP Office Plug-in additional features</a> <sup>[178]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Log into the Avaya IP Office Plug-in</a> <sup>[155]</sup></li><li>• <a href="#">Make a call using the Avaya IP Office Plug-in</a> <sup>[173]</sup></li></ul> |
|--|--|--|

### 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](#) <sup>[152]</sup>
- [Software Requirements](#) <sup>[152]</sup>
- [Microsoft® Outlook® versions](#) <sup>[152]</sup>

#### 12.1.1 Hardware Requirements

The following are the hardware requirements:

- 1 GHz processor
- 1GB RAM (minimum)

**Note:** The number of Outlook contacts that the system displays in Avaya IP Office Plug-in is limited by the available RAM on the computer on which Avaya IP Office Plug-in is running. Loading too many contacts with insufficient RAM can result in the degradation of performance on the machine.

- 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 (x32 and x64)
- Windows 8 (x32 and x64)
- Windows XP Professional (x32)

#### Additional software requirements:

- Microsoft Internet Explorer 8.0/9.0/10.0.
- FireFox 16/17
- Chrome 23
- Safari 6.0
- Windows Installer 3.1 or later.

#### 12.1.3 Microsoft® Outlook® versions

The following are the supported Microsoft® Outlook® versions:

- Microsoft® Outlook® 2007
- Microsoft® Outlook® 2010 (x32 and x64)
- Microsoft® Outlook® 2013 (x32 and x64)



## 12.2 Installing Avaya IP Office Plug-in

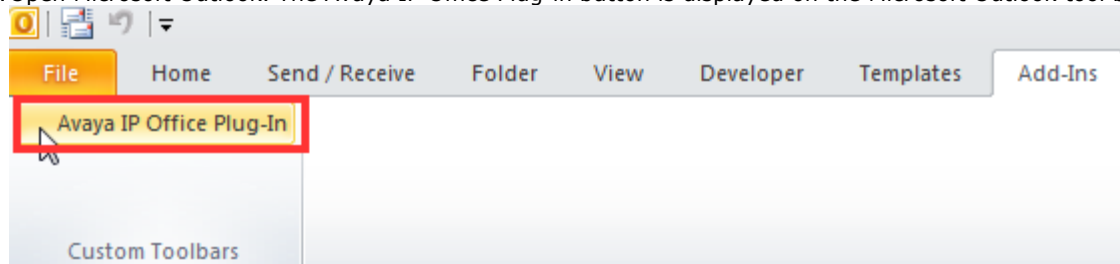
You can install Avaya IP Office Plug-in from the one-X Portal for IP Office server.

### To install one-X Call Assistant:

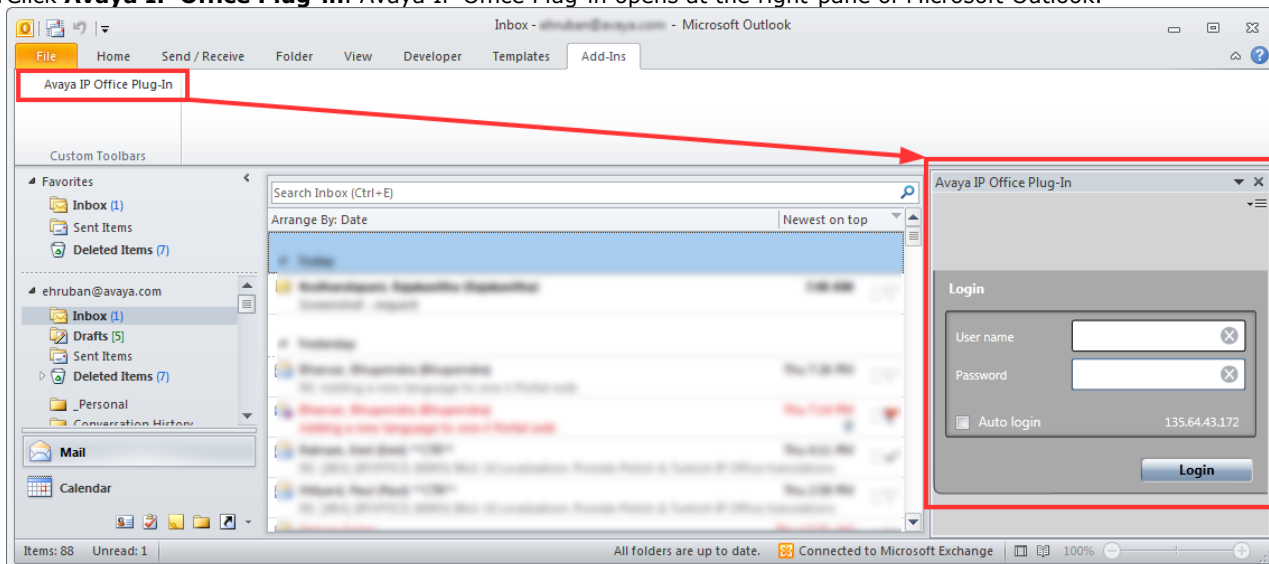
1. Log in to one-X Portal for IP Office.
2. In the **Configuration** tab, select **Desktop Integration**.
3. Click **Install one-X Desktop Clients**.
4. The next steps vary depending on the browser:
  - **Internet Explorer or Safari**  
The file download menu prompts you with options to perform on the file setup.exe. Select **Run**.
  - **Google Chrome or Firefox**  
When the browser prompts you, select **Save**. The browser downloads the installation file. When the download is complete, double click the downloaded file and select **Run**.
5. The system unpacks the installer prepares to install the one-X Call Assistant software. 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**. Enter your name and the organization that you work for.
8. 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**. Select the program features you want to install.
10. Select a folder where the software should be installed and accept the default prompts.
11. Click **Install**. The system displays the progress of the installation.
12. Click **Finish**.
  - **Note:** Depending on the environment that the one-X Desktop Clients are installed the installation wizard prompts you to restart the system.

### Configuring the Avaya IP Office Plug-in

1. Open Microsoft Outlook. The Avaya IP Office Plug-in button is displayed on the Microsoft Outlook tool bar.



2. Click **Avaya IP Office Plug-in**. Avaya IP Office Plug-in opens at the right-pane of Microsoft Outlook.



## 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 Avaya IP Office Plug-in:

1. Select **Start > Programs > Microsoft Office > Microsoft Office Outlook**.

**Note:** To ensure that you receive the notifications from the server you need to have administrator privileges. If you are using Windows 7 or Windows Vista OS then do the following:

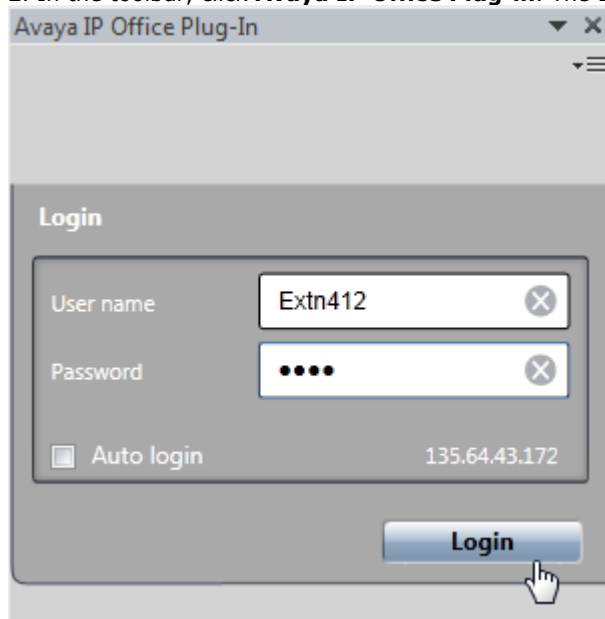
- a. Locate the .exe file of **Microsoft Office Outlook**. Typically, it is located in **My Computer > C: > Program Files > Microsoft Office > Office14**.

- b. Right click Outlook.exe file and select **Run as administrator**.

To run **Microsoft Office Outlook** as an administrator every time you start **Microsoft Office Outlook** do the following:

- a. Right click **Microsoft Office Outlook** and select **Properties**.
- b. In the **Microsoft Office Outlook Properties** window, select **Compatibility** tab.
- c. In the **Privilege Level** section, select **Run this program as an administrator**.
- d. Click **OK**.

2. In the toolbar, click **Avaya IP Office Plug-in**. The **Login** dialog box is displayed.

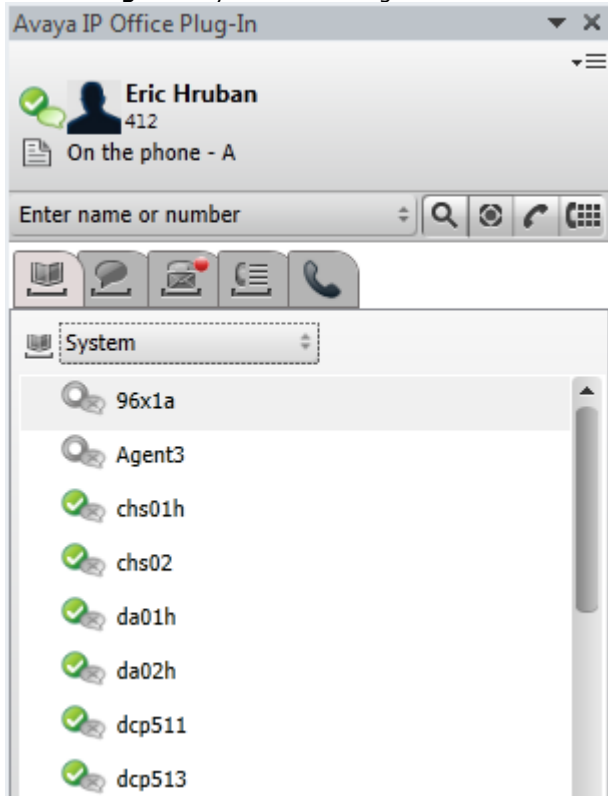


3. In the **Login** section:

- 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.

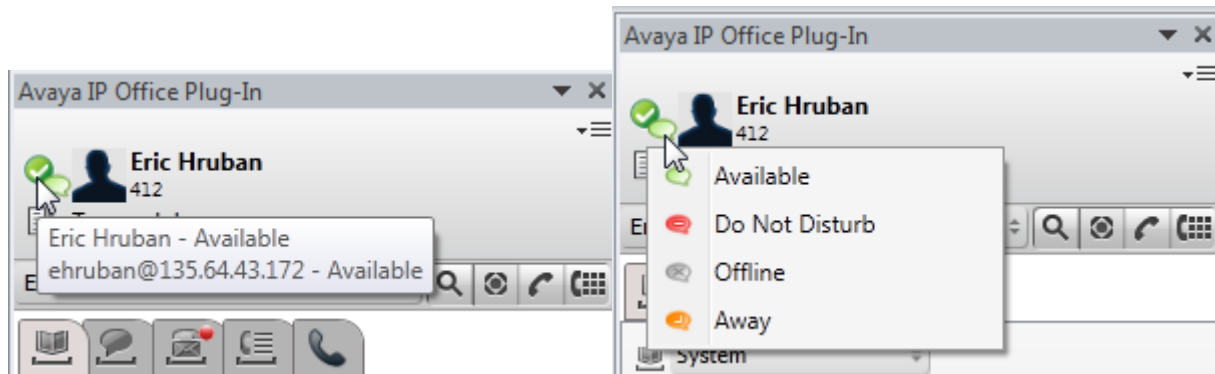
**Note:** If **Auto login** is enabled, then Avaya IP Office Plug-in automatically logs into the one-X Portal for IP Office server at the launch of Microsoft Outlook. You can also select this option from the **Settings**.

4. Click **Login**. Avaya IP Office Plug-in main screen is displayed with the list of system contacts.

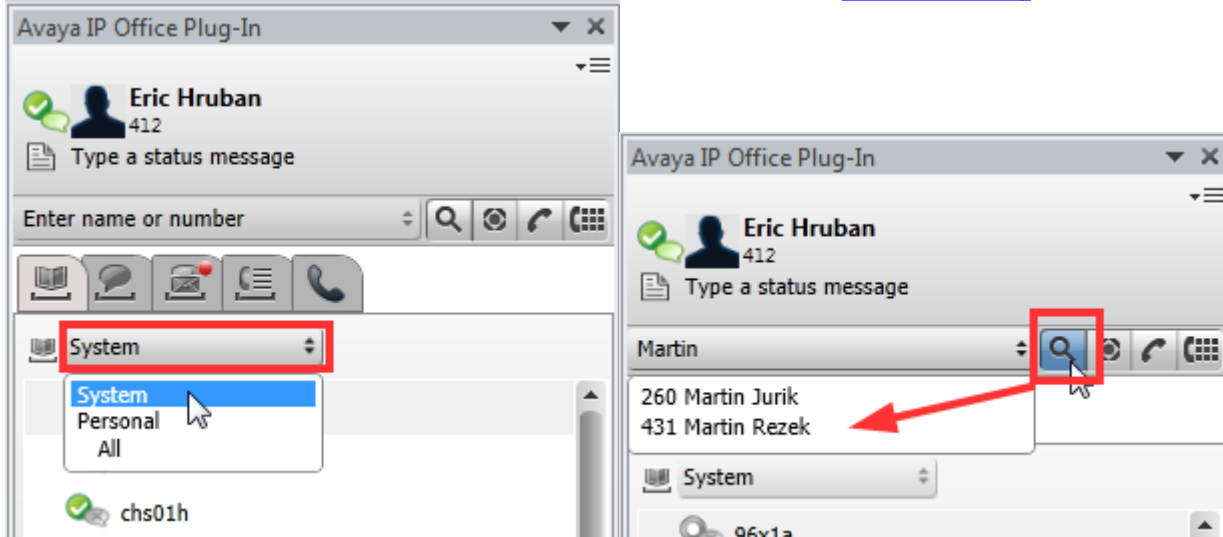


You can use Avaya IP Office Plug-in main screen to perform the following tasks:

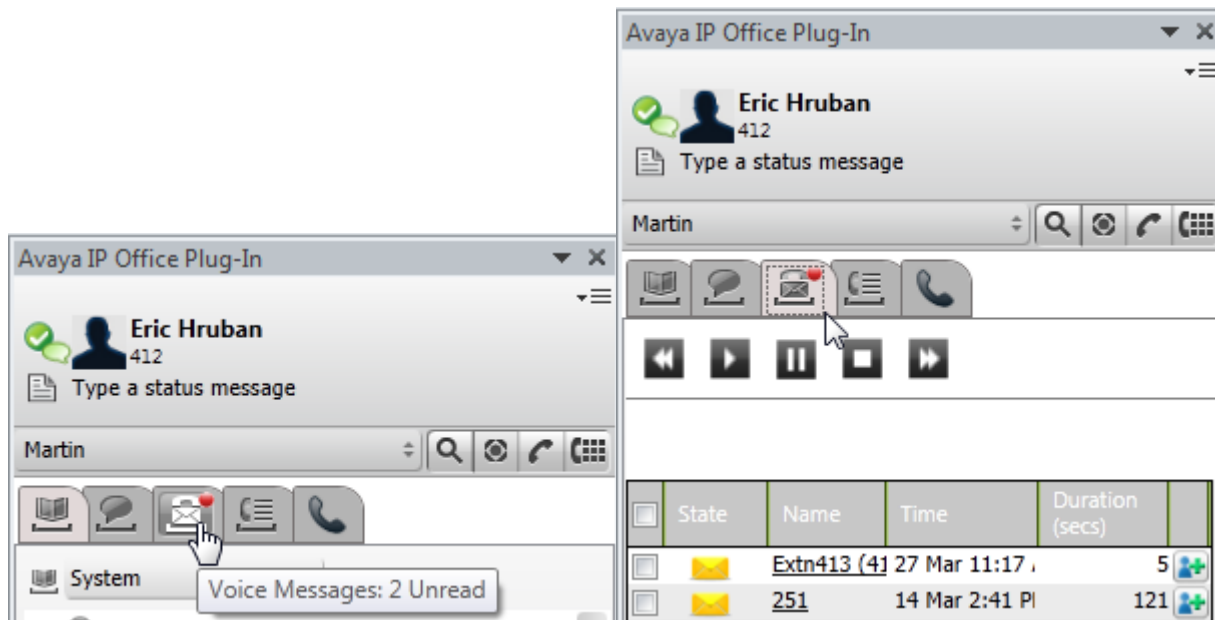
**View user presence:** To view the telephonic presence of the user, mouse over on the circle icon beside the displayed user name. To view the IM presence of the user, mouse over on the bubble icon beside the displayed user name. You can also change the IM presence by clicking the bubble icon and selecting a status from the list. For more information about the user presence, see [Presence information](#)<sup>[183]</sup>.



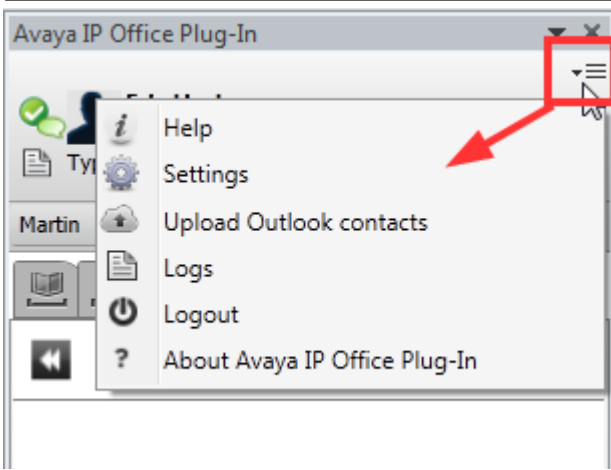
**View contacts:** You can view the System or Personal contacts from the Directory list. You can also search for a contact name in the search box and click the Search icon. For more information, see [Contact Directory](#)<sup>[181]</sup>.



**View unread voicemail messages and calls.** You can point to the Voice Message icon to view the number of unread voicemail messages. To view your call log, click the Call Log icon. For information about managing voicemail messages and calls, see [Voice mail options](#)<sup>[185]</sup> and [Avaya IP Office Plug-in call functions](#)<sup>[174]</sup>.



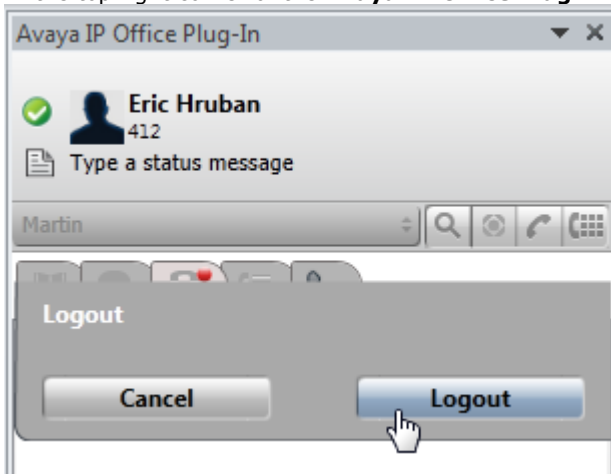
**Quick tasks:** You can customize the Avaya IP Office Plug-in settings, import contacts from Outlook, view the log list, and read help content for using Avaya IP Office Plug-in by clicking the down arrow icon. For more information, see [Connection](#)<sup>[160]</sup>.




## 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](#)<sup>[166]</sup>, [User](#)<sup>[166]</sup>, and [Logging](#)<sup>[167]</sup> 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.

**Note:** If you select **Use secure communication** check box, then set the port number for the server in secure mode. For more information see, [Secure communications](#)<sup>[167]</sup>.
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** if 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**.

## 12.5.4 Configuring dialing rules

You need to configure dialing rules to route the outgoing calls. The system applies the dialing rules automatically when you make a call using Avaya IP Office Plug-in.

Field	Description
<b>Apply Dialing Rules</b>	The system applies the dialing rules that you set. The system sets the prefix for an outbound call automatically.
<b>Number to dial access an outside line</b>	The digits that you need to dial to access an outside line.
<b>Your country code</b>	The country code of the country.
<b>Your area/city code</b>	The area code or the city code of the telephone server.
<b>PBX main prefix</b>	The main prefix of the PBX or the telephone server.
<b>Number to dial for long distance calls</b>	The digits that you need to dial to make a long distance call.
<b>Number to dial for international calls</b>	The digits that you need to dial to call an international telephone number.
<b>Length of internal extensions</b>	The number of digits in an internal extension.
<b>Length of national phone numbers (including area/city code)</b>	The number of digits that you need to dial including area or city code for a call within the country.  <b>Note:</b> For countries with multiple telephone numbers, you can separate it by a comma.
<b>Remove area/city code when making a local call</b>	The system removes the are or city call when you make a local call.  <b>Note:</b> This field is enabled only when you set the <b>Your area/city code</b> field.

### Procedure

1. In the top right corner of the Avaya IP Office Plug-in window, click . The drop-down menu displays **Minimize** and **Settings** options.
2. Click **Settings**. The system displays the **General Settings** dialog box.
3. In the left navigation pane of the **General Settings** dialog box, click **Dialing Rules**.

- 
4. In the **Dialing Rules** dialog box, set the dialing rules.
  5. Click **OK** , after you have set the dialing rules.

## 12.5.5 Profiles

You can create profiles that contain a set of telephone system settings in Avaya IP Office Plug-in. When you set a profile as active, then the system applies those settings to the telephone system. Using profiles you can easily control where your calls are directed and how they are treated.

By default the system displays three profiles, namely **Office**, **Mobile** and **Home**. You can edit these profiles but you cannot delete them. However you can also add an additional of four more profiles which you can edit and delete. The system displays a special profile called [Detected](#)<sup>[163]</sup> when the current telephone system settings do not match any of your profiles.

### Example

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

- The **Office** profile: to send calls to the desk extension. Voicemail on if calls ring unanswered and call pickup to allow other one-X Portal for IP Office users to pickup calls.
- The **Mobile** profile: to use mobile twinning to ring at both the desk extension and the mobile number. Set voicemail and call pickup on.
- The **Home** profile: to forward calls to an external number. Set voicemail on and call pickup off.

### 12.5.5.1 The Detected Profile


If the settings on the telephone system do not match any of your profiles, Avaya IP Office Plug-in displays the **Detected** profile. This profile contains the current settings on the telephone system.

The **Detected** profile can reappear even after you have selected an active profile. For example, when you select a profile as active, the settings of that profile are applied to the telephone system. However, if you change any of those settings using other methods such as dialing short codes, the settings on the telephone system settings do not match your profile and so the system displays the **Detected** profile.

### 12.5.5.2 Selecting Your Profile


To set a profile as active:

#### Procedure

1. In the top right corner of the Avaya IP Office Plug-in window, click . The drop-down menu displays **Minimize** and **Settings** options.
2. Click **Settings**. The system displays the **General Settings** dialog box.
3. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
4. In the **Profile Selection** section, choose the profile. For more information, see [Profiles](#)<sup>[163]</sup>.
5. Click **OK**.

### 12.5.5.3 Editing a Profile


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

1. In the top right corner of the Avaya IP Office Plug-in window, click . The drop-down menu displays **Minimize** and **Settings** options.
2. Click **Settings**. The system displays the **General Settings** dialog box.
3. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
4. In the **Profile Selection** section, choose the profile. For more information, see [Profiles](#)<sup>[163]</sup>.
5. Click **Edit**. Edit the profile settings. For more information, see [Profile Settings](#)<sup>[163]</sup>.
6. Click **OK**.

---

#### 12.5.5.4 Adding a Profile

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

1. In the top right corner of the Avaya IP Office Plug-in window, click . The drop-down menu displays **Minimize** and **Settings** options.
2. Click **Settings**. The system displays the **General Settings** dialog box.
3. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
4. In the **Profile Selection** section, click **Add Profile**.
5. In the **Name** field of the **Add Profile** section, type a name for the profile.
6. Select the different settings that are available to use within your profiles. For more information, see [Profile Settings](#) <sup>165</sup>.
7. After you have set the profile as required, click on **Save**.
8. Click **OK**.

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

### 12.5.5.5 Profile settings

The following are the different settings that are part of a profile:

- [Call Pickup](#) <sup>165</sup>
- [Mobility](#) <sup>165</sup>
- [Voicemail](#) <sup>166</sup>

#### 12.5.5.5.1 Call pickup

When you enable this option the other users of one-X Portal for IP Office can answer your call. The displays indicates that you have a call waiting to be answered in the one-X Portal for IP Office of the other user.

**Note:** You cannot enable this option for all calls waiting to be answered. For example, the hunt group calls.

#### 12.5.5.5.2 Mobility

In this mode, the system forwards your call to another number that you set. You have the option to forward the calls as follows:

- Without ringing at the extension.
- Only after it is unanswered at the extension.

The system forwards only the incoming external calls. The system forwards the internal and groups calls only when:

- Your system administrator configures the option.
- You configure the option using the controls on your phone.

Mobility	
<b>Use default deskphone</b>	The system forwards your call to the IP Office extension.
<b>Forward unconditional</b>	The system forwards the call immediately without ringing at your IP Office extension. This function is also called <i>send all calls</i> or <i>forward all</i> .
<b>Forward on no answer</b>	The system forwards only the incoming calls if the call is unanswered for a certain period of time.
<b>Enable mobile twinning</b>	The system forwards the incoming to your IP Office extension and the mobile number. You can switch the calls between your extension and the mobile number.
<b>Twinning number</b>	Set the mobile number.
<b>Enable telecommuter</b>	The system enables telecommuting. The system displays this option only if you are a Power user of one-X Portal for IP Office.
<b>Telecommuter number</b>	Set the telecommuter number. You can set an internal or an external number. When you set an external number, ensure that you add the external dialing prefix that is set in your phone system.
<b>Make a test call</b>	The system makes a test call to the telecommuter number that you set.
<b>Hold the line</b>	Controls the connection from the phone system to the telecommute number.

---

### 12.5.5.5.3 Voicemail

You can use the following settings to alter your voicemail settings.

**Note:** You can set some of these options only if your voicemail server is a Voicemail Pro system, these are disabled if your system uses embedded voicemail.

<b>Voicemail</b>	
<b>Active Greeting</b>	If your voicemail is provided by Voicemail Pro, your mailbox can include up to nine greetings that you have recorded. In each profile, you can use the <b>Active Greeting</b> setting to select the greeting that the system should use for your mailbox when the profile is active. By default, the system displays <i>System Greetings</i> .
<b>Voicemail</b>	The system receives the voicemail messages when you cannot answer calls.
<b>Voicemail Ringback</b>	When you have any new voicemail messages, when you next use your phone extension, the voicemail server alerts you about the message.
<b>Voicemail Outcalling</b>	The system displays this option only if your voicemail is provided by Voicemail Pro. If you have an outcalling configured for your voicemail mailbox, you can use this profile setting to switch the use of outcalling on or off.

## 12.6 Avaya IP Office Plug-in Directories



### Directory

Avaya IP Office Plug-in displays the directories of names and associated telephone numbers in the tab. When you hover the mouse over a contact, the system displays icons for various actions.

The different default directories in Avaya IP Office Plug-in are as follows:

- **Personal**  
Displays the personal contacts stored in 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 groups.
- **System**  
Displays the contacts stored in the phone system for use by all users and also the details of other users and hunt groups.

Use the Directories		
• <a href="#">View the Directories</a> <sup>[167]</sup>	• <a href="#">View the user status in the Directory</a> <sup>[168]</sup>	• <a href="#">Search the Directories</a> <sup>[169]</sup>
• <a href="#">Make calls from the Directory</a> <sup>[169]</sup>	• <a href="#">Delete a Directory Contact</a> <sup>[172]</sup>	• <a href="#">Add a Directory Contact</a> <sup>[170]</sup>
• <a href="#">Edit a Directory Contact</a> <sup>[171]</sup>	• <a href="#">Instant Message a Contact</a> <sup>[169]</sup>	• <a href="#">Add a Contacts Group Tab</a> <sup>[172]</sup>

### 12.6.1 Viewing Avaya IP Office Plug-in Directories

Avaya IP Office Plug-in displays the directories of names and associated telephone numbers.

- **Personal Directory**  
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 Avaya IP Office Plug-in. 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 and all the users and Hunt Groups 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](#) <sup>[170]</sup>.

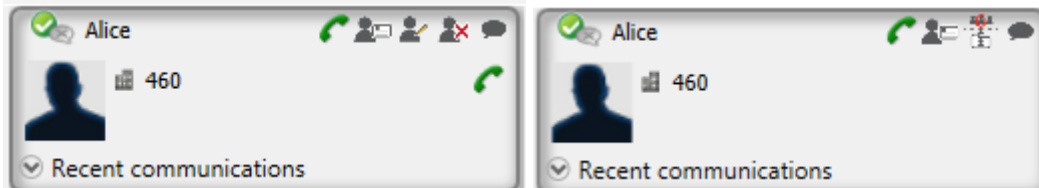
#### Personal Directory

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).
  - Any contacts uploaded from the IP Office Plug-in for Microsoft Office are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal for IP Office only, and are in addition to the maximum 100 Personal Directory contacts.
2. 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** 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.

## 12.6.2 Avaya IP Office Plug-in Directory Icons

The system displays a range of icons for the various actions that you can perform when you hover the mouse over a contact.



### Call Actions

Action	Icon	Description
Call		Call the contact.
Start IM		Instant message a contact.

### Directory Actions

Action	Icon	Description
Add		Add a contact in the <b>System</b> directory to the <b>Personal</b> directory.
View Details		View details of a directory contact.
Update Contact		For <b>Personal</b> directory contacts, edit the contact details.
Delete Contact		For <b>Personal</b> directory contacts, delete the contact.

### Contact Icons

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"> <li>Grey is not using one-X Portal for IP Office or they have set their portal presence to offline.</li> <li>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).</li> </ul>
Busy		The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb		The user has set <b>Do Not Disturb</b> . Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's <b>Do Not Disturb exception list</b> .
Logged Out		The user has logged out from their phone. Calls to them will most likely go to voicemail if available.




### 12.6.3 Searching Avaya IP Office Plug-in Directories

#### To search for a contact in the directory

1. Enter the name or number of the contact in the text box.
2. Click the search icon. The system displays the contact that matches the search criteria that you set.

### 12.6.4 Making a Call from the Avaya IP Office Plug-in Directory


#### To call a contact:

1. Hover the mouse over the contact.
2. Click . The system calls the primary phone number of the contact.

**Note:** To select an alternate number, click **More details** drop down list. The system displays **More details** drop down list only if the contact has an alternate email id or phone number.

### 12.6.5 Instant Messaging a Contact in Avaya IP Office Plug-in


#### To send an instant message to a contact in Avaya IP Office Plug-in:

1. Search for the contact in Avaya IP Office Plug-in.
2. Click  **Start IM**. The system displays the **Conversation** window.

---

## 12.6.6 Emailing a contact

### To email a contact:

1. Hover the mouse over the contact.
2. Click . The system email the primary phone email id of the contact.

**Note:** To select an alternate email id, click **More details** drop down list. The system displays **More details** drop down list only if the contact has an alternate email id or phone number.

## 12.6.7 Viewing Recent communications


The system displays the Recent communications based on the information in the call log. You can view the recent communications with a contact only if you have initiated any communication with the contact. If you have never communicated with a contact, the system does not display the **Recent communications** drop down list.

### To view the recent communications with a contact:

1. Locate the contact.
2. Hover the mouse over the contact.
3. Click **Recent communications** drop down list.

## 12.6.8 Adding a new Personal directory contact in Avaya IP Office Plug-in

You can add a new contact in the Personal directory.

1. In the **Directory** tab, select the **Personal**.
2. Type the name or number that you want to add and click the  icon.
3. The system displays the **Contact Details** window.
  - Type the details of the contact in the **Contact Details** window.
  - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the user status of the user. This applies even if another number is currently selected as the **Primary phone**.
  - You can select the **Group** in which of your personal contact should appear on.
  - You can add the gmail address of the contact. After you add the addresses you can start an email or initiate a chat from Avaya IP Office Plug-in directory.
  - When finished, click **Add**.


### 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).
  - Any contacts uploaded from the IP Office Plug-in for Microsoft Office are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal for IP Office only, and are in addition to the maximum 100 Personal Directory contacts.
2. 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** 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.

### 12.6.8.1 Adding a Contact from the System Directory in Avaya IP Office Plug-in

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** tab, select the **System** directory.
2. Locate the contact that you want to add to **Personal** directory. Hover the cursor over the contact and click on  icon.



3. You cannot edit the contact details but you can select the personal contact groups 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.



#### 12.6.8.2 Adding a Caller from the Call Log of Avaya IP Office Plug-in

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

1. Click on the  **Voice messages** tab.
2. Click the add  icon in the message details.
  - Type the details of the contact in the **Contact Details** window.
  - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the user status of the user. This applies even if another number is currently selected as the **Primary phone**.
  - You can select the **Group** in which of your personal contact should appear on.
  - You can add the gmail address of the contact. After you add the addresses you can start an email or initiate a chat from Avaya IP Office Plug-in directory.
  - When finished, click **Add**.


#### 12.6.8.3 Adding a Voicemail Caller to the Directory of Avaya IP Office Plug-in

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

1. Click on the  **Voice messages** tab.
2. Click the add  icon in the message details.
  - Type the details of the contact in the **Contact Details** window.
  - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the user status of the user. This applies even if another number is currently selected as the **Primary phone**.
  - You can select the **Group** in which of your personal contact should appear on.
  - You can add the gmail address of the contact. After you add the addresses you can start an email or initiate a chat from Avaya IP Office Plug-in directory.
  - When finished, click **Add**.

#### 12.6.9 Editing a Personal Contact in Avaya IP Office Plug-in

**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.

1. Search for the contact in the directory.
2. Click  **Update Contact**.
  - Type the details of the contact in the **Contact Details** window.
  - If the **Work phone** setting matches the extension number of a telephone system user, the directory contact displays the user status of the user. This applies even if another number is currently selected as the **Primary phone**.
  - You can select the **Group** in which of your personal contact should appear on.
  - You can add the gmail address of the contact. After you add the addresses you can start an email or initiate a chat from Avaya IP Office Plug-in directory.
  - When finished, click **Add**.


---

## 12.6.10 Deleting a Personal Directory Contact in Avaya IP Office Plug-in


Note that if the same contact appears on several personal groups, this action will only delete the contact from the currently displayed group. To see which group a personal contact appears on, select **View Details** instead of **Delete Contact**.

If you delete a contact from the **All** group, then the system deletes the contact from all the other groups as well.

### Deleting a contact from a group

1. Search for the contact in the directory.
2. Hover the mouse over the contact.
3. Click on the  **Delete** icon.
4. In the **Confirm** dialog box, click **Yes** to remove a contact from the list.

### Deleting multiple contacts from a group

1. Select the contacts in the group. Note: You can use the typical widows section options using the **Shift** or **Ctrl** keys to select the contacts.
2. Click on the  **Delete** icon located next to the **Directory** list combo box.
3. In the **Confirm** dialog box, click **Yes** to remove a contact from the list.


## 12.6.11 Adding A Personal Contacts Group in Avaya IP Office Plug-in

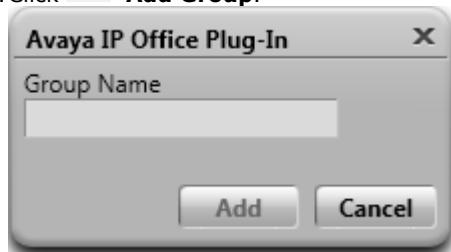
You can add up to five groups in your personal directory in addition to the default **All** group. personal contact can be listed in more than one groups.

When [editing the personal contact](#)<sup>[17]</sup> 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](#)<sup>[17]</sup> and [Outlook contact synchronization](#)<sup>[18]</sup>.


### Adding a personal contacts group

1. Select the **Personal** in the **Directory** tab.
2. Click  **Add Group**.




3. Enter a name for the new tab.
4. Click **Add**. The system displays a new tab in the Personal directory.

### Renaming a group

1. In the personal directory, select the group.
2. Click  **Edit Group**.
3. Type the new the name in the text box.
4. Click **Update**.

### Deleting a group

1. In the personal directory, select the group.
2. Click  **Delete Group**.

### 12.6.11.1 Outlook group in Avaya IP Office Plug-in


You can synchronize and upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office. After the Microsoft® Outlook® [contact synchronization](#) <sup>[183]</sup>, an **Outlook** group is automatically created in the **Directory** gadget.

#### To view the imported contacts:


- Select **Directory > 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  **Update Contact**.
1. In the **Contact Details** dialog box, change or update the details of the contact.
2. Click **Update**.

#### To delete a contact from the Outlook group:

1. Click  **Delete Contact**.
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 Avaya IP Office Plug-in .

## 12.7 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](#) <sup>[173]</sup>
- [Using the dial pad](#) <sup>[173]</sup>
- [Adding an account code and subject](#) <sup>[173]</sup>

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

### 12.7.1 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](#) <sup>[173]</sup>

### 12.7.2 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](#) <sup>[173]</sup>

### 12.7.3 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**.



## 12.7.4 Calling a contact using click to dial

You can make a call using the phone number in the email using [Click to dial](#)<sup>[179]</sup> feature.

### Prerequisite:

- Ensure that you are logged in to Avaya IP Office Plug-in.
- The phone number is in the format that the system can process. For more information see, [Phone number formats](#)<sup>[180]</sup>

### Microsoft® Outlook® 2007

1. Open the email.
2. Do one of the following:
  - If you have opened an email in read mode, hover the mouse over the phone number marked as smart tag, the system displays the smart tag icon .
  - If you have opened an email in edit mode, type a space after the phone number, the system displays the smart tag icon .

For more information see, [Smart Tags](#)<sup>[179]</sup>

3. Click **Call**.

### Microsoft® Outlook® 2010 and 2013

1. In the email, right-click the phone number that the system has marked as smart tag.  
For more information see, [Smart Tags](#)<sup>[179]</sup>
2. Select **Additional Actions**.
3. Click **Call**.

## 12.8 Avaya IP Office Plug-in call functions

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

- [Integrating a call](#)<sup>[175]</sup>
- [Answering a call](#)<sup>[175]</sup>
- [Placing a call on mute](#)<sup>[175]</sup>
- [Holding or unholding a call](#)<sup>[175]</sup>
- [Transferring a call](#)<sup>[175]</sup>
- [Ending a call](#)<sup>[175]</sup>
- [Starting a conference call](#)<sup>[175]</sup>

## 12.8.1 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 email recipient. 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.

## 12.8.2 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.

## 12.8.3 Placing a call on mute

### Placing a user of one-X Portal for IP Office in an active call on mute:

You can place a user of one-X Portal for IP Office 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.

## 12.8.4 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**.

## 12.8.5 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](#) <sup>[176]</sup>
- [Making an unsupervised transfer](#) <sup>[176]</sup>


### 12.8.5.1 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.

5. After you consult the person and if they want to accept the call, 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](#) <sup>[173]</sup>

### 12.8.5.2 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](#) <sup>[173]</sup>

## 12.8.6 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**.

## 12.8.7 Starting a conference call

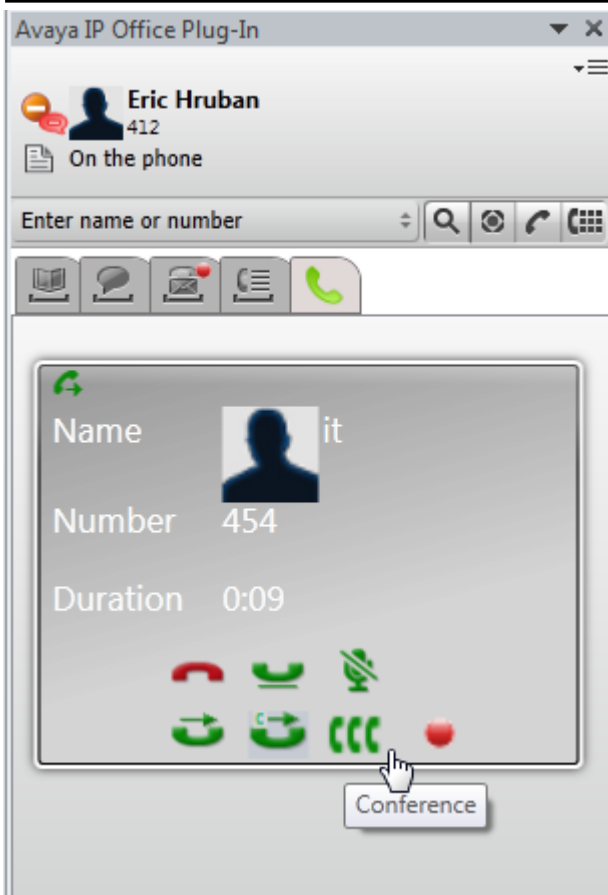
You can use the Avaya IP Office Plug-in to select and call the parties that you want to include in the conference call and then start the conference.

There are two types of conference calls that can be initiated via the Avaya IP Office Plug-in:

- [Ad hoc conference call](#) <sup>[177]</sup>
- [Meet Me conference call](#) <sup>[178]</sup>

To initiate a conference, click on the  icon.

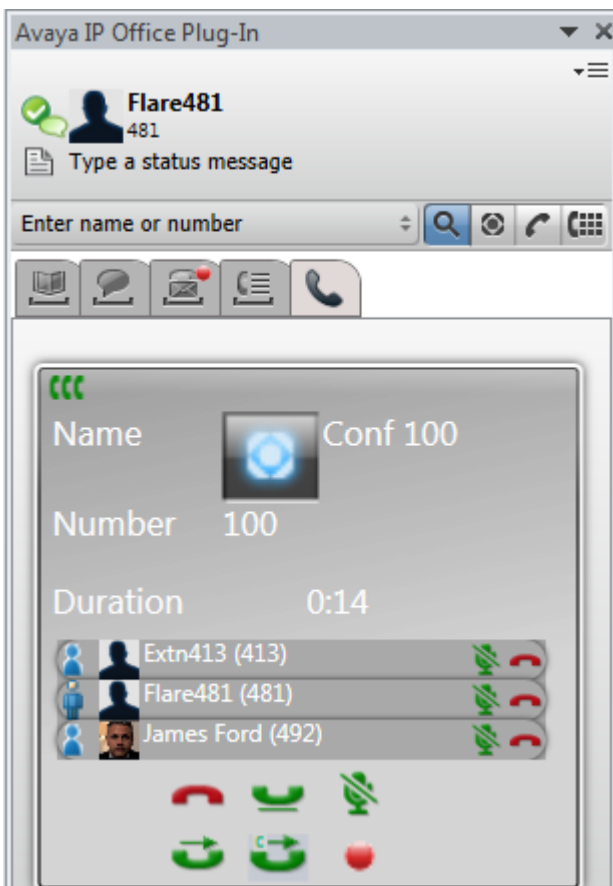




### 12.8.7.1 Ad hoc conference call

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:**

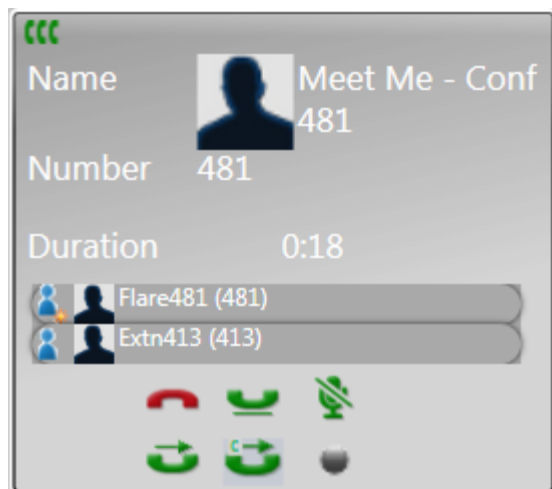
- You can view all the other participants in the conference. You can view the active or dropped, mute or unmute, and hold or retrieve status of the other participants in the conference.
- You can place the conference call on *Hold* or *Unhold*.
- You can *Transfer* the conference call to another party. You can consult with the other party and then complete Transfer of the conference call.

**12.8.7.2 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.



The system displays the active speaker in a Meet Me conference.

**12.9 Avaya IP Office Plug-in additional features**

The system retains the tab that you use even if you shutdown Avaya IP Office Plug-in. For example, if you are using the Directory tab of Avaya IP Office Plug-in and later when you shut down, Avaya IP Office Plug-in displays the Directory tab when you restart Avaya IP Office Plug-in.

There are various features supported by the Avaya IP Office Plug-in application.

- [Click to dial](#) <sup>[179]</sup>
- [Call log](#) <sup>[181]</sup>
- [Contact directory](#) <sup>[181]</sup>
- [Outlook contact synchronization](#) <sup>[183]</sup>
- [Presence information](#) <sup>[183]</sup>
- [Voice mail options](#) <sup>[185]</sup>
- [Multiple language support](#) <sup>[185]</sup>
- [Avatar](#) <sup>[181]</sup>
- [Terminal Services](#) <sup>[187]</sup>

### 12.9.1 Click to dial

You can make a call from the email using the click to dial feature in Avaya IP Office Plug-in.

**Note:** Avaya IP Office Plug-in supports the click to dial feature only on 32 bit versions of Microsoft® Outlook® 2007 , 2010 and 2013.

Microsoft® Office components required to use the click to dial:

- Microsoft® Word
- Microsoft® Outlook® with .NET programmability support
- Office Tools
  - Actions .NET Programmability Support (for Outlook 2010,2013 setup)
  - Smart Tag .NET programmability Support (for Outlook 2007 setup)
  - Microsoft Forms 2.0 .NET Programmability Support

By default, all the components of Microsoft® that you need to use the click to dial feature are installed when you install Microsoft® Office Suite. However, if you customize the options when installing Microsoft® Office Suite, and do not include any components, you cannot use the click to dial feature.

You cannot use the click to dial feature if you install Microsoft® Office Suite with the default options and later remove the options after installation.

**Note:** If you have installed only Microsoft® Outlook® using the Microsoft® Outlook® only installer, the system does not install all the components and you cannot use the click to dial feature.

When you make a call using the click to dial feature, if you have outbound dialing preferences then the system applies the rules to the number that you click to dial.

### Smart tags

When you enable smart tags, the system processes certain types of data in a document. For example, the system processes dates or names and automatically marks them as smart tags and underlines the text with a purple dotted line. When you click a smart tag, the system displays the various actions that you can perform for that data type.

**Note:** The system marks the phone numbers as smart tags only if you have installed Avaya IP Office Plug-in.

---

### 12.9.1.1 Enabling Smart tags

#### Microsoft® Outlook® 2007

1. In the **Tools** menu, select **Options**.
2. Click the **Mail Format** tab.
3. Click **Editor Options**.
4. Click **Proofing**, and then click **AutoCorrect Options**.
5. Click the **Smart Tags** tab.
6. Enable **Label text with smart tags** check box.
7. Select **Avaya IP office** smart tag listed in **Recognizers**.
8. Enable **Show Smart Tag Actions** buttons check box.
9. Click **OK**.

#### Microsoft® Outlook® 2010 and 2013

1. Select **File > Outlook Options**.
2. Click **Mail**.
3. Click **Editor Options**.
4. Click **AutoCorrect Options**.
5. Click the **Actions** tab.
6. Select **Enable additional actions in the right-click menu** check box.
7. Select **Avaya IP office** smart tag listed in **Available actions**.
9. Click **OK**.

### 12.9.1.2 Phone number formats

To use the click to dial feature, the number must be separated from the remaining text of the sentence by any non-alphabetic delimiter such as a space, comma, :, ::, ->, -, and others.

For example, the system cannot process the following format: **Phone number9960000671**

The system cannot process phone numbers that are hyper linked.

#### Examples of the formats that the system can process:

- Phone number 9960000671
- Phone number:9960000671
- Phone number->9960000671
- Phone number-9960000671

#### Phone number formats that the system supports:

- (10) 69445464
- 06 87 71 23 45
- 080312345
- 07700 954 321
- (954) 555-1234
- 800-555-1212
- 800 555 1212
- 800.555.1212
- 1-800-555-1212
- 800-555-1212-1234
- 1-(800) 555.1212
- +919960000671
- (+91) 99960000671

## 12.9.2 Avatar

The system displays the avatar that is configured in one-X Portal for IP Office in the following screens:

1. Next to your username.
2. When you hover the mouse on a contact in the System directory for users who have configured their avatar in one-X Portal for IP Office.

**Note:** If a system contact is added as personal contact then the system displays the avatar in personal contact also.

3. In the incoming call.
4. In an active call.
5. IM conversation contact.
6. For a participant in conference.
7. When you play the voicemail for a contact.

Whenever you change the avatar in one-X Portal for IP Office, the system reflects the updated avatar in Avaya IP Office Plug-in. If you do not set an avatar, the system displays the default image for the contact.

## 12.9.3 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.

**Note:** Avaya IP Office Plug-in does not display call log for Hunt Groups.

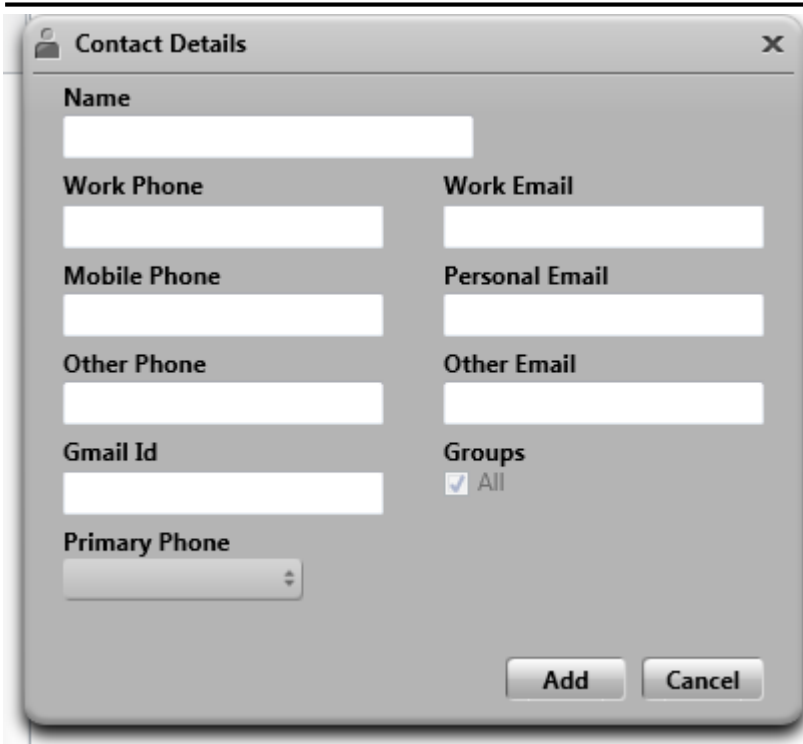
In the call log, you can:

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.

## 12.9.4 Contact Directory

### Operations:

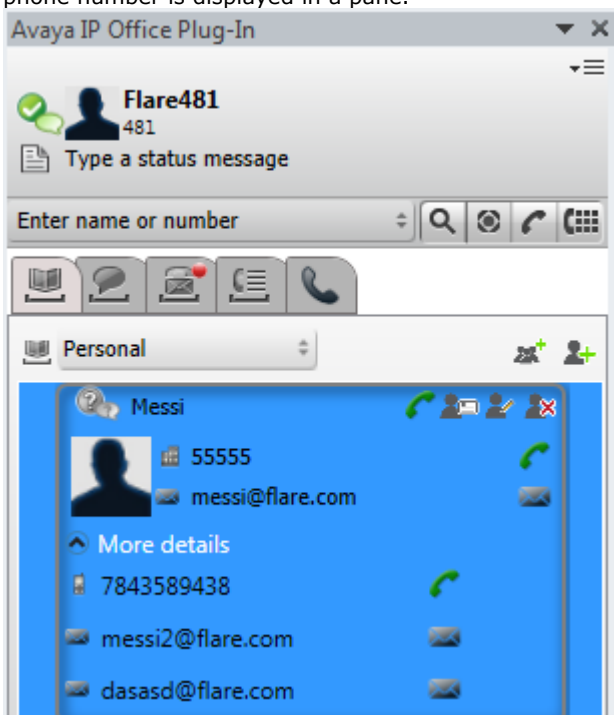
1. You can get the details of the contact from the System and Personal contact directory. The following information is available from the one-X Portal for IP Office server.
  - Name, Work Phone, Mobile Phone, Other Phone, Work Email, Personal Email, Other Email, Gmail ID, OCS ID, and Primary Phone type.



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 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](#) <sup>183</sup> of the contacts, in the Avaya IP Office Plug-in.

### 12.9.5 Outlook contact synchronization

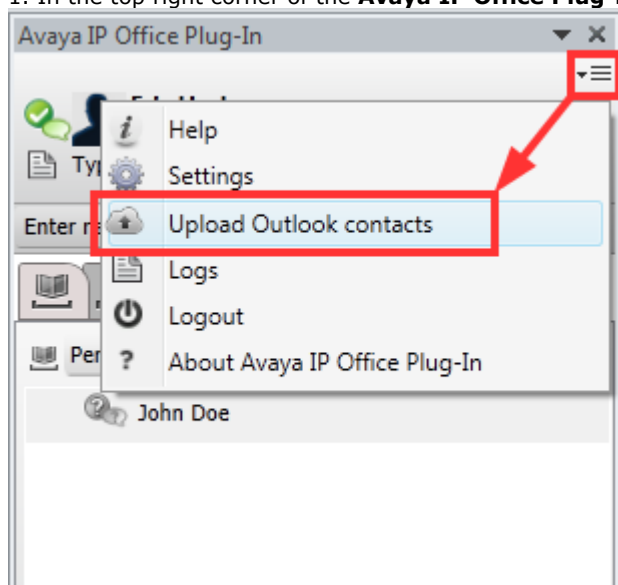
You can upload the contacts from Microsoft® Outlook® to the one-X Portal for IP Office contact directory. The system lists the contacts in the **Directory** gadget > **Personal** > **Outlook group**.

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
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®.



### 12.9.6 Presence information

The system displays the presence information in the context of the contacts in the directory. You can also view the telephony presence of users in the directory.

#### 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 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
	<b>Available</b>	The status indicates that you are available and can be called.
	<b>Busy</b>	The status indicates that you have a call in progress.
	<b>Do Not Disturb</b>	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.
	<b>Logged Out</b>	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.
	<b>Ringling</b>	This status indicates that the phone is ringing and you have an incoming call.
	<b>Unknown</b>	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
	<b>Available/ Online</b>	The status indicates that you are logged into the IM server and available for chat.
	<b>Do not disturb</b>	The status indicates that you have enabled <i>Do No Disturb</i> on the IM.
	<b>Offline</b>	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 using the one-X Portal for IP Office.
	<b>Away</b>	The status indicates that you are logged in to the IM but currently away from your desk.
	<b>Unknown</b>	This status indicates that your presence on the IM is unknown.

### 12.9.6.1 Setting a status message

You can set a status message using Avaya IP Office Plug-in.

#### Procedure:

1. Hover the mouse over **Type a status message** label. The system displays *Click to set status message*.
2. Click on the **Type a status message** label.
3. Type the status message in the text box.
4. Press the **Enter** or **Esc** key. The system displays the status message under the user name and presence status.

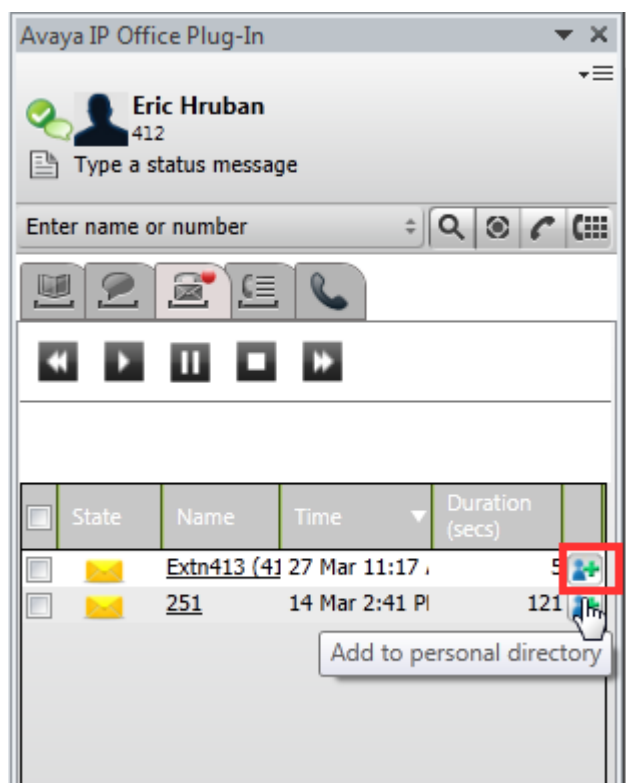


## 12.9.7 Voice mail options

### Avaya IP Office Plug-in voice messages functionality:

**Note:** Avaya IP Office Plug-in does not display any voicemail messages for Hunt Groups.

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.

## 12.9.8 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:

- **English (US)**
- **Chinese**
- **Dutch**
- **English (UK)**
- **French**
- **German**
- **Italian**
- **Portuguese (Brazil)**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**

- 
- Turkish


## 12.9.9 Sending an instant message

You can send an instant message to any contact and broadcast a message to all the system contacts using Avaya IP Office Plug-in.

### 12.9.9.1 Sending an instant message to a contact

You can send an IM to any contact using Avaya IP Office Plug-in.

#### To send an instant message:

1. Click the **Contacts** tab. The system displays a list of all the contacts.
2. Hover the mouse over the contact.
3. Click  **IM**. The system displays a conversation window. The system the name of the participant and icons to call, send e-mail, save conversation, save font, clear conversation.
4. Type the message in the message box.
5. Press **Enter** key to send an IM.

**Note:** If you receive a new IM when you are conversing with a contact. The system flashes the name of the new contact in the IM contacts list.

### 12.9.9.2 Sending an instant message to all system contacts

You can broadcast an instant message to all system contacts.

#### To broadcast an instant message:

1. Click the **IM** tab. The system displays a conversation window with and the list of all IM contacts.
2. Select **everyone**.
3. Type the message in the message box.
4. Press **Enter** key to send an IM.

### 12.9.9.3 Using mybuddy

To use *mybuddy* feature:

1. Click the **IM** tab. The system displays a conversation window with and the list of all IM contacts.
2. Select **mybuddy**.
3. Type the command in the message box.
4. Press **Enter** key to send an IM.

## 12.9.10 Terminal Services

Avaya IP Office Plug-in for Microsoft® Outlook® 2010 and Microsoft® Outlook® 2013 supports terminal services using Citrix and Microsoft Terminal services clients.

**Note:** Avaya IP Office Plug-in for Microsoft® Outlook® 2007 does not support terminal services.

**Note:** Avaya IP Office Plug-in is compatible with Citrix only when used in Local profiles.

## 12.9.11 Secure communications

The system encrypts all the information that you send or receive between one-X Portal for IP Office and Avaya IP Office Plug-in using the secure port.

**Note:** The system does not encrypt the IM messages. The secure port number for one-X Portal for IP Office on Windows platform is 8443 and the secure port number for one-X Portal for IP Office on Linux platform is 9443.

You can configure the system to use secure mode. For more information see, [Connection](#)<sup>[166]</sup>.

# 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.

**Note:** Localized versions of Avaya IP Office Plug-in for Salesforce.com are not available.

Use the Avaya IP Office Plug-in for Salesforce.com		
<ul style="list-style-type: none"> <li>• <a href="#">System requirements</a> <sup>189</sup></li> <li>• <a href="#">Integrate</a> <sup>191</sup></li> <li>• <a href="#">Log out</a> <sup>195</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Install Avaya IP Office Plug-in for Salesforce.com</a> <sup>190</sup></li> <li>• <a href="#">Use Screen pop functionality</a> <sup>192</sup></li> <li>• <a href="#">Make a call</a> <sup>196</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Start Avaya IP Office Plug-in for Salesforce.com</a> <sup>190</sup></li> <li>• <a href="#">Login</a> <sup>195</sup></li> <li>• <a href="#">Call functions</a> <sup>197</sup></li> </ul>

### 13.1 Avaya IP Office Plug-in for Salesforce.com system requirements

- *Salesforce.com CTI toolkit R4.x.*
- *Microsoft .NET 4.0 framework.*

Supported Operating Systems	Supported Browsers
<b>Windows 7 (64bit)</b>	Internet Explorer 8 (64 bit)
	Internet Explorer 9 (64 bit)
	Firefox 3.5 or later
	Chrome 10 or later
<b>Windows 7 (32 bit)</b>	Internet Explorer 8
	Internet Explorer 9
	Firefox 3.5 or later
	Chrome 10 or later
<b>Windows XP</b>	Internet Explorer 8
	Internet Explorer 9
	Firefox 3.5 or later
	Chrome 10 or later

**Note:** The system displays a warning message in FireFox and Chrome that reads: *Please keep this window open. Your CTI adapter is communicating with Salesforce. If you close this window, your SoftPhone might not work.*

**Note:** If the system displays the following warning message in Internet Explorer 8: *Do you want to view only the webpage content that was delivered securely? Do one of the following:*

- Always click **No** to load the plugin properly.
- Disable the warning message by selecting **Tools > Internet Options > Security > Custom Level**. In **Miscellaneous** enable the option **Display mixed content**.
- **Avaya IP Office Plug-in for Salesforce.com** works with the following Salesforce Editions:
  - a. Professional Edition (with API access enabled).
  - b. Enterprise Edition.
  - c. Unlimited Edition.
  - d. Developer Edition.

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

### To install one-X Call Assistant:

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**  
When the browser prompts you, select **Save**. The browser downloads the installation file. When the download is complete, double click the downloaded file and select **Run**.
5. The system unpacks the installer prepares to install the one-X Call Assistant software. 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**. Enter your name and the organization that you work for.
8. 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**. Select the program features you want to install.
10. Select a folder where the software should be installed and accept the default prompts.
11. Click **Install**. The system displays the progress of the installation.
12. Click **Finish**.
  - **Note:** Depending on the environment that the one-X Desktop Clients are installed the installation wizard prompts you to restart the system.

## 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.
- Ensure that the port number 8069 (web socket) is open on the one-X Portal for IP Office server.

### 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 one-X Portal for IP Office Server Information section:
  - a. Type the IP address of your one-X Portal for IP Office in the **Server IP Address** field.
  - b. Type the port number in the **Port** field. By default, the server port is 8080.

**Note:** If you set **Use secure communication** as **Y**, then set the port number for the server in secure mode. For more information, see [Secure communications](#)<sup>[19]</sup>.

Click **Save**.

To manage the call center users, click **Manage Call Center Users**.

### 13.4.1 Secure communications

The system encrypts all the information that you send or receive between one-X Portal for IP Office and Avaya IP Office Plug-in using the secure port.

**Note:** The secure port number for one-X Portal for IP Office on Windows platform is 8443 and the secure port number for one-X Portal for IP Office on Linux platform is 9443.

You can configure the system to use secure mode. For more information see, [Integrating Avaya IP Office Plug-in for Salesforce.com](#)<sup>[19]</sup>.

### 13.4.2 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.

Field Label	Value
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

8. In the **ScreenPop** section, type the following for each field:
  - a. Pop on Transfer and Conference - **Y**.
  - b. ANI - **Phone**.
  - c. Show Digits - **N**.
  - d. UUI 1 - **Account.AccountNumber**.
  - e. UUI Separator - **:** (that is, a colon)
  - f. UUI Data - **:** (that is, a colon)
  - g. Show UUI Data - **Y**.
  - h. Show Full UUI - **N**.
  - i. 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.

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, for example, caller ID 204101800. 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. The account name is 'Avaya India Pvt. Ltd.' with a link to 'View Hierarchy'. 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 at 4:48 AM and last modified by Sunil Reddy on 9/27/2011 at 4:53 AM. The account has a 'Billing' custom link.

### 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 204101800. You can choose to open either the Contact or Account.

The screenshot shows the Salesforce interface with the 'Advanced Search Results' page. The search criteria is '204101800'. 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 'SReddy', and contact owner alias 'SReddy'. Below the search results, it states 'There are no matching: Leads, Opportunities, Cases, Case Comments, Campaigns, Contracts, Assets, Activities, Notes, Attachments, Ideas, Reports, Users'.

## 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 SoftPhone 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 SoftPhone 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 SoftPhone by:

- [Using the dial pad](#) <sup>[196]</sup>
- [Searching the contacts](#) <sup>[196]</sup>
- [Typing the number](#) <sup>[196]</sup>

### 13.8.1 Using the dial pad

You can call a contact using the dial pad in Salesforce SoftPhone.

#### 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 SoftPhone.

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 SoftPhone.

#### 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 SoftPhone to

- [Answering a call](#)<sup>[197]</sup>
- [Muting or unmuting a call](#)<sup>[197]</sup>
- [Holding or retrieving a call](#)<sup>[197]</sup>
- [Ending a call](#)<sup>[197]</sup>
- [Transferring a call](#)<sup>[197]</sup>

### 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 SoftPhone.

The system displays the details of the caller in the Avaya IP Office Plug-in for Salesforce.com SoftPhone

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 SoftPhone 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 SoftPhone.

- [Making a supervised transfer](#)<sup>[198]</sup>
- [Making an unsupervised transfer](#)<sup>[198]</sup>



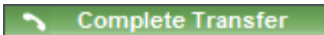
---

### 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.


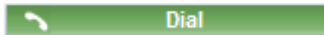
#### To make a supervised transfer:

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.

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](#)<sup>[200]</sup> 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](#)<sup>[125]</sup>. 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 No Answer

A Forward on No Answer number can be set for your calls. When set and enabled; if a call arrives for you when you are [busy](#)<sup>[200]</sup> to any further calls, it will be forwarded to that number. The number can be internal or external.

### 14.8 Forward on Busy

You can set a Forward on Busy number for your calls. When you set a number and enable this option, if you are busy on a call or when all the call appearances are busy, the system forwards the call to your Forward on Busy 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](#)<sup>[200]</sup>.



---

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. The system sets your extension number as the default bridge number for a Meet Me conference.

## 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.

You can park and unpark a call on a multisite telephony network such as a Small Community Network.

For example, if you park a call in slot 1, then the users on the local telephony network and Small Community Network can unpark the call. The system displays the call that is parked on slot 1 for any user who is configured on a local telephony network or a Small Community Network has the same 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 24, 75, 80, 85, 167, 170
- 1600 Series 24, 75, 80, 85, 167, 170
- 9**
- 9600 Series 24, 75, 80, 85, 167, 170
- A**
- Account code 39
- Add
  - Contacts Tab 88, 172
  - Personal directory contact 85, 170
- Add to Personal Directory
  - From Call Log 77, 86
  - From the System Directory 85, 170
  - From voicemail messages 86, 107, 171
- Adding a Caller to Your Directory 77
- Agent 60
- Alerting 37
- All 76
- Analog 24
- Answer 36, 43
  - Shortcut 120
- Appearance buttons 24, 48
- Application Server 140
- Audio 121
- Auto Hold 45
- Available 21, 60
- B**
- Balloon Tips 147
- Brazilian Portuguese 13, 128
- Browser 13
- Busy 21
- Busy Not Available 60
- Busy on Held 45
- Button
  - To Desk 61
  - To Mobile 61
- Buttons 33
- C**
- Call 39
  - From the Call Log 41
  - From the Directory 41
  - From Voicemail 42
  - Icons 33
  - Record 50
  - Swap 48
  - Toggle 48
- Call Assistant 134
  - Start 138
- Call Log 16, 24, 75, 76
  - Add to personal directory 77, 86
  - Make a call 41, 77
- Call progress 39, 40, 41, 42, 77, 83, 107
- Call recording warning 50
- Call redirection settings 21
- Call Waiting Indicator 21
- Call Waiting On 24, 48
- Calls 16
- Centralized call log 76
- Chat with 58, 93
- Checking Voicemail Messages 106
- Chrome 13, 121
- Clear Tab 76
- Clock 16, 126
- Color 97, 98
- Complete Transfer 36, 52
- Conference 36, 37, 52, 67, 72
  - Transfer 51
- Conferencing Calls 67
- Configuration 120
  - Sounds 121
- Configure 54, 120, 125
- Connected 37
- Consult 36, 52, 53, 84
- Consultation call 52, 67
- Contact 77, 85, 86, 87, 107, 170, 171
  - Email 92
  - Primary phone 24, 80, 85, 167, 170
- Customer Call Reporter 60
- D**
- Default Deskphone 99
- Delete
  - Call log 76
  - Personal directory contact 87, 172
  - Voicemail messages 106
- Deskphone 99
- Detected 97, 163
- Directories 80, 167
- Directory 16
  - Add tab 88, 172
  - Icons 33, 81, 168
  - Make a call 41, 83
- Do Not Disturb 21, 59, 81, 120, 125, 168
  - Exceptions 120, 125
- Drop 36, 44, 67, 69, 70, 72
  - Shortcut 120
- Dutch 13, 128
- E**
- Edit
  - Personal directory 77, 85, 86, 87, 107, 170, 171
  - Personal directory contact 87, 171
- Email 77, 85, 86, 87, 92, 107, 170, 171
- Enable
  - Sound Notifications 121
- Enable Hot Key 140
- Enbloc 24
- English 13, 128
- Enquiry call 52, 67
- Exceptions 125
- Explorer 13
- Extension 13
- External 16
- External directory 80, 167
- F**
- Failed 37
- Firefox 13, 121
- Format 108
- Forward
  - Immediate 100, 165
- Forward on No Answer 43, 44
- Forwarding 81, 168
- French 13, 128
- G**
- Gadget
  - World Clock 126
- Gadgets 16
- German 13, 128
- Google Chrome 13, 121
- Green background 97, 98

Greetings 108  
Group Tab 88, 172

**H**

Held 37  
Hold 36, 45  
    Shortcut 120  
Hold the Line 101  
Hold Timeout 45  
Home 96, 163  
Hot desking 26, 200  
Hot Key 140  
hunt groups 76

**I**

Icons  
    Call 33  
    Directory 33, 81, 168  
    Messages 106  
    User 81, 168  
Ignore 109  
Immediate 100, 165  
Incoming 76  
Indicator 21  
Initial Test Call 101  
Install  
    Screen Pop Application 137  
Instant Message 58, 93  
Internet Explorer 13  
Italian 13, 128

**J**

JavaScript 13

**K**

Keyboard shortcuts 120

**L**

Language 13, 128  
LDAP 80, 167  
Less... 39  
Licensed 13  
Listen 109  
Listen on 103, 166  
Logged in 13  
Logged out 21, 81, 168, 200  
Login code 200  
Logon Information 140  
Logout 20

**M**

Mailbox 106  
Main 16  
Make a call 39  
    From Messages 42, 107  
    From the Call Log 41, 77  
    From the Directory 41, 83, 169  
    From Voicemail 42  
    Shortcut 120  
Making a Supervised Transfer 52  
Making an Unsupervised Transfer 51  
Media player 121  
Message 58, 93  
Message Icons 106  
Messages 16, 106, 147  
    Make a call 42, 107  
Messages Indicator 21  
Missed 76  
Missed call 44  
Missed hunt group calls 76

Mobile 96, 163  
Mobile Twin 61  
Mobile twinning 100  
Mobility  
    Forward 100, 165  
    Mobile twinning 100  
    Telecommuter Mode 101  
    Use Default Deskphone 99

More... 39  
Mozilla Firefox 13, 121  
Music on hold 45  
Mute 69, 70, 72  
Mute All 69, 70, 72

**N**

Network 201  
New  
    Personal directory contact 85, 170  
No Answer 44, 100, 165  
Normal 81, 168  
Number 33  
**O**  
Off Hook 37, 81, 168  
Office 96, 163  
Offline 21  
On Hook 81, 168  
Orange background 97, 98  
Outcalling 103, 166  
Outgoing 76

**P**

Park 54, 201  
    Recall 54, 55  
    Return 54  
Park Slot Numbers 54  
Park Slots 54, 120  
Parking Calls 54  
Passcode 108  
Password 13, 140  
Pause 106  
Personal directory 16, 80, 167  
    Add from Call Log 77, 86  
    Add from System Directory 85, 170  
    Add from voicemail 86, 107, 171  
    Capacity 24, 80, 85, 167, 170  
    Edit 77, 85, 86, 87, 107, 170, 171  
Personalized Greetings 108  
Phones 13  
    Analog 24  
    SIP 24  
pickup 99, 109, 165  
Play the message 106  
Playback 16  
Pop on CLI 142  
Pop on Outdial 142  
Popup Window 58, 93  
Portuguese 13, 128  
Prefix 39  
Presence 21, 120, 125  
Primary phone 24, 77, 80, 85, 86, 87, 107, 167, 170, 171, 201  
Priority message 106  
Private message 106  
Profile  
    Color 97, 98  
    Detected 97, 163  
Progress 39, 40, 41, 42, 77, 83, 107

---

Proxy server exceptions 121

## Q

Queues 60

Quick Time 121

## R

Read message 106

Reason Code 60

Recall 54, 55

Received 76

Record 36, 50

Warning 50

Recording 37

Retrieve 36, 52, 67

Parked Call 54

Return

Park 54

Return Time 51, 52

Ringback 103, 166

Ringling 121

Russian 13, 128

## S

Safari 121

Save 106

Saved message 106

Screen Pop To 142

Screen Popping 137, 140

Searching

Directories 82, 169

Messages 106

Server Information 140

Server Port 140

Shortcuts 120

SIP 24

Skip

Backwards 106

Forwards 106

Slot number 54, 201

Small Community Network 54, 201

Softphone 13

Sound Configuration 121

Sounds 121

Start

Call Assistant 138

Status 21, 81, 168

Stop 106

Recording 50

Stop Rec 36

Subject 39

supervised transfer 51, 52, 201

Swap Calls 48

Switching Between Calls 48

System directory 16, 80, 167

Add to Personal Directory 85, 170

## T

T3 Series 24, 80, 85, 167, 170

Tabs 16

Tag 39

Taskbar 134

Telecommuter Mode 101

Telephones 13

Test Call 101

Time Zones 126

To Desk 61

To Mobile 61

Toggle Calls 48

transfer 36, 51, 52, 53, 84, 201

Complete 52

Return Time 51, 52

Supervised 52

To Desk 61

To Mobile 61

Unsupervised 51

Transferring Calls

Unsupervised 51

Transfers Using the Directory 53

Twining 61, 100

## U

Unconditional 100, 165

Unknown 81, 168

Unmute 69, 70, 72

Unmute All 69, 70, 72

Unpark 54, 201

Unread message 106

unsupervised transfer 51, 201

Upload Personalized Greeting 108

URL 13

Use Default Deskphone 99

User

Icons 81, 168

Name 13

Password 13

User Name 140

User Status 81, 168

## V

Voicemail 43

Add to personal directory 86, 107, 171

Listen on 103, 166

Messages 106

Outcalling 103, 166

Ringback 103, 166

Voicemail code 108

Voicemail Messages Indicator 21

Voicemail Screening Configuration 109

Voicemail\_screening 109

## W

Warning

Recording 50

Wav 108

Web

Address 13

Browser 13

Windows

Safari 121

Windows Media Player 121

World Clock 16, 126



Performance figures and data quoted in this document are typical, and must be specifically confirmed in writing by Avaya before they become applicable to any particular order or contract. The company reserves the right to make alterations or amendments to the detailed specifications at its discretion. The publication of information in this document does not imply freedom from patent or other protective rights of Avaya or others.

All trademarks identified by the ® or ™ are registered trademarks or trademarks, respectively, of Avaya Inc. All other trademarks are the property of their respective owners.

This document contains proprietary information of Avaya and is not to be disclosed or used except in accordance with applicable agreements.

© 2014 Avaya Inc. All rights reserved.