IP Office™ Platform 11.0.4.0

Using one-X Portal for IP Office

15-601131 Issue 15f - (Wednesday, November 20, 2019)

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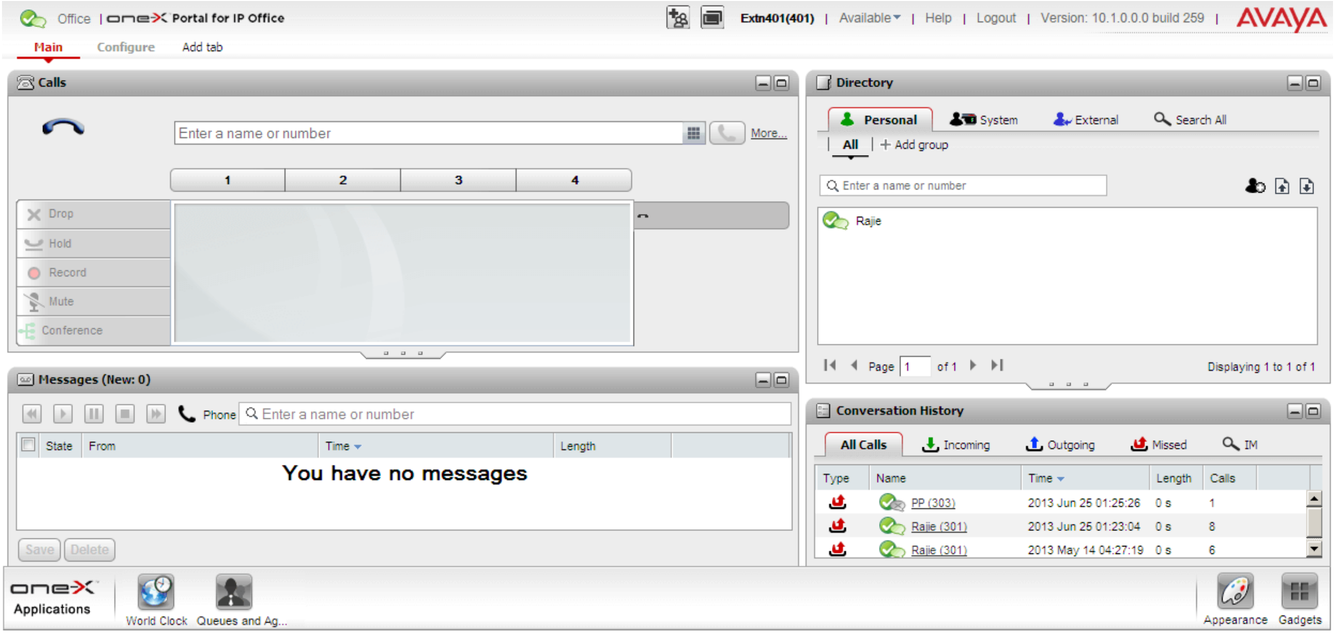
Chapter 1.
one-X Portal

1. one-X Portal

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

- Control your telephone and telephone calls.
- View details of calls and directories of contacts.
- Configure settings that affect how your calls are treated by the telephone system.
- Conference calls.
- Manage your voicemail messages.



Rajie

You have no messages

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

This documentation covers the use of one-X Portal Release 11.0.4.0.

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1.2 What's New in this Release

The following is a summary of the new user features in the IP Office Release 11.0.4.0 version of one-X Portal:

- **IP Office Web Client Enhancements** 228
  The IP Office Web Client client which can be used by portal users to make voice and video calls through their browser has been enhanced. It now supports conference and web collaboration controls.
- **Directory Avatar Support** 150
  When hovering over a contact in the one-X Portal directories, the contact information displayed now includes the contact's avatar image.

1.3 PC Requirements

one-X Portal is a licensed through licenses entered by your system administrator 231 into the IP Office system 230. They also configure which IP Office users are allowed to use one-X Portal. If you are licensed to use one-X Portal, you need the following to log in:

- **Computer**
  You need a computer with a network connection to the one-X Portal server.
- **Web Browser**
  one-X Portal is tested using the following web browsers:
  - **Internet Explorer 10.0/11.0.**
  - **Microsoft Edge**
  - **Firefox**
  - **Google Chrome**
  - **Safari 8/9**
  - The web browser should be Javascript enabled.
  - 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**).
  - To playback on PC, you may need to accept the security certificate being used by the voicemail server. Enter ***https://<voicemail_server_address>:5443/*** in your browser and accept the certificate exception.
  - The **Remember me on this computer** option shown in the login menu requires the browser to allow cookies.
- **IP Office Extension**
  one-X Portal can be used with most phones supported by the IP Office telephone system.
- **User name**
  Your need your IP Office user name as set by the system administrator. Note that this is not necessarily the same as the name shown on your phone's display.
- **Password**
  Your IP Office user password. Note that this can be different from your telephone login code 231 if you also have one of those.
- **IP Address**
  You need the address of the one-X Portal server.

Languages Supported

one-X Portal supports the languages shown below. You can select the language you want to use while logging in 11. The language that you set is applicable only to the one-X Portal. This setting does not affect the language of other websites that you access using the browser.

- **Brazilian**
- **Chinese**
- **Czech**
- **Dutch**
- **English (US)**
- **English (UK)**
- **French**
- **German**
- **Italian**
- **Japanese**
- **Korean**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**
- **Turkish**

Non one-X Portal Users

Basic users, that is those who are not configured as one-X Portal users, can still use the ***Change Password*** link on the one-X Portal login page in order to change their user password.

1.4 Logging In

1. In your web browser, enter the URL in the form of ***https://<server name>:<server port>/onexportal.html*** where:
    - ***<server name>*** is the name or the IP address of the one-X Portal server.
    - ***<server port>*** is the port number used by the one-X Portal. This is either 9443 or 8443 for HTTPS access.
    - In some cases, you may use ***http://*** rather than ***https://*** and ***8080*** as the port. Your system administrator will advise if that is allowed.
2. Enter your **User name** and **Password**.
    - 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 only if you are the only person who uses the computer.
    - **Login to phone**
      You can have the portal also log you into an extension on the phone system or at an external phone. To do this click **Login to phone**. You do not need to do this if you are already logged in on the extension on the telephone system that you want to use.
        - **Internal Phone Login**
          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 12.
        - **External Phone Login**
          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. This option is only supported if configured for you by your system administrator. For more information, see Telecommuting 12.
3. Click **Login**.
    - If a **Change Password** menu appears, you system administrator has configured your account to the **Force New Password** setting. Enter your current password again and a new password and click **Confirm**. Note that the new password must meet the requirements set by your system administrator, otherwise the menu reappears. See Changing Your Password 150.
    - If login fails, the one-X Portal may display one of the following messages:
        - "*Invalid user credentials*"
          This indicates that either the user name or password is incorrect.
        - "*A license could not be assigned to you. Please contact your administrator*"
          This indicates that you are either not licensed for one-X Portal usage or one-X Portal could not connect to the telephone system.
        - "*Csta Resource not available*"
          This indicates that your browser does not support one-X Portal.

1.5 Hot Desking

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

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 login menu to both login to one-X Portal and to specify the phone to which you want to be logged on.

When you use this method to log in to both one-X Portal and a phone, when you log out of one-X Portal 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.

1.6 Telecommuting

Telecommuter mode allows you to make and receive calls using a phone at a remote location with all calls being started by and going via the telephone system. It requires you to also have a data connection from that location over which you can connect a web browser to your company's one-X Portal server. This mode is only available to you if configured by your system administrator.

- You make calls using one-X Portal to dial the number. The phone system will make a call to your configured telecommute number and when answered it will then make a call to the number dialed as if it had been dialed from your normal internal extension, 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.
- While telecommute mode is selected, you are logged out of your normal internal 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 [12] 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.

1.7 Logging Out

When you have finished using one-X Portal, you should click on the **Logout** link shown in the top right. This will end your session and return the browser to the log in screen [11]. If you used portal to login to an extension, you will be prompted whether you also want to log out from the phone you are using.

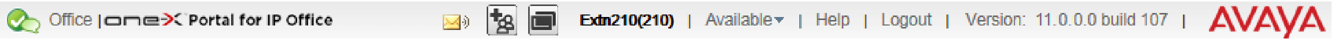
If you simply browse to another website, your browser's back, forward and history functions can be used to return to your portal session without needing to log in again. While this can be useful to you, it is a risk if you use the portal from a shared computer or one in a publicly accessible location. After you have finished using the portal, always use the **Logout** control and close the browser.

1.8 The Main Page

The one-X Portal consists of two tabs or pages; **Main** and **Configure**[144]. The elements displayed on the **Main** tab are described below.

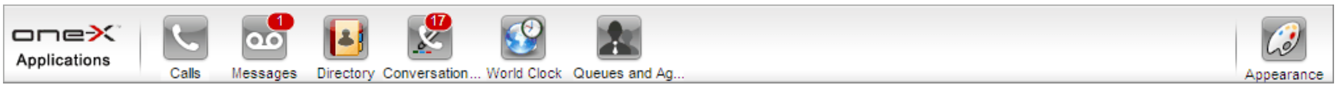
Title Bar[16]

The title bar shows you information about yourself.


Office | one-X Portal for IP Office
Extn210(210)
Available
Help
Logout
Version: 11.0.0.0 build 107
AVAYA

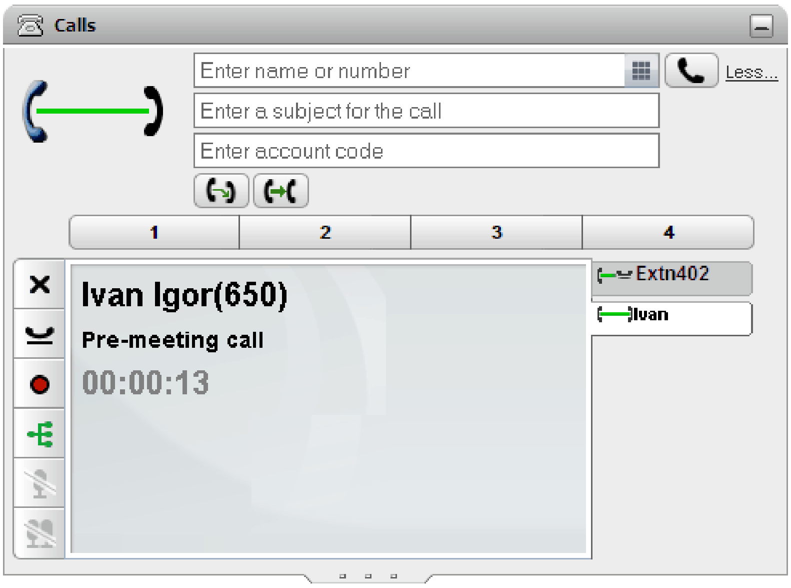
Toolbar

The toolbar at the bottom is used to access controls for the one-X Portal appearance[22] and to display icons for minimized gadgets[23].



Calls Gadget[28]

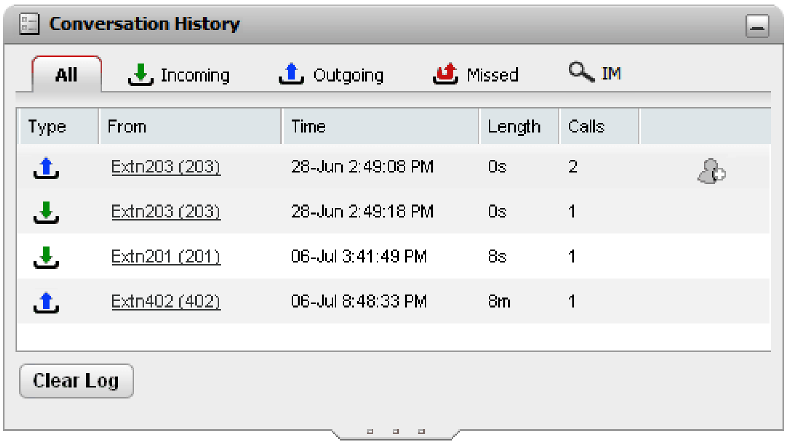
The **Calls** gadget shows details of you current calls, with a sub-tab for each call. The text boxes at the top of the gadget can be used to make new calls.



Ivan Igor(650)
Pre-meeting call
00:00:13

Conversation History 91

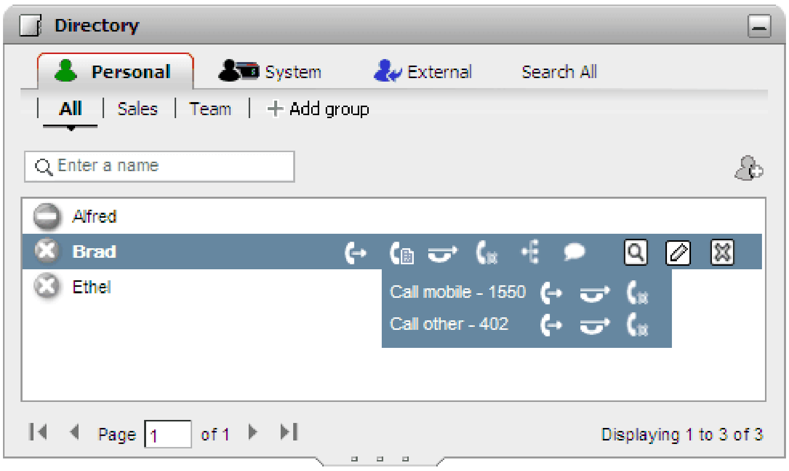
The **Conversation History** gadget displays your call log which is stored by the telephone system.



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

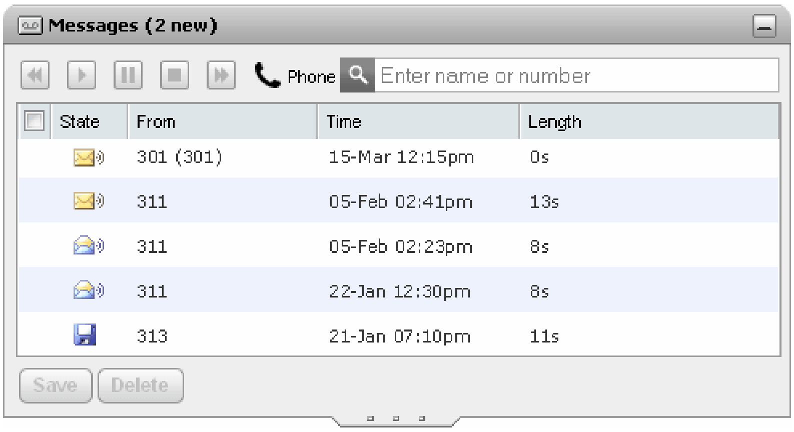
Directory 97

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 230 on the phone system. The **External** directory allows you to search other directories, access to which has been configured by the system administrator 231.



Messages 123

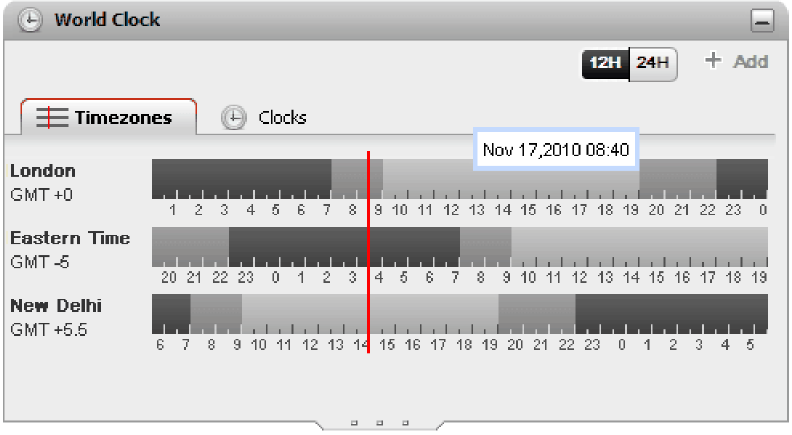
The **Messages** gadget shows you details of the messages in your voicemail mailbox. You can use the gadget to playback the messages via your phone or via your browser if it supports multimedia.



☐ State	From	Time	Length
	301 (301)	15-Mar 12:15pm	0s
	311	05-Feb 02:41pm	13s
	311	05-Feb 02:23pm	8s
	311	22-Jan 12:30pm	8s
	313	21-Jan 07:10pm	11s

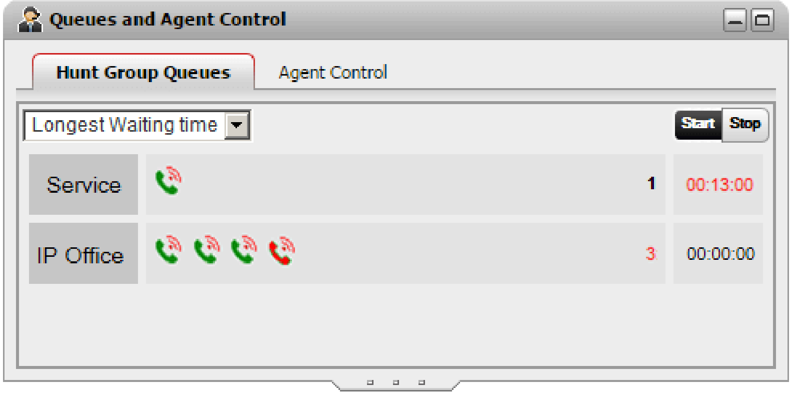
World Clock 148

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.



Queues and Agent Control 56

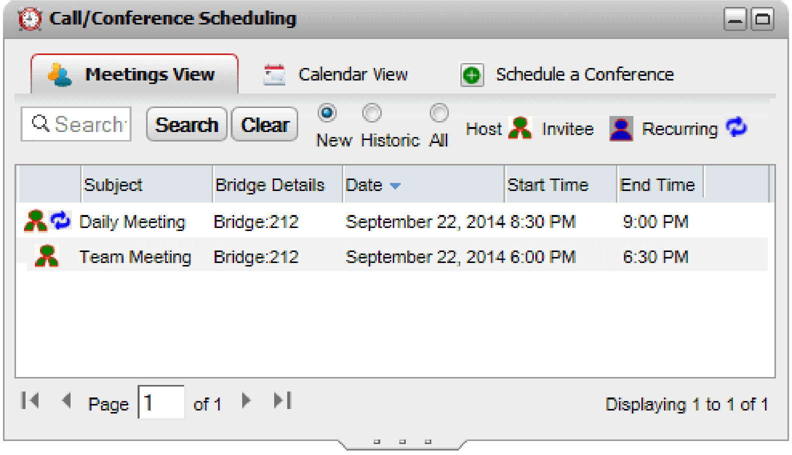
This gadget allows you to handle hunt groups. One table lets you monitor the number of calls queuing to be answered for up to 5 different hunt groups. You can then use the queues to answer one of those calls if necessary. The other table lets you see and change your current membership of groups to which you belong.



Service	1	00:13:00
IP Office	3	00:00:00

Call/Conference Scheduling 76

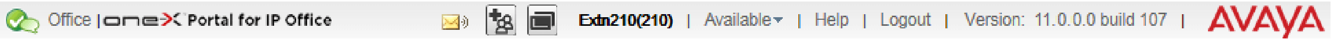
This gadget allows you to view the future conferences to which you have been invited and to also schedule conferences.



Subject	Bridge Details	Date	Start Time	End Time
Daily Meeting	Bridge:212	September 22, 2014	8:30 PM	9:00 PM
Team Meeting	Bridge:212	September 22, 2014	6:00 PM	6:30 PM

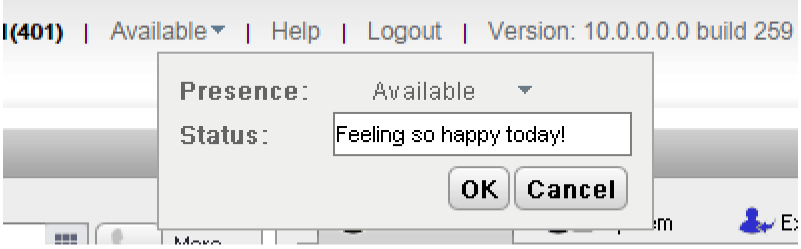
1.9 The Title Bar/Presence Icons

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


Office | one-X Portal for IP Office
Extn210(210) | Available | Help | Logout | Version: 11.0.0.0 build 107 |
AVAYA

The items on the title bar show:

- **Your Presence**
  These icons indicate your current presence in the one-X Portal 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. There are two types of presence:
  - **Telephone presence**[17]**:** This presence is related to your telephone status.
  - **IM presence**[17]**:** This presence is related to your instant messaging (IM) status.
- **New Voicemail Messages:**[123] This icon appears if you have new voicemail messages.
- **Access Your Conference Bridge**[72]
- **Access Web Collaboration**[74]
- Office **Your Profile**
  Your currently active profile[114]. 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**[114] page.
- Extn218(218) **Name and Number**
  Your name and internal extension number.
- Available **Your Status**
  This drop-down shows your current selected status. It allows you to change your status and to add a status message that is seen by other users.


l(401) | Available | Help | Logout | Version: 10.0.0.0 build 259
OK
Cancel

Presence: Available

Status: Feeling so happy today!

  - **Presence**
    You can select from the following statuses.

Status	Description
Available	This is the normal state in which you can make and receive calls.
Do not disturb	While in this state, calls to you are redirected to voicemail if available or otherwise the other users will receive a busy tone. The exception is calls from numbers that you have added to your list of Do Not Disturb Exceptions[147]. In this state, you can still make calls.
Offline	You can select this state if you want to continue using one-X Portal but do not want other one-X Portal users to be able to send you instant messages[129] using the one-X Portal.

  - **Status**
    You can enter a status message of up to 50 characters. This is shown to other users using the one-X Portal client or third-party clients while you are logged in. When logged off or have your status set to Offline, the message is not visible to the other users.
- **Help**
  Use this link to open the one-X Portal help in a new browser tab or window.
- **Logout**[12]
  Use this link when you have finished using one-X Portal. It will return you to the one-X Portal login screen[11].
- **Version**
  The version number of the one-X Portal you are currently using.

1.9.1 Telephone Presence Icons

Presence Icon	Presence Status	Description
✓	**Available**	This status indicates that you are available and can be called.
⊖	**Busy**	This status indicates that you have a call in progress.
✖	**Do Not Disturb**	This status indicates that you have enabled *Do Not Disturb* 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 147.
○	**Logged Out**	This 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 to alter your configuration settings.
☎	**Ringing**	This status indicates that the phone is ringing and you have an incoming call.
?	**Unknown**	This status indicates that your presence on the phone system is unknown. The presence cannot be determined as the phone number is not an extension on the telephone system.

1.9.2 IM Presence Icons

Presence Icon	Presence Status	Description
💬	**Available/ Online**	This status indicates that you are logged into the IM server and available for chat.
⊖	**Do not disturb**	This status indicates that you have enabled *Do Not Disturb* on the IM
✖	**Offline**	This status indicates that other users will not be able to send you instant messages 129 using the one-X Portal.
◔	**Away**	This status indicates that you are logged into the IM but currently away from your desk.
?	**Unknown**	This status indicates that your presence on the IM is unknown.

1.9.3 Viewing Other User's Presence

You can view the presence status of contacts in the Conversation History 90, Messages 122, and Directory 96 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.

1.10 Phone Notes

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

1.10.1 Incoming Calls

The calls that are indicated to you through one-X Portal 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 user will be down to IP Office system configuration settings.

1.10.2 Outgoing Calls

The outgoing calls that you can make are subject to the your IP Office configuration settings. On some phones, the call log shown by the phone and the redial function uses information stored by the phone. When that is the case, they will typically not include calls made using one-X Portal.

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, is unaware of such activity until the prepared digits are sent from the phone to the telephone system.

- This typically applies to phones on a DECT system and to SIP phones.
- Avaya 1400, 1600, 9500, 9600, J100, M-Series and T-Series phones can be optionally set to use en-bloc dialing.
- The off-hook status of a 1100 series phones is not reflected in one-X Portal.

1.10.3 Call Gadget Buttons

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 some SIP and DECT phones.

- **Answer Button Not Shown/Clickable**
  When an incoming calls is presented while the phone is on-hook, one-X Portal 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. This includes the B179, J129 and H175 telephones. Use of the portal button to answer calls is supported for 1100/1200 Series and E129 telephones.
- **Call Button Causes Call to Yourself**
  When making a call from one-X Portal while 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 calls you and only makes the outgoing call when you answer (go off-hook).

1.10.4 Call Log/History Entries

The call log shown is stored on the telephone system as part of your user settings. Up to 30 records 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.

For incoming call, by default, only personal calls (non hunt group) to the user that were answered by the user or which went unanswered anywhere are included in the call log.

- **Missed Calls**
  Calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls. However, your telephone system administrator can configure the logging of missed calls.
- **Missed Hunt Group Calls**
  By default, only hunt group calls that you answer are logged. However, your telephone system administrator can configure your call log to include missed hunt group calls for selected hunt groups.
- **Automatic Deletion**
  Old call records are automatically deleted when the call log capacity is reached and a new call record needs to be added. In addition, the telephone system administrator can configure the telephone system to delete log entries after a set period.

The Phone Call Log

If you are using an Avaya phone (1400, 1600, 9500, 9600 or J100 Series) 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 is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal. The two will change in parallel.

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

1.10.5 Personal Directory

If you are using a Avaya phone (1400, 1600, 9500, 9600 or J100 Series) phone with a **Contacts** button, or M-Series, T-Series phone, you can also use your **Personal** directory contacts through the phone and edit them using the phone.

1. As **Personal** directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The one-X Portal application and the telephone system can only store up to 250 Personal directory contacts per user (subject to its own system limits).
    - Any contacts uploaded from the Avaya IP Office Plug-in are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal only, and are in addition to the maximum 250 Personal Directory contacts.
2. Contacts can be edited through the phone or through one-X Portal.
3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current **Primary phone** number. The matching telephone system record contains just one number, which will be changed to match the currently selected **Primary phone** number on one-X Portal if that selection is changed.

1.10.6 Number of Calls

one-X Portal does not limit the number of calls that you can make and receive. While you can only have one call connected at any time, you can have multiple held calls at the same time. However, the phone system 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 231 as appearance buttons 230. 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 230 to any further incoming calls.
    - For outgoing calls, you can use one-X Portal to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.
- **Phones Without Appearance Buttons**
  If the phone you are using does not have appearance buttons, your **Calls Waiting On** setting, as set by your system administrator, controls the number of calls that you can receive.
    - If your **Calls Waiting On** setting is enabled, you can use one-X Portal to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being busy 230. However, using one-X Portal 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 230. However, using one-X Portal you can still make additional outgoing calls.

Notes

1. You can only have one connected call at a time. If you connect to another call (by making a call, answering a call, unpark a call, retrieve a call from hold, etc.), the existing call to which you were connected is automatically put on hold. This is called **Auto Hold**. Your system administrator 231 can disable **Auto Hold** for the whole system. If this is done, when you connect to a call, any current call is disconnected.
2. Calls that have been parked are not included. Unlike held calls they are parked on the phone system rather than held at your phone.

1.11 Terminal Services

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

Chapter 2.
Changing the Layout

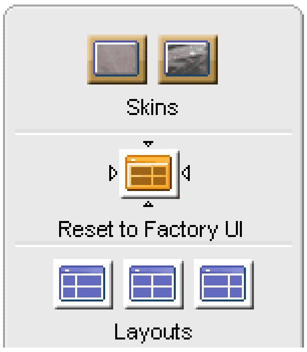
2. Changing the Layout

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

Change the one-X Portal Layout		
- Select a Skin [22]	- Change the Column Widths [22]	- Show/Hide a Gadget [23]
- Add External gadgets [25]	- Maximize a gadget [23]	- Resize a Gadget [24]
- Move a Gadget [24]	- Default the Layout	- Add a custom tab
- Delete a custom tab		

2.1 Selecting a Skin

You can change the skin style of one-X Portal. The styles that are available are the default and black skins. The styles can be changed in the Appearance Menu.



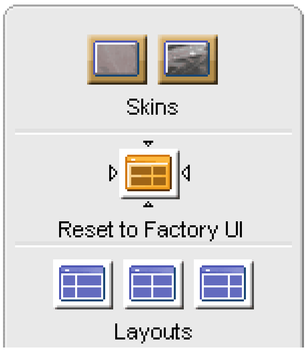
1. Click **Appearance** . The system displays the skin styles.

   Default **Black**

2. Click the preferred skin style. The system changes the one-X Portal interface to the preferred skin style.
3. Click anywhere on your one-X Portal 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.

40:60 Ratio **50:50 Ratio** **60:40 Ratio**

2. Click the preferred skin style. The system changes the one-X Portal interface to the preferred skin style.
3. Click anywhere on your one-X Portal application to exit the settings.

2.3 Minimizing Gadgets

You can minimize any of the gadgets shown on the **Main** tab by selecting the ⊟ icon in the top right of the gadget. While minimized, the gadget is reduced in size to just its title bar and an icon in the toolbar at the bottom of the one-X Portal.

Minimized Gadget Icons

- **Calls Gadget** 28
  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** 122
  This icon also shows the number of unread messages in your mailbox.
- **Conversation History Gadget** 90
  This icon also shows the number of missed calls in your call log.
- **Directory Gadget** 96
  This icon displays directories of names and associated telephone numbers.
- **World Clock Gadget** 148
  This gadget shows the current time in various selected time zones.
- **Queues and Agent Control Gadget** 56
  This gadget is used to monitor hunt group queues of calls waiting to be answered.
- **Scheduler Gadget** 76
  This gadget shows you the scheduled conferences to which you have been invited and allows you to schedule new conferences.

To minimize a gadget:

1. To minimize a gadget, click on the ⊟ icon in the top right of the gadget. To minimize a gadget that is maximized you should first restore it by clicking the 🗗 icon.

To restore a gadget:

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

2.4 Maximizing a gadget

You can maximize one of the gadgets on the **Main** tab. When a gadget is maximized, the other gadgets are automatically minimized 23 to the toolbar at the bottom of the one-X Portal.

The system only displays a maximized gadget while you are logged in. If you log out, when you next log in the gadget in no longer maximized.

To maximize a gadget:

1. To maximize a gadget, click the 🗖 icon in the top right of the gadget title bar. To maximize a gadget that is minimized you must first restore it. Either click on its icon in the toolbar at the bottom of the screen or click the 🗗 icon in gadget title bar.

To restore the gadget:

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

2.5 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.

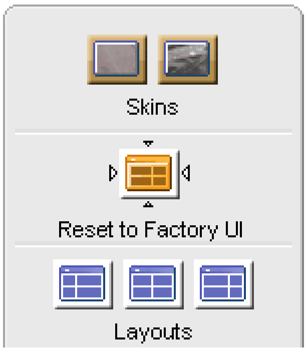
To change the height of a gadget, click and drag **resize** in the gadget.

2.6 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.

2.7 Default Layout

If you have adjusted the layout of one-X Portal, 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 interface to the default skin style.
3. Click anywhere on your one-X Portal application to exit the settings.

2.8 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 window.
2. Type the name of the custom tab in **Add Personalized Tab** dialog box. You cannot change the name of the custom tab after you add. Ensure that the name of the custom tab does not exceed 20 characters.
3. Click **Add**.

2.9 Deleting a custom tab

To delete a custom tab:

1. Click the custom tab that you would like to delete in the one-X Portal 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.

2.10 Add External gadgets

one-X Portal 11.0.4.0 enables you to add and use the external gadgets without launching an independent application for each gadget.

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

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

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

To add an external gadget:

1. Click the tab where you would like to add the external gadgets.
2. Click ▦ **Gadgets**, in the toolbar. one-X Portal displays a list of categories such as **ALL**, **COMMUNICATION**, **FINANCE**, **PRODUCTIVITY**, **TECHNOLOGY**, and others.
3. Select a category.
4. Enable the gadget that you want to add. The system displays the gadget in the panel that has least number of gadgets.

To remove an external gadget:

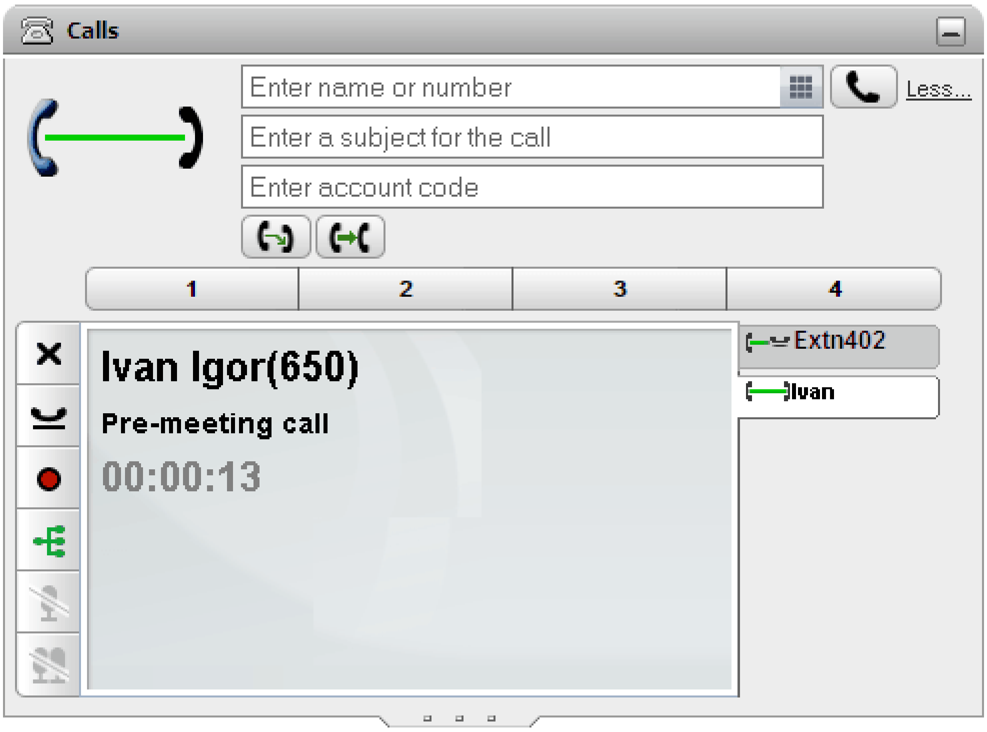
You can remove only the external gadgets from one-X Portal. You cannot remove the default gadgets from the one-X Portal **Main** tab.

- 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.

Chapter 3.
Making and Answering Calls

3. Making and Answering Calls

This section covers how you can use one-X Portal to make and answer calls. Using the ☎ **Calls** gadget, details of each call are shown on separate tabs. The buttons 31 shown will vary but generally indicate actions that you can perform with the currently displayed call.



Ivan Igor(650)

Pre-meeting call

00:00:13

Make and Answer Calls

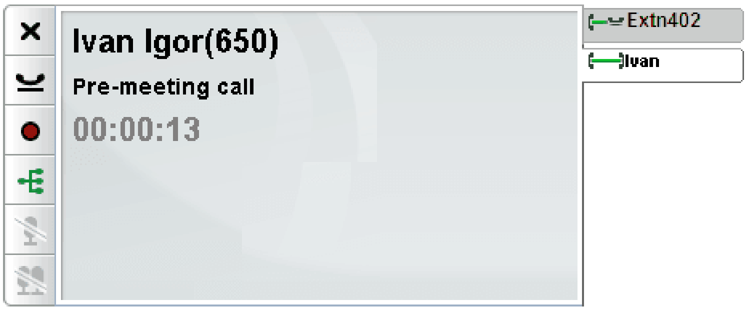
- Make a call 34
- Unanswered calls 40
- Hold calls 42
- Transfer calls 46
- Instant message other users (Chat) 129
- Enable Mobile Twinning

- Answer a call 38
- End a call 40
- Switch between calls 44
- Park calls 51
- Select Do Not Disturb 54
- Arrange a Ringback

- Pick up a call 39
- Mute a call 41
- Record a call 45
- Send DTMF tones 53
- Use Agent controls

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 or alerting call. Each tab has a call status icon 33 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.

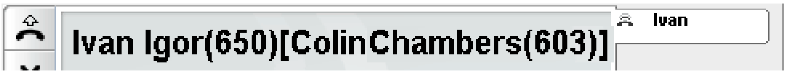
Call Buttons

The buttons 31 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.

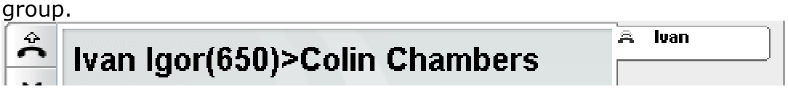
Call Details

The calls details in the center panel show the following from top to bottom:

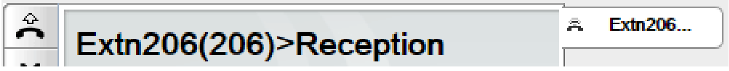
- **Caller Name and Number**
  The top row shows the caller number. If the telephone system is able to associate a name with the number, it will display that name and then the number in brackets. The telephone system can associate a name by matching the number to entries in its directory or your directory.
  - **Transferred Call**
    If a call has been transferred, the name of the caller being transferred is shown followed by the source of the transfer in brackets.



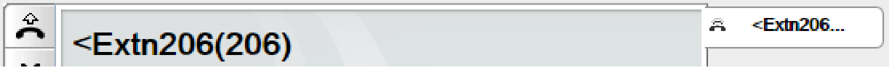
  - **Forwarded Call**
    If a call has been forwarded to you, the name of the caller is shown followed by **>** and the name of whoever forwarded the call to you. This is also used for hunt group calls, showing the caller and the hunt group.



  - **Hunt Group Call**
    A group call shows the caller details followed by > and the name of the group handling the call.



  - **Returning Call**
    A **<** followed by the caller details indicates a call returning to you for some reason such as being held or parked for too long. It may also indicate a callback you set from the phone or ringback 38 set through the portal, in which case when you answer the system will then call that user.

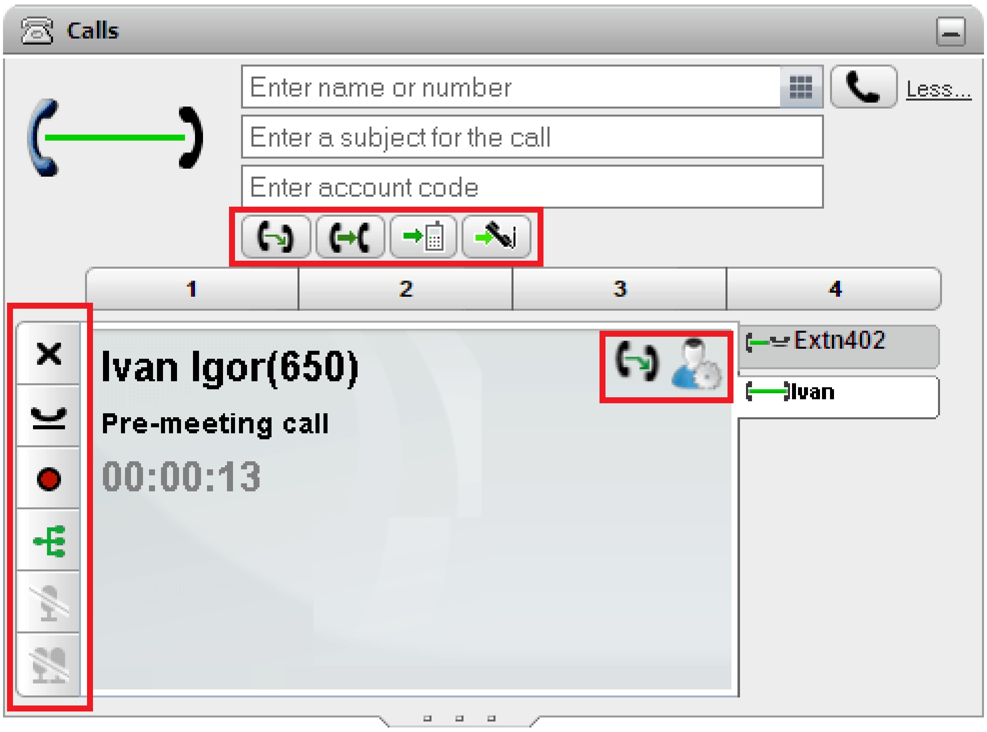


- **Call Subject**
  This row is only present if a subject has been associated with the call. The call subject is also known as the 'call tag'.
  - A subject is a short text message that can be associated with a call. If there is a subject associated with the call, it is displayed. Depending on the phone being used, the subject is also displayed on the phone.
  - You can use the one-X Portal to enter a call tag when making a call 34 or transferring a call 47. 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.
  - The telephone system can also add a subject to a call if configured by your system administrator.

- **Account Code**
  This row is only present if an account code has been associated with the call.
  - If there is an account code associated with the call, it is displayed.
  - You can use the one-X Portal to set an account code when making a call 34 or transferring a call 47. You can also add an account code during a call, see see Adding an Account Code 55.
  - The telephone system can automatically associate an account code with a call based on the caller's number.
- **Call Timer**
  When you make a call the system starts the call timer. When that call is answered, the call timer is restarted and continues until you end or drop the call. For calls on an analogue telephone line, the timer does not restart when the call is answered.

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 .



Call Buttons: Left-Side

Icon	Action	Description
	Answer Call	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call, see Phone Notes[18].
✕	**Drop Call**	For a currently connected call, pressing ✕ disconnects the call.
	Redirect Call	For an alerting call, pressing ✕ will redirect the call using your a Forward on No Answer[118] setting if set or otherwise to voicemail if available. You cannot drop a call returning to you after being held or parked for too long.
📞	**Call**	Make a call using the details set in the call fields. On some types of phone this first causes a call to you and then, when you answer, makes the outgoing call, see Phone Notes[18].
●	**Record Call**	Start recording the current call.
■	**Stop Recording**	Stop recording the current call.
	Hold Call	Puts the call on hold.
	Retrieve Held Call	Take a call back from hold.
	Complete Transfer	With a call on hold and another call in progress, transfer the held call to the current connected party.
	Conference Call	With a call on hold and another call in progress, you can conference the calls.
	Mute	Mute your connection to a call.
	Mute All	For conferences which you initiate, this control allows you to mute all the other conference parties.
	Unmute	Unmute your connection to a call.
	Unmute All	For conferences which you initiate, this control allows you to unmute all the other conference parties.

Call Buttons: Top-Row

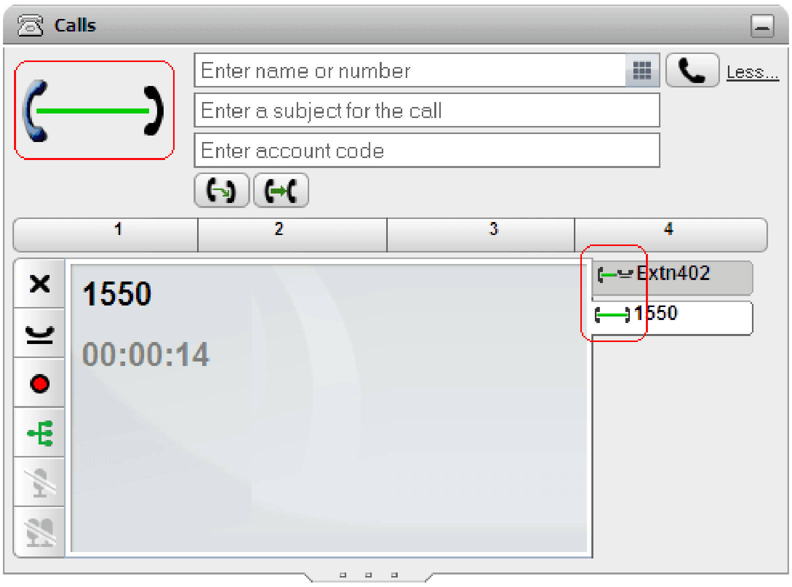
Icon	Action	Description
	Consult	Put the current call on hold and call the number set in the call fields.
	Transfer	Transfer the current call immediately to the number set in the call fields.
	Transfer to twin	Transfer a call from your phone to your mobile.
	Claim from twin	Transfer a call from your mobile back to your phone.

Call Buttons: Right-Side

Icon	Action	Description
	Transfer Call	With 2 call in progress, transfer your currently connected call to the currently held caller.
	Add Account Code	Add an account code to the call or change the current account code.

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
	- **Idle/On Hook** This icon indicates that you currently have no call connected.
	- **Alerting/Ringing** This icon indicates a call being presented to you to be answered 38. Depending on other phone settings your phone also gives an audible ring and flash its lamp or icons.
	- **Dialing** This icon is shown when you are in the process of making a call but not yet ringing or connected, for example still dialing the number.
	- **Outgoing Call Ringing** This icon indicates that the call you have made is now ringing. Note that for analog telephone lines, calls are treated as answered immediately as those lines do not provide call progress signals to the telephone system, just audible ringing that you can hear.
	- **Could Not Connect** The icon indicates that the call you were making could not be connected for some reason.
	- **Connected** This icon indicates the call to which you are currently talking or listening.
	- **Held Call** This icon indicates a call that you have been placed on hold.
	- **On Hold** This icon indicates a call that you placed on hold.
	- **Conference** This icon is shown when you are in a conference call that you started.
	- **Screened Call** This icon indicates a caller leaving a voicemail message. See Voicemail Call Screening 126.

3.4 Making a Call

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

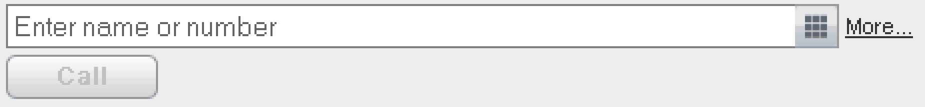
- From the Call Gadget 34
- Using the Dial Pad 185
- From the Directory 36
- From the Conversation History 36
- From the Voicemail 37

3.4.1 Making a Call from the Calls Gadget

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

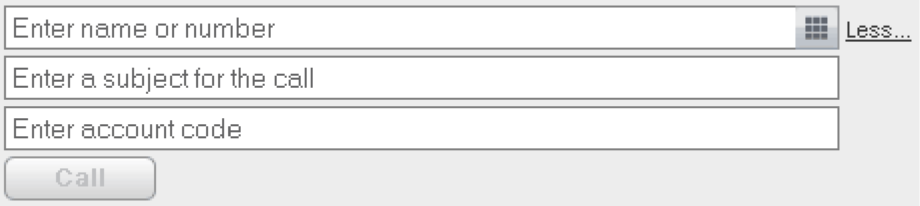
To make a call from the Calls gadget:

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



Enter name or 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 231 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 boxes again, click on **Less...**.



Enter name or number

Enter a subject for the call

Enter account code

  - 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 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 the ☎ button. If you already have another call in progress, that call is automatically put on hold 230.

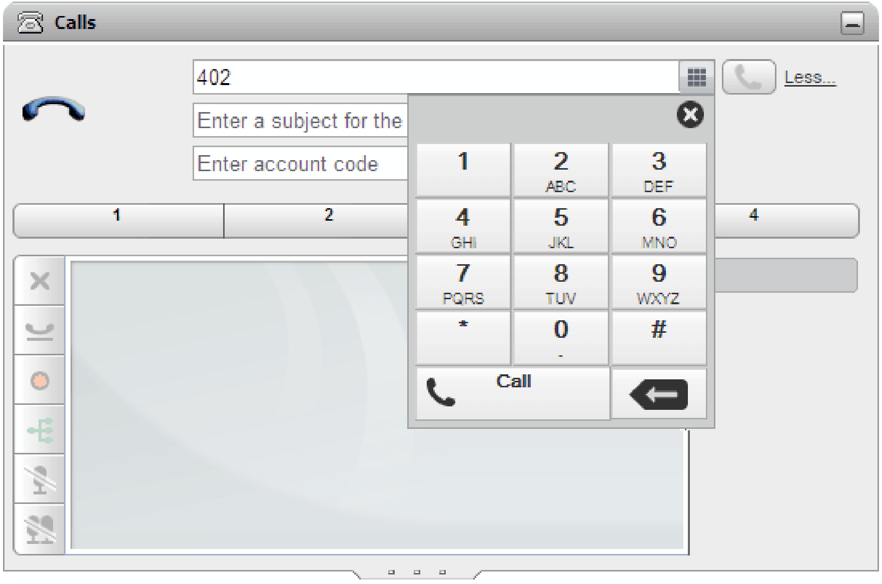
- The progress of the call is displayed on a tab in the ☎ **Calls** gadget. If the call fails, the gadget displays a reason for the failure if known.
- When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

3.4.2 Making a Call using the Dial Pad

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

To make a call using the dial pad:

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

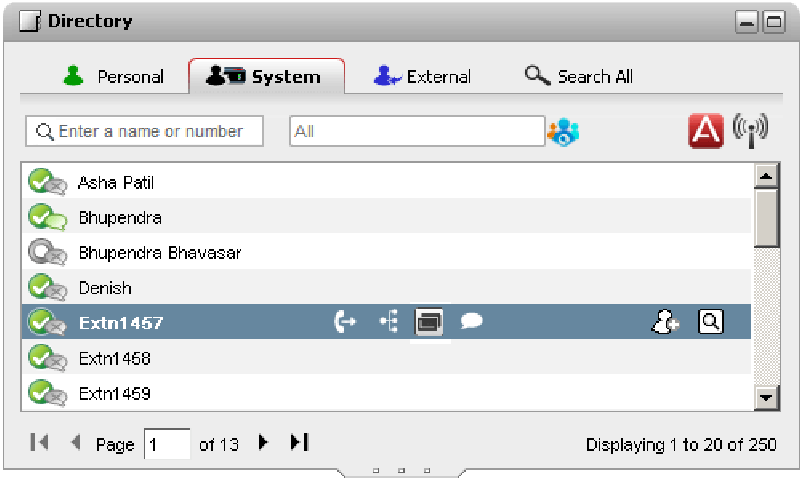


2. Using the dial pad enter the number you want to call. For external calls, remember to add any external dialing prefix used by your telephone system.
3. To delete the last digit entered, click on the ⌫ delete icon.
4. At any time you can exit the dial pad to continue entering call details into the 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 call icon. If you already have another call in progress, that call will be automatically put on hold 230.
   - The progress of the call is displayed on a tab in the ☎ **Calls** gadget. If the call fails, the gadget displays a reason for the failure if known.
   - When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

3.4.3 Making a Call from the Directory

To make a call 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. The directory icons[98] 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 a icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.
   - **Alternate Numbers:**
     If this icon is displayed, the contact has alternate numbers. You can click the icon and select the call options available for those numbers.

- The progress of the call is displayed on a tab in the **Calls** gadget. If the call fails, the gadget displays a reason for the failure if known.
- When calling an internal user, if they do not answer you can set a ringback[38] to call you when they end their current or next call.

3.4.4 Making a Call from the Conversation History

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

To make a call from your conversation history:

1. Using the **Conversation History** gadget on the **Main** tab, locate the contact that you want to call.
2. Click on the name or number to make a call.

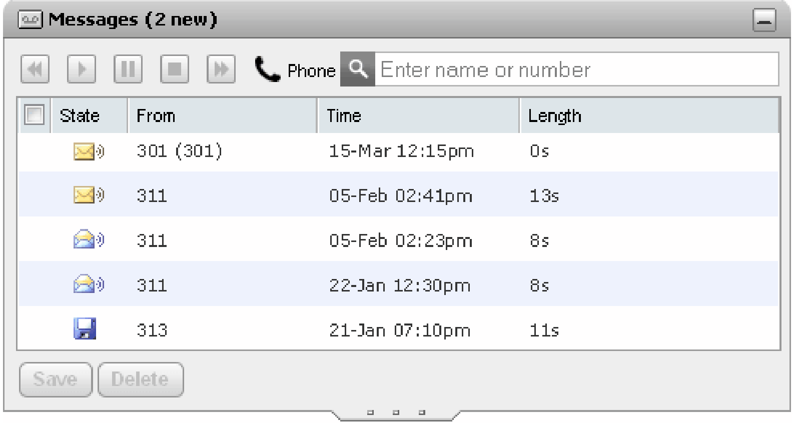
- The progress of the call is displayed on a tab in the **Calls** gadget. If the call fails, the gadget displays a reason for the failure if known.
- When calling an internal user, if they do not answer you can set a ringback[38] to call you when they end their current or next call.

3.4.5 Making a Call from Voicemail

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

To make a return call from voicemail:

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



☐ State	From	Time	Length
✉	301 (301)	15-Mar 12:15pm	0s
✉	311	05-Feb 02:41pm	13s
✉	311	05-Feb 02:23pm	8s
✉	311	22-Jan 12:30pm	8s
💾	313	21-Jan 07:10pm	11s

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. If the call fails, the gadget displays a reason for the failure if known.
   - When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

3.5 Arranging a Ringback

When another user does not answer your call to their internal extension because they are busy on a call, you can set a ringback. Once set, when the user ends that call, the system will ring you if you are free. When you answer the ringback call, the system then automatically rings the user. Note that a ringback set from the portal is separate from any callback set from your telephone.

If another internal user's status is shown 98 as ⛔ ***Busy - On Call***, you can set a ringback 38 on them. The system will then ring you when they end their current call and you are free.

To set a ringback:

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 your cursor over the busy contact. Click on the icon to set a ringback on that user.
4. The system will inform you that the ringback is set or if you already have a ringback set on another target.

To clear a ringback:

1. Repeat the process above to remove a previously set ringback.

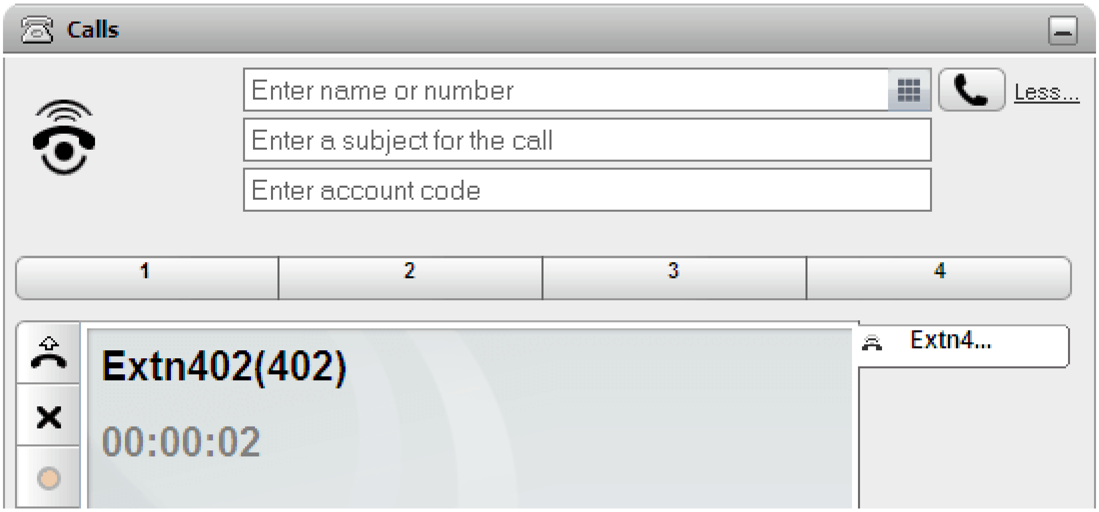
3.6 Answering a Call

When a new call alerts your phone, one-X Portal 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 230 settings or going to voicemail. If you already have a call connected, answering another call using one-X Portal will automatically put the existing call on hold 43.

To answer a call:

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 230. Alternatively, pressing the ✕ drop button redirects the call, see Redirecting an Incoming Call 39.

   - 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. See Phone Notes 18.

3.7 Redirect an Incoming Call

You can attempt to drop an incoming call. Dropping a call has different effects depending on the type of call and other options:

- **Hunt Group Calls**
  If the call is a hunt group call, dropping the incoming call causes it to be presented to the next agent in the group or follow other hunt group settings (which can include presenting the call to you again).
- **Personal Calls**
  If the call is a direct call to you, dropping it causes it to:
  - Go to your forward on busy destination if set and enabled.
  - Else the call goes to your voicemail if available.
  - Else the call continues to ring (drop has no effect).
- **Hold/Park Return Calls**
  If the call is returning from being held or parked for too long you cannot drop it.

To drop an incoming call:

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

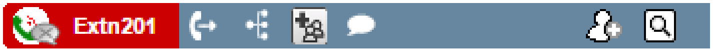
3.8 Pickup a Call

Each one-X Portal user, including you, has an active profile that includes a Call Pickup 116 setting. When this setting is enabled, other one-X Portal 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.

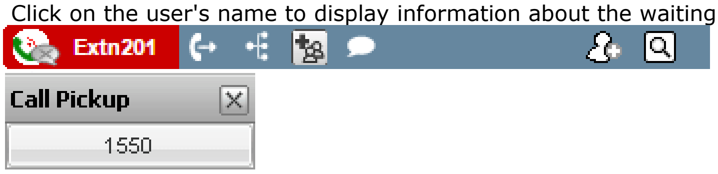
When a user has enabled call pickup, the ☎ icon normally used to indicate they are ringing is also accompanied by their name being shown on a red background.

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 user's name to display information about the waiting call or calls.



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

3.9 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 230 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** 230 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 remains unanswered there. However, that is not always possible.
  - You can switch forwarding on/off and change the destination number using a one-X Portal profile 114.
- If you are enabled to use voicemail, the caller will hear your mailbox greeting. You can switch voicemail on or off using a one-X Portal profile 114.
- 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 91 as a missed call.

For Calls To A Hunt Group of Which You Are a Member

Hunt groups 230 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.

3.10 Ending a Call

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

3.11 Muting a call

You can mute your speech connection to a call. Whilst a call is muted, you can hear the caller but they cannot hear you.

- **Phone Mute Controls**
  The one-X Portal does not reflect the status and use of the mute button on your phone. You should only use your either you phone or one-X Portal to mute and unmute calls.

- **Parked calls**
  Retrieving a parked call cancels any muting that may have previously been applied to that call before it was parked.

- **Held calls**
  If you mute a call and then put it on hold, that muting is canceled when you unhold the call. However, if you mute a call and the other party holds the call, the muting is not canceled when the call is taken off hold.

- **Conference Calls**
  If you are the conference host, you may be able to mute other parties in the conference. See Muting Conference Parties 66.

To mute a call:

- In the **Calls** gadget click **Mute**.

To unmute a call:

- In the **Calls** gadget, click **Unmute**.

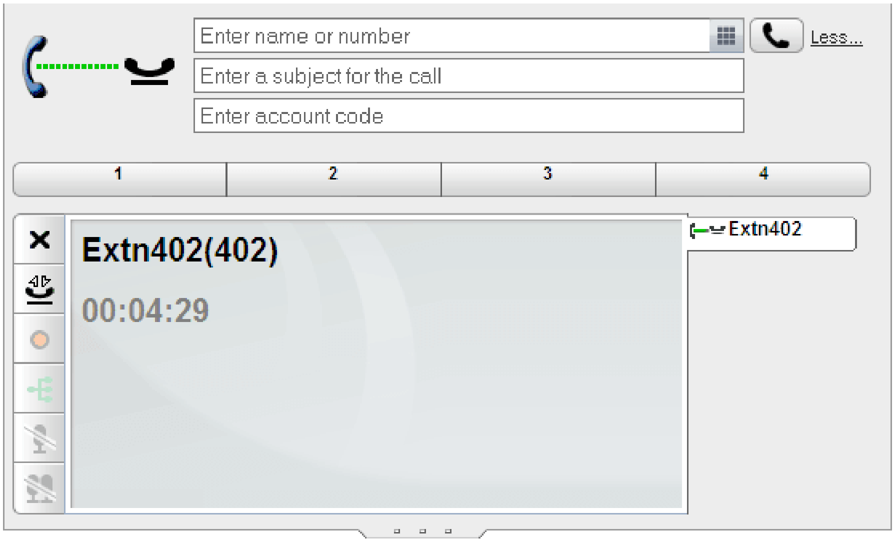
3.12 Holding Calls

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

3.12.1 Holding a Call

To hold 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.

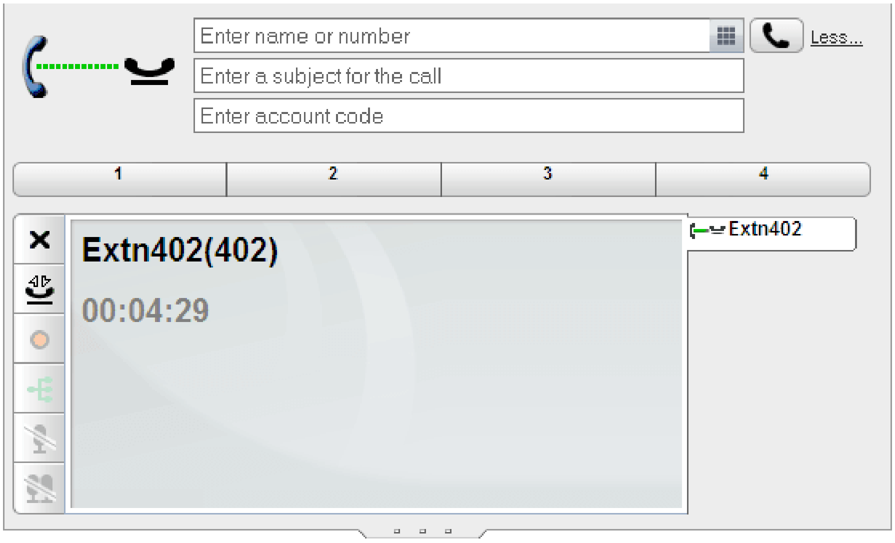
Notes

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.
2. The **Hold Timeout** for all held calls is set by the system administrator 231. 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 230 settings. You cannot drop a hold reminder.
3. If the system administrator has configured you for **Busy on Held**, while you have any held calls, the phone system will treat you as being busy 230 to further incoming calls.

3.12.2 Retrieving a Held Call

To retrieve a held call:

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

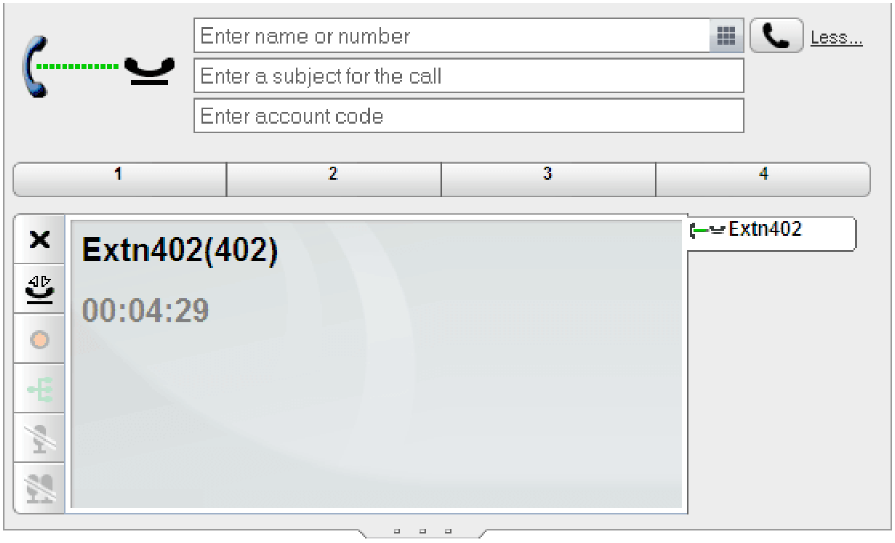


2. Click the retrieve held call button on the left. The call icon changes to a ⟨—⟩ icon.
3. If you were connected to another call it is automatically changed to a held call.

3.12.3 Ending a Held Call

To end a held call:

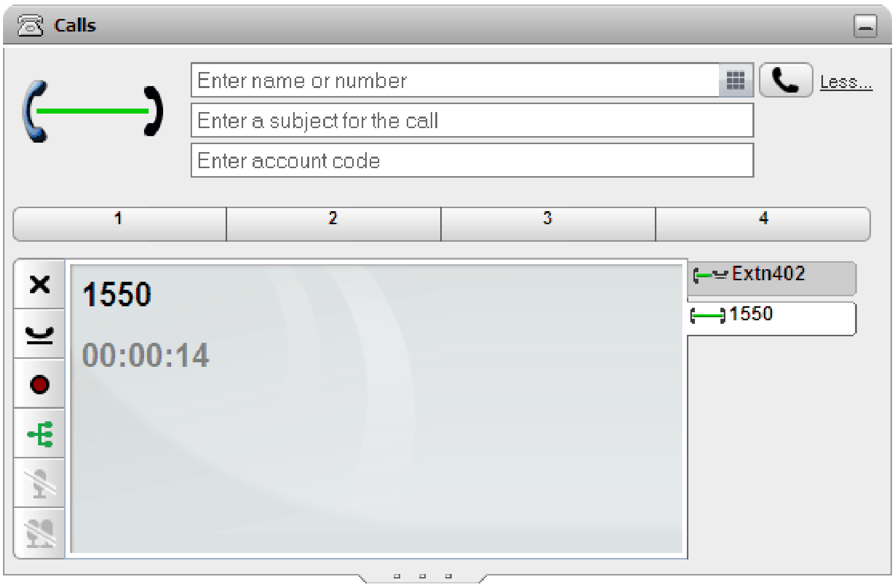
1. Using the ☎ **Calls** gadget on the **Main** tab, select the call tab for the held call. It will display a ⟨⋯⟩ icon.



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

3.13 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 33 (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 230.

Number of Calls

one-X Portal does not limit the number of calls that you can make and receive. While you can only have one call connected at any time, you can have multiple held calls at the same time. However, the phone system 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 231 as appearance buttons 230. 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 230 to any further incoming calls.
  - For outgoing calls, you can use one-X Portal to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.
- **Phones Without Appearance Buttons**
  If the phone you are using does not have appearance buttons, your **Calls Waiting On** setting, as set by your system administrator, controls the number of calls that you can receive.
  - If your **Calls Waiting On** setting is enabled, you can use one-X Portal to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being busy 230. However, using one-X Portal 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 230. However, using one-X Portal you can still make additional outgoing calls.

Notes

1. You can only have one connected call at a time. If you connect to another call (by making a call, answering a call, unpark a call, retrieve a call from hold, etc.), the existing call to which you were connected is automatically put on hold. This is called **Auto Hold**. Your system administrator 231 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.

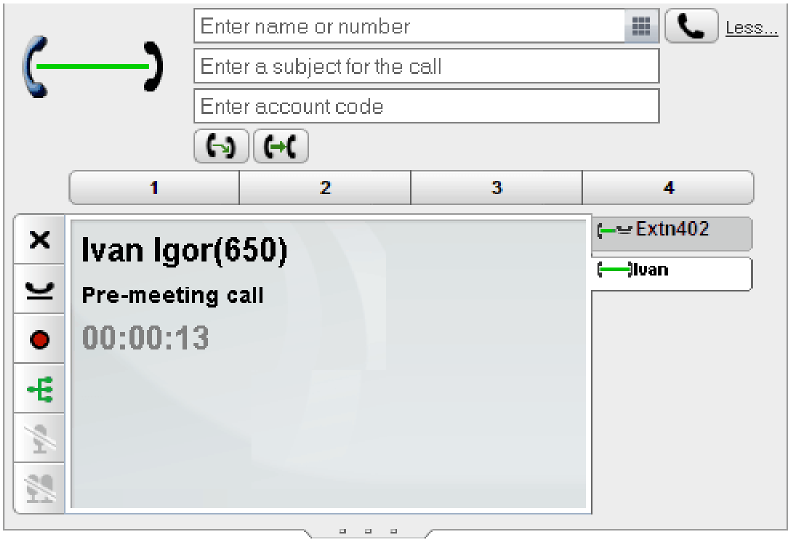
3.14 Recording a Call

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 231 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.



Ivan Igor(650)

Pre-meeting call

00:00:13

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.

3.15 Transferring Calls

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

Unsupervised Transfer	An unsupervised transfer is one where, having dialed the number of the transfer destination, you complete the transfer without waiting for the call to be answered.
Supervised Transfer	A supervised transfer is one where you talk (or try to talk) to the transfer destination before completing the transfer. Your initial call to the transfer destination is called a consultation call or enquiry call. This method of transferring calls allows you to confirm if the transfer target is present and wants to accept the call.
Conference Transfer	You can also transfer a call by starting a conference 71 between all the parties and then leaving the conference.

Notes

1. Your system administrator 231 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.

3.15.1 Transferring Current Calls Together

If you have two calls in progress in the portal; one currently connected and one on hold, you can chose to transfer the calls together.

To transfer two calls together:

1. With two calls in progress in the calls gadget, the currently connected call (↔) details displays a ⇄ transfer icon.

2. To transfer the calls together click the icon.

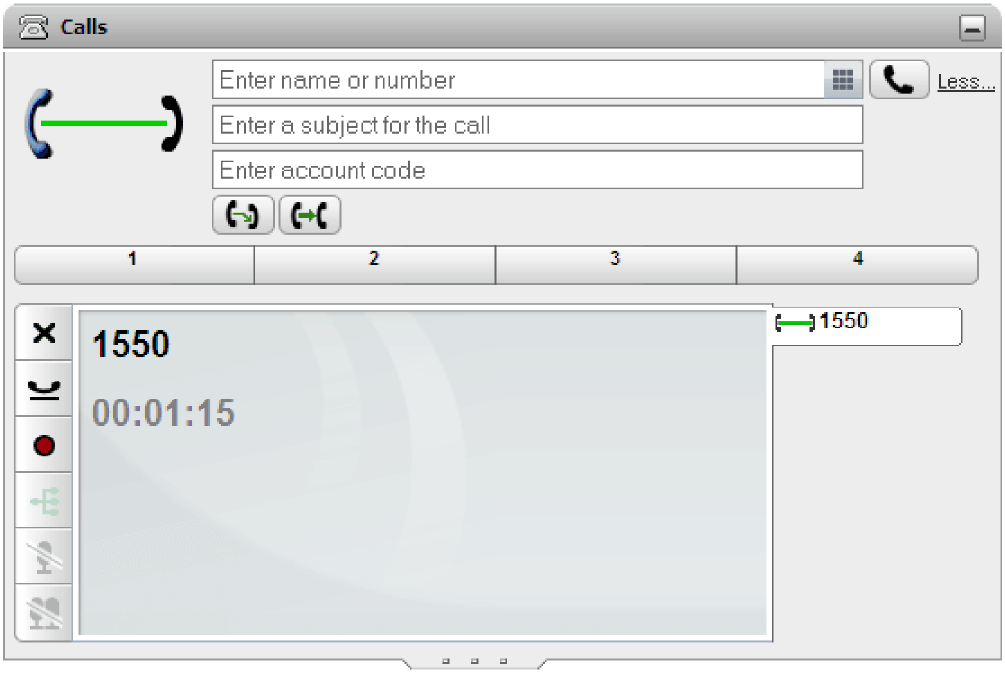
3. The current call is transferred to the held caller and you are no longer connected.

3.15.2 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.

To make an unsupervised transfer:

1. Using the ☎ **Calls** gadget on the **Main** tab, select the call tab for the call you want to transfer. Click the icon 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 button.
   - Alternatively, locate the contact in the directory gadget 103 and, by hovering the cursor over that contact, click on the transfer icon to do an unsupervised transfer to that contact's primary number.
3. The call is transferred.

Notes

1. Your system administrator 231 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.

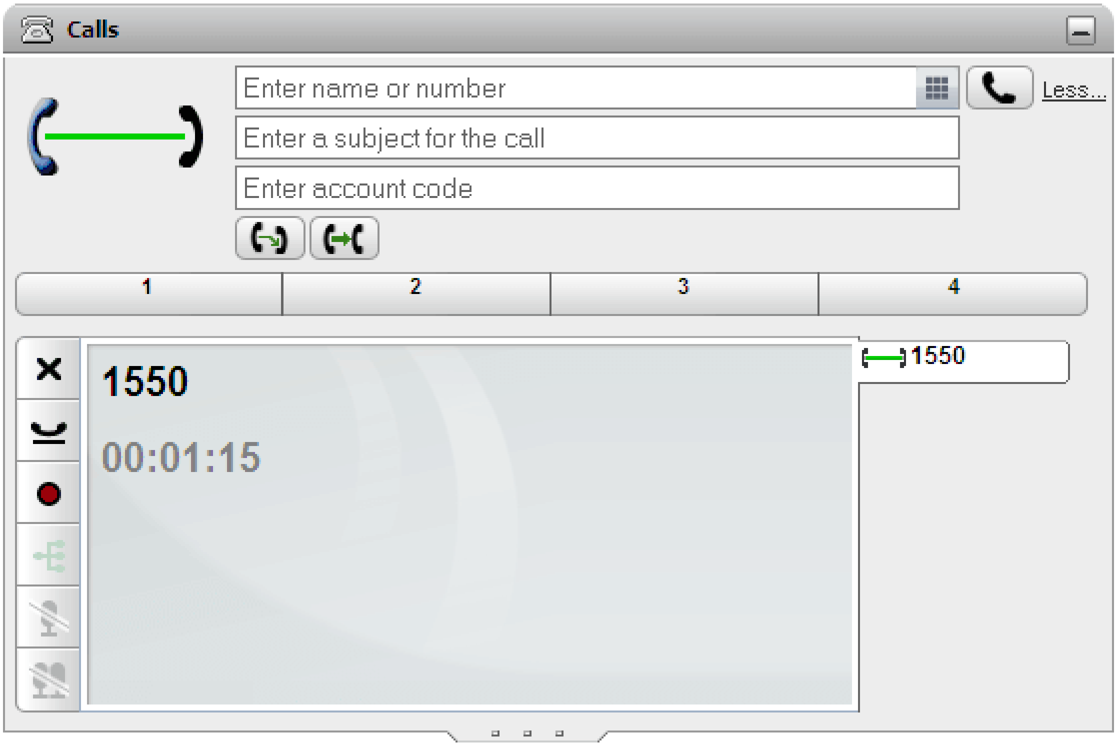
3.15.3 Making a Supervised Transfer

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.

To make an unsupervised transfer:

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 button.
   - Alternatively, Alternatively, locate the contact in the directory gadget 103 and, by hovering the cursor over that contact, click on the consult icon to do an supervised transfer to that contact's primary number.
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 ✕ 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

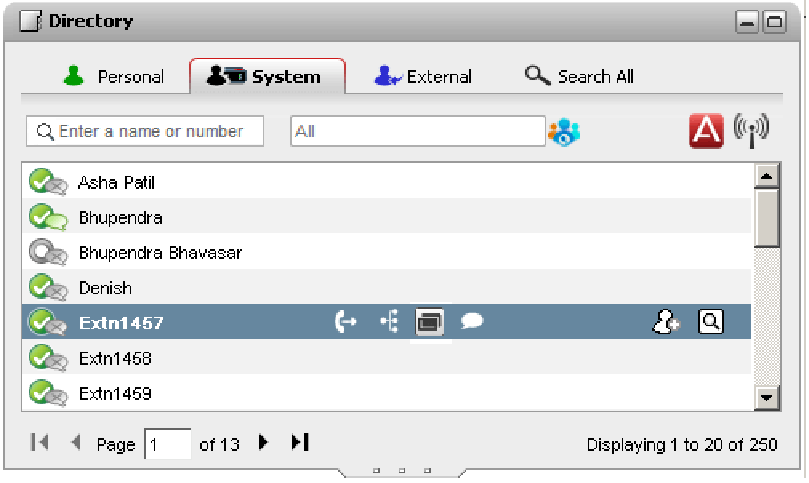
1. Your system administrator 231 can enable a **Transfer Return Time** for you. When set, if a transferred call is not answered within that time, it can recall to you.
2. The ability to transfer an external call to another external number can be restricted by your system administrator.

3.15.4 Transfering Calls Using the Directory

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

To transfer a call using the directory:

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



2. Because you already have a connected call, additional options are shown when your hover the cursor over a directory contact.

   - **Transfer:**
     Use the transfer icon to do a simple unsupervised transfer 47 to the contact's primary number.
   - **Consult:**
     Use the consult icon to start a supervised transfer 48 to the contact's primary number.
   - **Conference:**
     Use the conference icon to conference yourself, the held call and the contact's primary number.
     - **Alternate Numbers:**
       If this icon is displayed, the contact has alternate numbers. You can click the icon and select the call options available for those numbers.

3.16 Parking Calls

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

You can park and unpark a call on a multisite telephony net work 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 231 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 231.

3.16.1 Configuring Your Park Slots

one-X Portal 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.

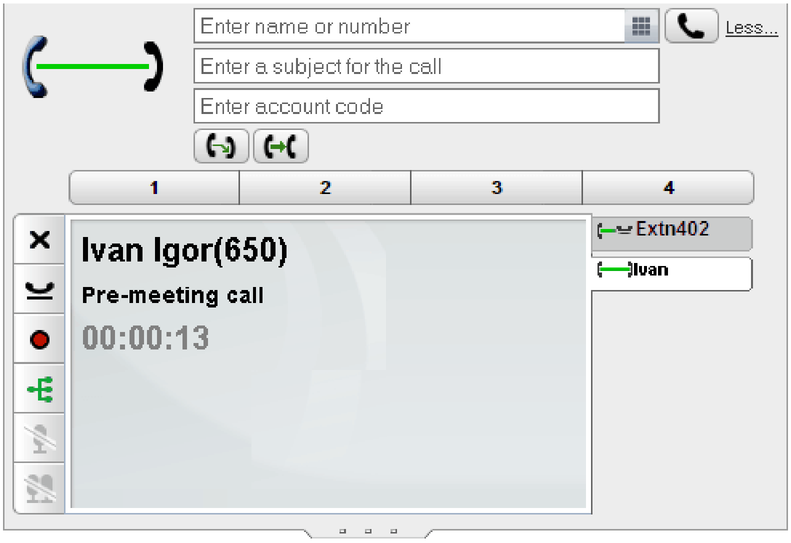
To configure your park slots:

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**.

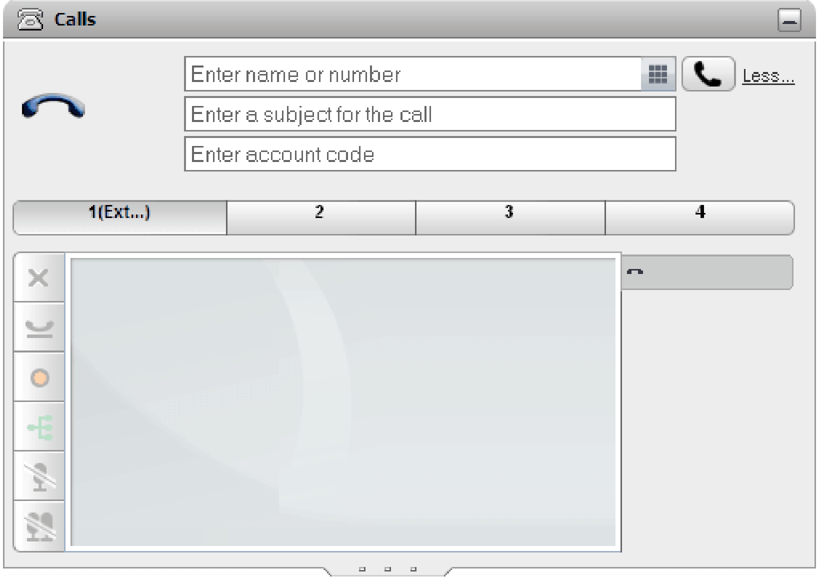
3.16.2 Parking a Call

To park a call:

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



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



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

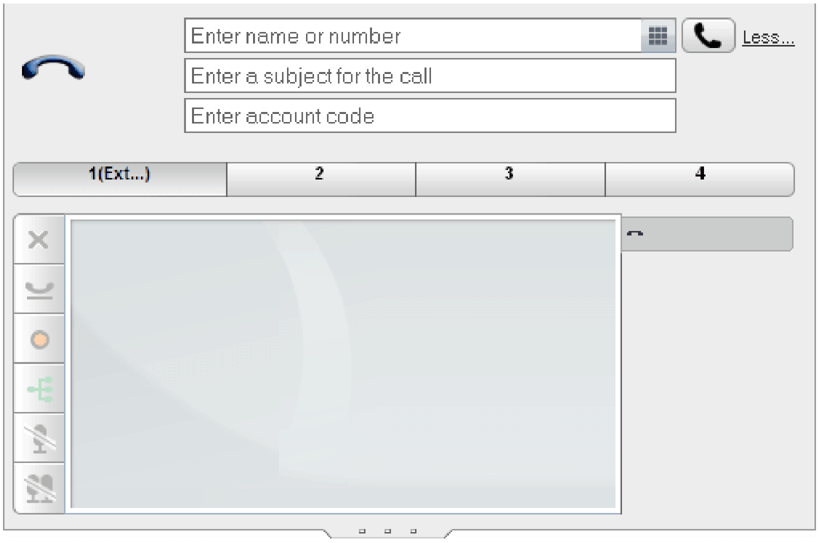
Notes

1. If you park a call and leave it parked too long it will recall to you. The default is to recall after 5 minutes but your system administrator 231 can adjust this. You cannot drop a parked call that recalls your phone.

3.16.3 Unparking a Call

To unpark 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.

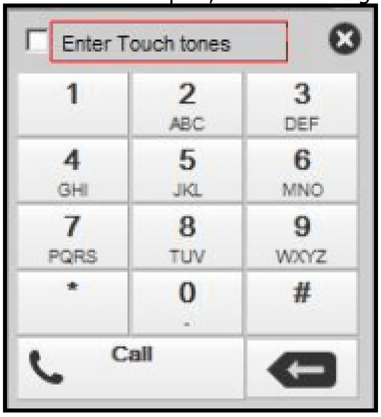
3.17 Dialing Additional Digits

Once a call in connected, you may need to dial addition digits that need to be heard by the far end of the call, for example, when calling an external voicemail system.

- **Note:** You can send DTMF signals only for an active call. You cannot send DTMF signals when you place a call on hold and when the party you are calling is using a SIP telephone.

To dial additional DTMF digits:

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



2. Select the **Enter Touch tones** option. While enabled, any additional digits dialled from the dial pad are sent to the currently active call rather than being used to start a new call.

3. Click the numbers and the characters in the dial pad to send the additional DTMF digits.

To disable the Touch tones option:

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

3.18 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** 147. 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 Available▾ status selector.
2. Select ***Do Not Disturb***.
3. Your status icon will change to ✖ do not disturb.

To switch Do Not Disturb Off:

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

3.18.1 Do Not Disturb Exceptions

Calls from numbers in this list are still be able to ring your phone even when you have **Do Not Disturb** enabled 54. However, they will still see your status as being on 'do not disturb'.

This only applies for calls direct to your extension number' it does not apply for calls to any hunt group 230 of which you are a member.

You can use one-X Portal to add numbers from your Personal and the System directories to your exceptions list. Numbers added in other ways, for example from your phone or by your system administrator, are also shown and can be deleted using one-X Portal.

To configure your DND exceptions:

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 231 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 matching numbers in the exceptions list according to the primary phone 231 numbers of your directory contacts. If the directory contact no longer matches the number in the exceptions list, no name is displayed.
2. one-X Portal does not currently allow the entry of the wildcards *N* and *X*, where *N* represents any numbers and *X* represents any single digit. For example, to allow all numbers from 5551000 to 5551099, add the exception number as either *55510XX* or *55510N*. These can be entered by your system administrator 231.

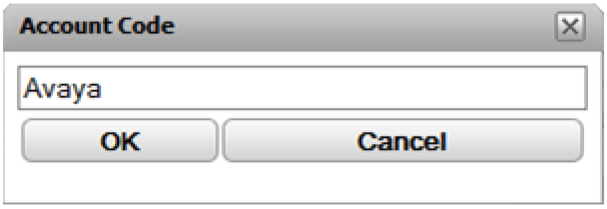
3.19 Adding an Account Code

A call may have an account code associated with it. That account code is then included in the call log output by the telephone system at the end of the call and may be used for purposes such as call billing.

The one-X Portal allows your to add an account code when you make or transfer a call. It displays the account code currently associated with a call in the call details 29. Using the portal you can add an account code to the currently connected call or change the calls existing account code.

To add an account code to a call:

1. In the call details display, click the icon.
2. Enter the account code for the call.



Avaya

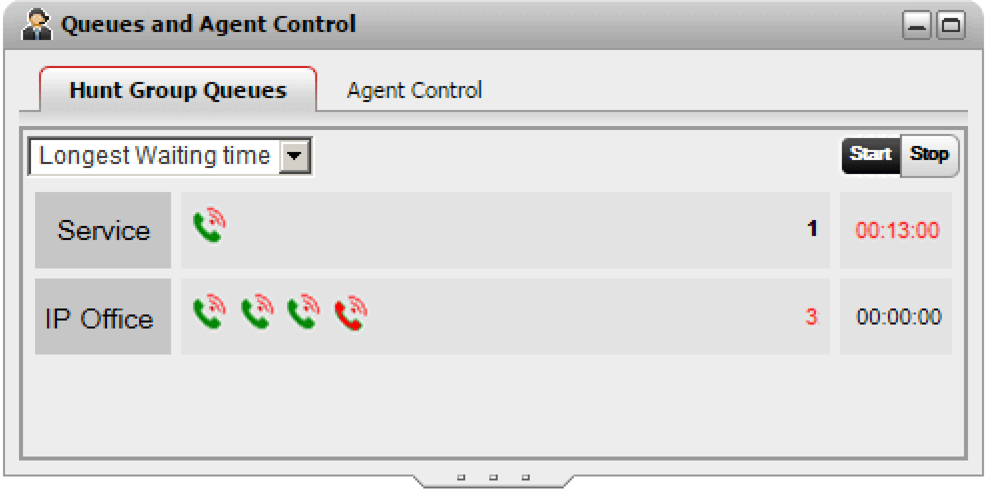
3. Click **OK**.

- If the account does not match a valid code in the telephone system, the menu displays a **!** symbol. Either click **Cancel** or enter a valid account code.
- If the account code is valid, it is added to the call details.

3.20 Viewing Hunt Group Queues

Using the **Hunt Group Queues** tab of the **Queues and Agent Control** gadget you can monitor up to 5 different hunt groups queues. To do this you must first configure the hunt groups to monitor, see Configuring Hunt Group Queues 146.

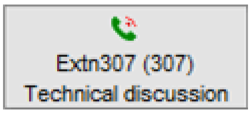
For each queue you can configure alarms levels based on the number of queue calls and the time of the longest waiting calls. You can then use the queues to answer a call in that queue. The gadget also allows you to filter which queued calls are displayed.



The queue display for each hunt group displays an icon for every queued call for that group. On the right-hand side of the gadget, the number of queued calls is displayed and the waiting time of the longest waiting call.

Maximized Queues Display

If the **Queues and Agent Control** gadget is maximized 23 by clicking on the ▭ icon, each queued call is enlarged to also include call information.



Queue Alarms Display

For each hunt group that you configure to monitor 146, you can also set two alarms thresholds.

- **Number of Calls in Queue**
  This alarms triggers when exceeded by the number of calls queued waiting to be answered by the hunt group. When triggered, the icons for the extra queued change from green to red. and the number of waiting calls also changes to red.
- **Longest Waiting Time**
  This alarm triggers when exceeded by the time of the longest waiting call in the hunt groups queue. When triggered, the longest waiting time shown for the queue changes to red.

To start queue monitoring:

1. Click the **Start** button.

To stop queue monitoring:

1. Click the **Stop** button.

To view call details:

1. Hover the cursor over the waiting call icon. Details of the call (name, number and subject) are displayed if available.

To answer a queued call:

1. Click on the icon for the queued calls. The first call in the queue is answered.

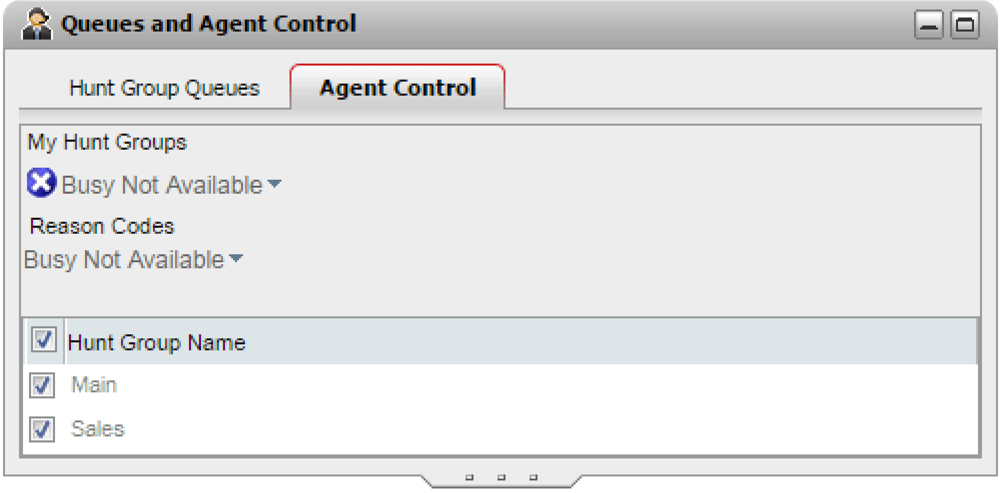
To filter the queued calls:

You can use the filter drop-down to filter which calls are displayed for each queue. The number of queued calls and the time of the longest waiting call are adjusted to reflect just the calls shown.

1. Click on the drop-down list in the top-left of the gadget and select the filtering that should be applied to the queued calls display.
    - **Longest Waiting Time**:
      View details of the all the calls waiting.
    - **Caller name**
      Enter a set of comma separated values which are then used to filter the displayed calls using to matching caller names.
    - **Subject**:
      Enter a set of comma separated values to filter the calls displayed by the subject that has been associated with the call.
    - **Call priority**:
      Use the drop-down menu to filter calls by priority. The priority is a value assigned to calls by the telephone system.
2. Click the 🔍 icon to apply the filter (except for **Longest Waiting** which is applied immediately). Note that the icon is only enabled if there are calls matching the criteria specified.

3.21 Controlling Your Group Status

You can use **Agent Control** tab of the **Queues and Agent Control** gadget to see your current membership status for hunt groups. If allowed by your system administrator you can also change that status.



My Hunt Groups
Busy Not Available

Reason Codes
Busy Not Available

☑ Hunt Group Name
☑ Main
☑ Sales

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 groups 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 itself.

- ***After Call Work***
  This state is used after a group call 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 group calls. You will be prompted to select a **Reason Code** from the set of codes available on the telephone system.

Enabling/Disabling Your Membership of a Group

The **My Hunt Groups** section displays the group of which you are a member. You can use the list to enable or disable your current membership of some or all groups. You only receive calls for queues for which your membership is currently enabled.

Your telephone system administrator configures for which groups you can change your membership state, by default it is none. The hunt group name is grayed out if you cannot control your membership status for that hunt group.

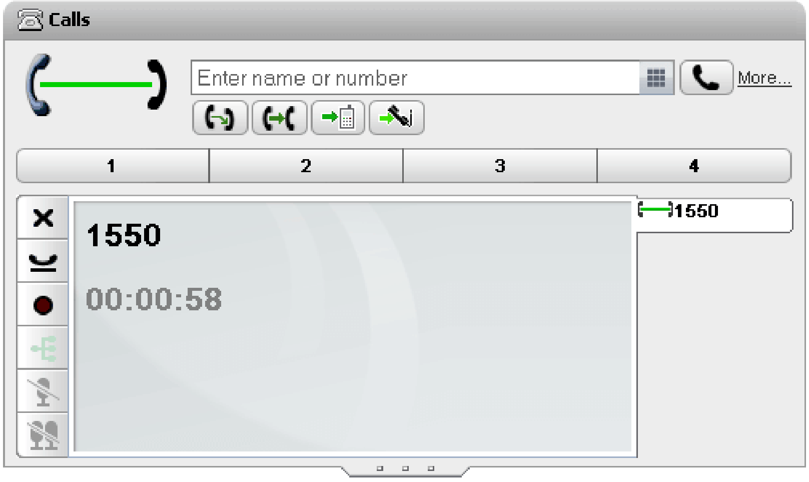
The checkbox at the top of the list enables/disables your membership for all groups for which you are allowed to change your membership.

3.22 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 profile 118. 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:



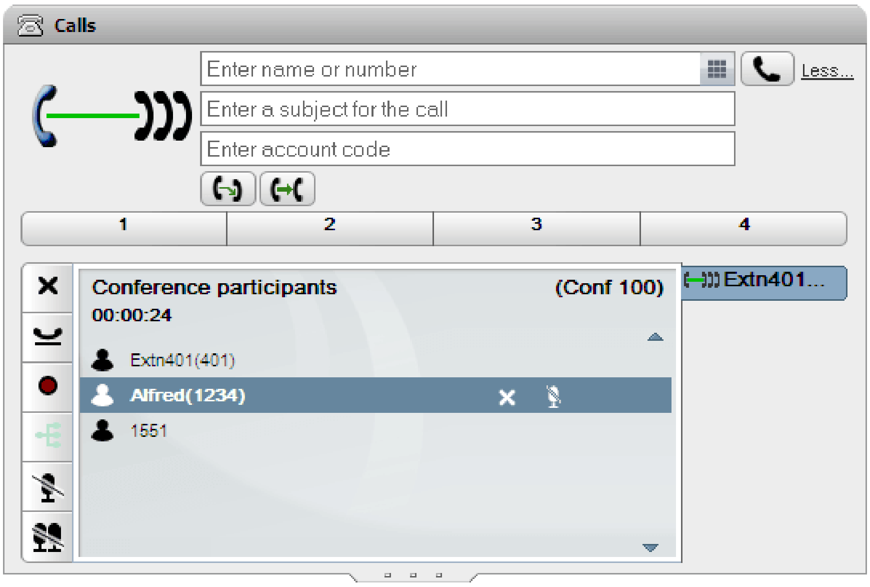
- **Transfer to Twin**
  When you have answered a call on your normal extension, you can transfer it to your twinned number by clicking this button. The phone system will attempt to transfer the call to that number. If not answered the call will return, to your normal extension. It also returns if answered 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 to start and manage conference calls. The conference parties are listed in the ☎ **Calls** gadget.



Conference participants (Conf 100)
00:00:24
Extn401(401)
Alfred(1234)
1551

Notes

1. The maximum number of conferences and participants in any particular conference depends on the total resources of the telephone system and the number of conferences already in progress. It also is limited by other features, for example call recording also uses 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. If you are involved in more than one conference, each conference has a separate tab. The conference with the most recent status change is automatically brought to the front.

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4.1 Conference Types

There a several types of conference. The use of some controls and features depends on the type of conference:

Type	Description
Ad Hoc Conference	These are a simple impromptu conferences started by making or answering a normal call and then manually adding another party or parties to the call to make it into a conference. The person who starts the conference by adding the other party to the call is the conference host. Ad hoc conferences cannot be locked and do not indicate the loudest speaker.
Meet Me Conference	This is a conference that uses a conference bridge number. You and other parties can join the conference by various methods setup by the system administrator. However, no one can hear and talk to each other, ie. the conference does not start, until the owner of the bridge number also joins the conference.
Scheduled Conference	These are the same as meet me conferences. Using the one-X Portal, you can schedule future conferences 76 and send invitations to the other parties. You can also view the conferences to which you have been invited.
Web Collaboration	A meet me conference is an audio conference call. In parallel with a meet me conference, the telephone system may also provide a web collaboration session where the conference parties can share documents, application windows or their PC desktop.

4.2 The Conference Host

The conference host is able to perform special functions such as muting or dropping other conference parties. The conference host is shown at the top of the call details in the **Calls** gadget.

- For an ad hoc conferences, the conference host is the person who started the conference.
- For a meet me conference, the conference host is the owner of the conference bridge number.

4.3 Search a Conference

Whilst the portal conference can support conferences up to the maximum number of parties supported by your telephone system, it can only display 20 conference parties at a time. Therefore, for large conferences, additional controls appear at the bottom of the call details windows that allow you to page through the conference parties.

In addition, a search box appears at the top of the call details window. You can use this to search for the page on which the required party appears.

4.4 Conference Call Controls

When you have a conference call in progress, the conference call tab displays a range of controls. Some depend on whether you are the conference host 230 or just a normal conference member.

Conference Buttons

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

Icon	Action	Description
✕	**Drop Call**	For a currently connected call, pressing ✕ disconnects the call.
●	**Record Call**	Start recording the conference. All the members of the conference may hear a recording warning and, if so, that warning repeats any time any other party joins the conference.
☐	**Stop Recording**	Stop recording the conference.
	Hold Call	Puts the call on hold.
	Retrieve Held Call	Take a call back from hold.
	Mute	Mute your connection to the conference.
	Unmute	Unmute your connection to the conference.

Additional Conference Host Buttons

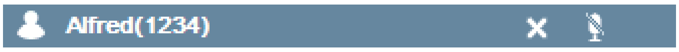
If you are the conference host, the following additional controls are also available in the top-right of the call details.

Icon	Action	Description
	Mute All	This control allows you to mute all the other conference parties.
	Unmute All	This control allows you to unmute all the other conference parties.
	Drop All	This controls drops all the other participants from the conference call.
🔒	**Lock Conference**	This control can lock/unlock the conference. While locked, no other parties can join or rejoin the conference. This control is only available for meet me conferences.

Using the Conference Party Icons

If you are the conference host 230, by clicking on the icons of an individual party in the conference, you can perform actions on that party.

When you hover the cursor over a participant in the conference, the system displays a list of actions that you can perform.



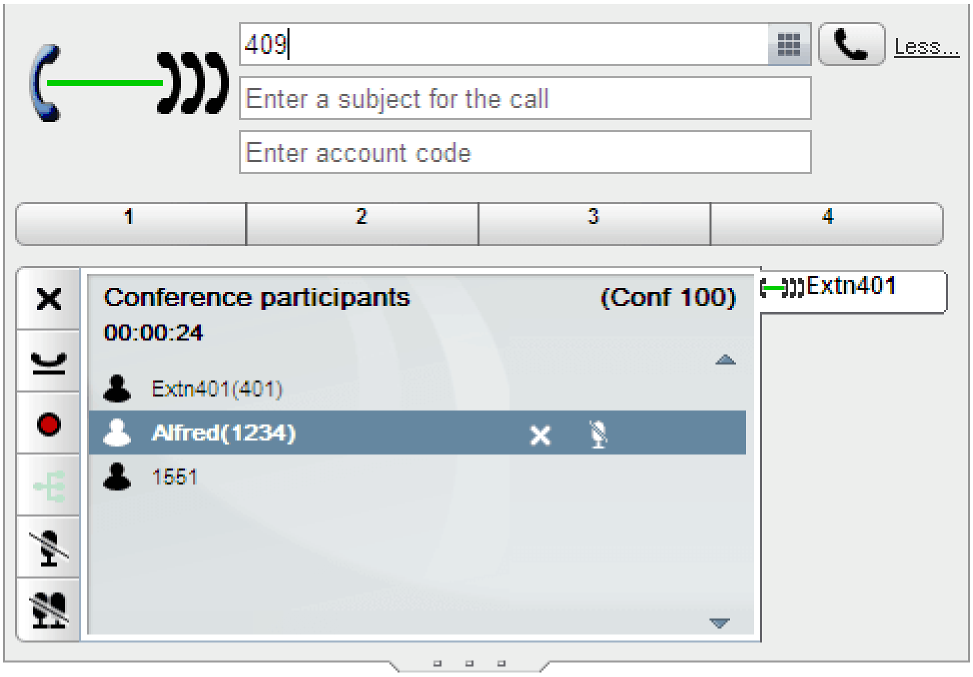
- To drop the participant from the conference, click ✕ **Drop**. The indicates that the participants are no longer in the conference.
- To place the participant in the conference on mute, click **Mute**. The indicates that the participant is placed on mute.
- To place a participant in the conference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

4.5 Adding Another Party to a Conference

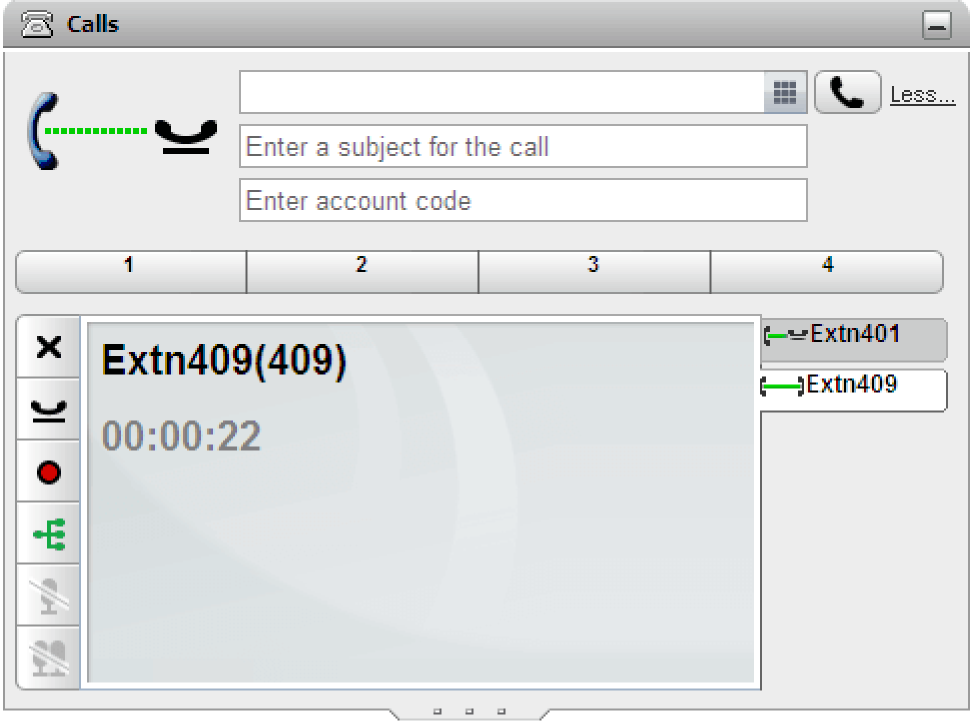
You can add an additional party to the conference.

To add another party to a 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

If you are the conference host ⇨230, you can mute other parties in the conference, otherwise you can only mute yourself.

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 the individual telephones.

To mute yourself:

1. Click the **Mute** button on the conference tab. Your icon changes to show that you are muted.

To mute another party in the conference:

1. In the **Calls** gadget, hover your cursor over the participant that you want to mute. A number of call functions icons appear next to the parties name.
2. Click **Mute**. The participants icon changes to to indicate that they are muted.

To unmute another party in the conference:

1. In the **Calls** gadget, hover your cursor over the participant that you want to mute. A number of call functions icons appear next to the parties name.
2. Click **Unmute**.

To mute all other parties in the conference:

1. In the **Calls** gadget, click **Mute All**.

To unmute all other parties in the conference:

1. In the **Calls** gadget, click **Mute All**.

4.7 Dropping Participants From a Conference

If you are the conference host ⇨230, you can drop other parties from a conference, otherwise you can only drop yourself.

To drop a party from the conference:

1. In the **Calls** gadget, hover your cursor over the participant that you want to drop. A number of call functions icons appear next to the parties name.
2. Click ✖ **Drop**. The participants icon changes to to indicate that the participants is no longer in the conference.

To drop all other parties:

1. In the **Calls** gadget, click **Drop All**.

To drop yourself from the conference:

1. In the **Calls** gadget, click ✖ **Drop**.

4.8 Parking a Conference Call

The conference host ⇨230 can park a conference. Any participant can unpark a parked conference, however the conference host still retains the ownership privileges.

To park a conference call:

1. In the **Calls** gadget, select the park slot where you want to park the call.

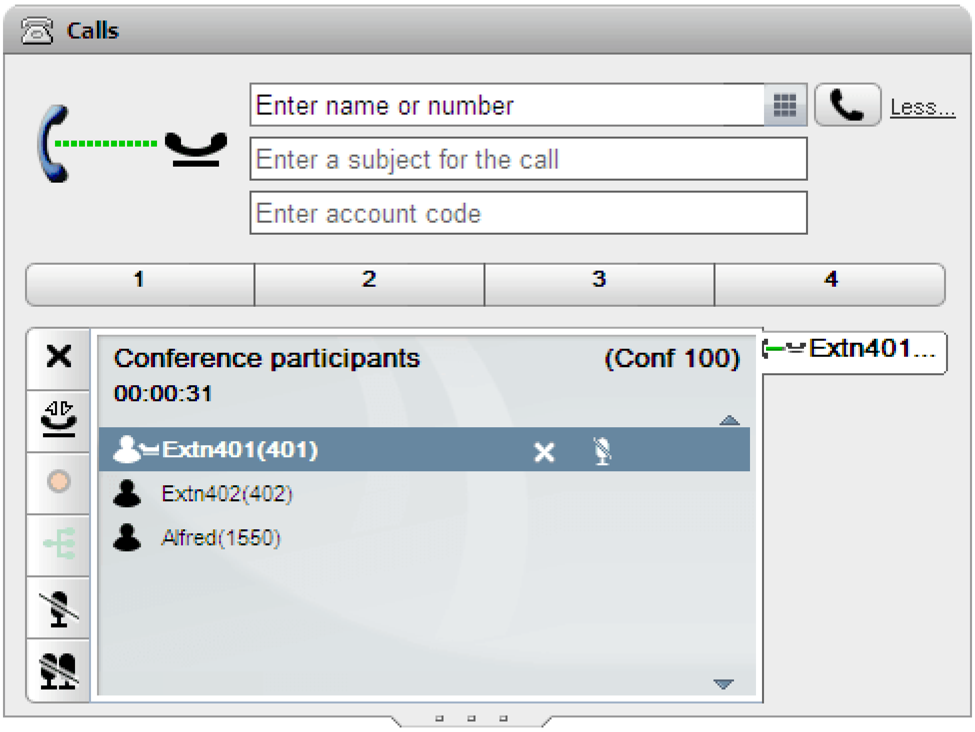
To unpark a conference call:

1. In the **Calls** gadget, select the park slot where you parked the call and then click the button.

4.9 Holding a Conference

You can click to put a conference call on hold. The other parties in the conference are still able to talk to each other without you. Your status in the conference display is updated to show that you are on hold.

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



Conference participants (Conf 100)
00:00:31
Extn401(401)
Extn402(402)
Alfred(1550)

To return to the conference click on **Retrieve**.

4.10 Ad Hoc Conferences

These are a simple impromptu conferences started by making or answering a normal call and then manually adding another party or parties to the call to make it into a conference. The person who starts the conference by adding the other party to the call is the conference host. Ad hoc conferences cannot be locked and do not indicate the loudest speaker.

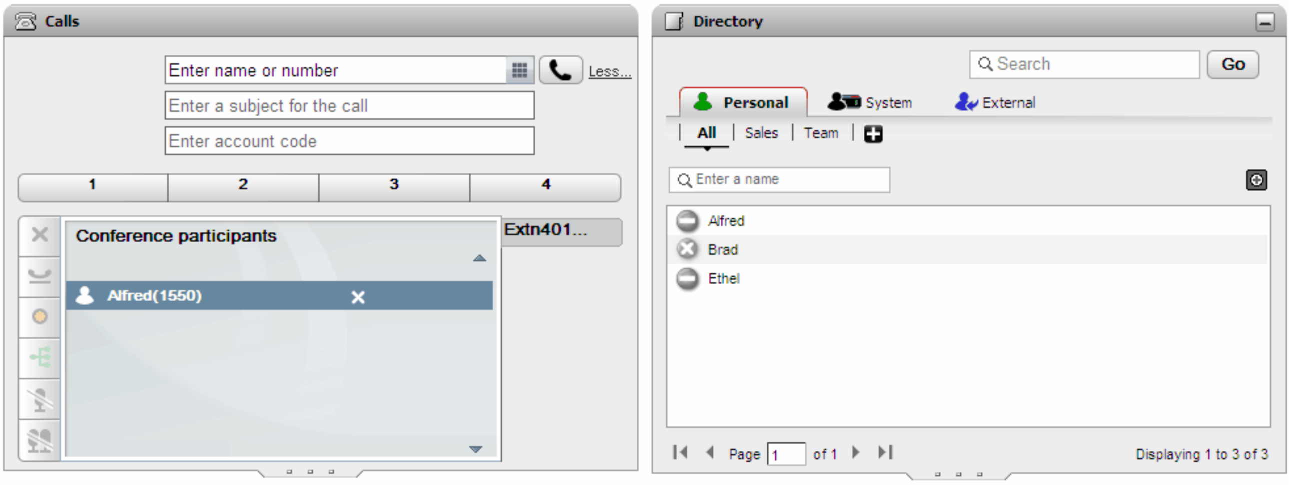
4.10.1 Starting an Ad Hoc Conference

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

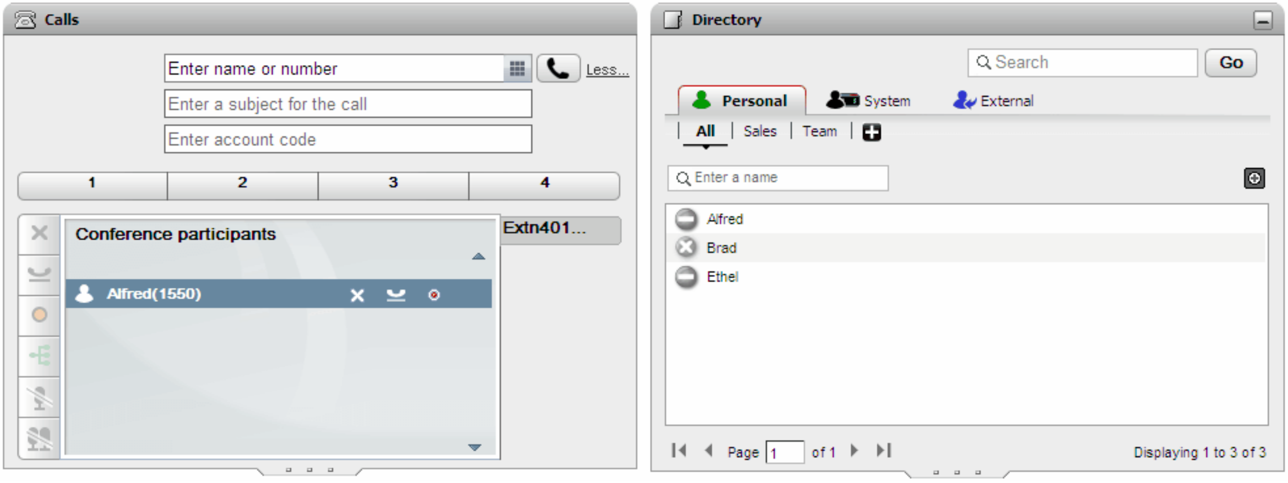
To start an ad-hoc conference:

1. In the directory gadget, locate and hover over the contact you want to add to start a conference with.

2. Click on the icon. This starts a call to that contact using the conference information display rather than the normal call information display.

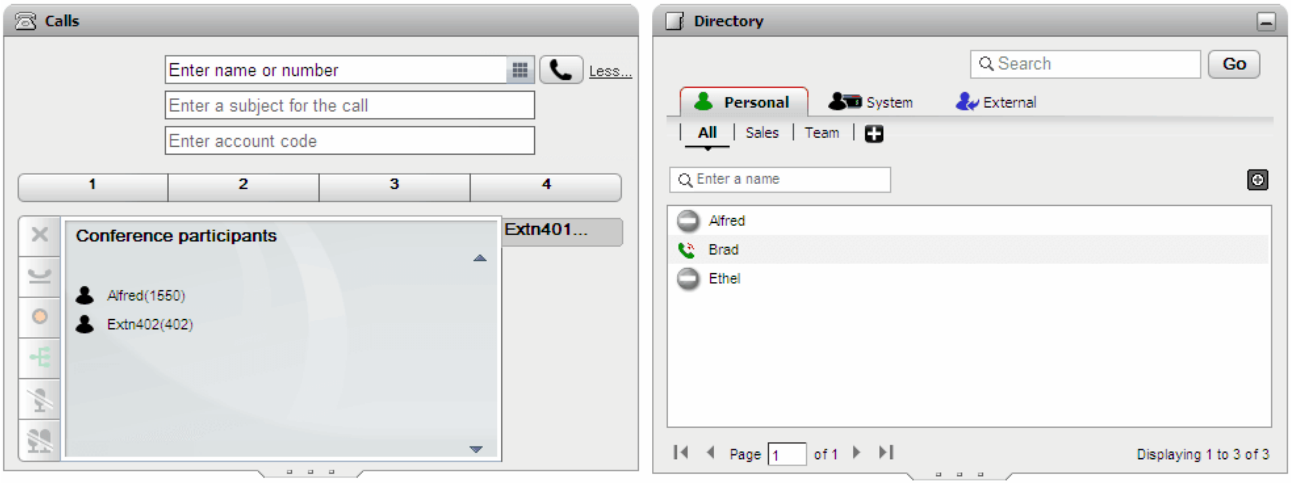


3. When the party answers, inform them that you want to include them in a conference. If they do not answer or do not want to be included in the conference, hover over them in the calls gadget and click on the ✕ drop icon shown. The icons also allow you to hold the call or record the call.

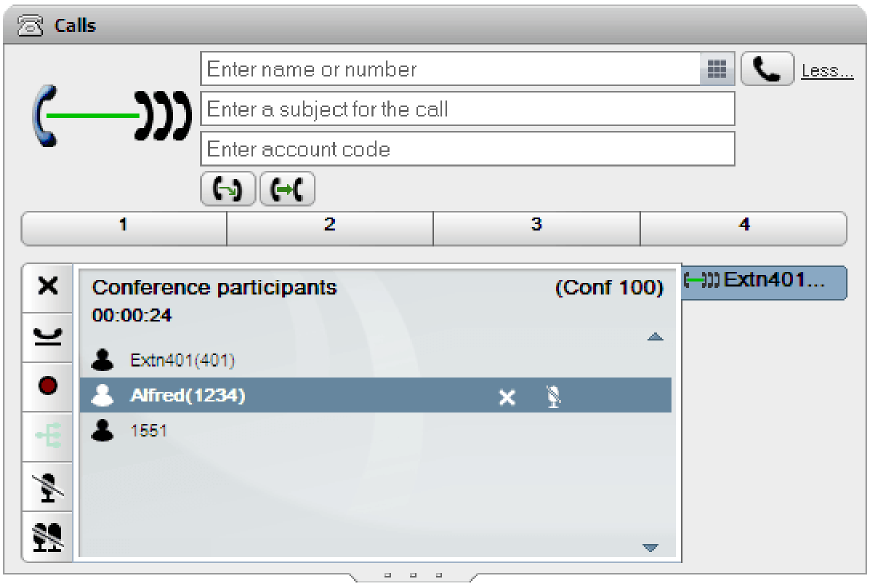


4. Locate and hover over the next contact you want to add to the conference.

5. Click on the icon. The previous party added is put on hold while you hear the progress of the call to the new contact.



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

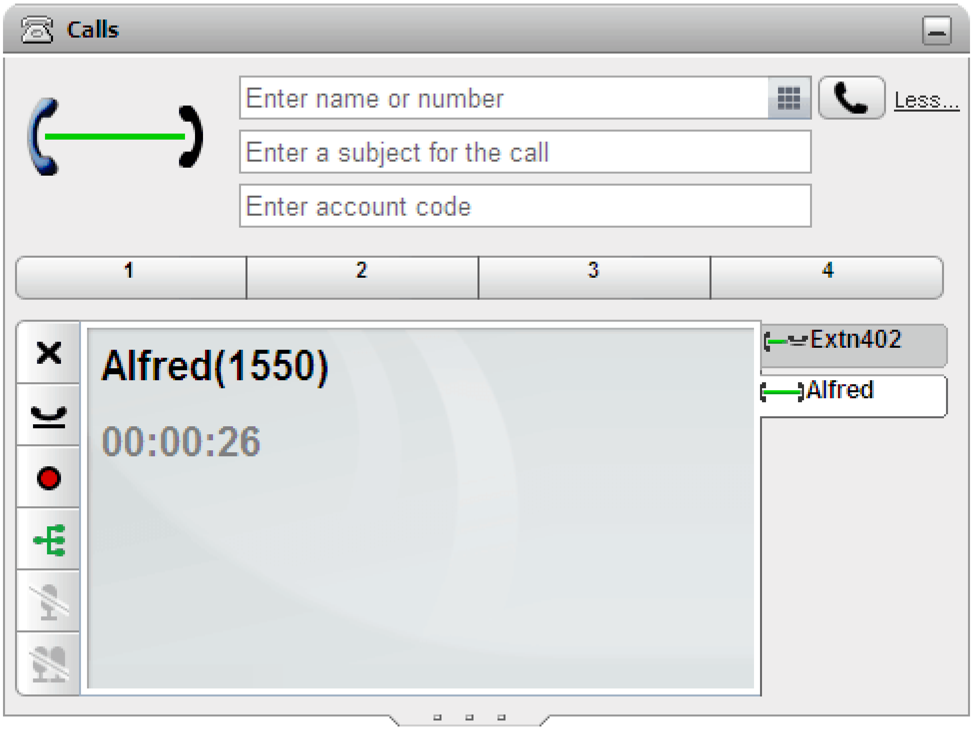


4.10.2 Turning Held Calls into an Ad Hoc Conference

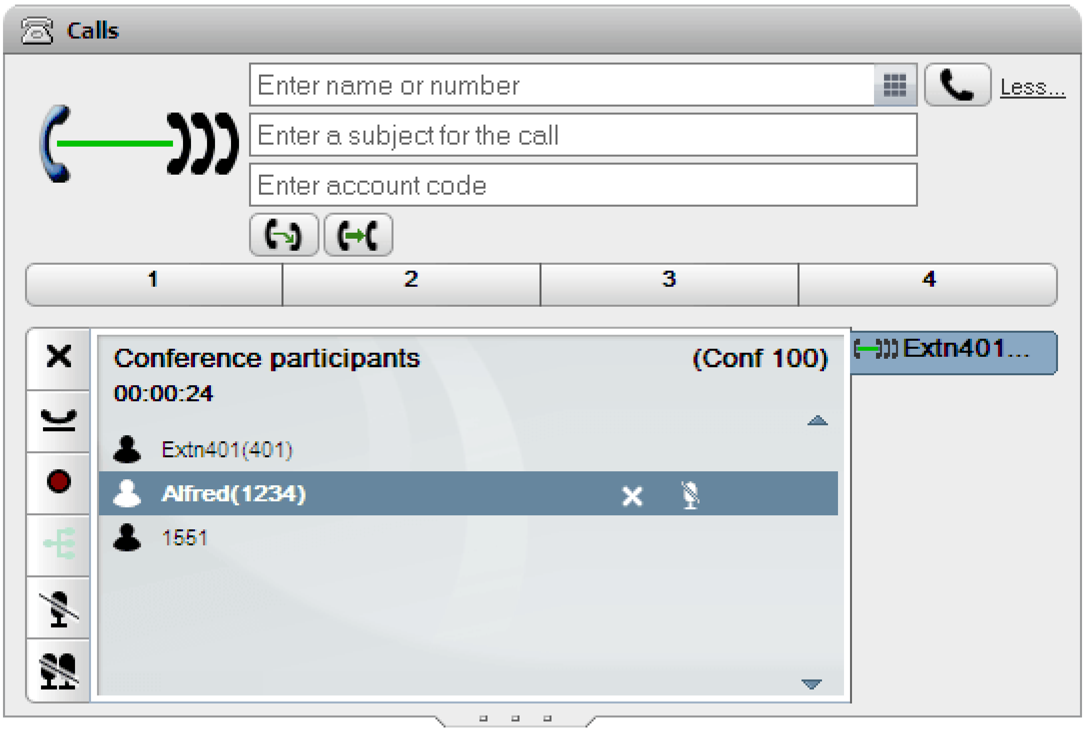
If you have several held calls or held calls plus a connected call, you can turn them into an ad hoc conference.

To turn your held calls into an ad hoc conference:

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.



4.11 Meet Me Conferences

This is a conference that uses a conference bridge number. You and other parties can join the conference by various methods setup by the system administrator. However, no one can hear and talk to each other, ie. the conference does not start, until the owner of the bridge number also joins the conference.

4.11.1 Joining Your Own Meet Me Conference

You can use the one-X Portal to directly join your personal meet me conference.

To join your own meet me conference:

1. To start your own meet me conference, click the icon at the top of the one-X Portal screen.
    - If your system also supports web collaboration, you can also click the icon to join the parallel web collaboration session.

4.11.2 Joining Other Meet Me Conferences

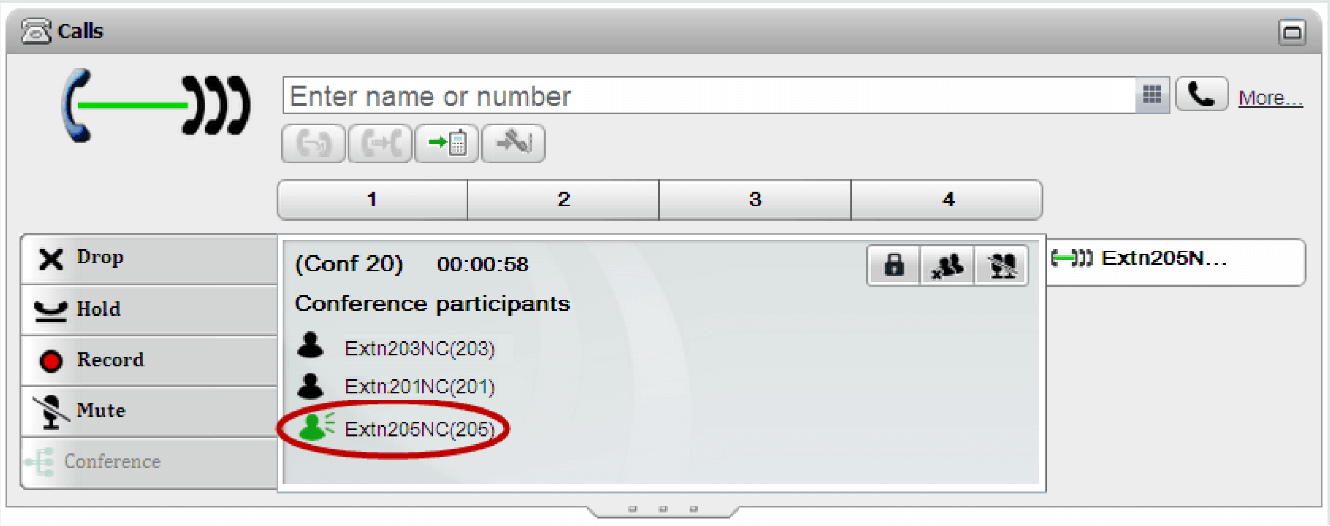
The methods by which you and other users can join meet me conferences depends on your system administrator. They may configure special numbers that you can dial for each particular conference or to be prompted to enter the conference number.

However, if your system supports the **Call/Conference Scheduling** gadget, you can use its meetings view 82 to join any meet me conference you scheduled or to which you have been invited.

To do this, in the **Meetings View**, locate the meeting and click the icon. If the meeting includes a web collaboration session, you can also click on the icon to join the web collaboration session.

4.11.3 Conference Speaker Recognition

For meet me conferences of more than 3 participants, the one-X Portal indicates the current loudest speaker using a a green icon.



4.11.4 Adding a Contact to Your Meet Me Conference

You can use the **Directory** gadget to add other parties to your meet me conference.

To add a directory contact to a meet me conference:

1. In the **Directory** gadget, locate the contact you want to add.
2. Hover your cursor over the contact and click on the **Dial to my bridge** icon.
3. The system adds the contact to your *Meet Me* conference when the contact answers the call.

4.11.5 Start a Group Conference

For groups of which you are a member, you can initiate a meet me conference with all the group members.

To initiate a group conference:

1. In the **System** tab of the **Directory** gadget, locate the group.
2. Hover your cursor over the group and click the icon.
3. The system starts a meet me conference for you and the group members.

4.11.6 Configuring Your Conference Bridge Details

Meet me conferences that you start use your personal bridge number. Currently this is fixed to match your extension number.

To configure your conference bridge settings:

1. In the **Configure** tab, select **Telephony**.
2. In the **Bridge Configuration** section, set the meet me conference bridge details that you want to use:
   - **Bridge Number**
     This is your personal conference bridge number for meet me conferences. It is set to match your extension and currently cannot be changed.
   - **Audio Conference Pin**
     This is your conference PIN number set in the telephone system and needed to enter your conference. By default, when scheduling a conference this value is also set as the host and participant code for your conference.
3. Click **Save**.

4.11.7 Locking a Meet Me conference

If you are the conference host 230, you can lock and unlock a meet me conference. Whilst locked, no participants can join or rejoin the conference.

- **Note**: A locked conference is automatically unlocked if the conference host 230 exits the conference.

To lock the conference:

1. In the **Calls** gadget, click **Lock Conference**.

To unlock the conference:

1. In the **Calls** gadget, click **Unlock Conference**.

4.12 Web Collaboration

A meet me conference is an audio conference call. In parallel with a meet me conference, the telephone system may also provide a web collaboration session where the conference parties can share documents, application windows or their PC desktop.

- **Availability**
  These features may require configuration by your system administrator before they are available. Contact your system administrator for details.
  - Web collaboration is only available to users configured as **Office Worker**, **Teleworker** or **Power User** profiles by the system administrator.

4.12.1 Starting Your Own Web Collaboration Session

You can use the one-X Portal to join your own web collaboration session. Since you have already logged into the portal, you are not asked to login to the web collaboration.

To start your own web collaboration session:

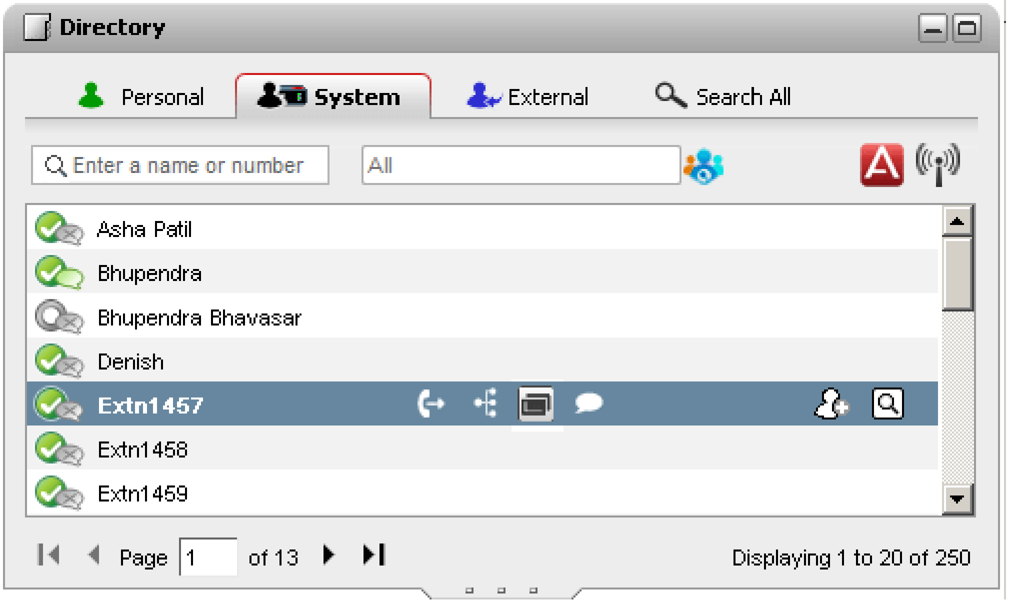
1. Click on the the icon at the top of the one-X Portal screen.
   - You can also click the icon to join your personal meet me conference if you have not already joined the audio conference.

4.12.2 Join a Web Collaboration Session from the Directory

You can use the directory to join another user's web collaboration session. Since you have already logged into the portal, you are not asked to login to the web collaboration session.

To join another user's web collaboration session:

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 your cursor over the other user's entry in the directory. Directory icons 98 for the directory functions you can perform are displayed.



4. To open a browser window for the user's web collaboration, click the icon.

4.12.3 Manual Access

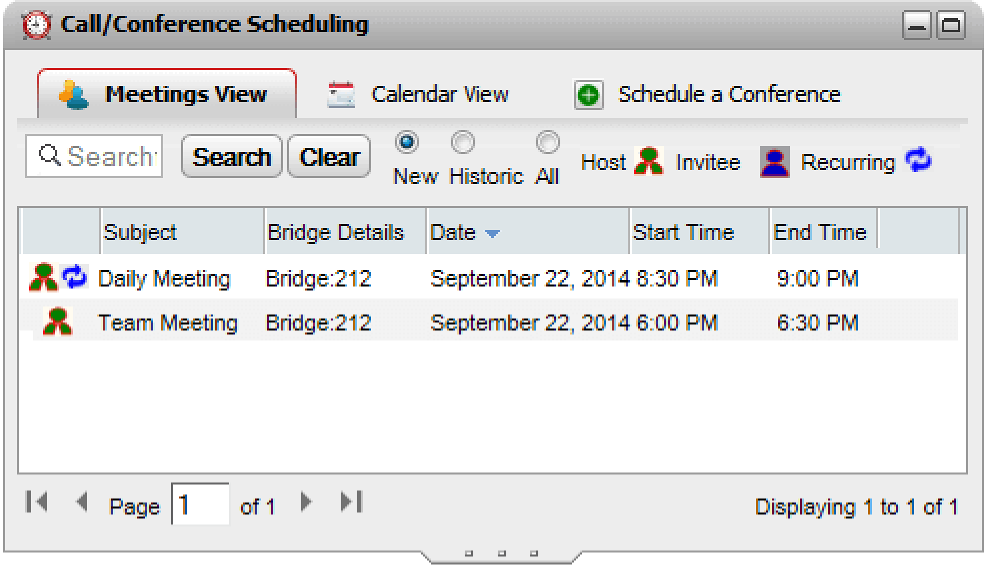
While you can access web collaboration directly using the icon, occasionally you may need to access it manually. You can do this by entering the correct address in your browser.

To open web collaboration using a browser:

1. In your browser, enter **https://<*server*>:9443/meeting** where <server> is the IP address or domain name of your one-X Portal server.
2. Select **Login as conference owner** and enter your name and password.
3. Click **Login**.
4. You can now:
   - **Access your own conference:** Click **Conference**.
   - **Manage your library of documents:** Click **Library**.
   - **See your conference reports:** Click **Reports**.
   - **Enter another users conference:** Enter their extension number and click **Enter**.

4.13 Conference Scheduling

In addition to the traditional conference controls, one-X Portal can also provide options for scheduling conferences.



	Subject	Bridge Details	Date	Start Time	End Time
	Daily Meeting	Bridge:212	September 22, 2014 8:30 PM		9:00 PM
	Team Meeting	Bridge:212	September 22, 2014 6:00 PM		6:30 PM

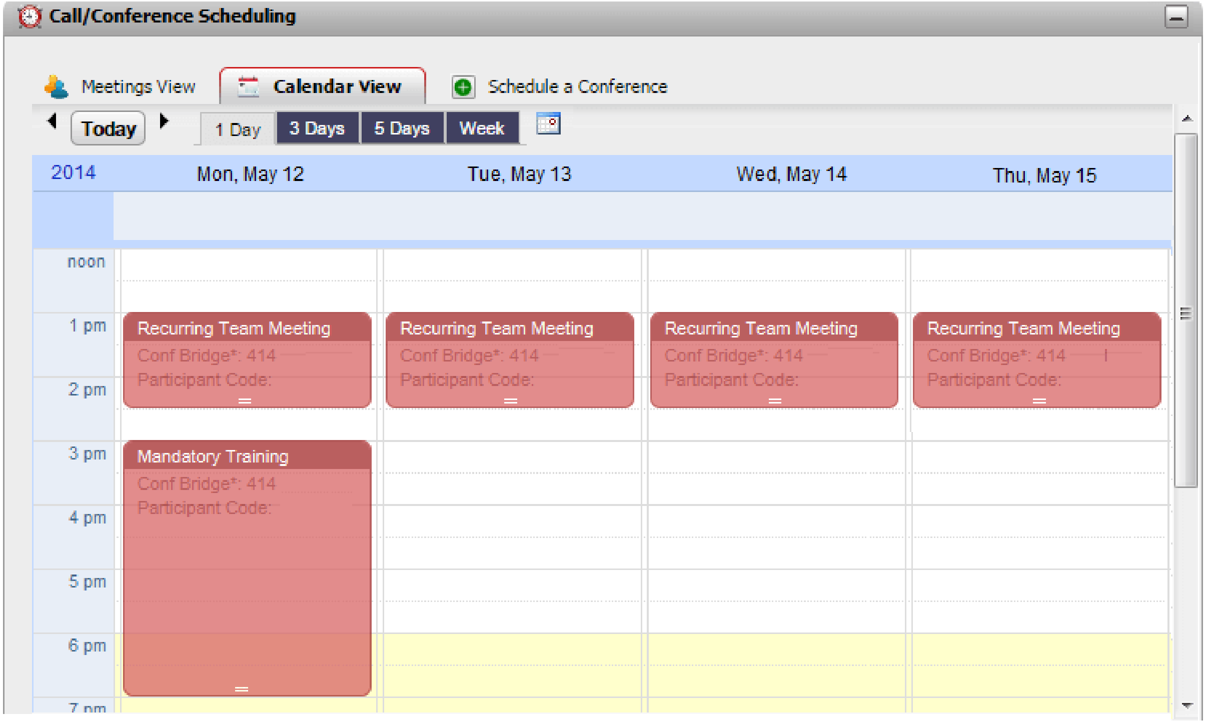
- **Availability**
  These features may require configuration by your system administrator before they are available. Contact your system administrator for details.
  - Conference scheduling is only available to users configured as a **Power User** by the system administrator.
  - Schedule conferences are not included in portal resiliency. Similarly, conferences schedule during resiliency are lost on recovery of normal operation.

Schedule Conference Calls		
• View my conference calendar 77 • Schedule a new conference 79 • Edit conference details 84 • Viewing your conferences	• Delete a scheduled conference 84 • Sorting the conferences 82 • Show/hide previous conferences 82 • Search the conferences	• Join a conference 83 • Join a web collaboration session 83 • Start your own conference 83 • Extending your conference 87 • Switch conference notifications on/off

- **Conference Resources**
  You can schedule meet me conferences. However, the system cannot reserve and guaranteed resources for those conferences. When scheduling or changing a conference, if the system determines from the other already scheduled conferences that it will not have sufficient capacity at the time for your conference, it displays a warning.

4.13.1 Viewing Your Conference Calendar

The Calendar View shows your scheduled conferences in a traditional appointment book style. It includes conferences of which you are the host (shown in red) and conferences to which you have been invited (show in blue).



To view your conferences:

1. On the **Main** tab, click on the ⏰ **Call/Conference Scheduling** gadget.
2. Select **Calendar** View.
   - **Conferences You Host**
     Conferences of which you are the host are shown in red.
   - **Other Conferences**
     Other conferences to which you have been invited are shown in blue.

To change the time span shown:

1. In the **Calendar View**, click on the required time span for displayed conferences. The options are **1 Day**, **3 Days**, **5 Days** or **Week**.
   - You cannot use this option on recurring conferences.

To view a particular date:

1. In the **Calendar View**, adjust the date shown as follows:
   - Click the ◀ and ▶ icon to move forward or backwards in time.
   - Click on the 📅 icon to select a particular date to display.
   - Click on **Today** to display the current date.

To view your conferences as a simple table:

1. Click **Meetings View**. See Viewing Your Meetings 82.

4.13.1.1 Adding a New Conference

To add a new conference:

1. In the **Calendar View**, locate the date and time when you want to start the conference.
2. Double click on that space in the calendar.
3. The **Schedule a Conference** tab is displayed with that start date and time already set. See Scheduling a New Conference 79.

4.13.1.2 Editing a Conference

For conferences of which you are a host, shown in red, you can change the conference details. When you adjust a conference, the scheduler prompts you to confirm the details and then sends out a new set of notifications 85 to the participants.

- **Conference Resources**
  You can schedule meet me conferences. However, the system cannot reserve and guaranteed resources for those conferences. When scheduling or changing a conference, if the system determines from the other already scheduled conferences that it will not have sufficient capacity at the time for your conference, it displays a warning.

To change the duration/end time of a conference:

You cannot use this method to adjust a recurring meeting.

1. Click on the conference in the calendar.
2. Click and drag the **=** sign at the bottom edge of the conference to select the new end time.
3. The scheduler prompts you to confirm change. Click **Yes**.
4. The scheduler confirms the changes. Click **Close**.

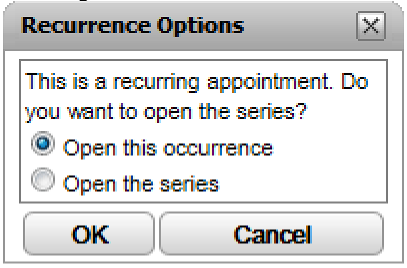
To change the start time and/or day of a conference:

You cannot use this method to adjust a recurring meeting.

1. Click on the conference in the calendar.
2. Click and drag conference details to the new location in the calendar.
3. The scheduler prompts you to confirm the change. Click **Yes**.
4. The scheduler confirms the changes. Click **Close**.

To edit the conference details:

1. Double-click on the meeting in the calendar.
   - If the meeting is a recurring meeting, select whether you want to adjust the whole series or just the current selected occurrence. When adjusting a single occurrence you can only adjust the start time and not if the meeting includes a web conference.



Recurrence Options

This is a recurring appointment. Do you want to open the series?

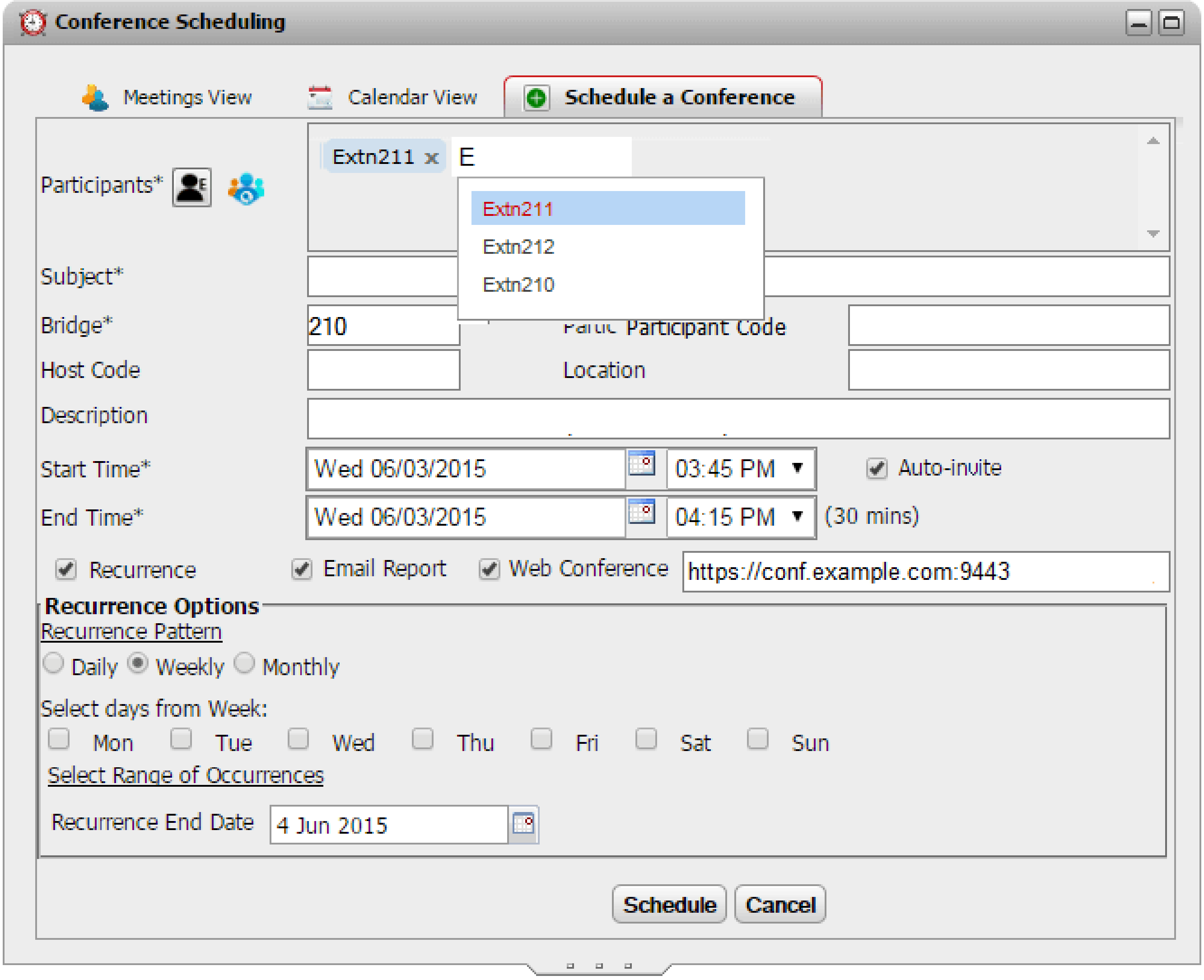
● Open this occurrence

○ Open the series

2. The meeting details are shown in the **Schedule a Conference** 79 tab view.
3. Adjust the meeting details as required and click **Schedule**.
4. The scheduler prompts you to confirm the change. Click **Yes**.
5. The scheduler confirms the changes. Click **Close**.

4.13.2 Scheduling a New Conference

You can use the **Call/Conference Scheduling** gadget to schedule a future conference. When you have scheduled the conference, the system sends conference notifications 85 to the invited parties.



Conference Scheduling

Meetings View | Calendar View | **Schedule a Conference**

Participants*: Extn211 × E
Extn211
Extn212
Extn210

Subject*:

Bridge*: 210

Participant Code:

Host Code:

Location:

Description:

Start Time*: Wed 06/03/2015 03:45 PM ☑ Auto-invite

End Time*: Wed 06/03/2015 04:15 PM (30 mins)

☑ Recurrence ☑ Email Report ☑ Web Conference https://conf.example.com:9443

Recurrence Options

Recurrence Pattern

○ Daily ● Weekly ○ Monthly

Select days from Week:

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Select Range of Occurrences

Recurrence End Date: 4 Jun 2015

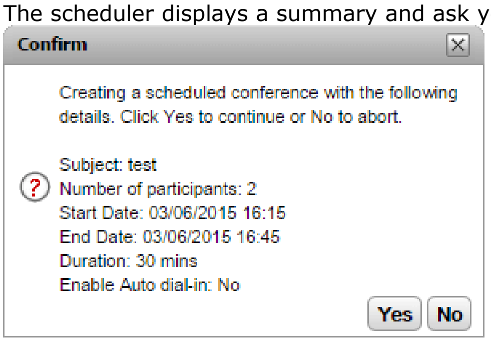
Schedule | Cancel

This tab is also used by the **Calendar View** and **Meetings View** tabs when you select to edit an existing conference.

- **Conference Resources**
  You can schedule meet me conferences. However, the system cannot reserve and guaranteed resources for those conferences. When scheduling or changing a conference, if the system determines from the other already scheduled conferences that it will not have sufficient capacity at the time for your conference, it displays a warning.

To schedule a conference:

1. On the **Main** tab, click on the **Call/Conference Scheduling** gadget.
2. Select the **Schedule a Conference** tab.
3. In the **Participants** section, enter the people you want invited to the call. As you type, the portal will show matches from the directories, select a match to complete the entry. You can add a whole group 107 from your personal directory by typing the group name.
   - To add an external contact who is not currently in the directory, click on the icon and enter their details.
   - To search for a directory contact click . Enter the name you want to match and search within the list of personal and system contacts. Click on one of the matches to add it to the participants.
4. Enter a **Subject** that summarizes the reason for the meeting.
5. The **Host Code** and **Participant Code** fields automatically match your conference PIN. However, if required, you can change them.
6. In **Location**, set a note for the physical location of any physical meeting that is occurring in parallel with the audio conference.
7. In **Description**, enter any additional details for the conference.
8. Set the date and times for the start of the conference and for the end of the conference.
9. If you want the server to call the participants at the start of the conference, select **Auto-Invite**.
10. If you want to run a web collaboration session in parallel to the audio conference, for example to share documents, select **Web Conference** and enter the URL for access the session.
11. If you want the conference to repeat at regular intervals, select **Recurrence** and set the frequency for the repeat conferences and when the repeats should end.
   - **Recurrence Pattern**
     This field allows you to select the frequency of each repeated conference.
     - ***Daily***
       When selected, the additional options for either **Every Day** or **Every Week Day** are available.
     - ***Weekly***
       When selected, you can then select which days of the week the meeting should occur.
     - ***Monthly***
       When selected, you can select the day of the month (by date) and how many months between repeats.
   - **Select Range of Occurrences**
     This field allow you to set the date when the recurring conferences should end.
11. As the conference host you can have a conference report 87 emailed to you when the conference ends. To do this select **Email Report**.
12. Click **Schedule**.
11. The scheduler displays a summary and ask you to confirm the meeting.

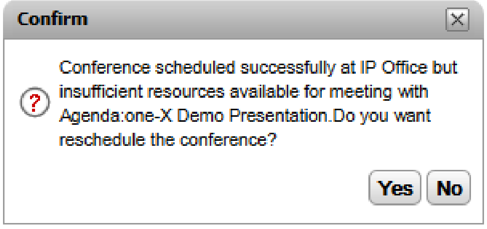


Creating a scheduled conference with the following details. Click Yes to continue or No to abort.

Subject: test
Number of participants: 2
Start Date: 03/06/2015 16:15
End Date: 03/06/2015 16:45
Duration: 30 mins
Enable Auto dial-in: No

12. Click **Yes**.

- If the system determines from the other already scheduled conferences that it will not have sufficient capacity for all your conference invitees, it displays a warning. You can select whether to still book you conference or return to change its setting.

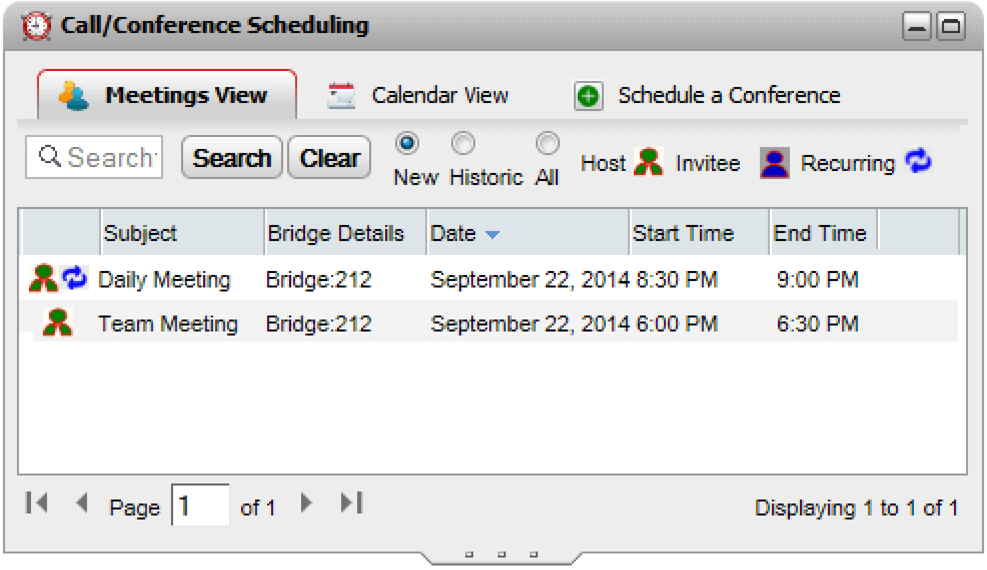


Conference scheduled successfully at IP Office but insufficient resources available for meeting with Agenda:one-X Demo Presentation.Do you want reschedule the conference?

13. Click **Close**. The scheduler sends out conference notifications 85 to the participants.

4.13.3 Viewing Your Meetings

The **Meetings View** shows your scheduled conferences in a table format. It allows you to sort and search through the conference of which you are a host or have been invited. In addition, you can use the controls next to each conference perform various actions.



	Subject	Bridge Details	Date	Start Time	End Time
	Daily Meeting	Bridge:212	September 22, 2014	8:30 PM	9:00 PM
	Team Meeting	Bridge:212	September 22, 2014	6:00 PM	6:30 PM

To view your conferences:

1. On the **Main Page** tab, click on the **Call/Conference Scheduling** tab.
2. Select **Meetings View**.
   - A conference of which you are the host.
   - A conference to which you have been invited.
   - A recurring conference.

4.13.3.1 Sorting the Conferences

To sort the conferences:

1. In the **Meetings View**, to sort the list of meetings by a date, click on the column header.

4.13.3.2 Showing/Hiding Previous Conferences

The view shows future scheduled meetings and can also show previously meetings that have occurred in the past 15 days. By default, it starts showing only future scheduled meetings, ie. **New** is selected.

To show or hide previous conferences:

1. In the **Meetings View**, click on the radio button for the type of scheduled conferences to show.
   - **New**
     Show scheduled conferences set to occur in the future.
   - **Historic**
     Show scheduled conferences that occurred in the past. By default the system retains conference details for up to 15 days (set by your system administrator).
   - **All**
     Show both future and previous scheduled conferences.

4.13.3.3 Searching the Conferences

You can use the search box to only show conferences with matching details.

To search the conferences:

1. In the **Meetings View**, enter the filter term into the Search Meetings View box and click **Search**. Only those meetings with matching details are now shown in the list of meetings.
2. To return to the full list of meetings, click the **Clear**.

4.13.3.4 Joining a Conference

You can use the **Meetings View** to join conferences to which you have been invited.

To join an audio conference:

1. In the **Meetings View**, locate the meeting.
2. Click on the meeting details to highlight it. Click the icon.

4.13.3.5 Joining a Web Conference

For any conference that has a web collaboration part, you can use the **Meetings View** to join the web collaboration.

To join a web collaboration session:

1. In the **Meetings View**, locate the meeting.
2. Click on the meeting details to highlight it. Click the icon.

4.13.3.6 Starting Your Own Conferences

For conferences of which you are the conference host, shown in red, you can use the **Meetings View** to start the conference. This puts you into the audio conference and calls the other internal parties.

To start a conference:

1. In the **Meetings View**, locate the meeting.
2. Click on the meeting details to highlight it. Click the icon.

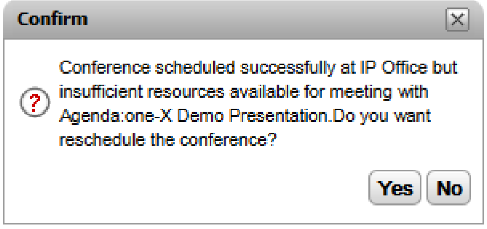
4.13.3.7 Editing Conference Details

For conferences of which you are the conference host, shown in red, you can view and edit the conference details. If you make any changes, the system will send updated conference notifications 85 to the participants.

- **Editing Recurring Conferences**
  For recurring conferences, using meetings view you can only edit the conference series. To edit a single conference instance within the series use the calendar view 78.
- **Conference Resources**
  You can schedule meet me conferences. However, the system cannot reserve and guaranteed resources for those conferences. When scheduling or changing a conference, if the system determines from the other already scheduled conferences that it will not have sufficient capacity at the time for your conference, it displays a warning.

To edit conference details:

1. In the **Meetings View**, locate the meeting.
2. Click on the meeting details to highlight it. Click the ✏ icon.
3. The meeting details are shown and can be edited.
4. Click **Schedule** to confirm the changes.
   - If the system determines from the other already scheduled conferences that it will not have sufficient capacity for all your conference invitees, it displays a warning. You can select whether to still book you conference or return to change its setting.



Confirm

Conference scheduled successfully at IP Office but insufficient resources available for meeting with Agenda:one-X Demo Presentation.Do you want reschedule the conference?

4.13.3.8 Deleting Scheduled Conferences

For conferences of which you are the host, you can delete the conference. This removes the conference from your calendar and meetings view. If the conference deleted was a future conference, the system sends out conference notifications 85 about the cancellation.

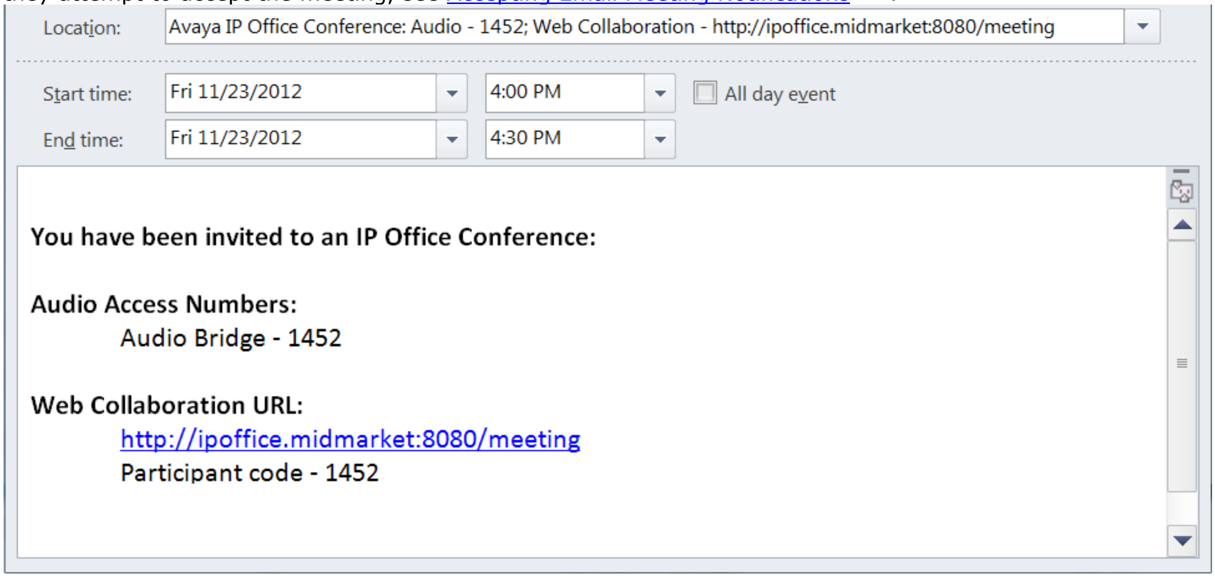
To delete a scheduled conference:

1. In the **Meetings View**, locate the meeting.
2. Click on the meeting details to highlight it. Click the ✖ icon.

4.13.4 Conference Notifications

When you schedule a meet me conference, the system will send various types of notification to conference participants.

- **Email Notifications**
  It sends an email to all the invited parties for which it has a known email address set in the telephone system. The system also sends an updated email whenever a scheduled meeting is changed or canceled. Note that the one-X Portal conference scheduler does not know about and reflect user acceptance, rejection or deleting of conference invites in their own Outlook calendars. If Outlook users see a warning *"Meeting cannot be found in Calendar"* when they attempt to accept the meeting, see Accepting Email Meeting Notifications 86.



Location: Avaya IP Office Conference: Audio - 1452; Web Collaboration - http://ipoffice.midmarket:8080/meeting

Start time: Fri 11/23/2012 4:00 PM ☐ All day event

End time: Fri 11/23/2012 4:30 PM

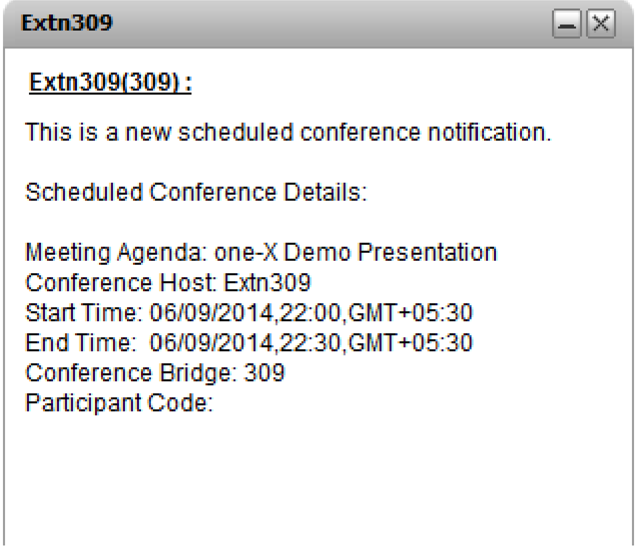
You have been invited to an IP Office Conference:

Audio Access Numbers:
Audio Bridge - 1452

Web Collaboration URL:
http://ipoffice.midmarket:8080/meeting
Participant code - 1452

- **Telephone Notification**
  The system can call the conference participants when the conference starts. That includes you if you scheduled the conference. The call attempt lasts for 2 minutes. This option is enabled by selecting the **Auto-Invite** option in the conference settings.

- **Instant Messaging Notifications**
  Also, for those invited parties who are logged in to one-X Portal instant messaging, it will send an instant message. The system also sends an instant message whenever a scheduled meeting is changed or canceled and when the conference starts. You can choose not to receive these notification, see below.



Extn309

Extn309(309) :

This is a new scheduled conference notification.

Scheduled Conference Details:

Meeting Agenda: one-X Demo Presentation
Conference Host: Extn309
Start Time: 06/09/2014,22:00,GMT+05:30
End Time: 06/09/2014,22:30,GMT+05:30
Conference Bridge: 309
Participant Code:

To switch conference notifications on/off:

1. Select the **Configure** tab and click on **Notification**.
2. Your scheduled conference notifications are controlled by the **Enable Conference Scheduling Pop-up Notifications** setting.
3. Change the setting as required and click **Save**.

4.13.4.1 Accepting Email Meeting Notifications

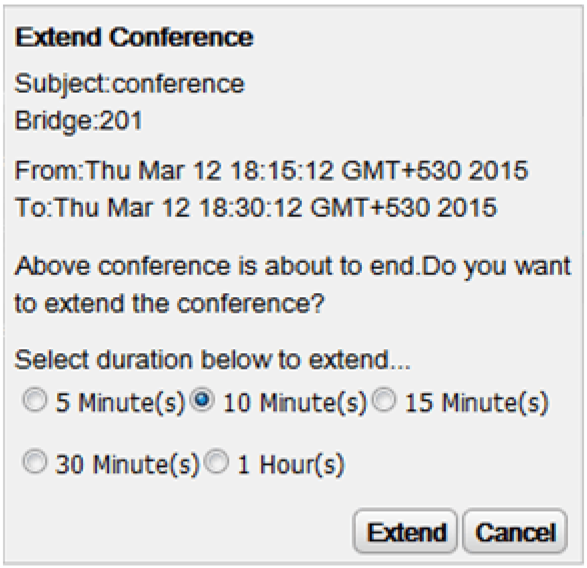
one-X Portal and Avaya IP Office Plug-in conference scheduling can send an Outlook format email invite to the conference participants. However, participants may see the error ***"Meeting cannot be found in the Calendar"*** in their Outlook. To resolve this issue, a registry settings change is required as shown below.

To enable accepting conference invites in the Outlook Calendar:

1. Click **Start** and select **Run**.
2. Type **regedit** and click **OK**.
3. Locate and then click the following registry key:
   HKEY_CURRENT_USER\Software\Microsoft\Office\<version>\Outlook\Options\Calendar
4. From the menu bar, select **Edit | New | DWORD Value**.
5. Enter ***ExtractOrganizedMeetings***.
6. From the menu bar, select **Edit | Modify**.
7. Set the **Value data** to ***1*** and click **OK**.
   - When this key is set to ***1***, then Outlook attempts to interpret 3rd party/unknown calendar formats so that the user can accept the invite.
   - When this key is missing or set to ***0***, then Outlook does not accept meeting invites sent in a 3rd party/unknown calendar format.
8. Select **File | Exit**.

4.13.5 Extending Your Conference

By default, scheduled conferences automatically end at the originally scheduled end time. However, for conferences for which you are the host you can extend the conference. 5 minutes before the scheduled end time the one-X Portal displays a notification that allows you to select whether you want to extend the conference time.



Extend Conference

Subject:conference

Bridge:201

From:Thu Mar 12 18:15:12 GMT+530 2015

To:Thu Mar 12 18:30:12 GMT+530 2015

Above conference is about to end.Do you want to extend the conference?

Select duration below to extend...

○ 5 Minute(s) ● 10 Minute(s) ○ 15 Minute(s)

○ 30 Minute(s) ○ 1 Hour(s)

4.13.6 Conference Reports

You can select to receive reports for meet me conferences that you have scheduled (select **Email Report** when scheduling the conference ⇒79). The report, in the form of a CSV text file, is emailed to you when the conference ends. That is when the last person exits the conference.

The report includes details such as the number of participants, when the conference started and ended and the time each participant joined and left the conference.

```
Bridge Details,30093009,Participants of Conference#,4,Start Time,10 February 2016 07:00:00 AM,EndTime,11 February 2
 ,,,,Time Zone,GMT+5:30,Duration(HH:MM:SS),25:00:00


Participant Name,Device,Start Time,End Time,Duration(HH:MM:SS)
Eric Smith,30093009,10 February 2016 07:00:00 AM,10 February 2016 08:00:01 AM,01:00:00
,,11 February 2016 07:00:01 AM,11 February 2016 08:00:01 AM,01:00:00

John Brown,30103010,10 February 2016 07:00:01 AM,10 February 2016 08:00:01 AM,00:59:59
,,11 February 2016 07:00:01 AM,11 February 2016 08:00:01 AM,00:59:59

Paul Smith,912041019077,10 February 2016 07:00:01 AM,10 February 2016 08:00:01 AM,00:59:59
,,11 February 2016 07:00:01 AM,11 February 2016 08:00:01 AM,00:59:59

Mary White,912041019076,10 February 2016 07:00:01 AM,10 February 2016 08:00:01 AM,00:59:59
,,11 February 2016 07:00:01 AM,11 February 2016 08:00:01 AM,00:59:59
```

An Example CSV File Contents

Chapter 5.

Conversation History

5. Conversation History

The **Conversation History** gadget displays details of calls all you have made, received and missed. The gadget also displays the history of the conversations with other contacts. You can use the call log to make a call 34, add the caller's details to your Personal Directory 92 or search IM conversation.

The call log shown is stored on the telephone system as part of your user settings. Up to 30 records 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.

For incoming call, by default, only personal calls (non hunt group) to the user that were answered by the user or which went unanswered anywhere are included in the call log.

- **Missed Calls**
  Calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls. However, your telephone system administrator can configure the logging of missed calls.

- **Missed Hunt Group Calls**
  By default, only hunt group calls that you answer are logged. However, your telephone system administrator can configure your call log to include missed hunt group calls for selected hunt groups.

- **Automatic Deletion**
  Old call records are automatically deleted when the call log capacity is reached and a new call record needs to be added. In addition, the telephone system administrator can configure the telephone system to delete log entries after a set period.

The Phone Call Log

If you are using an Avaya phone (1400, 1600, 9500, 9600 or J100 Series) 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 is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal. The two will change in parallel.

If you are using any other type of phone that has a call log, it will be a call log stored by the phone itself and so does not match the call log shown in one-X Portal. For example, calls made using the one-X Portal 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 Conversation History		
• Use the Conversation History 91 • Search instant message conversations	• Make a call	• Add a number to my directory

5.1 Using the Conversation History

The **Conversation History** displays details of calls you have made, received and missed. You can use the call log to make a call 34 or add the caller's details to your Personal directory 92.

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. Details of the 10 most recent calls are included. • **Missed Calls** Calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls. However, your telephone system administrator can configure the logging of missed calls. • **Missed Hunt Group Calls** By default, only hunt group calls that you answer are logged. However, your telephone system administrator can configure your call log to include missed hunt group calls for selected hunt groups. • **Automatic Deletion** Old call records are automatically deleted when the call log capacity is reached and a new call record needs to be added. In addition, the telephone system administrator can configure the telephone system to delete log entries after a set period.
IM	This tab enables you to search for conversations with the contacts.

- **Hunt Group Calls**
  Your system administrator 231 can configure whether your missed calls call log includes missed calls for selected hunt groups 230. 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** 92
  You can add the name and number to your **Personal** directory.

- **Clear Log**
  Delete all records from the currently viewed tab.

- **Name** 92
  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 Conversation History

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

To make a call from your conversation history:

1. Using the **Conversation History** 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. If the call fails, the gadget displays a reason for the failure if known.
    - When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

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.

To add a caller 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.
    a. 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 98 of the user. This applies even if another number is currently selected as the **Primary phone** 231.
        - You can use the **Group** list to select which of your personal contacts tabs 107 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 110 or initiate a chat from the one-X Portal directory.

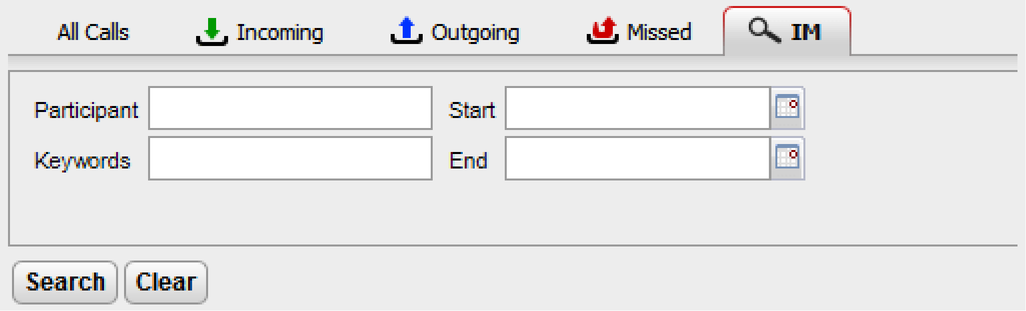
    b. When finished, click **Save**.

5.4 Searching for IM conversation

You can search instant message conversations that you have had with other contacts.

To search your instant message conversations:

1. In the **Conversation History** gadget on the **Main** tab, select the **IM** tab.



2. Enter the criteria on which you want to search. Each field is optional.

Field	Description
Participant	Type the name of the other contact in the conversation.
Keywords	Type the keywords in the IM conversation.
Start	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.
End	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.

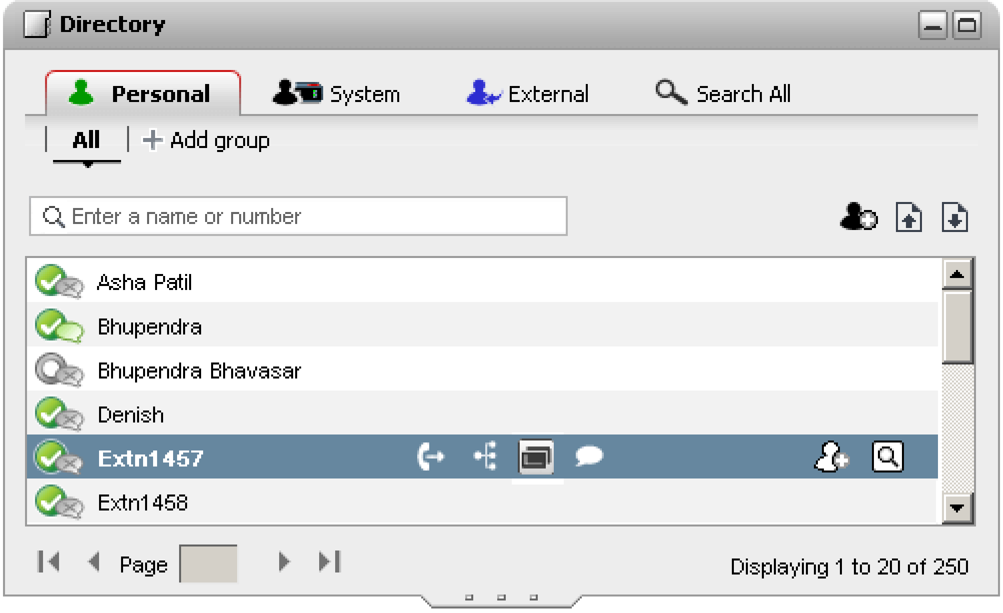
3. Click **Search**. The system displays the list of all conversations based on your search. If no results are found, click on **Back** to change your search criteria.
4. Click on the conversation that you want to open. The system opens the conversation.

Chapter 6.

Directories

6. Directories

Your one-X Portal 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.



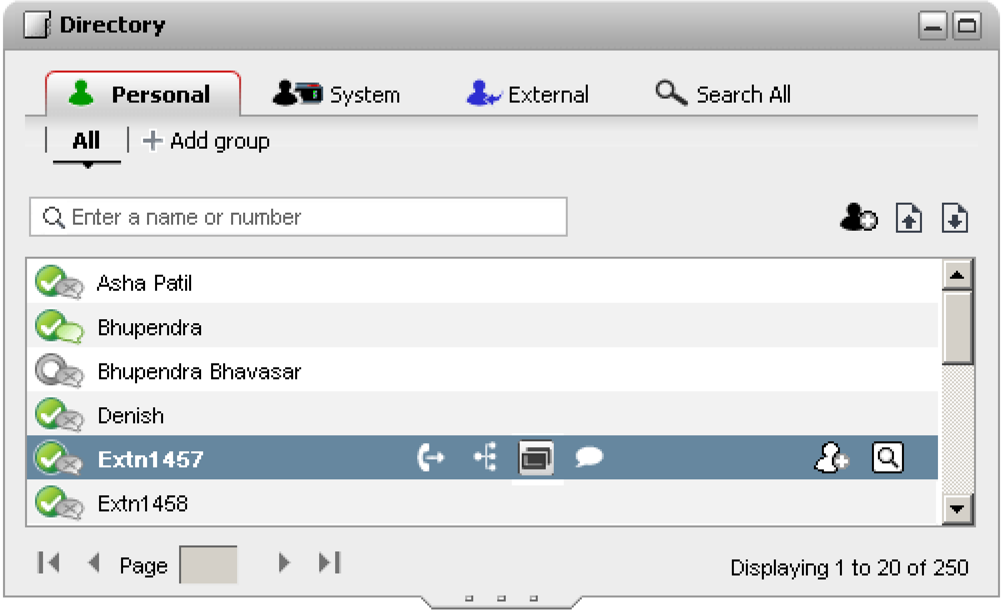
Each of the different types of directory listed below is shown on a separate tab. In addition you can create up to 4 additional tabs to which you can add selected contacts.

- **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** 34 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.

Use the Directories		
• View the Directories 97 • Make calls from the Directory 102 • Edit a Directory Contact 106 • Email a Contact	• View the user status in the Directory 98 • Transfer a call from the Directory 103 • Delete a Directory Contact 106 • Instant Message a Contact	• Search the Directories 100 • Add a Directory Contact 104 • Add a Contacts Group Tab

6.1 Viewing the Directories

The one-X Portal can display several directories (**System**, **Personal** and **External**) of names and associated telephone numbers.



- **Personal**
  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. 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**
  This is the directory of names and numbers from your telephone system plus all the users and Hunt groups 230 on the telephone system. Your one-X Portal administrator can also add System directory contacts. You cannot change these contacts. However, you can copy a System directory contact into your Personal directory 104.
  - The system only displays groups created by the system administrator 231. However, the system does not display XMPP hunt groups.
  - If the system administrator 231 has enabled the *"Ex-directory"*option for a Hunt group, 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.
- **External**
  Your system administrator 231 can configure one-X Portal to access an external LDAP directory. If your one-X Portal server has been configured to do this, you can perform a search of the external directory. The results of the search are shown here.
- **Search All**
  This additional option is used to display the results of a cross directory search 100.

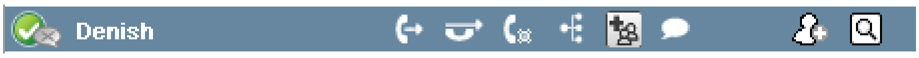
Personal Directory

If you are using a Avaya phone (1400, 1600, 9500, 9600 or J100 Series) phone with a **Contacts** button, or M-Series, T-Series phone, you can also use your **Personal** directory contacts through the phone and edit them using the phone.

1. As **Personal** directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The one-X Portal application and the telephone system can only store up to 250 Personal directory contacts per user (subject to its own system limits).
   - Any contacts uploaded from the Avaya IP Office Plug-in are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal only, and are in addition to the maximum 250 Personal Directory contacts.
2. Contacts can be edited through the phone or through one-X Portal.
3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current **Primary phone** number. The matching telephone system record contains just one number, which will be changed to match the currently selected **Primary phone** number on one-X Portal if that selection is changed.

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.
Ringback	☎	Set a ringback [38] on an internal user or clear an existing ringback. Useful when the status of the contact is shown as busy.
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, do an unsupervised transfer [47] to this contact.
Consult	☎	With a call already connected, start a supervised transfer [48] to this contact.
Conference	⊕	With a call already connected, start a conference between yourself, the current call and this contact. This is a ad hoc [230] conference.
Dial to my bridge	☎	Add the contact to your meet me conference [231] bridge.
Web Collaboration	▭	Open a browser window to the contacts web collaboration session [74].
Chat	💬	Start a chat session with another portal user or with a contact available on OCS.

Directory Actions

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

Contact Icons

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

State	Icon	Description
Available	✓	The user's work extension is available but they are not using one-X Portal or have set their portal presence 16 to offline.
	✅	The user's work extension is available and they are also logged into one-X Portal.
Busy	⛔	Indicates that a user's internal extension is busy for some reason. If the user is on a call the portal shows ***Busy - On Call***. If busy for some other reason then the portal just shows ***Busy***.
Do Not Disturb	✖	The user has set **Do Not Disturb** 16. Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's **Do Not Disturb exception list** 147.
Logged Out	○	The user has logged out 231 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.
Ringing	☎	This icon is used for an internal contact that is currently ringing.

Additional Icons

Action	Icon	Description
View Group Members	👥	Show the members of a selected hunt group. See Listing Hunt Group Members 101.
Group Conference	+	Start a meet me conference with the group. See Starting a Group Conference 73.
mybuddy	A	Open a mybuddy 138 session window.
Broadcast	((•))	Start an instant message session with everyone. See Instant Message Everyone 129.

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.

To search the Personal and System directories:

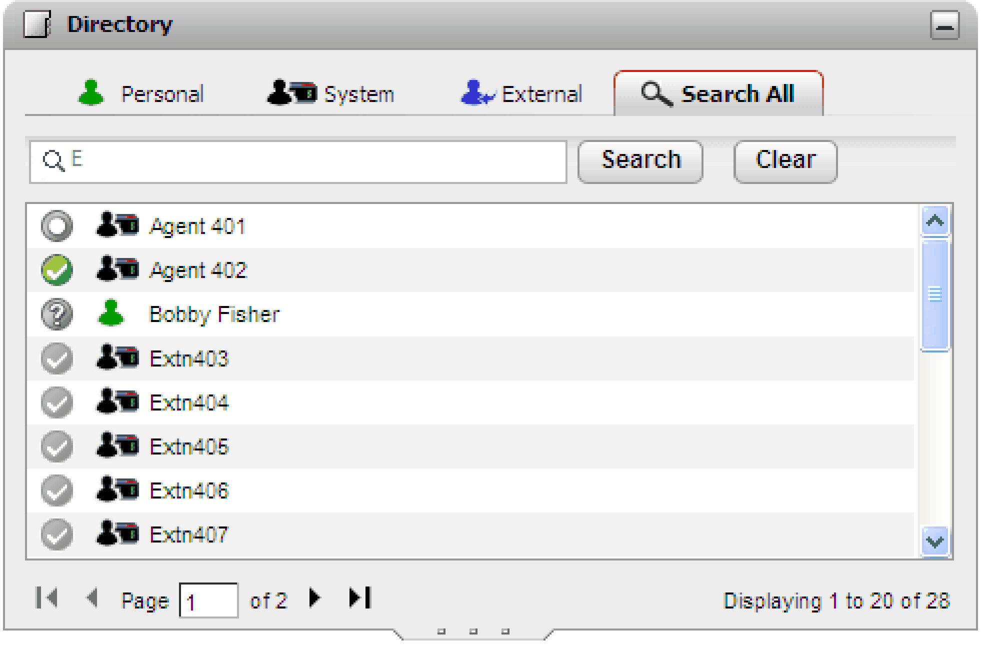
1. Begin entering the name or number required in the text box at the top-left of the directory.
2. The directory contacts still shown are those that match the name or number entered.
    - When there are multiple matches, you can use the |◀ ◀ Page [1] of 2 ▶ ▶| page icons at the bottom left to move between pages.
    - Alternatively, add more details to the search term to improve the search matching and so reduce the number of contacts displayed.

To searching the External directory:

1. Enter a name or number in the text box at the bottom and click on the **Go** button.
2. one-X Portal sends a search request to the remote directory and displays the results.

To searching All the Directories

1. Click the 🔍 **Search All** tab.
2. Enter your search name or number into the search box at the top and click the **Search** button.



E

Agent 401
Agent 402
Bobby Fisher
Extn403
Extn404
Extn405
Extn406
Extn407

Page 1 of 2

Displaying 1 to 20 of 28

To list members of a hunt group:

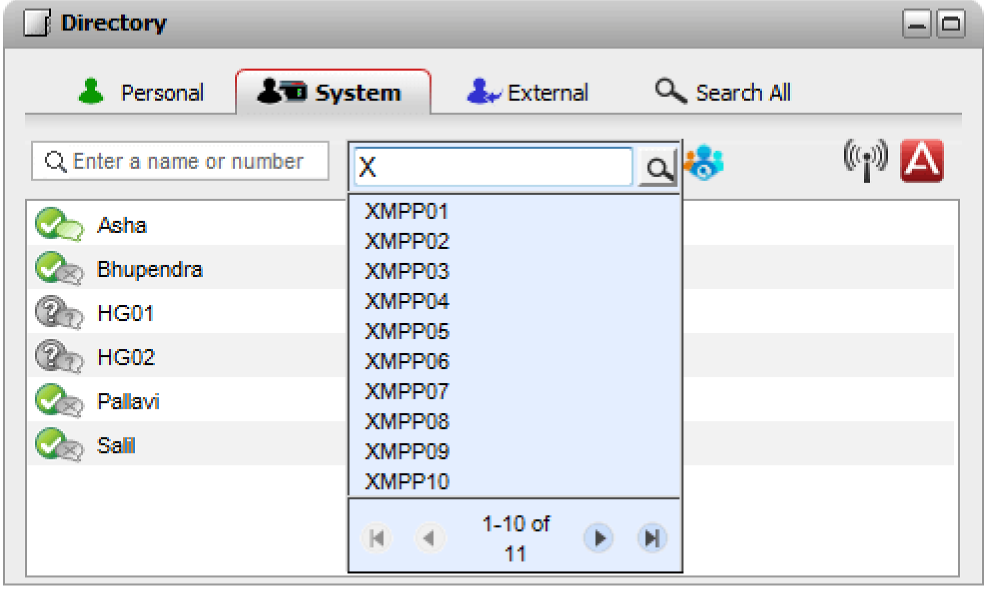
The System directory can be used to display the members of the hunt group and their status. See Listing Hunt Group Members ⇨101.

6.4 Listing Hunt Group Members

The system directory includes hunt groups configured on the telephone system (except those set as ex-directory by the system administrator). You can use the system directory to focus on a particular group and list only the members of that group.

To list the members of a hunt group:

1. In the **Directory** gadget, select the **System** tab.
2. Click on the icon.
3. A list of groups is displayed from which you can select the group required. If necessary entering the group name and click to filter the list of groups shown.



4. When the group required is listed, click on the group name. The hunt group members are listed in the directory window.
5. You can still use the left-hand search box to only show group members with matching names or numbers.

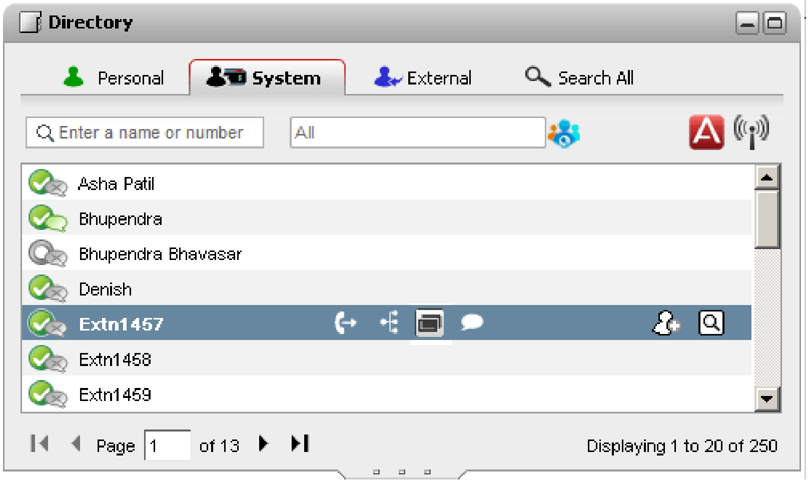
To clear the hunt group filter:

1. Click on the icon and select **All**.
2. The directory returns to listing all users and groups.

6.5 Making a Call

To make a call 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. The directory icons 98 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 a icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.
   - **Alternate Numbers:**
     If this icon is displayed, the contact has alternate numbers. You can click the icon and select the call options available for those numbers.

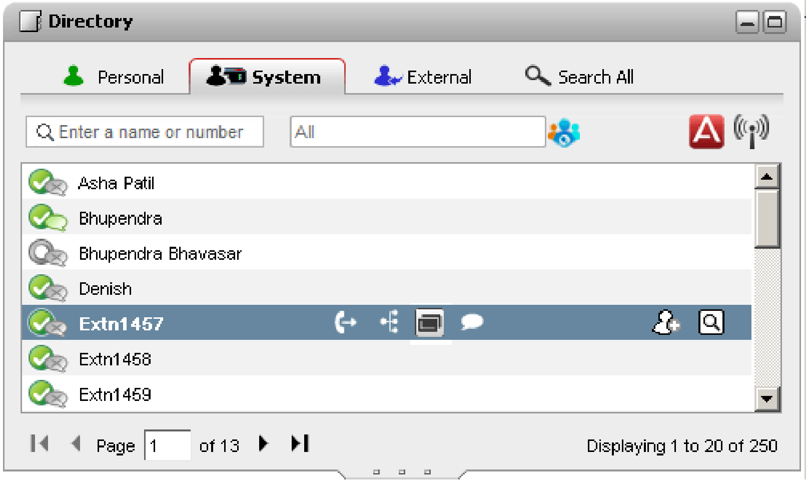
- The progress of the call is displayed on a tab in the **Calls** gadget. If the call fails, the gadget displays a reason for the failure if known.
- When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

6.6 Transferring a Call

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

To transfer a call using the directory:

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



2. Because you already have a connected call, additional options are shown when your hover the cursor over a directory contact.

- **Transfer:**
  Use the transfer icon to do a simple unsupervised transfer 47 to the contact's primary number.

- **Consult:**
  Use the consult icon to start a supervised transfer 48 to the contact's primary number.

- **Conference:**
  Use the conference icon to conference yourself, the held call and the contact's primary number.

  - **Alternate Numbers:**
    If this icon is displayed, the contact has alternate numbers. You can click the icon and select the call options available for those numbers.

6.7 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[124], the Conversation History[92] or the System directory[104] to your personal directory.

To add a new personal contact:

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.
    a. 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[98] of the user. This applies even if another number is currently selected as the **Primary phone**[231].
        - You can use the **Group** list to select which of your personal contacts tabs[107] 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[110] or initiate a chat from the one-X Portal directory.

    b. When finished, click **Save**.

Personal Directory

If you are using a Avaya phone (1400, 1600, 9500, 9600 or J100 Series) phone with a **Contacts** button, or M-Series, T-Series phone, you can also use your **Personal** directory contacts through the phone and edit them using the phone.

1. As **Personal** directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The one-X Portal application and the telephone system can only store up to 250 Personal directory contacts per user (subject to its own system limits).
    - Any contacts uploaded from the Avaya IP Office Plug-in are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal only, and are in addition to the maximum 250 Personal Directory contacts.
2. Contacts can be edited through the phone or through one-X Portal.
3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current **Primary phone** number. The matching telephone system record contains just one number, which will be changed to match the currently selected **Primary phone** number on one-X Portal if that selection is changed.

6.7.1 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.

- 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 shows the user's status.

To add a contact from the system 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[107] to which you want to add the system contact.
4. Click **Add** to add the contact in the hunt group that you selected.

6.7.2 Adding a Caller from the Conversation History

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

To add a caller 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.
   a. 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 98 of the user. This applies even if another number is currently selected as the **Primary phone** 231.
      - You can use the **Group** list to select which of your personal contacts tabs 107 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 110 or initiate a chat from the one-X Portal directory.

   b. When finished, click **Save**.

6.7.3 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.

To add a voicemail caller to your personal directory:

1. Click on **Main**.
2. View the **Messages** gadget.
3. Click the add icon in the message details.
   a. 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 98 of the user. This applies even if another number is currently selected as the **Primary phone** 231.
      - You can use the **Group** list to select which of your personal contacts tabs 107 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 110 or initiate a chat from the one-X Portal directory.

   b. When finished, click **Save**.

6.8 Editing a Personal Contact

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

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 **edit**.
   a. 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 98 of the user. This applies even if another number is currently selected as the **Primary phone** 231.
      - You can use the **Group** list to select which of your personal contacts tabs 107 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 110 or initiate a chat from the one-X Portal directory.

   b. When finished, click **Save**.

6.9 Deleting a Personal Directory Contact

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

To delete 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.
4. Click on the delete icon.

6.10 Adding A Personal Contacts Group

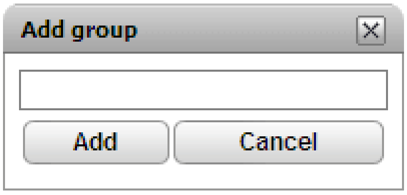
You can add up to five groups in your personal directory in addition to the default **All** group. Personals contact can be listed in more than one group.

When editing the personal contact 106 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 108 and Outlook contact synchronization 207.

To add 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.

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**.

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.

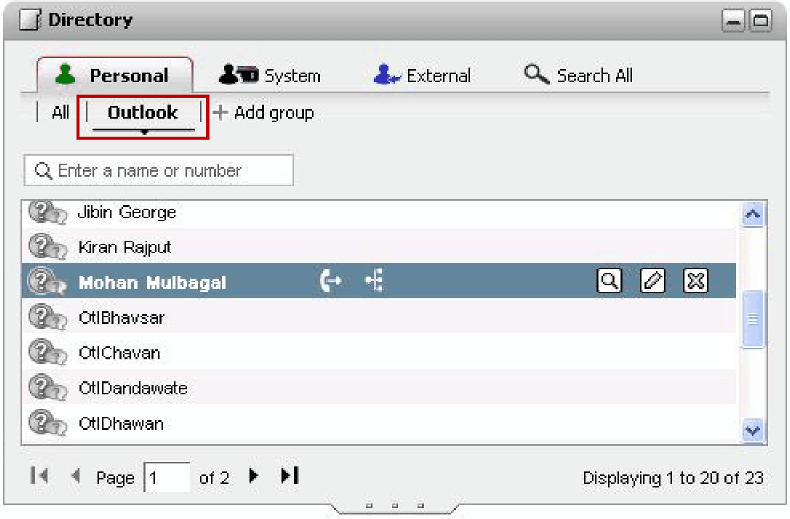
6.10.1 Outlook group

Though the Avaya IP Office Plug-in, you can upload 207 contacts from Microsoft Outlook to the one-X Portal. This creates an **Outlook** group in the **Directory** gadget.

You can update and delete contact from the **Outlook** group but cannot add a new contact to the group. However, any changes you make are not sent to Outlook and all changes are overwritten the next time you upload contacts from Microsoft Outlook.

To view the imported contacts:

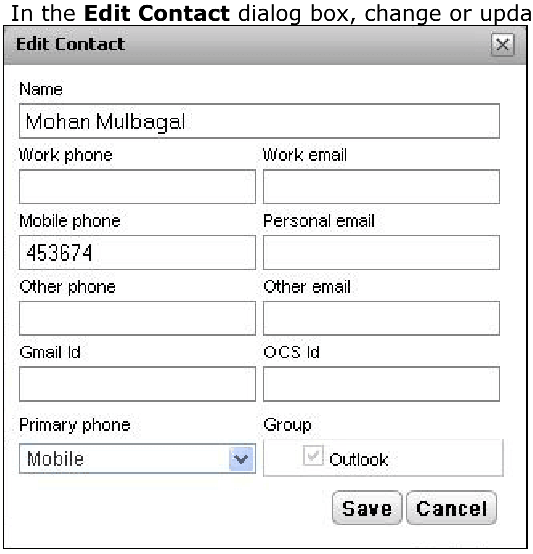
1. In the **Directory** gadget, click **Personal > Outlook**.



Jibin George
Kiran Rajput
Mohan Mulbagal
OtlBhavsar
OtlChavan
OtlDandawate
OtlDhawan

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.

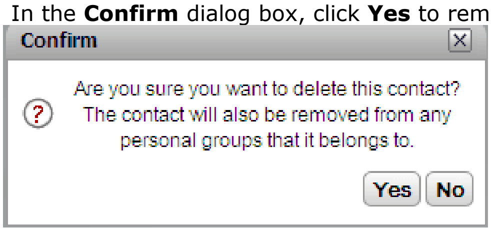


Name: Mohan Mulbagal
Mobile phone: 453674
Primary phone: Mobile
Group: ☑ Outlook

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.



Are you sure you want to delete this contact? The contact will also be removed from any personal groups that it belongs to.

6.11 Exporting/Importing Personal directory

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

- You cannot add more than 250 contacts to a Personal directory. If the total number of records exceeds 250 when you import the contacts, the system displays an error message.
- When the system imports the .CSV file, if one or more records does 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.
- 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.
- You can export only the contacts in **All** group.
- To learn the file format, manually create a personal directory entry and then export that directory. The resulting file contains all the headers necessary for a subsequent import.

Prerequisites

- Ensure that you disable any pop-up blocker in the browser.

To import a personal directory:

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.

To export a personal directory:

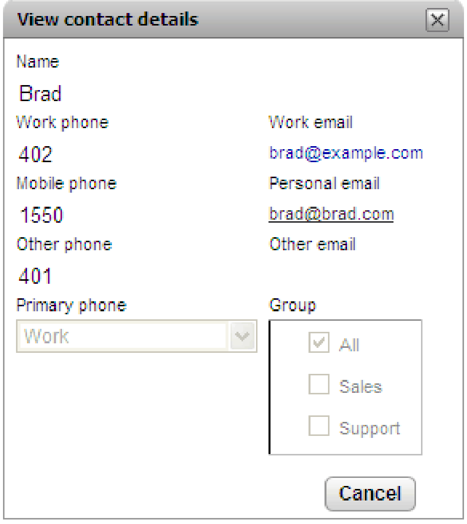
1. In the **Personal** directory tab click **Export**.
2. The system exports the contacts in the **Personal** directory to the default download location of the browser.
   - If your browser has pop-up blocking enabled, select to allow pop-ups from the one-X Portal address.
   - The file is named *PersonalDirExport.csv* prefixed with your user name.
3. The system also displays the number of records that were exported. Click **Close**.
4. Browse to the browser's download directory. In the last column of every record in the .CSV file that is exported, the system appends the groups created in one-X Portal.

6.12 Emailing a Contact

Contacts in your **Personal** and **External** directories can include email addresses. You can click these in order to email the contact using your PC's default email application.

To email a 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.



View contact details

Name
Brad

Work phone: 402
Work email: brad@example.com
Mobile phone: 1550
Personal email: brad@brad.com
Other phone: 401
Other email:
Primary phone: Work
Group:
☑ All
☐ Sales
☐ Support

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.

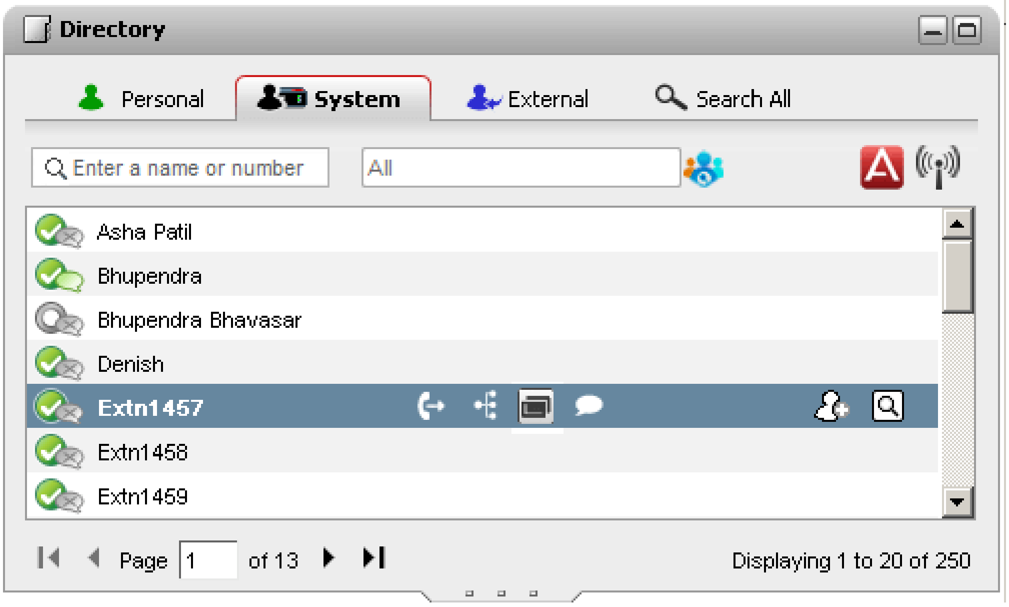
6.13 Instant Messaging a Contact

one-X Portal allows you to have instant message chat sessions with other users. 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, set your presence status 16 to ***Offline***.

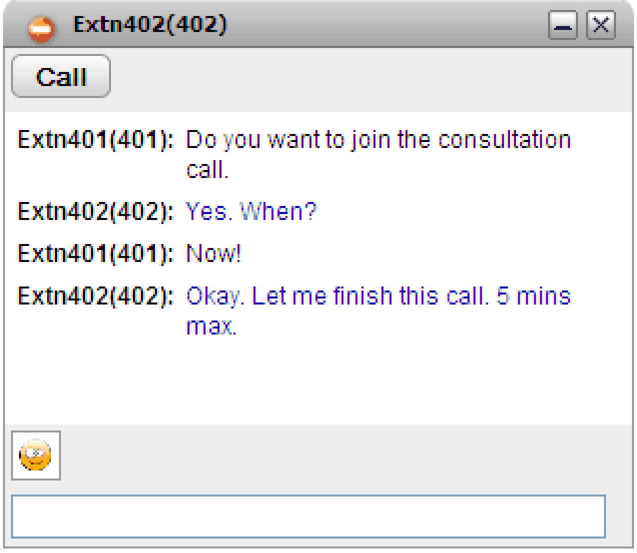
To instant message a contact:

1. Locate the other one-X Portal 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 and in the other user's one-X Portal.



Extn401(401): Do you want to join the consultation call.

Extn402(402): Yes. When?

Extn401(401): Now!

Extn402(402): Okay. Let me finish this call. 5 mins max.

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

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

6.14 Adding a contact to Meet Me conference bridge

You can use the **Directory** gadget to add other parties to your meet me conference.

To add a directory contact to a meet me conference:

1. In the **Directory** gadget, locate the contact you want to add.
2. Hover your cursor over the contact and click on the **Dial to my bridge** icon.
3. The system adds the contact to your *Meet Me* conference when the contact answers the call.

Chapter 7.

Profiles

7. Profiles

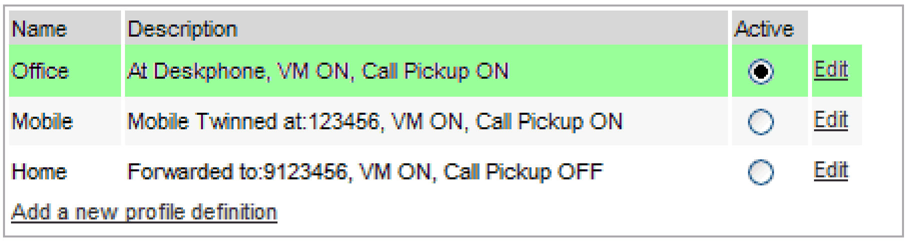
one-X Portal allows you to create profiles which contain a set of telephone system settings. By selecting which of your saved profiles is active, you apply that set of settings to the telephone system. Thus using profiles you are able to easily control where your calls are directed and how they are treated.

By default you have 3 profiles, called **Office**, **Mobile** and **Home**. You can edit these profiles but you cannot delete them. However you can also add 4 more profiles which you can edit and delete. A special profile call **Detected** 115 also appears. It is displayed when your current telephone system settings don't match any of your profiles.

Profile Settings	
Call Pickup	• Call Pickup on/off.
Mobility	• Default Deskphone 117 • Forward calls. 118 • Mobile Twinning. 118 • Telecommuter.
Voicemail	• Voicemail on/off. • Voicemail Ringback on/off. • Voicemail Outcalling on/off. • Listen on your phone/Listen on your PC. • Select which voicemail greeting to use.

Example

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



Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	●	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	○	Edit
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	○	Edit

Add a new profile definition

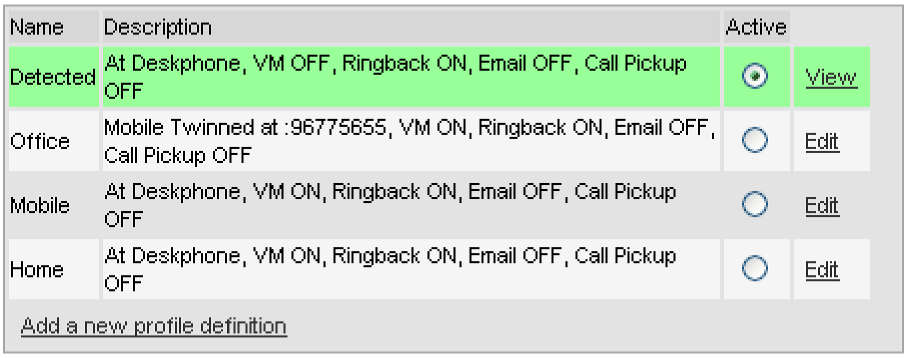
This user has configured the profiles to work as follows:

- The **Office** profile is set to send calls to the user's desk extension. Voicemail is on if calls ring unanswered and so is call pickup to allow other one-X Portal users to pickup calls.
- The **Mobile** profile is set to use mobile twinning to ring at both the user's desk extension and at another number. Voicemail and call pickup are also still on.
- The **Home** profile is set to forward calls to an external number. Voicemail is on but call pickup is off.

Create and Use Profiles		
• Use the 'Detected' Profile 115 • Add a New Profile	• Select an Active Profile 115 • Configure the Profile	• Edit a Profile

7.1 The Detected Profile

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



Name	Description	Active	
Detected	At Deskphone, VM OFF, Ringback ON, Email OFF, Call Pickup OFF	●	View
Office	Mobile Twinned at :96775655, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit
Mobile	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit
Home	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	○	Edit

Add a new profile definition

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

Changing Voicemail Settings Using Other Interfaces

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

7.2 Selecting Your Profile

Your currently active profile is shown in the status line 16 at the top-right of the one-X Portal screen.

To select your current profile:

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:

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.

To add a new profile:

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

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

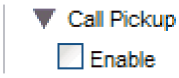
7.5 Profile Settings

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

Profile Settings	
Call Pickup	• Call Pickup on/off.
Mobility	• Default Deskphone 117 • Forward calls. 118 • Mobile Twinning. 118 • Telecommuter.
Voicemail	• Voicemail on/off. • Voicemail Ringback on/off. • Voicemail Outcalling on/off. • Listen on your phone/Listen on your PC. • Select which voicemail greeting to use.

7.5.1 Call Pickup

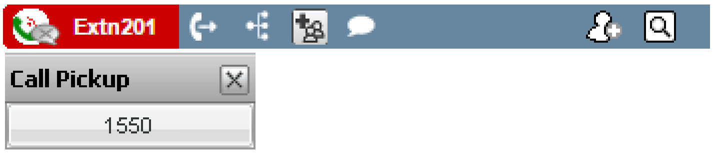
This option allows you to set whether other one-X Portal users to be able to pickup your calls 39 when this profile is your active profile.



▼ Call Pickup

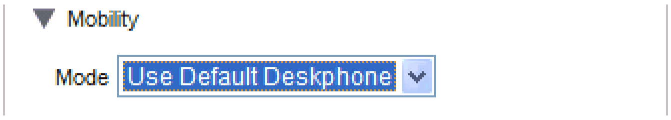
☐ Enable

In other one-X Portal 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 extension which you are using. This mode has no additional mobility settings.



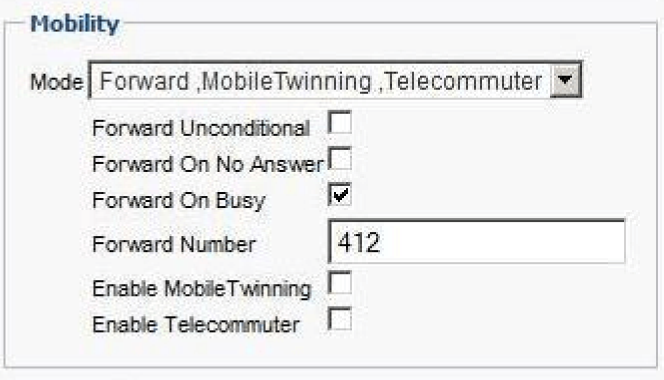
▼ Mobility

Mode: Use Default Deskphone

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 ☐

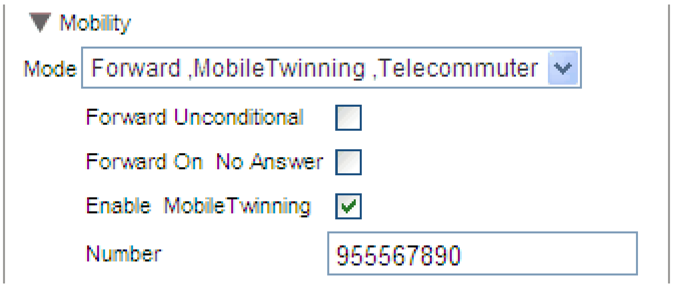
These options control when your calls are forwarded while the profile is active:

- **Forward Unconditional**
  If this option is selected, the calls are forwarded immediately without ringing at your 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 40.
- **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 phone's menus to select your forwarding settings. If those settings differ from the one set in your profile, the one-X Portal will change your profile to **Detected**.

7.5.4 Mobility - Mobile Twinning

Mobile twinning allows your incoming calls to ring at both your 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 59 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 server. This mode is only available to you if configured by your system administrator.

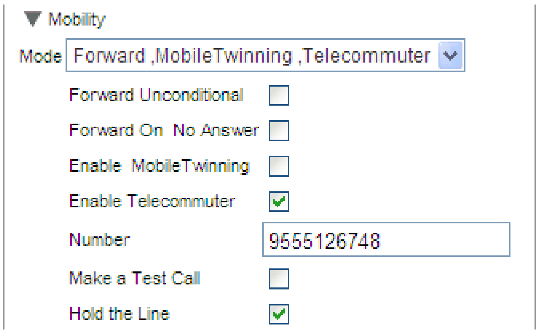
- You make calls using one-X Portal to dial the number. The phone system will make a call to your configured telecommute number and when answered it will then make a call to the number dialed as if it had been dialed from your normal internal extension, home telephone, or mobile. The numbers that you 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.

- While telecommute mode is selected, you are logged out of your normal internal 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 12 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 telephone configuration it can be used for a single additional call when an existing call via the telephone system 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 with this profile already active no test call is made.

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

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

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

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

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

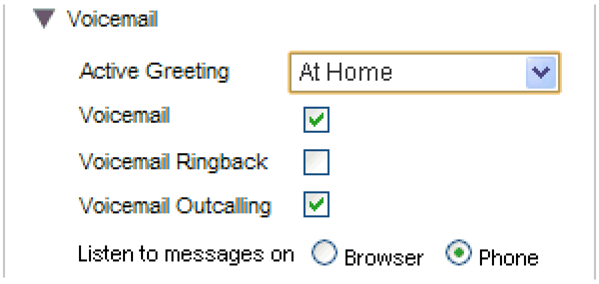
  - **If Selected**
    In this mode, once you make the profile active, the phone system will make a call to the telecommute number. When you answer you should leave the connection open (off-hook). You should then use one-X Portal to make, answer and control calls without replacing the handset between 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 to unhold or unpark the calls do not always work.

7.5.6 Voicemail

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



▼ Voicemail

Active Greeting: At Home

Voicemail ☑

Voicemail Ringback ☐

Voicemail Outcalling ☑

Listen to messages on ○ Browser ● Phone

- **Active Greeting** *(Voicemail Pro only)*
  If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have recorded 125. Within each of your one-X Portal profiles, you can use the **Active Greeting** setting to select which greeting should be used for your mailbox when the profile is active.
- **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 should playback your messages to your phone or to your browser.

  - 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.
  - If using Internet Explorer, check that the option **Play sound in webpages** is enabled (**Tools | Internet Options | Advanced | Multimedia**).
  - To playback on PC, you may need to accept the security certificate being used by the voicemail server. Enter ***https://<voicemail_server_address>:5443/*** in your browser and accept the certificate exception.

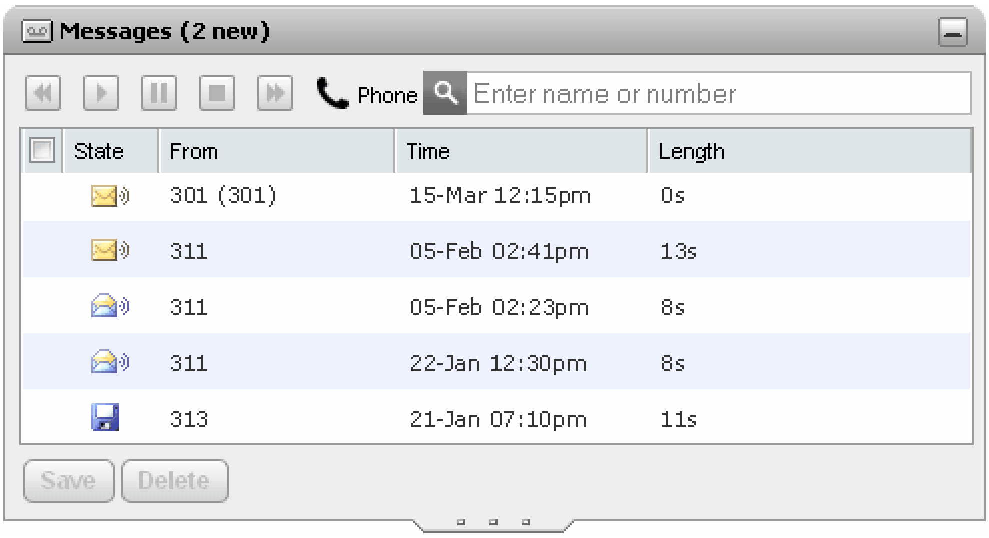
Changing Voicemail Settings Using Other Interfaces

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

Chapter 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.



Messages (2 new)

☐ State	From	Time	Length
✉	301 (301)	15-Mar 12:15pm	0s
✉	311	05-Feb 02:41pm	13s
📩	311	05-Feb 02:23pm	8s
📩	311	22-Jan 12:30pm	8s
💾	313	21-Jan 07:10pm	11s

The gadget displays a ❗ icon if your current mailbox password doesn't match the password requirements set by your system administrator. Click on the icon to change the password 125.

Access and Use Voicemail

- Enable/Disable Voicemail screening 126
- Switch between Phone and PC playback 124
- Record Mailbox Greetings

- Check Voicemail messages 123
- Add a Voicemail caller to my Directory 124
- Select Mailbox Greetings

- Call someone who left a message 124
- Change my Voicemail Mailbox Code

Changing Voicemail Settings Using Other Interfaces

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

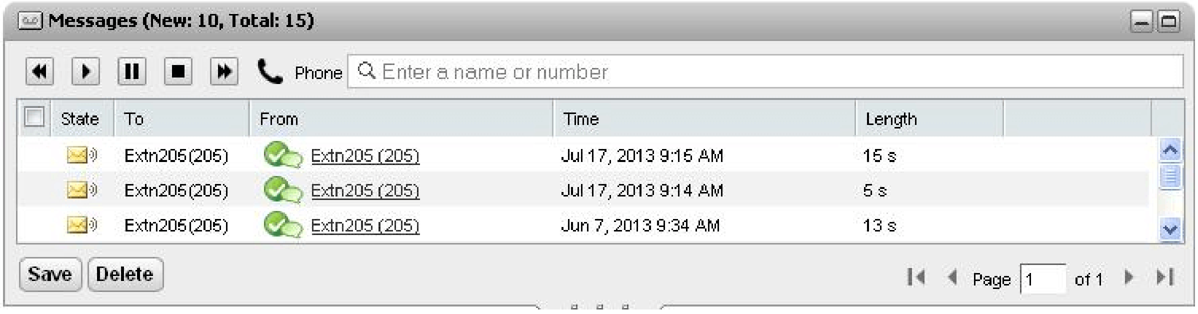
8.1 Group Messages

Your system administrator can configure you to receive message indication for messages in selected hunt group mailboxes. These messages are shown in and can be played back from your one-X Portal.

8.2 Checking Voicemail Messages

You can view your voicemail messages using the **Messages** gadget.

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



Messages (New: 10, Total: 15)

☐	State	To	From	Time	Length
	✉	Extn205(205)	Extn205 (205)	Jul 17, 2013 9:15 AM	15 s
	✉	Extn205(205)	Extn205 (205)	Jul 17, 2013 9:14 AM	5 s
	✉	Extn205(205)	Extn205 (205)	Jun 7, 2013 9:34 AM	13 s

2. You can click on a column header to sort the messages.
3. You can use the **Search** box at the top to filter the messages displayed to matching **From** value names or numbers.
4. To call the number associated with the message, click on the underlined **From** details.
5. You can click on the check boxes to select a message or messages and then:

   - **Save the message**
     To mark the messages as saved click **Save**. The message icon changes to a computer disk 💾 icon. Note that whilst the portal also displays group messages[122] it cannot save them.
   - **Delete the message**
     To delete the messages click **Delete**. Note that whilst the portal also displays group messages[122] it cannot delete them.
   - ▶ **Play the message**
     Play the selected message or restart play if paused. You can also select the message to play by clicking on the ✉, ✉ or 💾 message icon next to the message. The playback can be done through your phone or browser.
     - ☎ This icon indicates that your current profile[114] is set to playback messages to your phone extension.
     - 🎧 This icon indicates that your current profile[114] is set to playback messages through your PC.
   - ■ **Stop**
     Stop playing the current message.
   - ⏸ **Pause**
     Pause the playback of the current message.
   - ⏩ **Fast Forward**
     This option is grayed out and not supported when using playing back messages through your PC.
   - ⏪ **Rewind**
     This option is grayed out and not supported when using playing back messages through your PC.

Message Icons

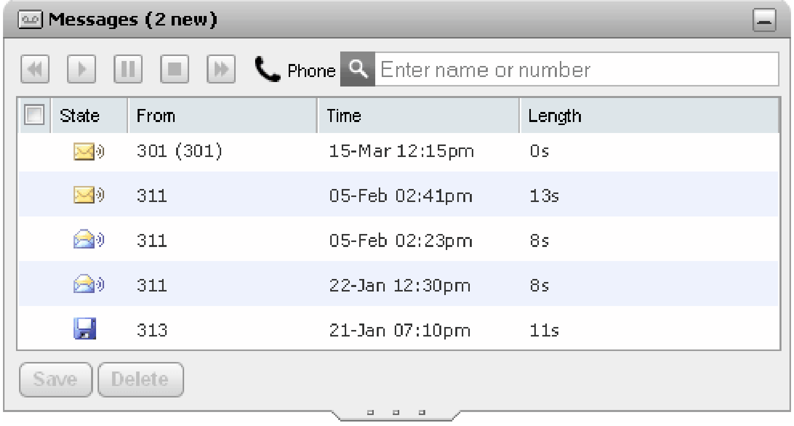
- ✉ **Unread message**
- ✉ **Read message**
  Note that by default, a read message is permanently deleted from the mailbox after 30 days unless changed to a saved message.
- 💾 **Saved message**
  Setting a message as saved stops it being automatically deleted after a period of time.
- ❗ **Priority message**
  This icon is added the message icon to indicate that the caller has set the message as a priority message.
- 🔒 **Private message**
  This icon is added to the message icons above to indicate that the caller has set the messages as a private message. Private messages cannot be forwarded to another voicemail mailbox.

8.3 Call Someone Who Left a Message

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

To make a return call from voicemail:

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



State	From	Time	Length
	301 (301)	15-Mar 12:15pm	0s
	311	05-Feb 02:41pm	13s
	311	05-Feb 02:23pm	8s
	311	22-Jan 12:30pm	8s
	313	21-Jan 07:10pm	11s

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. If the call fails, the gadget displays a reason for the failure if known.
   - When calling an internal user, if they do not answer you can set a ringback 38 to call you when they end their current or next call.

8.4 Switching Between Phone and PC Playback

You can have the **Messages** gadget playback your messages to your phone or to your computer. The setting used is part of your currently active profiles 114 voicemail options.

- If using Internet Explorer, check that the option **Play sound in webpages** is enabled (**Tools | Internet Options | Advanced | Multimedia**).
- To playback on PC, you may need to accept the security certificate being used by the voicemail server. Enter ***https://<voicemail_server_address>:5443/*** in your browser and accept the certificate exception.

8.5 Adding a Caller to Your Personal Directory

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

To add a voicemail caller to your personal directory:

1. Click on **Main**.
2. View the **Messages** gadget.
3. Click the add icon in the message details.
   a. 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 98 of the user. This applies even if another number is currently selected as the **Primary phone** 231.
      - You can use the **Group** list to select which of your personal contacts tabs 107 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 110 or initiate a chat from the one-X Portal directory.
   b. When finished, click **Save**.

8.6 Changing Your Voicemail Code

Using the **Messages** gadget you can access your voicemail messages 123 without needing any special code as you have logged into one-X Portal using a name and password. However, when accessing your voicemail mailbox by other methods, such as through the phone, you can have access protected by a voicemail passcode.

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

To change your voicemail code:

1. In the **Configure** tab, select **Security**. 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.
   - Note the displayed rules for what should be included in the password. These rules are set by your system administrator.
3. Click **Save**.

8.7 Recording Voicemail Greetings

You can use one-X Portal to record up to 9 greeting files for use with your voicemail mailbox. You can then use the **Active Greeting** 120 setting within your profiles to select which of the greetings should be used by each profile.

- 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. Contact your system administrator if you are unsure what type of voicemail your system uses.

To edit your personal greetings:

1. In the **Configure** tab, select **Voicemail**.
2. Click **Edit Personalized Greetings**. A call is made to your extension.
3. In the name field enter a name for the greeting.
4. Use the ● **Record** icon to start recording and the ■ **Stop** icon to finish recording.
5. After a greeting has been uploaded you can use the ▶ **Play** and ■ **Stop** icons to playback the greeting. You can also delete the file by clicking on ✖ delete.
6. To save the recording click on the 💾 save icon. You will hear a tone when the file has been saved.

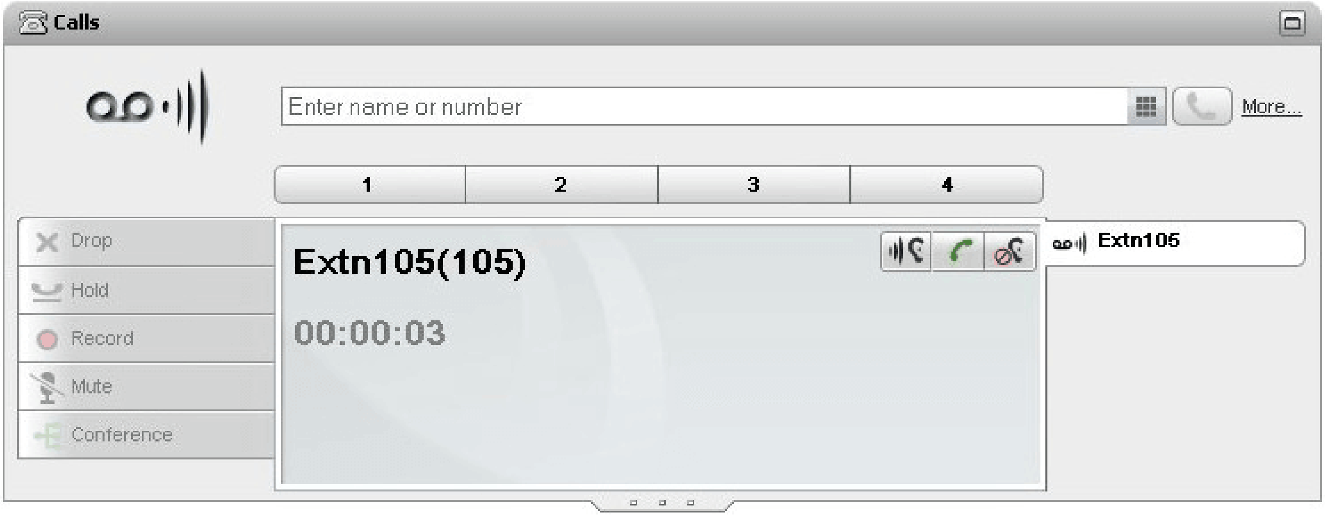
8.8 Select Your Voicemail Greeting

If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have recorded 125. Within each of your one-X Portal profiles 114, you can use the **Active Greeting** setting to select which greeting should be used for your mailbox when that profile is active.

- 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. Contact your system administrator if you are unsure what type of voicemail your system uses.

8.9 Voicemail screening

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

Chapter 9.
Instant Messaging

9. Instant Messaging

You can use your one-X Portal to instant message other portal users and have a chat session. In addition you can use some

Instant Messaging		
- Instant message other users 129 - Instant message everyone	- Start a call from IM 130 - Search instant message conversations	- Login with an external IM client 128 - Configuring IM notifications 131 - Enabling desktop notifications

- **Note:**
  Be aware if you send a message to a user who is experiencing network connectivity issues, the message may not arrive reliably. This can occur even if the current presence status of the user indicates that they are available.

9.1 Logging in using external clients

You can login to one-X Portal even when you are on move using external instant messaging clients such as Pidgin or Adium.

- **User name**:
  If your username for one-X Portal contains spaces then the username on the external client is without the spaces.
- **Password**:
  If the password is not set for one-X Portal then the password on the external client is your extension number.

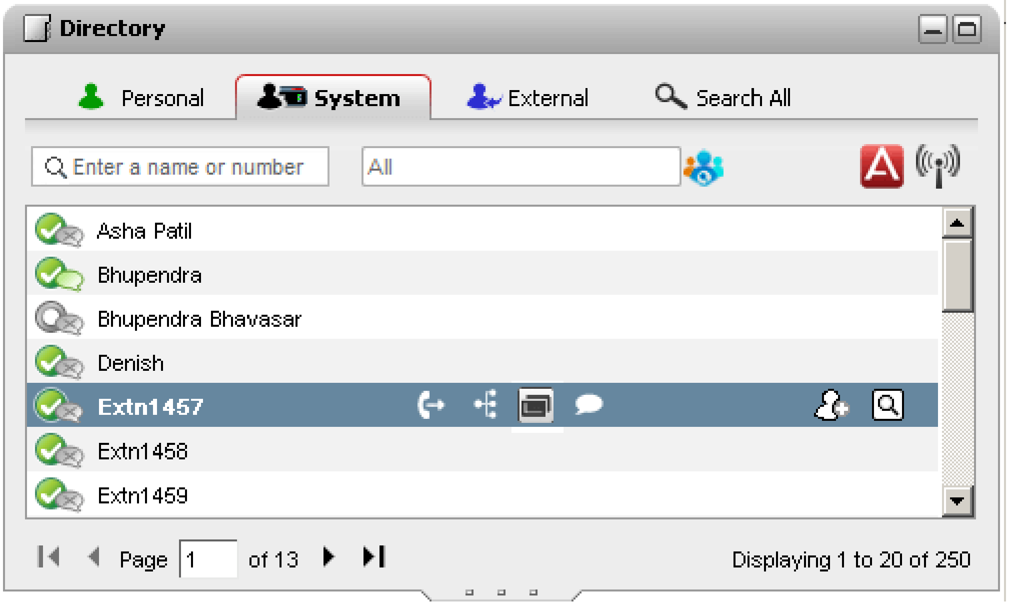
9.2 Instant Messaging Other Users

one-X Portal allows you to have instant message chat sessions with other users. 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.

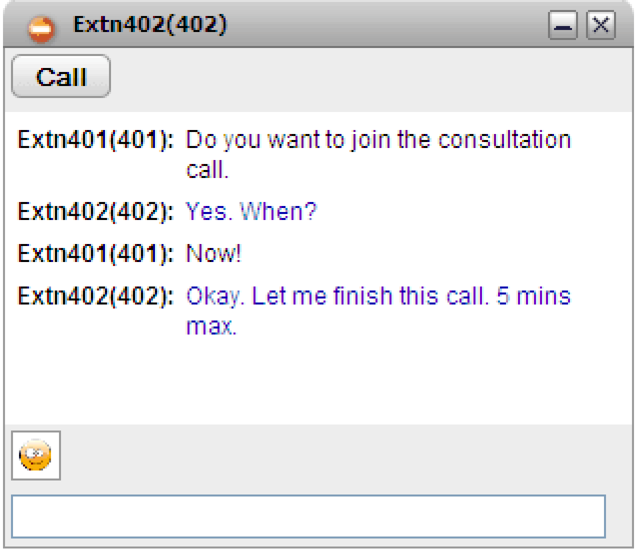
If you do not want other users to be able to start chat sessions with you while you are using one-X Portal, set your presence status 16 to ***Offline***.

To instant message a contact:

1. Locate the other one-X Portal 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 and in the other user's one-X Portal.



Extn401(401): Do you want to join the consultation call.
Extn402(402): Yes. When?
Extn401(401): Now!
Extn402(402): Okay. Let me finish this call. 5 mins max.

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

9.3 Instant Message Everyone

You can start an IM session will all the other one-X Portal users.

To instant message everyone:

1. In the **Directory** gadget, select the **System** tab.

2. Click on the icon.

9.4 Start a Call from IM

Sometimes, an 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.

- You can start a voice call only when you are on an IM session with a contact listed in your one-X Portal **System** directory.
- You can start a voice call even when you are using one-X Mobile or an external IM client.
- Starting a voice call does not end the IM session. You can communicate via the phone and IM at the same time.

To change a message session to a voice call:

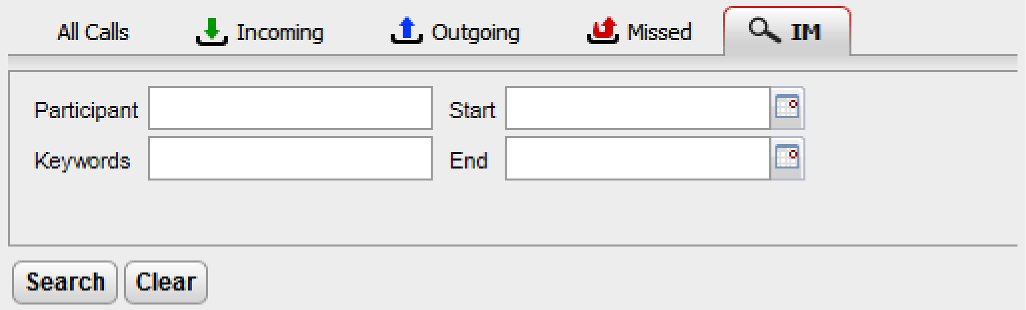
1. At any time during an IM conversation with a contact listed in your one-X Portal System directory, type *@call*.
2. Press Enter.
3. The IM session displays a message that reads: "*<user name> wants to talk to you - your phone will ring shortly*". The system initiates a call between your phone and the other person.

9.5 Searching Your IM Conversations

You can search instant message conversations that you have had with other contacts.

To search your instant message conversations:

1. In the **Conversation History** gadget on the **Main** tab, select the **IM** tab.



2. Enter the criteria on which you want to search. Each field is optional.

Field	Description
Participant	Type the name of the other contact in the conversation.
Keywords	Type the keywords in the IM conversation.
Start	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.
End	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.

3. Click **Search**. The system displays the list of all conversations based on your search. If no results are found, click on **Back** to change your search criteria.
4. Click on the conversation that you want to open. The system opens the conversation.

9.6 IM Notifications

In addition to using IM to chat with other users in the one-X Portal, the system can send various event notifications to you using the one-X Portal IM.

9.6.1 Configuring your notifications

Once you have enabled IM notifications, you can select which notifications you want to receive.

To configure your notifications:

1. Click the **Configure** tab and select **IM/Presence**.
2. Set the various options as required.
   - **Send conference entry IM**
     If selected, the system sends an instant message to you when someone joins your meet me conference.
   - **Send conference exit IM**
     If selected, the system sends an instant message to you when someone leaves your meet me conference.
   - **Voice message begin IM**
     If selected, the sysem sends an instant message to you when someone begins to leave a message in your voice mailbox.
   - **Voice message end IM**
     If selected, the system sends an instant message to you after someone leaves a message in your voice mailbox.
   - **Alternate IM ID**
     The system can send the above notifications to an alternate instant message identity. This requires your system maintainer to have configured XMPP server to server federation. In this way, you can get a notifications on your alternate instant messaging client. Notifications to the alternate identity are in addition to those within one-X Portal.
     - After defining an **Alternate IM ID**, you need to add or invite ***mybuddy*** to your contacts list in your alternate instant messaging application. Enter ***mybuddy@<XMPP_Domain>*** (for example, ***mybuddy@example.com***).
   - **Advertise on call status**
     See Advertise your call status 132.
   - **Advertise your calendar status**
     See Advertise your calendar status 132.
3. After making the changes click **Save**.

9.6.2 Advertise your call status

You can select whether the system should automatically change your IM presence status when you are on a call.

To configure advertising your call status:

1. Click the **Configure** tab and select **IM/Presence**.
2. Set **Advertise on Call Status** to the required setting.
    - **Presence and Message**
      When selected, when you on a call, your presence is changed to DND and your status shows as Busy and On the phone to other users. You do not see the Busy presence status in the top left corner of the System Directory.
    - **Message Only**
      When selected, when on a call, the system updates your status message to indicate you are on a call. You cannot set or edit the on the phone status message.
    - **None**
      The system does not alter your status message or presence indicator while you are on a call.
3. Click **Save**.

9.6.3 Advertise your calendar status

You can select whether the system should automatically change your IM presence status when you have an appointment or meeting in your calendar.

To configure advertising your call status:

1. Click the **Configure** tab and select **IM/Presence**.
2. Set **Advertise on Call Status** to the required setting.
    - **Presence and Message**
      The system updates your status message to indicate you are in a meeting and sets your presence to DND.
    - **Message Only**
      The system displays only your calendar message.
    - **None**
      The system does not alter your status message or presence indicator.
3. Click **Save**.

9.6.4 Enabling Desktop Notifications

In addition to using IM to using provide notifications visible in your one-X Portal browser session, it can provide notifications to your Windows taskbar when the browser is minimized. To do this, desktop notifications must be enabled both for your browser and for one-X Portal.

The exact method of enabling desktop notifications depends on your browser. Currently desktop notifications are only supported with Windows 7.

- **Enabling notifications in Google Chrome** 132
- **Enabling notifications in Firefox** 134
- **Enabling notifications in Internet Explorer** 134

9.6.4.1 Enabling notifications in Google Chrome

With notifications enabled as below, if you receive an instant message when you have the one-X Portal minimized in Chrome, the system displays a notification window. It displays the avatar of the contact who has sent you the IM and when you click on the notification window, the system displays one-X Portal window.

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 domain.
3. Click **Allow**. The system displays a welcome message and sends you desktop IM notifications.
4. Click **Save**.

If you did not allow the browser permission for desktop notifications, the system does not show notifications even if **Enable IM Desktop Notifications** is selected. To resolve this, do the following:

To add the portal to the browser permissions:

1. In the browser, type *chrome://chrome/settings/contentExceptions#notifications*.
2. Select the IP address of the one-X Portal 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
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 domain.
8. Click **Allow**. The system displays a welcome message and send you desktop IM notifications.

9.6.4.2 Enabling notifications in Firefox

With notifications enabled as below, if you receive an instant message when you have the one-X Portal minimized in Firefox, the system displays a notification window. It displays the avatar of the contact who has sent you the IM and when you click on the notification window, the system displays one-X Portal window.

To enable IM desktop notifications in Firefox:

1. In the **Configure** tab, click **Notifications** tab.
2. Select **Enable IM Desktop Notifications**.
   - **Enable IM Desktop Notifications Greyed Out**
     If the **Enable IM Desktop Notifications** option is greyed out:
     a. Click on the link shown below the **Enable IM Desktop Notifications** box.
     b. Click the **Enable IM Desktop Notifications** checkbox.
     c. A popup appears asking if you would like to show notifications. In the popup drop-down, change the selection option to **Always show Notifications**.
     d. A welcome desktop notification appears.

9.6.4.3 Enabling notifications in Explorer

Notifications are supported with Internet Explorer 10 and 11. With notifications enabled as below, if you receive an instant message when you have the one-X Portal minimized in Explorer, the system displays a notification window in the task bar. It displays the avatar of the contact who has sent you the IM and when you click on the notification window, the system displays one-X Portal window.

- **Note:** You cannot pin one-X Portal in HTTPS mode.

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 in Internet Explorer, the system displays the instructions to pin one-X Portal.
   - If you have already pinned one-X Portal in Internet Explorer, select **Enable IM Desktop Notifications**.

Chapter 10.
mybuddy

10. mybuddy

mybuddy is an interactive feature of one-X Portal that acts as a virtual assistant and responds to the commands that you type. It also show you information about call events and changes in the status of contacts.

mybuddy can work in conjunction with any XMPP 231-based messaging client. mybuddy can be used on a PC, Tablet, or Smartphone without running one-X Portal.

Use mybuddy		
• Accessing mybuddy 138 • mybuddy commands	• Configure notifications	• Store location numbers

10.1 Accessing mybuddy

To access mybuddy from one-X Portal:

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

10.2 mybuddy Commands

Note that the language used for myuddy commands matches that set for the user on the telephone system.

Command	Argument	
at	**cell**	Set your current location or number for call functions initiated by you from mybuddy. The value for cell, home and work are set through your one-X Portal preference. See Storing Numbers 141. This value is used by your call, conference, listen and pickup commands unless you specify an alternate location or number is specified when entering the command.
	work	
	home	
	<number>	
call	*<name>*	Start a call between your set at location and the specified name or number.
	<number>	
	<name> **from** *<name>*	Call the from and then start a call to the other name or number.
	<name> **from** *<number>*	
	<number> **from** *<name>*	
	<number> **from** *<number>*	
conference	**cell**	You can initiate a Meet Me conference 231 and also control the actions of each of the participants in the conference. As each participant enters your conference, the system displays a message. The participant number assigned to each participant is shown in square brackets. 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
	work	
	home	
	<number>	
find	*<name>*	Display the contact number and presence status of the matching first and or last name contacts in the directory.
follow	*<name>*	Follow the availability of the target. If the contact does not publish any calendar or telephony presence information, the system does not send you any notification. The system sends you a notification whenever the contact: • Concludes a meeting or an appointment • Disconnects an ongoing phone call • Changes their presence from Away, DND, or Offline to Available.
	<number>	
follow		Display a list of the contacts you are following.
help		Show help on the set of commands available.
help	*<command>*	Show help on the specified command.
listen		Listen to voicemail messages.
locate	*<name>*	Display the location of another user if available.
	<number>	
missed	*<days>*	Display your missed calls for the previous number of days, showing the caller, time of call and presence status of the caller if known.
pickup		Pickup the caller who is currently leaving you a voicemail message.
record		Start recording your current call.
stop		Stop recording your current call.
unfollow	*<name>*	Stop following the availability of the target.
	<number>	

Conference Call Commands

You can initiate a Meet Me conference 231 and also control the actions of each of the participants in the conference. For conferences you start, the system displays a message each time someone joins or leaves the conference. For example, if John Smith joins your 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 participant number assigned to each participant is shown in square brackets.

Command	Argument	
disconnect	*<participant number>*	Drop the participant from the conference. This command can only be used on conferences of which you are the conference host.
mute	*<participant number>* **all**	Mute the participant or participants in a conference. This command can only be used on conferences of which you are the conference host.
lock		Stop other parties joining the conference. This command can only be used on meet me conferences of which you are the conference host.
unlock		Allow other parties to join the conference.
unmute	*<participant number>* **all**	Unmute the participant or participants in a conference. This command can only be used on conferences of which you are the conference host.
who		The system displays the calling name or number and the number of participants. The system also displays who is currently speaking. The participant number of each participant is shown in square [] brackets.

10.3 Notifications

mybuddy can notify you of the voicemail and conference events when your IM client is open. This is configured through your one-X Portal preferences, see IM/Presence 131.

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 Host 230, 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. The phone configured to your one-X Portal 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. The phone that is configured to your one-X Portal rings.
3. Answer the phone and listen to the voicemail message.

10.4 Storing Numbers

You can pre-set your home and mobile phone numbers for use in commands. They can then be accessed using the values ***home*** or ***cell*** in commands.

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*". When you then make a call using mybuddy, for example call 555123456, the system initially calls to your set home number and on answer then starts a call to the specified call number.

To store your home and mobile phone numbers:

1. Click the **Configure** tab and select **Telephony**.
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 need to add a dialling prefix when making external calls from your telephone system, you should include that prefix in the numbers you set.
3. Click **Save**.

Chapter 11. Configuration

11. Configuration

The **Configure** tab is used to setup and control a range of one-X Portal 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		
• Change My Keyboard Shortcuts 144 • Configure IM/Presence 131 • Select my Language	• Configure Park Slots 144 • Set Do Not Disturb Exceptions 147 • Configuring Hunt Group Queues	• Enable Sounds 145 • Configure the World Clock 148 • Change Your Password 150 • Change your voicemail code

11.1 Keyboard Shortcuts

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

- **Answer a Call:** *Ctrl+Alt+A*
- **Make a Call:** *Ctrl+Alt+C*
- **Hold the Current Call:** *Ctrl+Alt+H*
- **Drop the Current Call:** *Ctrl+Alt+D*

To change your keyboard shortcuts:

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

1. 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**.

11.2 Park Slots

one-X Portal 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.

To configure your park slots:

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**.

11.3 Sound Configuration

If your computer and browser are configured for audio, one-X Portal 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** or **Quick Time**.

- If using Internet Explorer, check that the option **Play sound in webpages** is enabled (**Tools | Internet Options | Advanced | Multimedia**).
- To playback on PC, you may need to accept the security certificate being used by the voicemail server. Enter ***https://<voicemail_server_address>:5443/*** in your browser and accept the certificate exception.

To enable sound notifications:

1. Click the **Configure** tab and select **Telephony**.
2. In the **Sound Configuration** section, select **Enable sound notifications**.
3. Click **Save**.

11.3.1 Proxy Server Exceptions

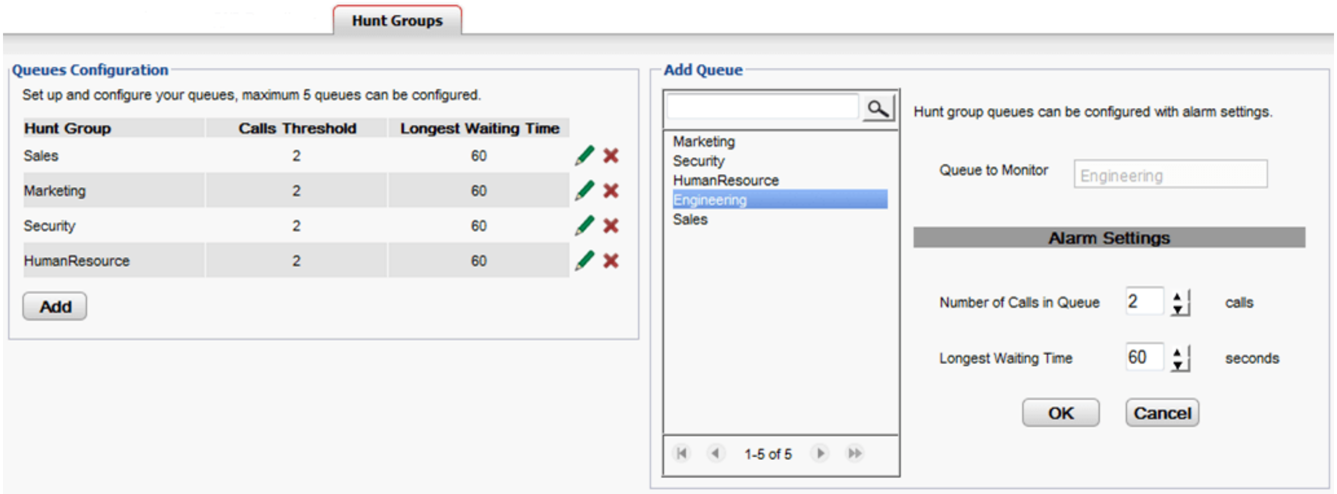
The playback of voicemail messages on your computer requires the IP address of the voicemail server to be entered into your browsers list of proxy server exceptions.

- **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.

11.4 Configuring Hunt Group Queues

You can use the **Queues and Agent Control** gadget to view details of the calls queued waiting to be answered by different hunt groups, see Viewing Hunt Group Queues 56. In order to use the **Queues and Agent Control** gadget, you need to select which hunt groups to monitor.

Note that only hunt groups that have queuing enabled on the telephone system can be monitored.



Queues Configuration

Set up and configure your queues, maximum 5 queues can be configured.

Hunt Group	Calls Threshold	Longest Waiting Time	
Sales	2	60	✎ ✖
Marketing	2	60	✎ ✖
Security	2	60	✎ ✖
HumanResource	2	60	✎ ✖

Add Queue

Hunt group queues can be configured with alarm settings.

Queue to Monitor: Engineering

Alarm Settings

Number of Calls in Queue: 2 calls

Longest Waiting Time: 60 seconds

To view the configured hunt groups for monitoring:

1. On the **Configure** tab select **Hunt Groups**.
   - The currently configured hunt groups for monitoring are shown in the **Queues Configuration** section.
   - The alarm thresholds for each hunt group are also listed.

To add a hunt group to monitor:

You can add up to 5 hunt groups to be monitored.

1. On the **Configure** tab, select **Hunt Groups**.
2. Click the **Add** button.
3. In the **Add Queue** panel select the required hunt group. You can use the search box to search for a particular named hunt group.
4. Set the alarms thresholds for the hunt group.
   - **Number of Calls in Queue**
     This alarms triggers when exceeded by the number of calls queued waiting to be answered by the hunt group. When triggered, the icons for the extra queued change from green to red. and the number of waiting calls also changes to red.
   - **Longest Waiting Time**
     This alarm triggers when exceeded by the time of the longest waiting call in the hunt groups queue. When triggered, the longest waiting time shown for the queue changes to red.
5. Click **OK**.

To edit a monitored hunt groups alarm settings:

1. On the **Configure** tab, select **Hunt Groups**.
2. Click on the ✎ icon next to the hunt group that you want to edit.
3. Adjust the alarms as required.
4. Click **OK**.

To remove a monitored hunt group:

1. On the **Configure** tab, select **Hunt Groups**.
2. Click on the ✖ icon next to the hunt group that you want to remove.
3. Click **OK**.

11.5 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[54]. However, they will still see your status as being on 'do not disturb'.

This only applies for calls direct to your extension number' it does not apply for calls to any hunt group[230] of which you are a member.

You can use one-X Portal to add numbers from your Personal and the System directories to your exceptions list. Numbers added in other ways, for example from your phone or by your system administrator, are also shown and can be deleted using one-X Portal.

To configure your DND exceptions:

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[231] 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

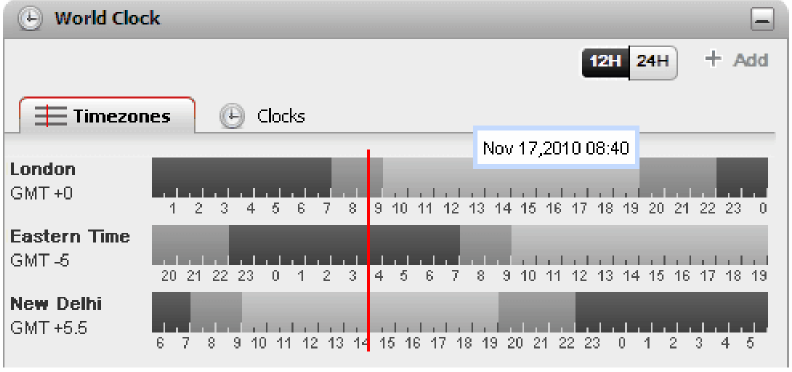
1. Names are not stored as part of the exceptions list, only the numbers. The names shown in the list are mapped by the one-X Portal matching numbers in the exceptions list according to the primary phone[231] numbers of your directory contacts. If the directory contact no longer matches the number in the exceptions list, no name is displayed.
2. one-X Portal does not currently allow the entry of the wildcards *N* and *X*, where *N* represents any numbers and *X* represents any single digit. For example, to allow all numbers from 5551000 to 5551099, add the exception number as either *55510XX* or *55510N*. These can be entered by your system administrator[231].

11.6 The World Clock Gadget

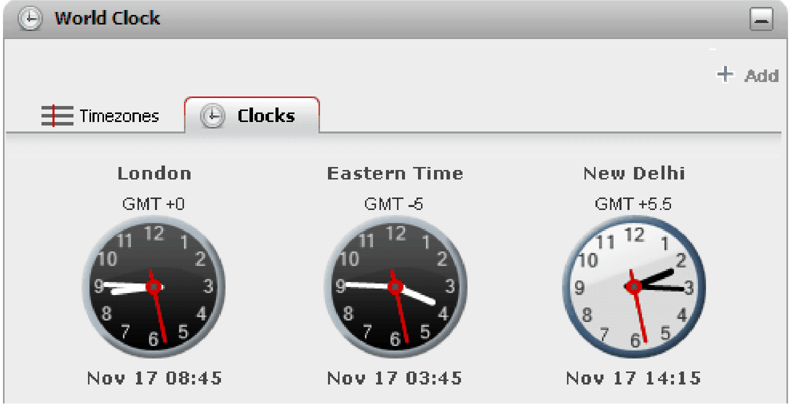
The **World Clock** gadget displays the time in selected time zones that you have added to the gadget. You can add up to 5 time zones to your world clock.

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.

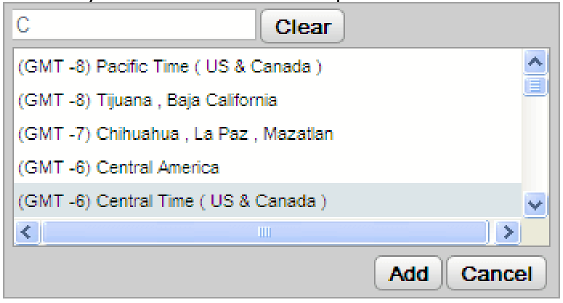


- **Clock**
  In this view, each time zone is shown as a clock.



- 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.


C
Clear
(GMT -8) Pacific Time (US & Canada)
(GMT -8) Tijuana , Baja California
(GMT -7) Chihuahua , La Paz , Mazatlan
(GMT -6) Central America
(GMT -6) Central Time (US & Canada)
Add
Cancel

- ✎ ☒ **Replace/Delete**
  Hovering your cursor over the name of a time zone displays icons for replacing or deleting that time zone.

11.7 Language support

one-X Portal supports the languages shown below. You can select the language you want to use while logging in 11. The language that you set is applicable only to the one-X Portal. This setting does not affect the language of other websites that you access using the browser.

- **Brazilian**
- **Chinese**
- **Czech**
- **Dutch**
- **English (US)**
- **English (UK)**
- **French**
- **German**
- **Italian**
- **Japanese**
- **Korean**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**
- **Turkish**

11.8 Changing Your Conference Bridge Numbers

Meet me conferences that you start use your personal bridge number. Currently this is fixed to match your extension number.

To configure your conference bridge settings:

1. In the **Configure** tab, select **Telephony**.
2. In the **Bridge Configuration** section, set the meet me conference bridge details that you want to use:
    - **Bridge Number**
      This is your personal conference bridge number for meet me conferences. It is set to match your extension and currently cannot be changed.
    - **Audio Conference Pin**
      This is your conference PIN number set in the telephone system and needed to enter your conference. By default, when scheduling a conference this value is also set as the host and participant code for your conference.
3. Click **Save**.

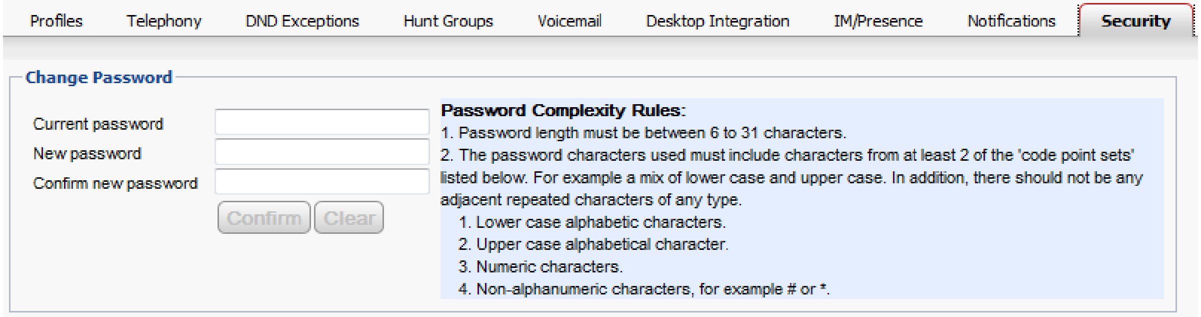
11.9 Changing Your Password

You can change your user password. This is the password that you use to login to one-X Portal and other IP Office applications. Note that this is not the same as your voicemail code 125 or phone login code.

- You can also change your password without logging in to one-X Portal. To do that click on **Change Password** shown at the bottom of the login menu.

To change the password:

1. On the **Configure** tab, select **Security**.



Password Complexity Rules:
1. Password length must be between 6 to 31 characters.
2. The password characters used must include characters from at least 2 of the 'code point sets' listed below. For example a mix of lower case and upper case. In addition, there should not be any adjacent repeated characters of any type.
   1. Lower case alphabetic characters.
   2. Upper case alphabetical character.
   3. Numeric characters.
   4. Non-alphanumeric characters, for example # or *.

2. Type your current password in **Current password** field.

3. Type the new password in **New password** and **Confirm new password** fields. Note the displayed rules for what should be included in the password. These rules are set by your system administrator through the telephone system.

4. Click **Confirm**. If the new password does not meet the password complexity rules, the one-X Portal displays a message to try again.

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

11.10 Changing Your Voicemail Code

Using the **Messages** gadget you can access your voicemail messages 123 without needing any special code as you have logged into one-X Portal using a name and password. However, when accessing your voicemail mailbox by other methods, such as through the phone, you can have access protected by a voicemail passcode.

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

To change your voicemail code:

1. In the **Configure** tab, select **Security**. 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.

   - Note the displayed rules for what should be included in the password. These rules are set by your system administrator.

3. Click **Save**.

11.11 Uploading an Avatar image

You can upload an image to be shown as your avatar. Your avatar, and those of other users, are shown:

- In the contact details when you hover over a contact in the one-X Portal directories.

- In instant messaging conversations.

- In the Avaya IP Office Plug-in 211.

To add or change your 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.

To delete your avatar image:

1. Click **Reset Avatar**.

Chapter 12.
one-X Call Assistant

12. 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 using your browser. 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 if you require access to its other functions.

Use the one-X Call Assistant (Windows PCs Only)		
• Install the one-X Call Assistant 157 • Start the one-X Call Assistant 158 • Configure the one-X Call Assistant 167 • Change password	• View the one-X Call Assistant icons 159 • Start the one-X Portal 158 • Screen pop one-X Portal 169 • View help	• Screen pop Outlook 169 • Hot key dial 168 • Enable announcements 172

12.1 one-X Call Assistant System Requirements

Ensure that the following system requirements are met before you install the one-X Call Assistant:

- Hardware Requirements 155
- Software Requirements 156

12.1.1 Hardware Requirements

The following are the hardware requirements:

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

12.1.2 Software Requirements

Supported Operating Systems

Only on **Pro** (**Professional**), **Enterprise** and **Ultimate** versions:

- **Windows 7**
- **Windows 8.1**
- **Windows 10**

Browsers

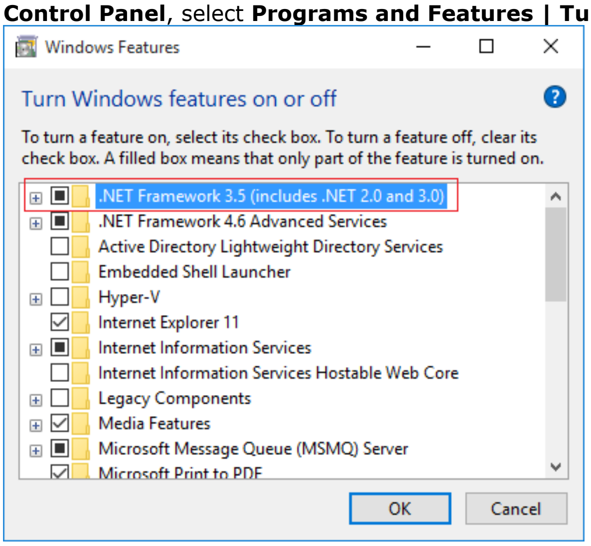
- **Internet Explorer 10.0/11.0.**
- **Microsoft Edge**
- **Firefox**
- **Google Chrome**
- **Safari 8/9**

Outlook Screen Popping

- **Microsoft Outlook 2007**
- **Microsoft Outlook 2010**

Additional Software Requirements

- **Windows Installer 3.1** or later.
- **Microsoft speech platform**
- **Microsoft speech engine** (specific to the locale)
- **.NET Framework 4.5.2**
  If necessary, the install package for this can be downloaded from the **Configure | Desktop Integration** page within one-X Portal.
- **.NET Framework 3.5**
  Support for .NET Framework 3.5 must also be enabled within the Windows Features on the user PC (from the **Control Panel**, select **Programs and Features | Turn Windows features on or off**).



Turn Windows features on or off

To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on.

- ■ .NET Framework 3.5 (includes .NET 2.0 and 3.0)
- ■ .NET Framework 4.6 Advanced Services
- ☐ Active Directory Lightweight Directory Services
- ☐ Embedded Shell Launcher
- ☐ Hyper-V
- ☑ Internet Explorer 11
- ■ Internet Information Services
- ☐ Internet Information Services Hostable Web Core
- ☐ Legacy Components
- ☑ Media Features
- ■ Microsoft Message Queue (MSMQ) Server
- ☑ Microsoft Print to PDF

12.1.3 Language support

The one-X Call Assistant supports the language listed below. When first started, the language selected depends on the language set in your computer's **Regional Settings**. If that language is not supported, **English** is selected.

- **Brazilian**
- **Chinese**
- **Czech**
- **Dutch**
- **English (US)**
- **French**
- **German**
- **Italian**
- **Japanese**
- **Korean**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**
- **Turkish**

12.1.4 Terminal Services

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

12.2 Installing one-X Call Assistant

The file to install the portal's desktop clients for one-X Call Assistant and Avaya IP Office Plug-in can be downloaded from the one-X Portal server. This common installer is used for both desktop clients.

To install the desktop client software:

1. Log in to one-X Portal.
2. In the **Configure** tab, select **Desktop Integration**.
3. Click the link to download the installer for Avaya IP Office Plug-in and one-X Call Assistant. Note: Do not rename the downloaded file.
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. 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 software. Select the installer language and click **OK**. 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** and click **Next**.
7. Check the details for the connection to the one-X Portal server. These should match parts of the URL that you normally use to connect your browser to one-X Portal.
   - **Avaya one-X Portal Sever IP or Name:**
     Set this to match the part of the URL you use to browse the portal between the // and : characters. If the // are not shown, start from the start of the URL to the : character.
   - **Port:**
     Set this to match the digits that follow the : in the URL you use to browse to the one-X Portal. For example ***9443***, ***8443*** or ***8080***.
   - **Secure Communication Mode:**
     If the URL you use in the browser is HTTPS, select this option.
8. Click **Next**. 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**. To simplify support, we recommend that you accept the default destination folder. Click **Next**.
10. Click **Install**. The system displays the progress of the installation.
11. When finished a list of options is displayed. Select those you want and click **Finish**.

12.3 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.

- **Auto-Update**
  If a newer version of call assistant software is available from the portal server, you will be prompted to install it. Note that if you select ***Yes*** it may be necessary to also restart the call assistant. You can select ***Later*** to skip installing the update at this particular time. However that will mean that some features may be unavailable until the update is installed.

To start one-X Call Assistant manually:

1. Click **Start**. Select **All Programs**.
2. Select **IP Office** and then select **Avaya one-X Call Assistant**.
3. The icon that appears in the Windows taskbar notification area indicates the status of the application:
   - If the one-X Call Assistant connects correctly to the one-X Portal server, its displays as a icon or if you have missed calls, a icon.
   - If one-X Call Assistant is not connected to one-X Portal server, it displays as a icon. If the icon does not change to one of the two above after a few seconds:
     a. Right-click the icon and select **Settings**.
     b. Select **Connection**. Set the settings are required (see Connection 167) and click **OK**.

To run the client as an administrator:

To ensure that you receive the notifications from the server you need to have administrator privileges. You can do this when you start the one-X Call Assistant by right-clicking it and selecting **Run as administrator**.

To set the client to always run as an administrator:

1. Right-click **one-X Desktop Clients** and select **Properties**.
2. In the **one-X Desktop Clients Properties** window, select **Compatibility** tab**.**
3. In the **Privilege Level** section, select **Run this program as an administrator**.
4. Click **OK**.

12.4 Starting one-X Portal

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

To start the one-X Portal:

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

12.5 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 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 167.

- **Connected**
  A large green dot indicates that the one-X Call Assistant is connected to your one-X Portal sever.

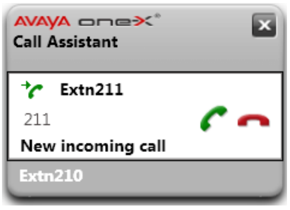
- **Missed Calls**
  Exclamation marks in the icon indicate that you have missed calls in your call log. When you hover the mouse over the icon the system displays the number of missed calls.

- **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 can appear at the same time. When you hover the mouse over the icon the system displays additional details.

12.6 one-X Call Assistant Messages

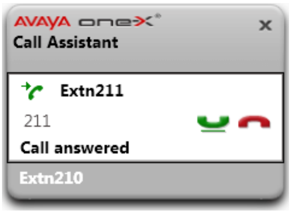
When you make and receive calls, the one-X Call Assistant displays the call progress. The system displays the name or only the number of the party at the other end of the call.



New incoming call

Incoming Call

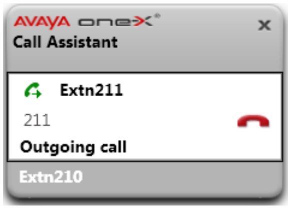
- When you have a call waiting to be answered, the one-X Call Assistant displays the details of the caller. Click **Answer** to answer the call. When you answer a call the system, if you enable screen pop up the system closes the existing one-X Portal window and opens a new one.
- To dial using the hot keys, press the **Tab** key, until the system highlights the answer button, then press the hot key combination **Ctrl+Shift+A**.



Call answered

Connected Call

- 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**.

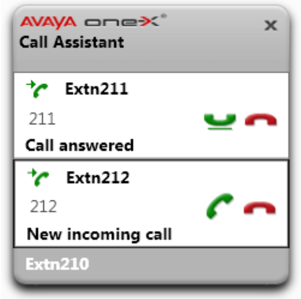


Outgoing call

Outgoing Call

When you make a call, using your phone, one-X Portal or one-X Call Assistant 168, the system displays the details of the call progress. You can use the **Drop** option to end attempt.

- 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**.
- For some types of external calls, for example analog phone lines, the system cannot detect the progress of the call and so displays the call as connected even though the call may still be ringing.

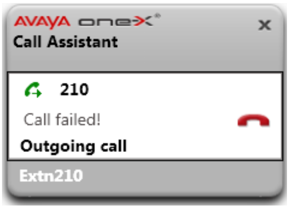


Call answered

New incoming call

Multiple Calls

The pop-up allows you to handle multiple calls, for example if an additional call arrives whilst you are already connected on a call.

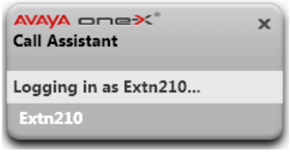


Call failed!

Outgoing call

Failed Call

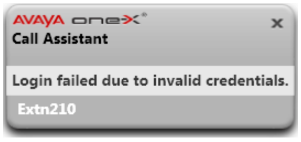
- This message indicates that the call attempt failed for some reason.



Logging in as Extn210...

Logging In

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



Login failed due to invalid credentials.

Login Failed

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

12.7 Voicemail Messages

When you have any new voicemail messages, the one-X Call Assistant icon changes to show a small red dot, ie. an or icon. If you hover the mouse over the icon, it displays information about the number of messages.

- **Note:** one-X Call Assistant does not display voicemail messages for hunt groups.

12.8 Missed Calls

When you have any missed calls, the one-X Call Assistant icon changes to show !!, ie. a or icon. If you hover the mouse over the icon, it displays information about the number of missed calls.

In addition to the missed calls display above, you can also access your full call log 165 using the one-X Call Assistant.

To clear the missed calls:

1. Right-click the icon and select **Clear Missed Calls**.

12.9 Changing your password

You can use the one-X Call Assistant to change your user password. This is the same password used for all your one-X Portal access.

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

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Connection**.
3. Click **Change Password**.
4. Enter your current password and the new password that you want to use.
   - Note that password complexity rules set by your system administrator may apply. To view what those rules are, click on **Password Complexity Rules**.
5. Click **Confirm**.
6. Click **OK**.

12.10 Help menu

To view help:

1. In the notification area, right-click the icon and select **Help**.

12.11 New version available notification

When you login to the one-X Portal, 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 and install it.

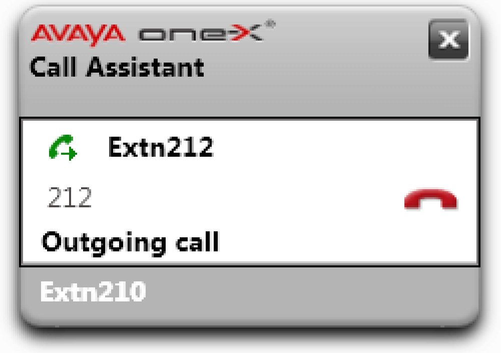
12.12 Call Handling

12.12.1 Making a Call

You can use the call assistant to make calls. Note that the call assistant's dialing rules 171 may adjust the number to ensure that it is suitable for dialing from the telephone system.

To make a call:

1. In the application that you are using, highlight the number you want to dial.
2. Press **Ctrl+Shift+C** (the default hot keys 168 for this function).
   - If the hot key combination matches one used by the application from which you are dialing, then dialing is overridden. If this happens:
     - Copy the number to the clipboard using **Ctrl+C**.
     - Click on the desktop to remove focus from the application and then press **Ctrl+Shift+C** to dial the number stored in the clipboard.
3. The dialing rules, if any, are applied to the number and then it is dialed.
4. The call pop-up displays the progress of the call attempt.

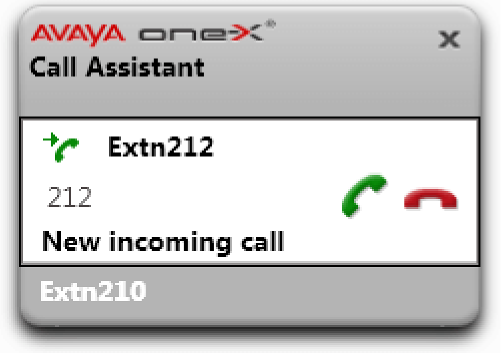


- To end the call attempt, click on the **End** call icon.

12.12.2 Answering a Call

To answer a call:

1. When an incoming call arrives, the pop-up appears showing the call details.



2. Click on the **Accept** call icon to answer the call.
   - To ignore the call, click on the **Ignore** icon. For direct calls to you the call is redirected to voicemail if available, for hunt group calls it rings the next available member of the group.

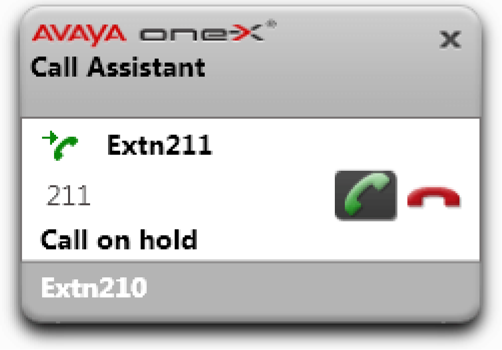
12.12.3 Holding a Call

You can use the one-X Call Assistant pop-up to hold calls.

- 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. 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 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 to further incoming calls.

To hold a call:

1. Click on the **Hold** icon. The call is put on hold. The pop-up indicates that the call is held.



Extn211
211
Call on hold
Extn210

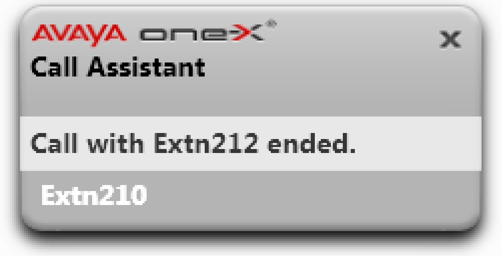
To take a call off hold:

1. Click on the **Retrieve** icon next to the call details.

12.12.4 Ending a Call

To end a call:

1. Click on the **End** icon in the call pop-up.
2. The pop-up shows that the call has ended for a few seconds and then disappears if you have no other calls in progress.



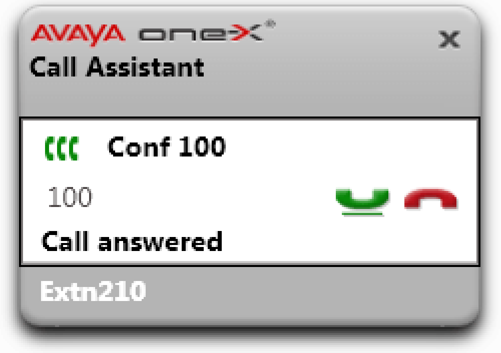
Call with Extn212 ended.
Extn210

12.12.5 Conferencing Calls

With one call on hold and another in progress you can turn all the calls into an ad hoc conference.

To conference your calls:

1. Click on the (((Conference icon. Alternatively press **Ctrl+Shift+F** (the default hot keys 168 for this function).
2. The pop-up now shows that the connected call is a conference call.



AVAYA one-X

Call Assistant

(((Conf 100

100

Call answered

Extn210

12.12.6 Transfer a Call

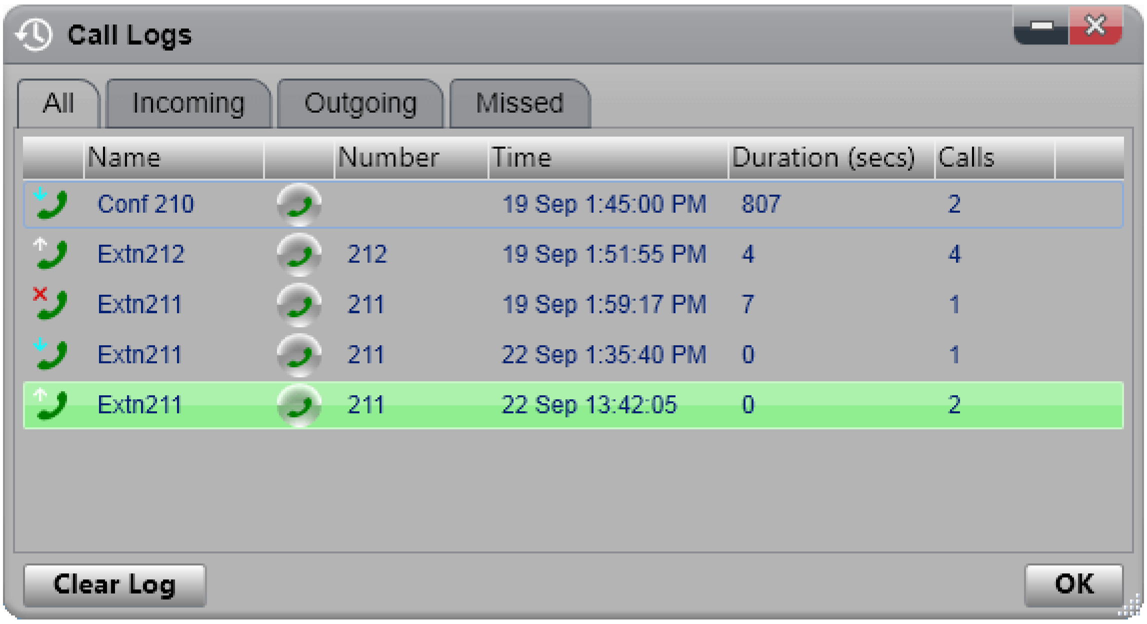
You can use the one-X Call Assistant to transfer your current call. This is an immediate blind transfer. The number selected for dialing may be adjusted by the configured dialing rules 171 to ensure that it is suitable for dialing as an outgoing telephone number suitable for the telephone system.

To transfer a call:

1. In the application that you are using, highlight the number to which you want to transfer the current call.
2. Press **Ctrl+Shift+T** (the default hot keys 168 for this function).
   - If the hot key combination matches one used by the application from which you are dialing, then dialing is overridden. If this happens:
     - Copy the number to the clipboard using **Ctrl+C**.
     - Click on the desktop to remove focus from the application and then press **Ctrl+Shift+T** to dial the number stored in the clipboard.
3. The one-X Call Assistant dialing rules are applied to the number and then the current call is transferred to it.

12.13 Call Log

You can access your call log using to the one-X Call Assistant. You can then use the call log to make return calls.



Name	Number	Time	Duration (secs)	Calls
Conf 210		19 Sep 1:45:00 PM	807	2
Extn212	212	19 Sep 1:51:55 PM	4	4
Extn211	211	19 Sep 1:59:17 PM	7	1
Extn211	211	22 Sep 1:35:40 PM	0	1
Extn211	211	22 Sep 13:42:05	0	2

The call log shown is stored on the telephone system as part of your user settings. Up to 30 records 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.

For incoming call, by default, only personal calls (non hunt group) to the user that were answered by the user or which went unanswered anywhere are included in the call log.

- **Missed Calls**
  Calls that you do not answer but are answered by voicemail or a covering extension are not normally logged as missed calls. However, your telephone system administrator can configure the logging of missed calls.

- **Missed Hunt Group Calls**
  By default, only hunt group calls that you answer are logged. However, your telephone system administrator can configure your call log to include missed hunt group calls for selected hunt groups.

- **Automatic Deletion**
  Old call records are automatically deleted when the call log capacity is reached and a new call record needs to be added. In addition, the telephone system administrator can configure the telephone system to delete log entries after a set period.

The Phone Call Log

If you are using an Avaya phone (1400, 1600, 9500, 9600 or J100 Series) 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 is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal. The two will change in parallel.

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

12.13.1 Displaying Your Call Log

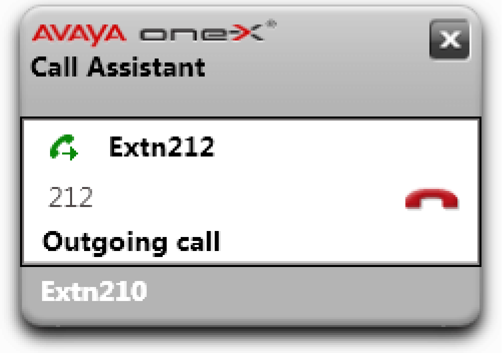
To display your call log:

1. Right-click on the one-X Call Assistant icon and select Call Logs. Alternatively, press **Ctrl+Shift+G** (the default hot keys 168).
2. Your call log is displayed. The log consists of tabs for the different types of call plus a tab for all calls. The icon next to each call also indicates the call type:
   - **Incoming**
     Calls that you answered. Details of the 10 most recent callers are included.
   - **Outgoing**
     Calls that you made. Details of the 10 most recent call destinations are included.
   - **Missed**
     Calls that you did not answer. Details of the 10 most recent missed callers are included.

12.13.2 Make a Call from Your Call Log

To make a call from your call log:

1. Access your call log 166.
2. Locate the call that you want to return or repeat.
3. Click on the icon in the call details.
4. The pop-up appears showing the call progress and allowing you to end the call if required.



AVAYA one-X
Call Assistant
Extn212
212
Outgoing call
Extn210

12.13.3 Clear Your Call Log

To clear your call log:

1. Access your call log 166.
2. Click **Clear Log**.

12.14 Settings

You can access the one-X Call Assistant settings by right-clicking on the applications icon in the system tray and selecting **Settings**.

12.14.1 Connection

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

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Connection**.
3. In the **Server Information** section:
    - **Application server:**
      Set this to match the part of the URL you use to browse the portal between the // and : characters. If the // are not shown, start from the start of the URL to the : character.
    - **Server Port:**
      Set this to match the digits that follow the : in the URL you use to browse to the one-X Portal. For example ***9443***, ***8443*** or ***8080***.
    - **Use secure communication:**
      If the URL you use in the browser is HTTPS, select this option. When you select this option, the browser pop up feature that opens one-X Portal web client also use the same mode.
4. In the **Logon Information** section, enter the **User name** and **Password** that you use to login to one-X Portal in your browser.
5. Click **OK**.

12.14.2 Hot Keys

You can customize a hot key combination for various functions. If the hot key combination that you set for one-X Call Assistant is same as the number that a function in the current application uses, then the application function takes precedence over the one-X Call Assistant.

The default hot keys are: 212 211

Function	Default Keys
Make a call	Ctrl+Shift+C
Play the last announcement	Ctrl+Shift+P
Mute/unmute announcement	Ctrl+Shift+M
Show active notifications	Ctrl+Shift+N
Call status	Ctrl+Shift+None
Phone status	Ctrl+Shift+S
Announce all Hot keys	Ctrl+Shift+K
Open the settings window	Ctrl+Shift+O
Exit one-X Call Assistant	Ctrl+Shift+E
Open one-X Portal	Ctrl+Shift+X

Function	Default Keys
Logout/Login	Ctrl+Shift+L
Answer call	Ctrl+Shift+A
Hold/Unhold	Ctrl+Shift+H
Drop call	Ctrl+Shift+Q
Transfer call	Ctrl+Shift+T
Ad hoc conference	Ctrl+Shift+F
Call logs	Ctrl+Shift+G
DND on	Ctrl+Shift+D
DND off	Ctrl+Shift+W

- **Note:** After you install one-X Call Assistant the system does not display the default hot keys for *Play the last announcement, Mute announcement, Phone status,* and *Announce all Hot keys* until you enable announcements 172.

To customize the hot keys:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Hot Key**. Select the hot key combination that you want to use.
3. Click **Update hot key**.
4. Click **OK**.

To use hot keys:

To answer, hold, retrieve, and drop a call in the one-X Call Assistant Messages 160 using hot keys you need, to ensure that the answer, hold, retrieve, or drop button is in focus. To get the focus on the button, press the **Tab** key until the system highlights the button.

12.14.3 Screen Popping

When making and answering calls using the one-X Call Assistant, you can use this feature to automatically pop the full one-X Portal client in a browser window. This may be useful to carry out further actions on the call or get additional information.

The screen pop uses a minimal version of your default browser. That is, a browser window without the usual toolbars and buttons so more compact that normal.

Outlook Popping

You can also set the system to pop the Outlook address book contact cards depending on the caller line identity of the caller and/or the number that you dial. This feature requires Outlook to be running.

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

- **Outlook Versions:**
  - **Microsoft Outlook 2007**
  - **Microsoft Outlook 2010**
- **Operating Systems:**
  - **Windows 7** (32-bit, 64-bit)
  - **Windows 8.1** (32-bit, 64-bit)
  - **Windows 10**

To configure screen popping:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Screen Popping**. Enable the settings that you would like to set.

Fields	Description
Enable CA Popping	Enables screen popping when selected. The options below are then used to select when popping occurs and the type of popping.
Pop on caller line identity	Pop the one-X Portal window for incoming calls. If **Pop Outlook** is also selected, the Outlook contact card is popped if the caller ID of the caller matches an Outlook Address Book contact.
Pop on Outdial	Pop the one-X Portal window for outgoing calls. If Pop Outlook is also selected, the Outlook contact card is popped if the number you dial matches an Outlook Address Book contact.
Pop Outlook	Pop Outlook address book contacts using the settings above. This feature requires Outlook to be running.

3. Click **OK**.

12.14.4 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.

To configure logging:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Logging**. Select the options to create the log files.

Field	Description
Enable event logging	Creates the log files for the events that occur in one-X Call Assistant and you can view the log files in **Event Viewer** using the **Administrative Tools** option in windows.
Enable logging	Logs all the events that occur in one-X Call Assistant. The system creates the log files at *C:\Documents and Settings\<user>\Application Data\Avaya\IP Office\Avaya Call* where *<user>* is the name of the user who is logged into Windows.
Enable event logging for announcements	Creates the log files for the events that occur in one-X Call Assistant .
Enable logging for announcements	Logs all the events that occurs in one-X Call Assistant.
Max Log File Size (kb)	Specifies the maximum size of the log file. The system displays this option only if you have selected **Enable logging.**
Max log duration	Specifies the maximum duration of the logs. The system displays this option only if you have selected **Enable logging.**

3. Click **OK**.

To access the log files:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Logs**.

12.14.5 Dialing Rules

You may need to configure dialing rules to adjust the number dialled when you make a call →162 using the one-X Call Assistant. The rules ensure that the number dialed is a suitable for an outgoing call from your telephone system.

To set your dialing rules:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Dialing Rules**.
3. In the **Dialing Rules** dialog box, select which dialing rules you want applied:

Field	Description
None	Do not apply any dialing rules.
Use System Dialing rules (TAPI)	Apply the Windows PC's dialing rules. Those are set through the **Phone and Modem** options in the Windows control panel.
Use Custom Dialing rules	Apply the dialing rules that you set below.

4. If you selected **Use Custom Dialing rules**, set the rules:

Field	Description
Number to dial access an outside line	The prefix that should be added to outgoing external calls.
Your country code	The country code of your country.
Your area/city code	The area code or city code of the IP Office system.
PBX main prefix	The main prefix of the PBX of the telephone server.
Number to dial for long distance calls	The digits that indicate that the number being dialed is a long distance call.
Number to dial for international calls	The digits that indicate the number being dialed is an international telephone number.
Length of internal extensions	The number of digits for internal extensions.
Length of national phone numbers (including area/city code)	The number of digits, including area or city code, for a call national calls. For multiple entries use a comma to separate each entry.
Remove area/city code when making a local call	If selected, the system removes the area/city code when you make a local call. This field is only available if you have set an area/city code.

5. Click **OK**.

12.14.6 Announcements settings

The one-X Call Assistant can announce various events. The setting below are used to enable announcements and set the voice used for those announcements. The **Announcement selection** 173 settings are then used to select which events are announced.

To configure the announcement settings:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Announcements settings**.
3. Select the settings for the announcements.

Field	Description
Enable announcements	Announces the various events such as system, phone, screen navigation, phone, and call events that you select.
Select voice	You can select the voice you want the system used from the list of those Microsoft text-to-speech languages installed on your computer. The default voices available and the methods for installing additional voices depends on the version of Windows. Note that you can only select voices that match languages supported 156 by the one-X Call Assistant.
Voice speed	You can set the speed of voice. The system displays the value when you move the slider.
Volume	You can set the volume of the announcements.
Sample	Plays the sample announcement based on the settings that you select.

4. Click **OK**.

12.14.7 Announcements selection

You can enable announcements and select the voice used through the **Announcement settings** 172. The **Announcement selection** settings then control which events are announced.

Priority of Announcements

The possible announcements are grouped into four categories. When multiple events occur at the same time, the priority below is applied to how the announcements are played. For example: If playing a phone status message and a system error occurs, it ends the phone status message and plays the system error message. After it plays the system error message, it resumes playing the phone status message.

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

To configure which events are announced:

1. In the notification area, right-click the icon and select **Settings**.
2. Select **Announcements selection**.
3. Select the options that you want to the system to announce.

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

4. Click **OK**.

Chapter 13.
Microsoft Outlook Plug-In

13. Microsoft Outlook Plug-In

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 and make a call, answer a call, transfer a call. You don't have to open one-X Portal using a browser and then make a call.

Use the Avaya IP Office Plug-in for Microsoft Outlook		
- Check the Avaya IP Office Plug-in system requirements 176 - Log out of the Avaya IP Office Plug-in 184 - Use the Avaya IP Office Plug-in call functions	- Install the Avaya IP Office Plug-in 178 - Configure the Avaya IP Office Plug-in 222 - Use the Avaya IP Office Plug-in additional features	- Log into the Avaya IP Office Plug-in 179 - Make a call using the Avaya IP Office Plug-in

13.1 Installation

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

- Hardware requirements 176
- Software requirements 177
- Microsoft Outlook versions 177

13.1.1 Hardware Requirements

The following are the hardware requirements:

- 1 GHz processor
- 1GB RAM (minimum)
  The number of Outlook contacts that the system displays is limited by the available RAM on the computer on which the 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.

13.1.2 Software Requirements

Supported Operating Systems

Only on **Pro** (**Professional**), **Enterprise** and **Ultimate** versions:

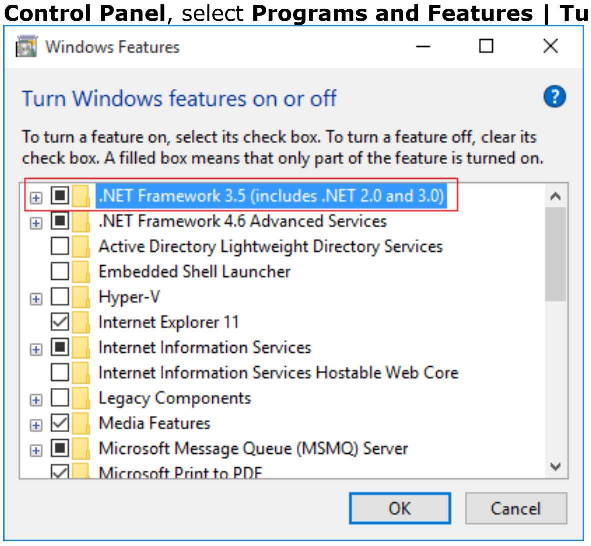
- **Windows 7**
- **Windows 8.1**
- **Windows 10**

Browser requirements:

- **Internet Explorer 10.0/11.0.**
- **Microsoft Edge**
- **Firefox**
- **Google Chrome**
- **Safari 8/9**

Additional Software Requirements

- **Windows Installer 3.1** or later.
- **.NET Framework 4.5.2**
  If necessary, the install package for this can be downloaded from the **Configure | Desktop Integration** page within one-X Portal.
- **.NET Framework 3.5**
  Support for .NET Framework 3.5 must also be enabled within the Windows Features on the user PC (from the **Control Panel**, select **Programs and Features | Turn Windows features on or off**).



Turn Windows features on or off

To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on.

- ■ .NET Framework 3.5 (includes .NET 2.0 and 3.0)
- ■ .NET Framework 4.6 Advanced Services
- ☐ Active Directory Lightweight Directory Services
- ☐ Embedded Shell Launcher
- ☐ Hyper-V
- ☑ Internet Explorer 11
- ■ Internet Information Services
- ☐ Internet Information Services Hostable Web Core
- ☐ Legacy Components
- ☑ Media Features
- ■ Microsoft Message Queue (MSMQ) Server
- ☑ Microsoft Print to PDF

13.1.3 Microsoft Outlook versions

The following are the supported Microsoft Outlook versions:

- **Microsoft Outlook 2007**
- **Microsoft Outlook 2010**
- **Microsoft Outlook 2013** *(Outlook contact screen popping not supported)*
- **Microsoft Outlook 2016** *(Outlook contact screen popping not supported)*
- **Microsoft Outlook (Office 365)** thick client *(Outlook contact screen popping not supported)*

13.1.4 Installing Avaya IP Office Plug-in

The file to install the portal's desktop clients for one-X Call Assistant and Avaya IP Office Plug-in can be downloaded from the one-X Portal server. This common installer is used for both desktop clients.

To install the desktop client software:

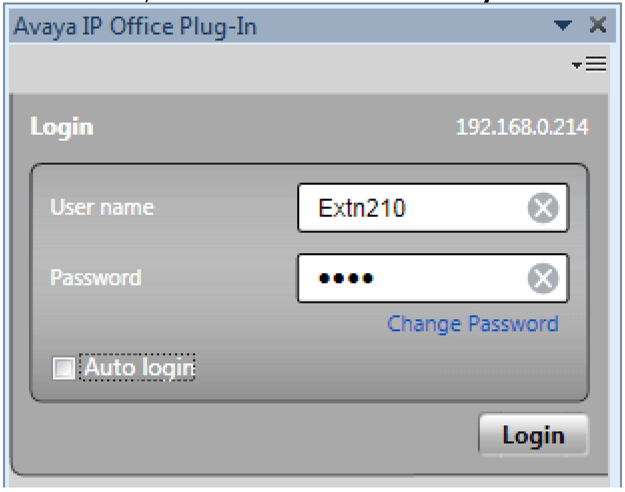
1. Log in to one-X Portal.
2. In the **Configure** tab, select **Desktop Integration**.
3. Click the link to download the installer for Avaya IP Office Plug-in and one-X Call Assistant. Note: Do not rename the downloaded file.
4. The next steps vary depending on the browser:
    - **Internet Explorer or Safari**
      The file download menu prompts you with options to perform on the file. 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 software. Select the installer language and click **OK**. 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** and click **Next**.
7. Check the details for the connection to the one-X Portal server. These should match parts of the URL that you normally use to connect your browser to one-X Portal.
    - **Avaya one-X Portal Sever IP or Name:**
      Set this to match the part of the URL you use to browse the portal between the // and : characters. If the // are not shown, start from the start of the URL to the : character.
    - **Port:**
      Set this to match the digits that follow the : in the URL you use to browse to the one-X Portal. For example ***9443***, ***8443*** or ***8080***.
    - **Secure Communication Mode:**
      If the URL you use in the browser is HTTPS, select this option.
8. Click **Next**. 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**. To simplify support, we recommend that you accept the default destination folder. Click **Next**.
10. Click **Install**. The system displays the progress of the installation.
11. When finished a list of options is displayed. Select those you want and click **Finish**.

13.2 Logging In

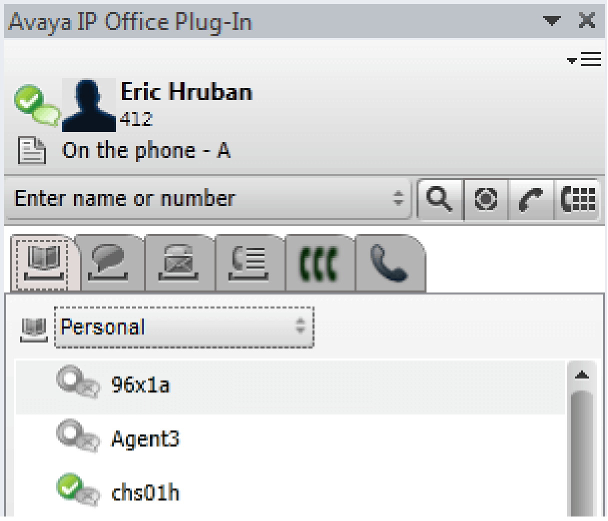
You can log in to one-X Portal using Avaya IP Office Plug-in.

To login:

1. Start your Outlook.
2. In the toolbar, select **Add-Ins** and click **Avaya IP Office Plug-in**. The **Login** dialog box is displayed.



3. Enter your one-X Portal user name and password. The menu also lets you change a password, see Changing Your Password 224.
4. To automatically login next time you start the plug-in, select **Auto login**. You can also select to start and display the plug-in automatically whenever your start Outlook, see User Settings 222.
5. Click **Login**.
   - **Auto-Update**
     If a newer version of the plug-in software is available from the portal server, you will be prompted to install it. Note that if you select ***Yes*** it may be necessary to also restart Outlook. You can select ***Later*** to skip installing the update at this particular time. However that will mean that some features may be unavailable until the update is installed.
6. The plug-in main screen displays the list of contacts.



To ensure that you receive the notifications from the server you need to have administrator privileges on the PC and have selected **Show Notifications** 222 in the plug-in user configuration.

To run Outlook as an administrator:

1. Locate the ***Outlook.exe*** file. Typically, it is located in **My Computer > C: > Program Files > Microsoft Office > Office14**.
2. Right click **Outlook.exe** file and select **Run as administrator**.

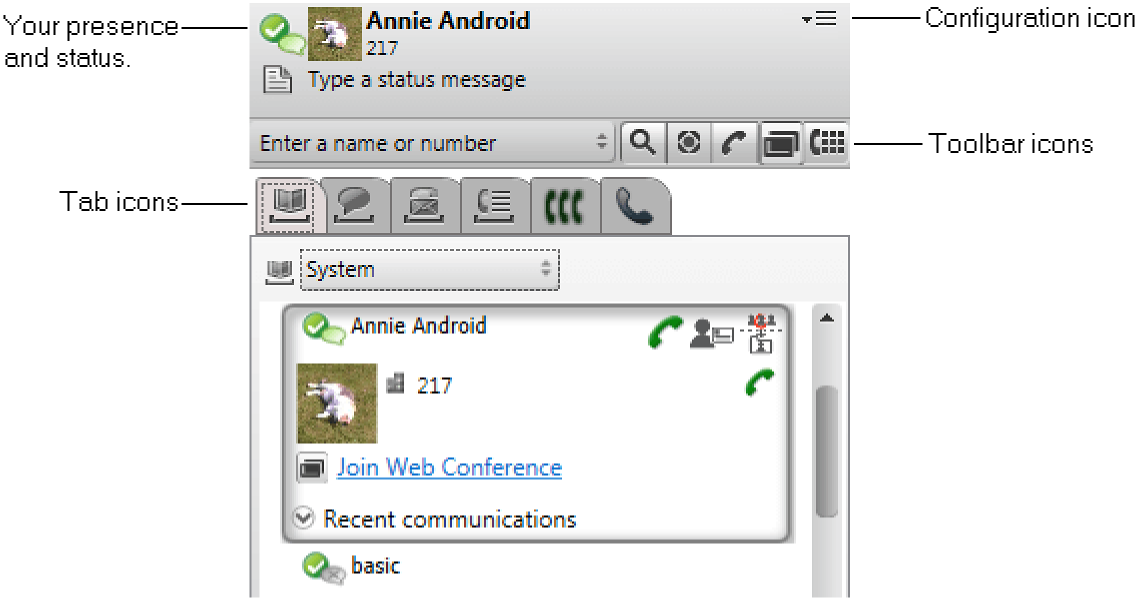
To always run Outlook as an administrator:

1. Right-click Microsoft Office Outlook and select **Properties**.

2. Select the **Compatibility** tab.
3. In the **Privilege Level** section, select **Run this program as an administrator**.
4. Click **OK**.

13.3 Avaya IP Office Plug-in Display

The following section provides a quick view of the plug-in display.



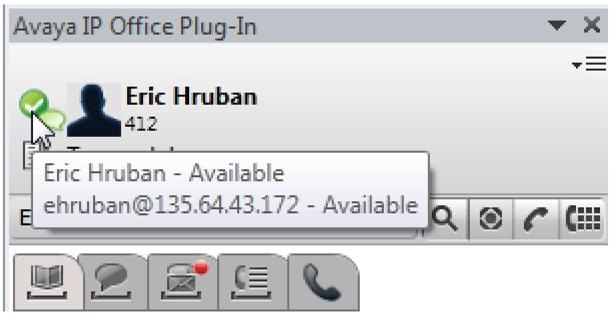
- **Your presence and status**
  View your presence and status. Hover over the items for more information and click to change. See Presence Information 217.
- **▾☰ Configuration icon**
  Access a range of tasks. See Settings 222, Profiles 219, Logging Out 184 and Outlook contact synchronization 207.
- **Toolbar icons**
  - **Search** 202
    Search the directories for a matching name or number entered in the adjacent name or number box.
  - **More** 185
    Add futher information to a call such as a subject (tag) or account code.
  - **Call** 185
    Call the name or number entered in the adjacent name or number box.
  - **Web Collaboration** 193
    Open a browser windows for your own web collaboration conference.
  - **Dial Pad** 185
    Display the dial pad for making a call.
- **Tab icons**
  The lower part of the plug-in consists of a number of tabs.
  - **Directories** 199
    Displays the various directories. The selector at the top of the tab allows selection of which directory to show.
  - **Chat/Instant Messages** 203
    Displays your instant messaging sessions.
  - **Voicemail** 213
    This tab shows your voicemail messages and allows you to control their playback. The icon shows a red dot when you have any new messages.
  - **Call Log** 212
    Displays your call log. The selector at the top of the tab allows selection of what type of calls to show.
  - **Conferences** 194
    This tab displays conferences to which you have been invited or have invited others.
  - **Call** 185
    This tab displays details of the current call or calls in progress.

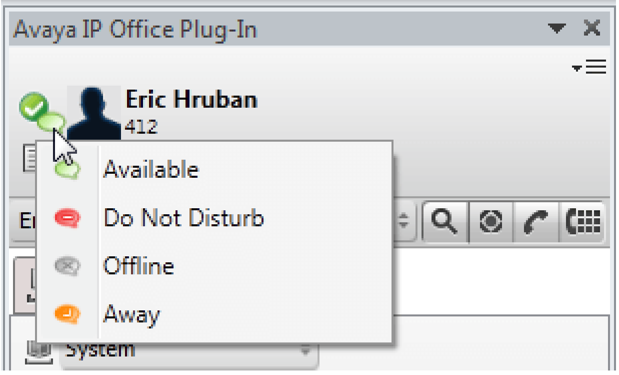
13.4 Quick Overview

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

View your user presence

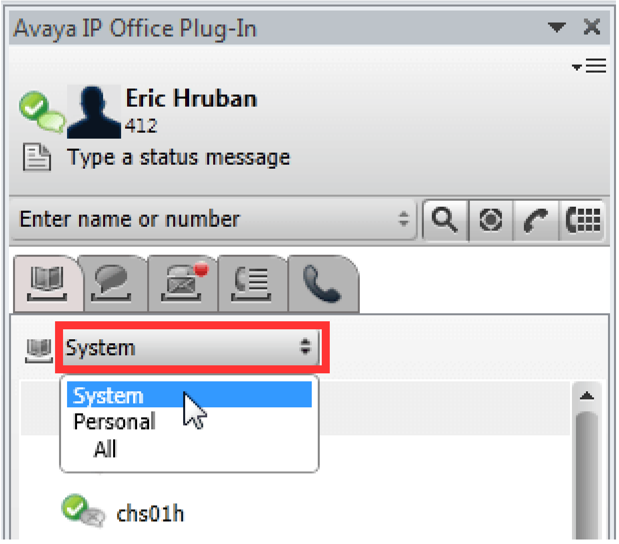
To view your presence, mouse over on the circle icon beside your user name. To view your IM presence, mouse over on the bubble icon beside your user name. You can also change the IM presence by clicking the bubble icon and selecting a status from the list. For more information about the user presence, see [Presence information] [217].

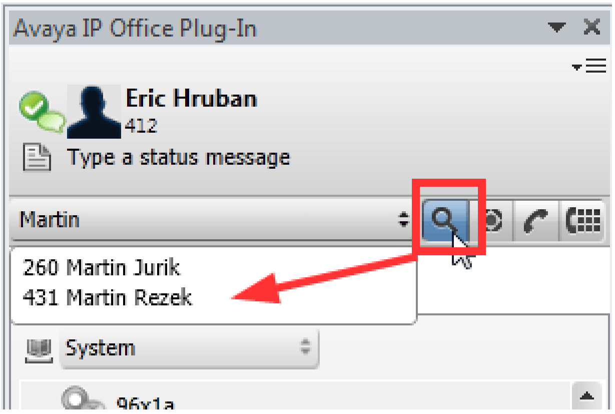




View contacts

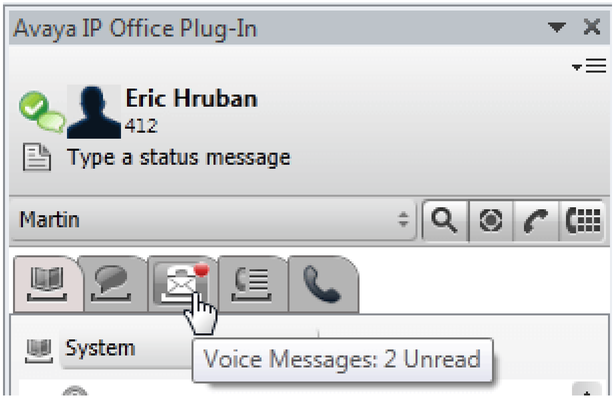
You can view the System or Personal contacts from the Directory list. You can also search for a contact name in the search box and click the **Search** icon. For more information, see [Contact Directory] [203].

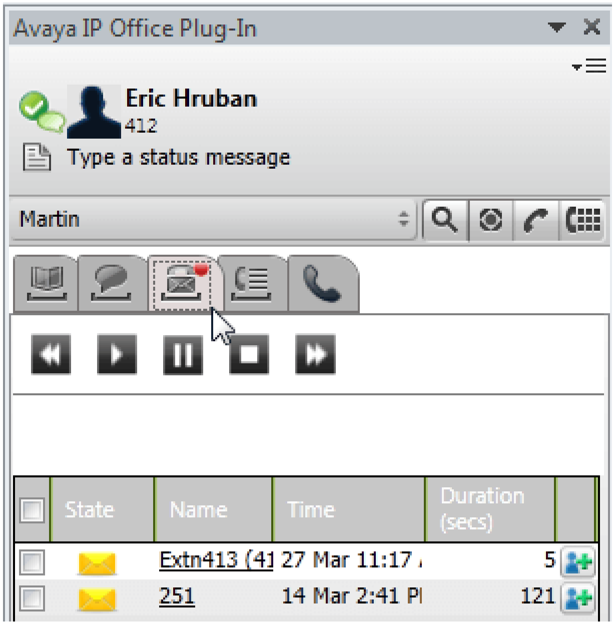




View unread voicemail messages and calls

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 213 and Avaya IP Office Plug-in call functions 185.

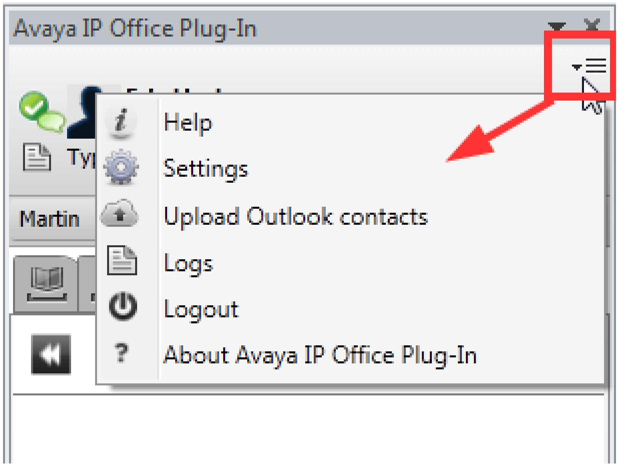




☐	State	Name	Time	Duration (secs)
☐	✉	Extn413 (41	27 Mar 11:17 ,	5
☐	✉	251	14 Mar 2:41 PI	121

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 222.



13.5 Hide the Plug-In

You can close the plug-in window without needing to logout. You may need to do this if you temporarily need more space in your Outlook window to perform other functions.

Whilst closed, the plug-in will not automatically reappear if you receive a call. In order to make or receive calls you need to use the controls on your phone instead.

To close the plug-in window:

1. Click on the ✕ icon at the top of the plug-in. Alternatively click ▼ and select **Close**.

To reopen the plug-in window:

1. In the toolbar, select **Add-Ins** and click **Avaya IP Office Plug-in**.

13.6 Logging out

To log out:

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**.

13.7 Call functions

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

13.7.1 Making Calls

You can make calls using the plug-in in a number of ways. Note that the number actually dialed may be affected by the configured dialing rules 224:

- Typing a name or number 185
- Using the dial pad 185
- Using click to dial 186
- Adding an account code and subject 185

13.7.1.1 Typing a 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. For more information on adding an account code and a subject to a call see Adding an account code and a subject 185.
2. Press **Enter** or click **Call**.

13.7.1.2 Using the dial pad

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

To make a call using the dial pad:

1. Click **dial pad**.
2. Type the number of the contact you want to call.
3. Click **Call**.

13.7.1.3 Adding an account code and a subject

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

To add the subject and account code for a call:

1. Click **More**.
2. Type the subject in the **Subject** of call field. This becomes a text tag that is displayed on other internal phones to which the call might be transferred.
3. Type the account code in the **Account Code** field. The account code is included in the telephone system's call records after the call ends.
4. Click **OK**.

13.7.1.4 Using click to dial

You can make a call using the phone number in the email using Click to dial 209 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 210.

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 ⓘ. For more information see, Smart Tags 209
   - If you have opened an email in edit mode, type a space after the phone number, the system displays the smart tag icon ⓘ.
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 209
2. Select **Additional Actions**.
3. Click **Call**.

13.7.1.5 Calling from Outlook

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.

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.

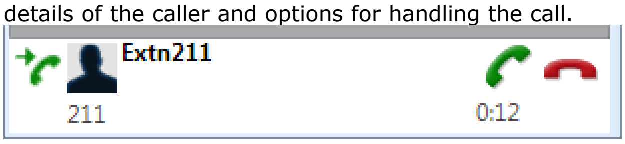
Calling from meeting request:

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.

13.7.2 Answering a call

To answer a call:

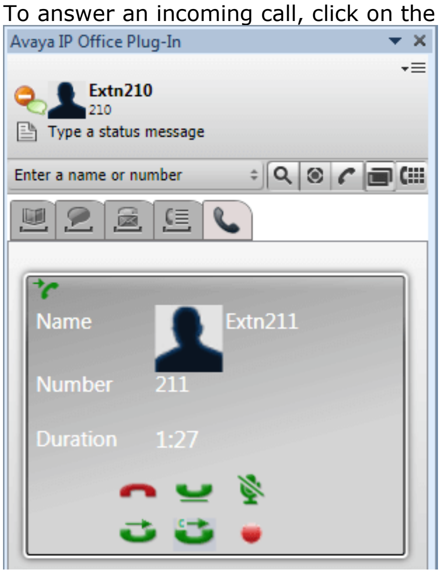
1. When you receive an incoming call, your presence icon changes to . The bottom of the plug-in also shows details of the caller and options for handling the call.



Extn211
211
0:12

- To ignore the call, click on the icon. For direct calls to you the call is redirected to voicemail if available, for hunt group calls it rings the next available member of the group.

2. To answer an incoming call, click on the icon. The call details are now shown on the calls tab.



Name Extn211
Number 211
Duration 1:27

3. The call controls shown vary to match the functions that you can use:

- **End call**
  End the call. The caller is disconnected. For an ad-hoc conference that you started this ends the whole conference.

- **Hold** 188
  Put the call on hold.

- **Mute** 188
  Mute the call.

- **Unmute** 188
  Unmute the call.

- **Transfer** 189
  Transfer the call to another number.

- **Consult** 189
  Put the call on hold pending transfer whilst you make a consultation call to the transfer destination.

- **Complete Transfer** 189
  Finish a consultation call by transferring the held call.

- **Conference** 190
  Conference the current call and any held call.

- **Record**
  Start recording the call.

13.7.3 Placing a call on mute

You can mute your speech connection to a call. Whilst a call is muted, you can hear the caller but they cannot hear you.

- **Phone Mute Controls**
  The one-X Portal does not reflect the status and use of the mute button on your phone. You should only use your either you phone or one-X Portal to mute and unmute calls.
- **Parked calls**
  Retrieving a parked call cancels any muting that may have previously been applied to that call before it was parked.
- **Held calls**
  If you mute a call and then put it on hold, that muting is canceled when you unhold the call. However, if you mute a call and the other party holds the call, the muting is not canceled when the call is taken off hold.
- **Conference Calls**
  If you are the conference host, you may be able to mute other parties in the conference. See Muting Conference Parties 66.

To mute a call:

1. To place a user on mute, click **Mute**.

To unmute a call:

1. To unmute a user, click **Unmute**.

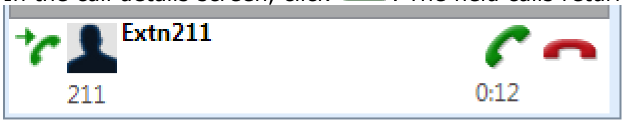
13.7.4 Holding or unholding a call

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

- 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. 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 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 to further incoming calls.

To place a call on hold:

1. In the call details screen, click . The held calls returns to being shown at the bottom on the plug-in display.



To unhold or retrieve a call:

1. To retrieve a call that you placed on hold, click **Retrieve**.

13.7.5 Transferring a call using Avaya IP Office Plug-in

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

- Making a supervised transfer 189
- Making an unsupervised transfer 189

13.7.5.1 Making a supervised transfer

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

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

To make a supervised transfer:

1. Answer the incoming call.
2. Click **Consult**.
3. Use the form that appears to enter the name or number to which you want to transfer the call.
4. When the required match is selected or the number entered, click **Go**. The system places the current call on hold whilst you consult the other party.
    - If the other party answers and will accept the transfer, click **Complete Transfer**.
    - If the other party does not answer or does not want to accept the transfer, click **End**. Then click to take the previous call back from hold.

13.7.5.2 Making an unsupervised transfer

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

To make an unsupervised transfer:

1. Click **Transfer**.
2. Use the form that appears to enter the name or number to which you want to transfer the call.
3. When the required match is selected or the number entered, click **Go**. The call is transferred.

13.7.6 Ending a call

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

To end a call:

1. To end a call, click **End Call**.

13.8 Conference Calls

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:

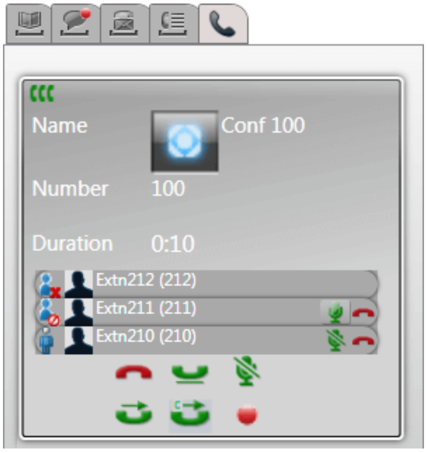
- Ad hoc conference call 190
- Meet Me conference call 192

13.8.1 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 host.

To start an ad hoc conference:

1. With a current call connected, either:
    - Put the call on hold by clicking and make a second call. When answered, click .
    - If another call arrives, click to accept the call. The existing call is automatically put on hold. Click to conference the calls together.
2. The conference is started and shown in the call details tab.



Name Conf 100

Number 100

Duration 0:10

Extn212 (212)

Extn211 (211)

Extn210 (210)

3. Since you started the conference, you are shown as the conference host by the . As the host, you can drop, mute and unmute any of the other participants in the conference using the icons next to their details.

To drop yourself from the conference:

1. Click the icon next to your name in the list of conference members. You are dropped from the conference.

Conference Host Controls

If you are the conference host, you can perform a range of functions as below.

To drop a party from the conference:

1. Click on the icon next to the name of the conference party that you want to drop. They are dropped and their icon changes to .

To end the whole conference:

1. Clicking the icon at the bottom of the conference display.

To mute/unmute a party in the conference:

1. Click on the or icon next to the name of the conference party that you want to mute or unmute. The currently muted parties are shown by a icon.

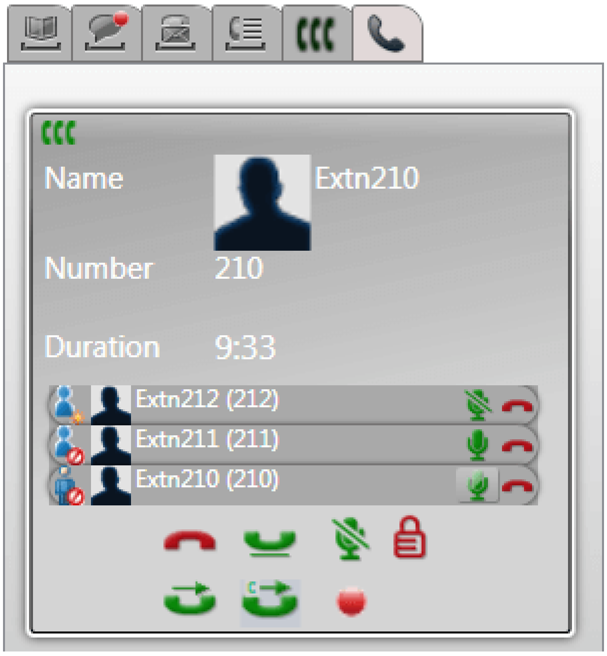
To mute/unmute all parties in the conference:

1. Click on the or icon at the bottom of the conference display. The currently muted parties are shown by a icon.

13.8.2 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 is the conference host.

A meet me conference call provides features similar to an ad hoc conference. However, the active speaker in a meet me conference is indicated (or >) and the conference host can lock and unlock the conference.



Name Extn210

Number 210

Duration 9:33

Extn212 (212)

Extn211 (211)

Extn210 (210)

Conference Host Controls

If you are the conference host, you can perform a range of functions as below.

To drop a party from the conference:

1. Click on the icon next to the name of the conference party that you want to drop. They are dropped and their icon changes to .

To end the whole conference:

1. Clicking the icon at the bottom of the conference display.

To mute/unmute a party in the conference:

1. Click on the or icon next to the name of the conference party that you want to mute or unmute. The currently muted parties are shown by a icon.

To mute/unmute all parties in the conference:

1. Click on the or icon at the bottom of the conference display. The currently muted parties are shown by a icon.

To lock the conference:

1. Click on the icon at the bottom of the conference display. The icon changes to and no other users can join the conference whilst it is locked.

To unlock the conference:

1. Click on the icon at the bottom of the conference display. The icon changes to .

13.8.3 Adding Another Conference Party

If necessary, you can add another party to your conference (ad hoc or meet me).

To add another party to the conference:

1. Click on the **Hold** icon at the bottom of the call details. The conference continues without you and appears as a call at the bottom of the call tab.
2. Use the plug-in to make a call to the other party that you want to add to the conference.
   - If they want to join the conference, click on the **Conference** icon.
   - If they do not want to join the conference, click on the **End** icon to end the call. Then click on the **Retrieve** icon shown by the conference call at the bottom of the call tab.

13.8.4 Web Collaboration

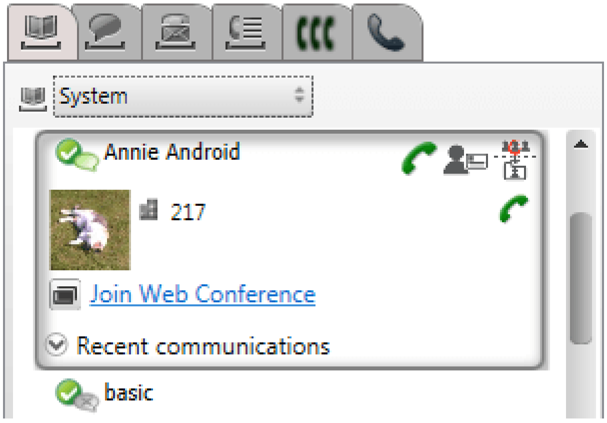
If you are also configured as a web collaboration user, you can use your Avaya IP Office Plug-in to join you web collaboration conference. You can also use it to join other users web collaboration conferences to which you have been invited.

To access you own web collaboration:

1. In the toolbar, click on the web collaboration icon.
2. A browser window to your web collaboration is opened.

To access another user's web collaboration:

1. Click on the contacts icon.
2. Locate and select the other user's contact details.
3. Click on the **Join Web Conference** link in their contact details.

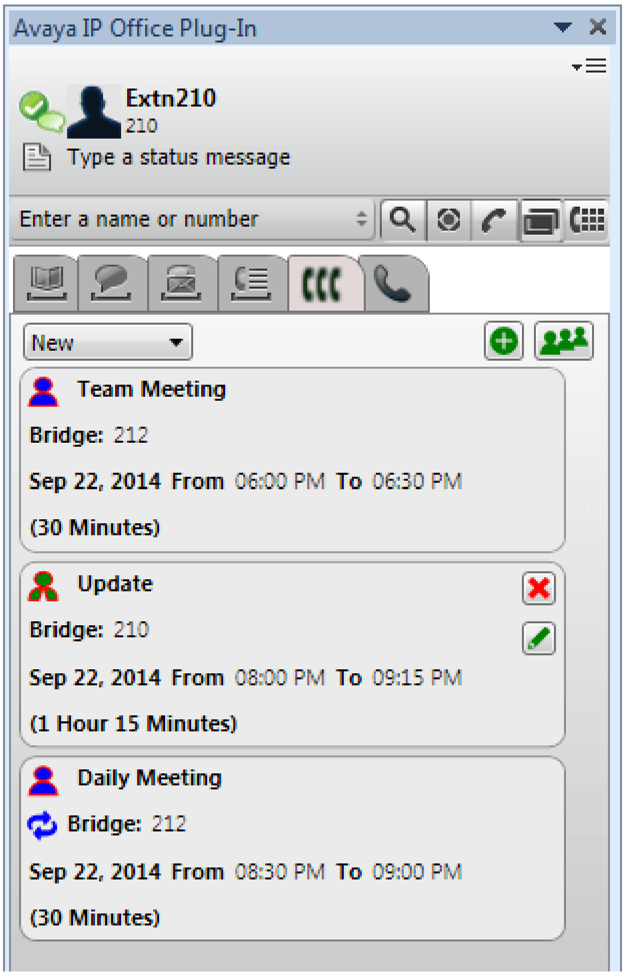


4. A browser window to their web collaboration is opened.

13.8.5 Scheduled Conferences

Clicking on the tab shows you your scheduled conferences. These are conferences to which you have been invited and conferences that you have scheduled yourself.

- **Availability**
  These features may require configuration by your system administrator before they are available. Contact your system administrator for details.
  - Conference scheduling is only available to users configured as a **Power User** by the system administrator.
  - Schedule conferences are not included in portal resiliency. Similarly, conferences schedule during resiliency are lost on recovery of normal operation.



Team Meeting
Bridge: 212
Sep 22, 2014 From 06:00 PM **To** 06:30 PM
(30 Minutes)

Update
Bridge: 210
Sep 22, 2014 From 08:00 PM **To** 09:15 PM
(1 Hour 15 Minutes)

Daily Meeting
Bridge: 212
Sep 22, 2014 From 08:30 PM **To** 09:00 PM
(30 Minutes)

- A conference of which you are the host.
- A conference to which you have been invited.
- A recurring conference.

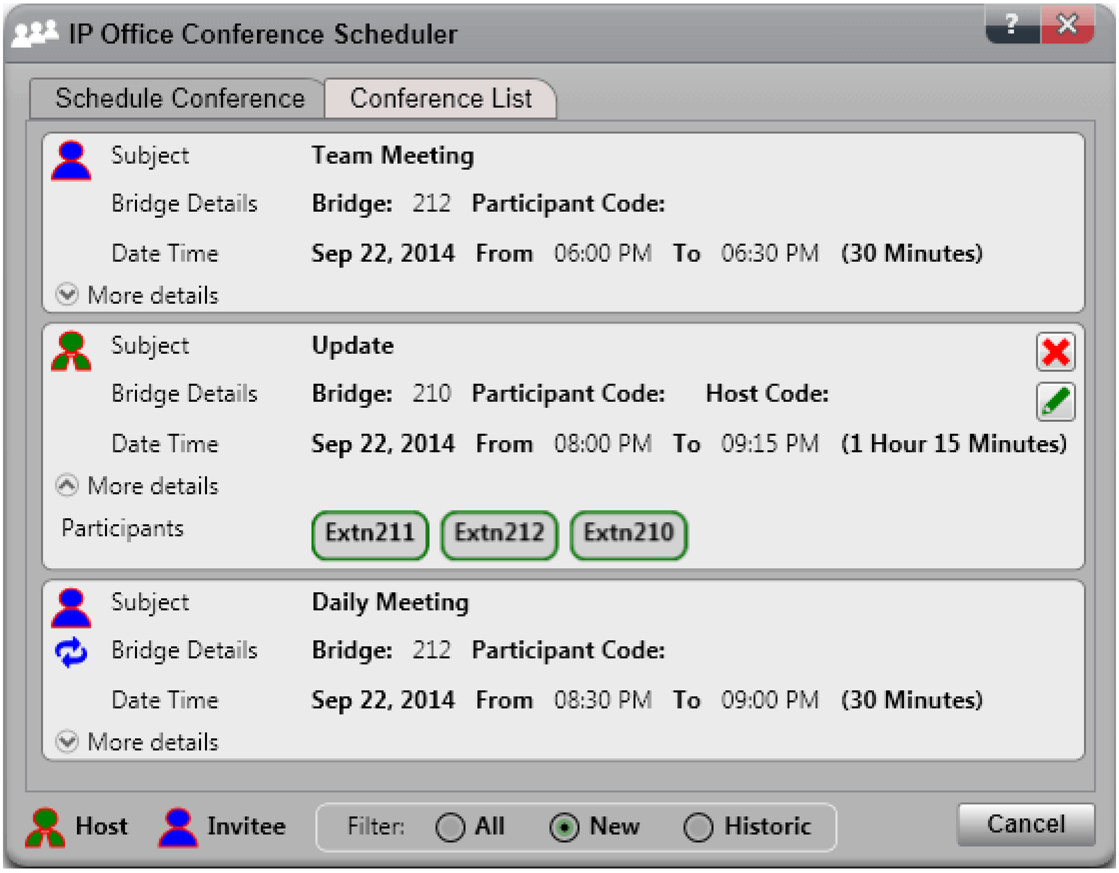
You can use the drop-down at the top to select which conferences are show:

- **New**
  Show scheduled conferences set to occur in the future.
- **Historic**
  Show scheduled conferences that occurred in the past. By default the system retains conference details for up to 15 days (set by your system administrator).
- **All**
  Show both future and previous scheduled conferences.

13.8.5.1 View the Conferences in Detail

To view the conference details:

1. Clicking on the tab to show your scheduled conferences.
2. Click on the icon. Alternatively, double-click on one of your scheduled conferences.
3. Click on the **Conference List** tab.



Subject **Team Meeting**
Bridge Details **Bridge:** 212 **Participant Code:**
Date Time **Sep 22, 2014 From** 06:00 PM **To** 06:30 PM **(30 Minutes)**
More details

Subject **Update**
Bridge Details **Bridge:** 210 **Participant Code: Host Code:**
Date Time **Sep 22, 2014 From** 08:00 PM **To** 09:15 PM **(1 Hour 15 Minutes)**
More details
Participants Extn211 Extn212 Extn210

Subject **Daily Meeting**
Bridge Details **Bridge:** 212 **Participant Code:**
Date Time **Sep 22, 2014 From** 08:30 PM **To** 09:00 PM **(30 Minutes)**
More details

Host Invitee Filter: ○ All ● New ○ Historic

4. You can filter, edit and delete the conferences in the same way as from the main plug-in window.
   - **New**
     Show scheduled conferences set to occur in the future.
   - **Historic**
     Show scheduled conferences that occurred in the past. By default the system retains conference details for up to 15 days (set by your system administrator).
   - **All**
     Show both future and previous scheduled conferences.

13.8.5.2 Scheduling a New Conference

You can use the plug-in to schedule a conference.

To schedule a new conference:

1. Select the **Conferences** tab.

2. Click on the ⊕ icon.

3. In the **Participants** section, enter the people you want invited to the call. As you type, the portal will show matches from the directories, select a match to complete the entry. You can add a whole group 107 from your personal directory by typing the group name.

   - To add an external contact who is not currently in the directory, click on the icon and enter their details.

   - To search for a directory contact click . Enter the name you want to match and search within the list of personal and system contacts. Click on one of the matches to add it to the participants.

4. Enter a **Subject** that summarizes the reason for the meeting.

5. The **Host Code** and **Participant Code** fields automatically match your conference PIN. However, if required, you can change them.

6. In **Location**, set a note for the physical location of any physical meeting that is occurring in parallel with the audio conference.

7. In **Description**, enter any additional details for the conference.

8. Set the date and times for the start of the conference and for the end of the conference.

9. If you want the server to call the participants at the start of the conference, select **Auto-Invite**.

10. If you want to run a web collaboration session in parallel to the audio conference, for example to share documents, select **Web Conference** and enter the URL for access the session.

11. If you want the conference to repeat at regular intervals, select **Recurrence** and set the frequency for the repeat conferences and when the repeats should end.

    - **Recurrence Pattern**
      This field allows you to select the frequency of each repeated conference.

      - ***Daily***
        When selected, the additional options for either **Every Day** or **Every Week Day** are available.

      - ***Weekly***
        When selected, you can then select which days of the week the meeting should occur.

      - ***Monthly***
        When selected, you can select the day of the month (by date) and how many months between repeats.

    - **Select Range of Occurrences**
      This field allow you to set the date when the recurring conferences should end.

11. As the conference host you can have a conference report 87 emailed to you when the conference ends. To do this select **Email Report**.

12. Click **Schedule**.

13. Click **OK**.

13.8.5.3 Scheduling from Outlook

This options requires you to be logged into the plug-in ⇨179. However, you can use it when the plug-in is hidden ⇨184.

To schedule a conference from within Outlook:

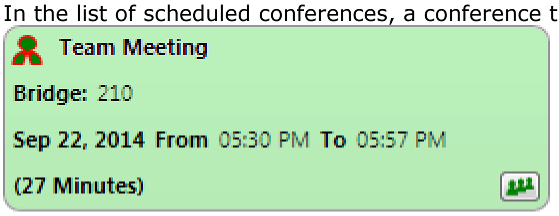
1. On the Home tab, click **New Items** and select **Avaya Office Conference**.
2. Alternatively, in the Outlook calendar view, click on the icon.
3. The conference scheduler menu is displayed. This allows you to schedule the conference. See Scheduling a New Conference ⇨196.

13.8.5.4 Joining a Scheduled Conference

You can use the plug-in to join a conference when it is due. You can also join a web collaboration session ⇨193.

To join a schedule conference:

1. In the list of scheduled conferences, a conference that has started is shown with a green background.



Team Meeting

Bridge: 210

Sep 22, 2014 From 05:30 PM To 05:57 PM

(27 Minutes)

2. To join that conference, click on the icon. Your phone will ring with the conference invite,

13.8.5.5 Editing a Conference

You can edit scheduled conferences of which you are the host.

To edit a scheduled conference:

1. Click on the **Edit Conference** icon.
2. Adjust the conference details as required and then click **Update**.

13.8.5.6 Deleting a Conference

You can delete scheduled conferences of which you are the host.

To delete a scheduled conference:

1. Click on the ✖ **Delete Conference** icon.

13.8.5.7 Accepting Meeting Invites

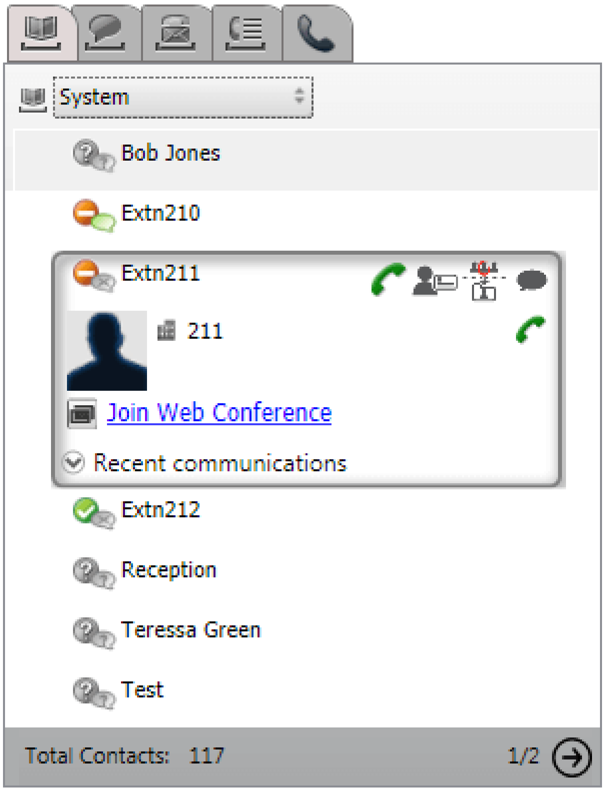
one-X Portal and Avaya IP Office Plug-in conference scheduling can send an Outlook format email invite to the conference participants. However, participants may see the error ***"Meeting cannot be found in the Calendar"*** in their Outlook. To resolve this issue, a registry settings change is required as shown below.

To enable accepting conference invites in the Outlook Calendar:

1. Click **Start** and select **Run**.
2. Type **regedit** and click **OK**.
3. Locate and then click the following registry key:
   HKEY_CURRENT_USER\Software\Microsoft\Office\<version>\Outlook\Options\Calendar
4. From the menu bar, select **Edit | New | DWORD Value**.
5. Enter ***ExtractOrganizedMeetings***.
6. From the menu bar, select **Edit | Modify**.
7. Set the **Value data** to ***1*** and click **OK**.
   - When this key is set to ***1***, then Outlook attempts to interpret 3rd party/unknown calendar formats so that the user can accept the invite.
   - When this key is missing or set to ***0***, then Outlook does not accept meeting invites sent in a 3rd party/unknown calendar format.
8. Select **File | Exit**.

13.9 Directories

The plug-in displays the directories of names and associated telephone numbers in the 🕮 **Directory** tab. When you hover the mouse over a contact, the system displays icons 201 for various actions.



The drop-down selector at the top allows selection of which directory is currently shown. The different directories are:

- **Personal**
  Displays your personal contacts stored in the phone system. If you are using an Avaya phone, these contacts are also accessible on the phone. You can also arrange your personal contacts into up to 5 groups 207 and select which group is currently shown or one of the following:
  - **All**
    Show all personal contacts except Outlook contacts.
  - **Outlook**
    Show contacts imported from Outlook 207.
- **System**
  Displays the contacts stored in the phone system for use by all users and also the details of other users and hunt groups.
- **External**
  Display contacts from an LDAP directory configured by the portal system administrator. Note that only the first 1000 contacts are shown. If a search is made on the external contacts, the contacts are updated to show the first 1000 matches.
- **Search Results**
  Show the results of the current directory search 202.

Use the Directories

- View the Directories 200
- Make calls from the Directory 202
- Edit a Directory Contact
- View the user status in the Directory 201
- Delete a Directory Contact 206
- Instant Message a Contact
- Search the Directories 202
- Add a Directory Contact 204
- Add a Contacts Group Tab

13.9.1 Viewing 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 administrator can also add System directory contacts. You cannot change these contacts. However, you can copy a System directory contact into your Personal directory 204.
- **External**
  Your system administrator 231 can configure one-X Portal to access an external LDAP directory. If your one-X Portal server has been configured to do this, you can perform a search of the external directory. The results of the search are shown here.

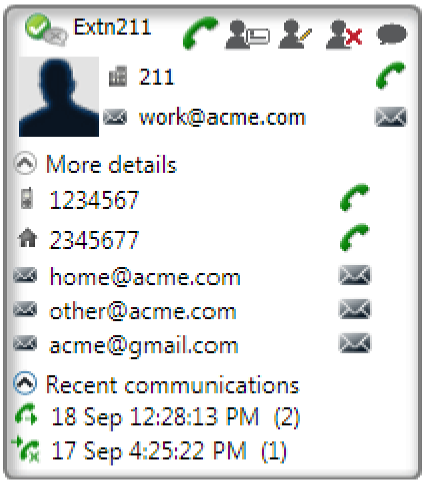
Personal Directory

If you are using a Avaya phone (1400, 1600, 9500, 9600 or J100 Series) phone with a **Contacts** button, or M-Series, T-Series phone, you can also use your **Personal** directory contacts through the phone and edit them using the phone.

1. As **Personal** directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The one-X Portal application and the telephone system can only store up to 250 Personal directory contacts per user (subject to its own system limits).
   - Any contacts uploaded from the Avaya IP Office Plug-in are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal only, and are in addition to the maximum 250 Personal Directory contacts.
2. Contacts can be edited through the phone or through one-X Portal.
3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current **Primary phone** number. The matching telephone system record contains just one number, which will be changed to match the currently selected **Primary phone** number on one-X Portal if that selection is changed.

13.9.2 Directory Icons

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



Extn211
211
work@acme.com
More details
1234567
2345677
home@acme.com
other@acme.com
acme@gmail.com
Recent communications
18 Sep 12:28:13 PM (2)
17 Sep 4:25:22 PM (1)

Personal Directory Actions

Action	Icon	Description
Delete group	✗	Delete the personal directory group.
Change group name	✎	Edit the personal directory group name.
Add a group	+	Add a personal directory group 207.
Add a contact	+	Add a personal directory contact.

Call Actions

Action	Icon	Description
Call	☎	Call the contact using their primary number.
Email	✉	Email 203 the contact.
Start IM	💬	Instant message 214 a contact.

Contact Actions

Action	Icon	Description
Add	+	Add a contact in the **System** directory to the **Personal** directory.
View Details	👤	View details 203 of a directory contact.
Update Contact	✎	For **Personal** directory contacts, edit the contact details 203.
Delete Contact	✗	For **Personal** directory contacts, delete the contact.

Contact Icons

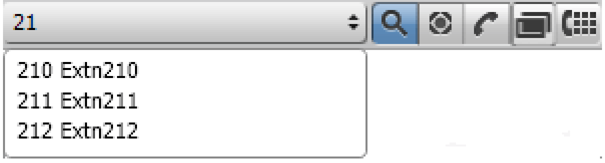
See also Presence information 217.

State	Icon	Description
Available	✓ ✓	The normal state for a user showing that their work extension is available and not in use. • Grey is not using one-X Portal or they have set their portal presence to offline. • The icon is green if the user is also logged into one-X Portal (unless they have set their presence to offline).
Busy	⛔	The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb	✖	The user has set **Do Not Disturb**. Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's **Do Not Disturb exception list**.
Logged Out	○	The user has logged out from their phone. Calls to them will most likely go to voicemail if available.

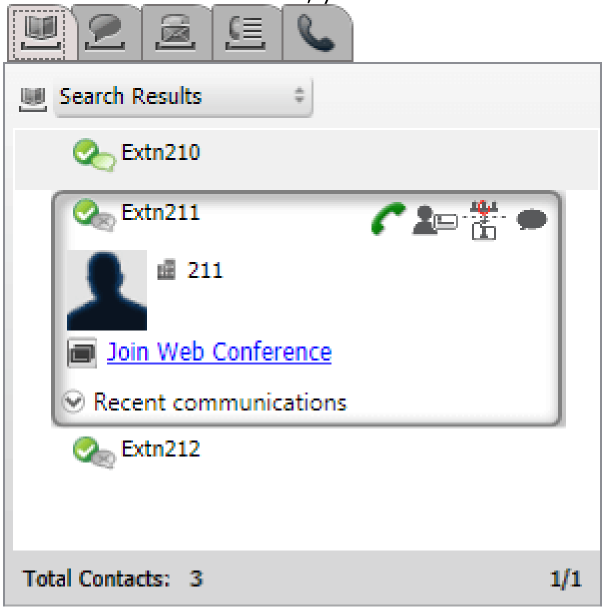
13.9.3 Searching Directories

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 matching contacts. Note: The external directory only returns the first 1000 possible matches.



- To make a call, select a contact and click ☎.
- On the **Directories** tab, you can select **Search Results** to see more details of the search results.



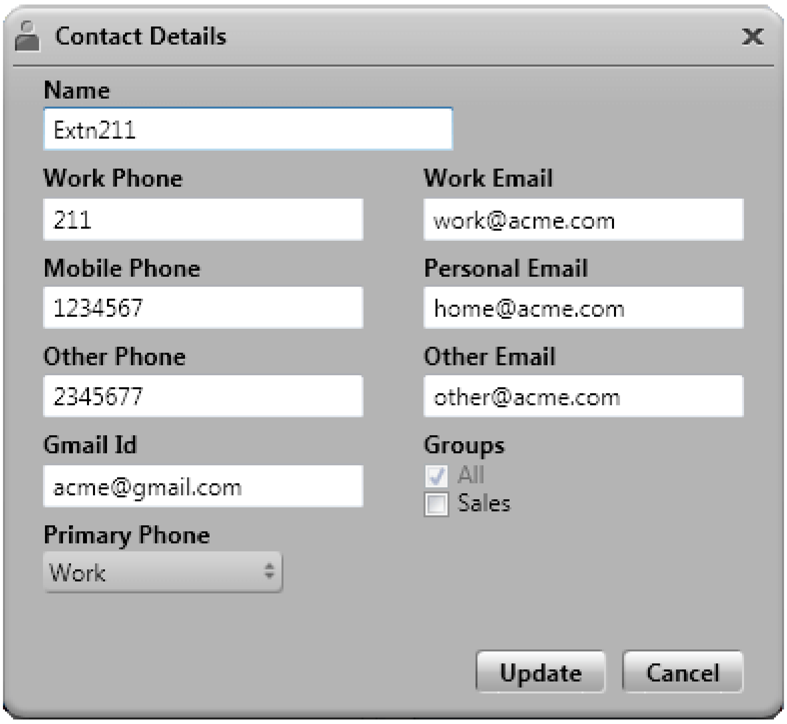
13.9.4 Making a Call from the Directory

To call a contact:

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

13.9.5 Editing Contact Details

Clicking the **Details** or **Edit** icon show the details of a contact. The details include selection of which telephone number should be used as the contacts primary number and which personal directory groups the contact should appear in.



Name: Extn211

Work Phone: 211

Work Email: work@acme.com

Mobile Phone: 1234567

Personal Email: home@acme.com

Other Phone: 2345677

Other Email: other@acme.com

Gmail Id: acme@gmail.com

Groups:
☑ All
☐ Sales

Primary Phone: Work

13.9.6 Instant Messaging a Contact

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.

13.9.7 Emailing a contact

To email a contact:

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

13.9.8 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.

13.9.9 Adding a new Personal directory contact

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.
    a. 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.

    b. When finished, click **Add**.

Personal Directory

If you are using a Avaya phone (1400, 1600, 9500, 9600 or J100 Series) phone with a **Contacts** button, or M-Series, T-Series phone, you can also use your **Personal** directory contacts through the phone and edit them using the phone.

1. As **Personal** directory contacts are added, they are stored by both the one-X Portal application and by the telephone system and kept in sync. The one-X Portal application and the telephone system can only store up to 250 Personal directory contacts per user (subject to its own system limits).
    - Any contacts uploaded from the Avaya IP Office Plug-in are listed in the Outlook group under the Personal tab. They are stored in the one-X Portal only, and are in addition to the maximum 250 Personal Directory contacts.
2. Contacts can be edited through the phone or through one-X Portal.
3. Personal directory contacts shown by the one-X Portal can contain several numbers with one selected as the current **Primary phone** number. The matching telephone system record contains just one number, which will be changed to match the currently selected **Primary phone** number on one-X Portal if that selection is changed.

13.9.9.1 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.

To add a contact from the system 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.

13.9.9.2 Adding a Caller from the Call Log

To add a caller to your personal contacts:

1. Click on the icon next to the call details.
2. The contact details form is shown with the details from the call log added.
3. Complete the details and then click **Add**.

13.9.9.3 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 the **Voice messages** tab.

2. Click the add icon in the message details.
   1. 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.
   2. When finished, click **Add**.

13.9.10 Editing a Personal Contact

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**.
   a. 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.

   b. When finished, click **Add**.

13.9.11 Deleting a Personal Directory Contact

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.

To 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.

To delete 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.

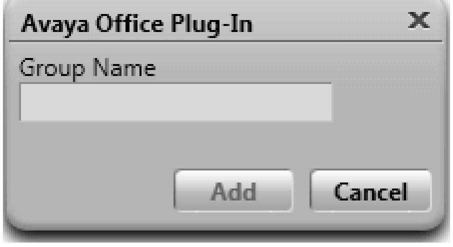
13.9.12 Adding a Personal Contacts Group

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

Note: You cannot add, rename or delete a group named Outlook in the personal contacts group. For more information, see Outlook group 208 and Outlook contact synchronization 207.

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**.

13.9.13 Importing Outlook contacts

You can upload the contacts from Microsoft Outlook to the directory. They appear in your personal directory as a group called **Outlook**.

The mapping table list the fields in outlook contact and their corresponding fields in the plug-in directory. Note however that the plug-in doesn't import contacts from Public Exchange Contact Folder.

Outlook	one-X Portal
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:

This process will overwrite any existing contacts in the Outlook group.

1. In the top right corner of the **Avaya IP Office Plug-in** window, right-click ▾☰ **Options**.
2. Click **Upload Outlook Contacts**.
3. Select the contacts that you want to upload or select all.
4. Click **Upload**.

13.9.13.1 Outlook group in Avaya IP Office Plug-in

- You can update or delete the contact from the **Outlook** group. However, you cannot add a contact to the **Outlook** group.
- All changes made to the contacts in the **Outlook** group are overwritten during any future upload.

To view the imported contacts:

1. Select **Directory > Personal > Outlook**.

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

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

13.10 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 209
- Call log 212
- Contact directory 203
- Outlook contact synchronization 207
- Presence information 217
- Voice mail options 213
- Multiple language support 215
- Avatar 211
- Terminal Services 216

13.10.1 Click to dial

You can make a call from Outlook using the click to dial feature. In addition, if you enable smart tags, you can make calls from numbers in other applications. 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.

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.

The Microsoft Office components required to use the click to dial are:

- Microsoft Outlook
  - Click to dial is only supported on the 32-bit versions of Microsoft Outlook 2007, 2010 and 2013.
  - If you have installed only Microsoft Outlook using the Microsoft Outlook only installer, you cannot use the click to dial feature.
- 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

Smart Tagging Numbers

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.

13.10.1.1 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.
8. Click **OK**.

13.10.1.2 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 hyperlinked.

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

13.10.2 Avatar

Through one-X Portal you can configure an avatar 150 for yourself. The system displays your avatar in the following screens:

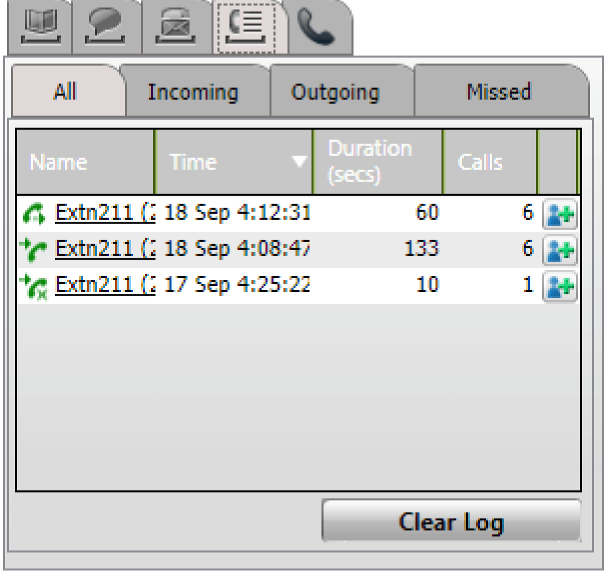
- Next to your user name.
- When you hover the mouse on a contact in the System directory for users who have configured their avatar in one-X Portal. If a system contact is added as personal contact then the system displays the avatar in personal contact also.
- In the incoming call.
- In an active call.
- IM conversation contact.
- For a participant in conference.
- When you play the voicemail for a contact.

13.10.3 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. In the call log, you can:

To view you call log:

1. Click on the **Call Log** tab. The call log is displayed.



Name	Time	Duration (secs)	Calls
Extn211 (2	18 Sep 4:12:31	60	6
Extn211 (2	18 Sep 4:08:47	133	6
Extn211 (2	17 Sep 4:25:22	10	1

2. The call log is divided into sub-tabs for different types of calls and each call type has a different icon:
   - **All**
     This tab shows all the calls you have made, answered and missed.
   - **Incoming**
     This tab shows the calls you have answered.
   - **Outgoing**
     This tab shows the calls you have made.
   - **Missed**
     This tab shows your missed calls.

To clear your call log:

1. Click on the **Clear Log** button.

To add a call to your personal contacts:

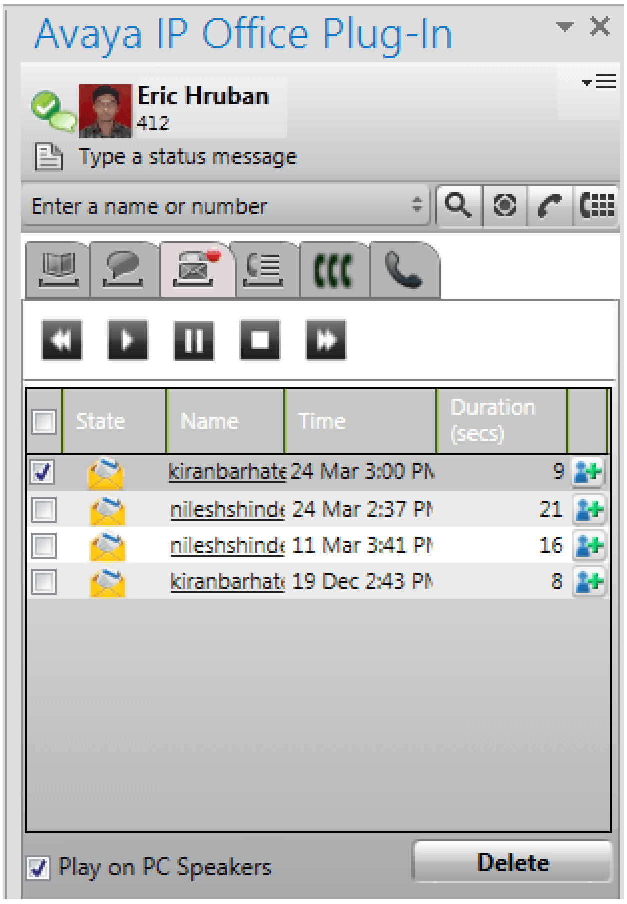
1. Click on the icon next to the call details.
2. The contact details form is shown with the details from the call log added.
3. Complete the details and then click **Add**.

To make a call from the call log:

1. Click on the name and number shown in the call log.

13.10.4 Voicemail options

Click on the icon to display the voicemail messages in your mailbox. The icon displays a red dot when you have any new messages. You can use the tab to sort, manage and playback you messages.



☐	State	Name	Time	Duration (secs)
☑		kiranbarhate	24 Mar 3:00 P	9
☐		nileshshind	24 Mar 2:37 P	21
☐		nileshshind	11 Mar 3:41 P	16
☐		kiranbarhat	19 Dec 2:43 P	8

☑ Play on PC Speakers

To play a message:

1. Select the message that you want to play.
2. Click on the icon to start the playing the message. You can use the other icons to control the playback of the message.
    - The **Play on PC Speakers** option controls whether the playback occurs on your telephone or through your PC. You can set the default value for this option through your profile settings 221.

To delete a message:

1. Select the message or messages that you want to delete.
2. Click on **Delete**.

To call back the caller:

1. Click on the name of the caller.

To add to your contacts:

1. Click on the icon. A new contact is created with the information available with the message.
2. Complete the contact and click **Update**.

13.10.5 Sending an instant message

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

13.10.5.1 Sending an instant message to a contact

You can send an IM to any contact using Avaya IP Office Plug-in. If you receive an new IM when you are conversing with a contact. The system flashes the name of the new contact in the IM contacts list.

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.
4. Type the message in the message box.
5. Press **Enter** key to send an IM.

13.10.5.2 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.

13.10.5.3 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.

13.10.6 Language support

The Avaya IP Office Plug-in supports the language listed below. When first started, the language selected depends on the language set in your computer's **Regional Settings**. If that language is not supported, **English** is selected.

- **Brazilian**
- **Chinese**
- **Czech**
- **Dutch**
- **English (US)**
- **English (UK)**
- **French**
- **German**
- **Italian**
- **Japanese**
- **Korean**
- **Polish**
- **Russian**
- **Spanish (Latin)**
- **Swedish**
- **Turkish**

13.10.7 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.

- Avaya IP Office Plug-in for Microsoft Outlook 2007 does not support terminal services.
- Avaya IP Office Plug-in is compatible with Citrix only when used in Local profiles.

13.10.8 Encrypted communications

The system can encrypt all the information that you send or receive between one-X Portal and Avaya IP Office Plug-in by using particular ports. This makes the connection more secure. The port number for a Windows based one-X Portal server is 8443 and for a Linux based server 9443.

You can configure the system to use encrypted mode. For more information see Connection 222. **Note:** The system does not encrypt the IM messages.

13.11 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 interface. This presence is visible to you on the one-X Portal 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 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 telephone system.

Presence Icon	Presence Status	Description
✓	**Available**	The status indicates that you are available and can be called.
⊖	**Busy**	The status indicates that you have a call in progress.
⊗	**Do Not Disturb**	The status indicates that you have enabled *Do Not Disturb* 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.
○	**Logged Out**	The status indicates that you have not logged into the extension on the phone system. Calls to you are redirected to voicemail if available. Otherwise, the callers receive a busy tone. You cannot make calls. However, you can still use one-X Portal to alter your configuration settings.
☎	**Ringing**	This status indicates that the phone is ringing and you have an incoming call.
?	**Unknown**	This status indicates that your presence on the phone system is unknown. The presence cannot be determined as the phone number is not an extension on the telephone system.

IM Presence

The IM presence indicates the status of an entry in the directory.

Presence Icon	Presence Status	Description
💬	**Available/ Online**	The status indicates that you are logged into the IM server and available for chat.
⊖	**Do not disturb**	The status indicates that you have enabled *Do Not Disturb* on the IM.
⊗	**Offline**	The status indicates that you have not logged into the server. You want to continue using the one-X Portal. If you choose to enable *Offline*, then other one-X Portal users will not be able to send you instant messages using the one-X Portal.
🕒	**Away**	The status indicates that you are logged in to the IM but currently away from your desk.
?	**Unknown**	This status indicates that your presence on the IM is unknown.

13.11.1 Setting a status message

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

To set a status message:

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.

13.12 Profiles

You can create profiles that contain a set of telephone system settings. When you set a profile as active, those settings are applied 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 219 when the current telephone system settings do not match any of your profiles.

Example

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

- **Office**: Send calls to the desk extension. Voicemail on if calls ring unanswered and call pickup to allow other one-X Portal users to pickup calls.
- **Mobile**: Use mobile twinning to ring at both the desk extension and the mobile number. Set voicemail and call pickup on.
- **Home**: Forward calls to an external number. Set voicemail on and call pickup off.

13.12.1 The Detected Profile

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

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.

13.12.2 Selecting Your Profile

To select and apply a profile:

1. In the top-right corner of the plug-in, click ▾≡. Click **Settings**.
2. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
3. In the **Profile Selection** section, choose the profile. For more information, see Profiles 219.
4. Click **OK**.

13.12.3 Editing a Profile

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

To edit a profile:

1. In the top-right corner of the plug-in, click ▾≡. Click **Settings**.
2. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
3. In the **Profile Selection** section, choose the profile. For more information, see Profiles 219.
4. Click **Edit**. Edit the profile settings.
5. Click **OK**.

13.12.4 Adding a Profile

In addition to the three default profiles, you can add four more. You cannot delete the default profiles you can only edit them. However, you can edit and delete the additional profiles that you created.

To add a profile:

1. In the top-right corner of the plug-in, click ▾≡. Click **Settings**.
2. In the left navigation pane of the **General Settings** dialog box, click **Profiles**.
3. In the **Profile Selection** section, click **Add Profile**.
4. In the **Name** field, type a name for the profile.
5. Select the different settings that are available to use within your profiles. See:

- **Call Pickup Settings** 221
- **Mobility Settings** 221
- **Voicemail Settings** 221

6. After you have set the profile as required, click on **Save**.
7. Click **OK**.

13.12.5 Call Pickup Settings

When you enable this option, other users of one-X Portal can answer your calls (not hunt group calls). The displays indicates that you have a call waiting to be answered in the one-X Portal of the other users.

13.12.6 Mobility Settings

In this mode, the system forwards your calls 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.

By default the system only forwards incoming external calls. To forward other calls need configuration through your phone's menus or by your system administrator.

Mobility Profile Settings	
Use default deskphone	The system forwards your call to the telephone system extension.
Forward unconditional	The system forwards the call immediately without ringing at your telephone extension. This function is also called send all calls or forward all.
Forward on no answer	The system forwards only the incoming calls if the call is unanswered for a certain period of time.
Enable mobile twinning	The system forwards the incoming to your telephone extension and the mobile number. You can switches the calls between your extension and the mobile number.
Twinning number	Set the mobile number.
Enable telecommuter	The system enables telecommuting. The system displays this option only if you are a Power user of one-X Portal.
Telecommuter number	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 you phone system.
Make a test call	The system makes a test call to the telecommuter number that you set.
Hold the line	Controls the connection from the phone system to the telecommute number.

13.12.7 Voicemail Settings

You can use the following settings to alter your voicemail settings. Note you can only set some options if your voicemail server is Voicemail Pro, they are disabled if your system uses embedded voicemail.

Voicemail Profile Settings	
Active Greeting	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 Active Greeting setting to select the greeting that the system should use for your mailbox when the profile is active. By default, the system displays System Greetings.
Voicemail	The system receives the voicemail messages when you cannot answer calls.
Voicemail Ringback	When you have any new voicemail messages, when you next use your phone extension, the voicemail server alerts you about the message.
Voicemail Outcalling	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.
Listen to messages on	This setting controls whether voicemail messages are played back on your telephone or through your PC. When viewing your messages 213 you can override the current setting.

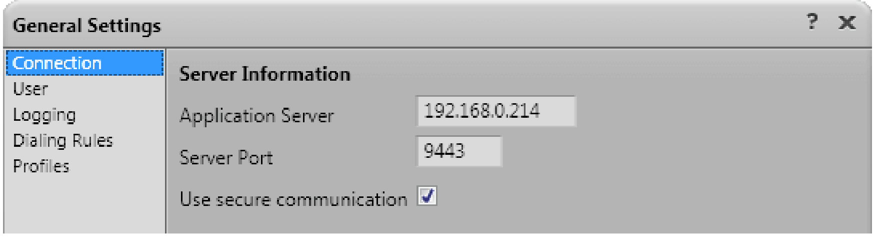
13.13 Configuration

You can set the Connection 222, User 222, and Logging 223 settings for Avaya IP Office Plug-in.

13.13.1 Connection Settings

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

1. In the top-right corner of the plug-in, click ▾☰. Click **Settings**.
2. In the navigation pane, select **Connection**.



Server Information

Application Server: 192.168.0.214

Server Port: 9443

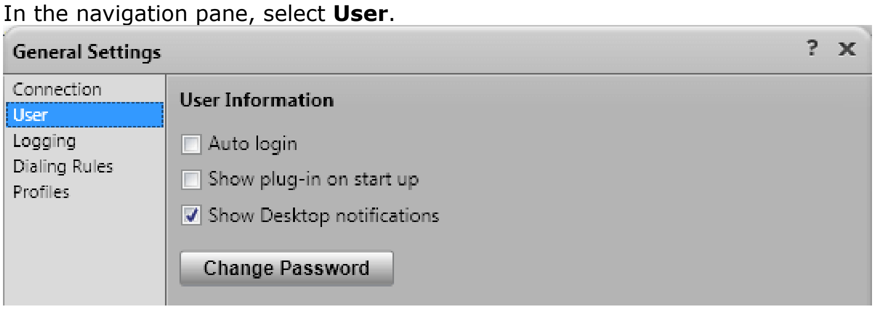
Use secure communication ☑

3. In the **Server Information** section:
   a. Type the IP address of the one-X Portal that you would like to connect to in the **Application Server** field.
   b. Type the server port for one-X Portal in the **Server Port** field. By default, the server port is 8080.
   c. If you select the **Use secure communication** check box, then set the port number for the server in secure mode. For more information see, Secure communications 216. The port number for a Windows based one-X Portal server is 8443 and for a Linux based server 9443.
4. Click **OK**.

13.13.2 User Settings

To configure the user settings:

1. In the top-right corner of the plug-in, click ▾☰. Click **Settings**.
2. In the navigation pane, select **User**.



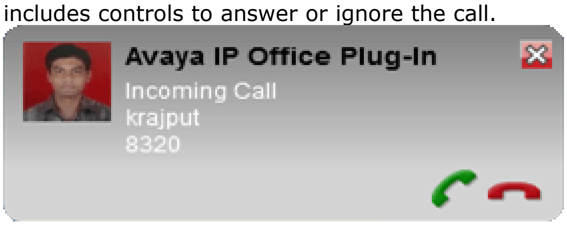
User Information

☐ Auto login

☐ Show plug-in on start up

☑ Show Desktop notifications

3. In the **User Information** section, set the settings as required:
   - **Auto Login**
     If **Auto login** is enabled, then Avaya IP Office Plug-in automatically logs into the one-X Portal server when the plug-in is started in Outlook.
   - **Show on Startup**
     If selected, the plug-in is automatically started whenever Outlook is started. Used in conjunction with **Auto Login** to both start and login to the plug-in whenever Outlook is started.
   - **Show Notification**
     When using Outlook, the plug-in show the user incoming calls, new voicemail messages and instant messages. However, if Outlook is minimized or not on top, the user does not see those messages. If **Show Notification** is enabled, additional notifications are shown in the Windows task bar.
     - For each incoming calls or voicemail messages, a notification is shown in the taskbar. The notification includes controls to answer or ignore the call.



Avaya IP Office Plug-In

Incoming Call

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- For instant messages, a notification is shown only when someone starts a new chat session. Additional messages cause the Outlook in the task bar to blink. This behaviour resets when you clear the messages from the plug-in message box or close the message box.

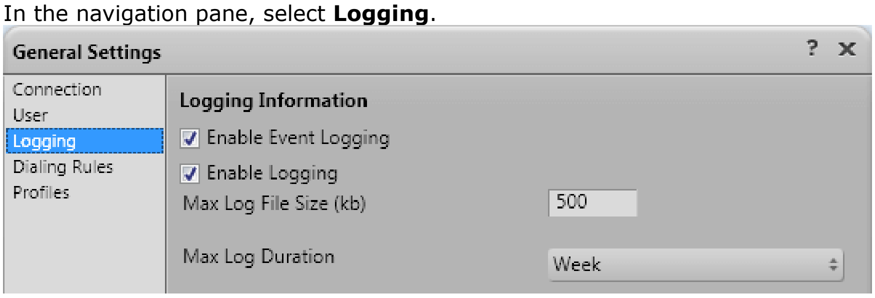
4. Click **OK**.

13.13.3 Logging Settings

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* where <*Current User*> is the name of the user who is currently logged into Windows.

To configure logging:

1. In the top-right corner of the plug-in, click ▾☰. Click **Settings**.
2. In the navigation pane, select **Logging**.



Logging Information

☑ Enable Event Logging

☑ Enable Logging

Max Log File Size (kb) 500

Max Log Duration Week

3. In the **Logging Information** section, you can
   - Select the **Enable Event logging** option.
   - Select the **Enable Logging** option.
   - Specify the **Max Log File Size (KB)** to be allowed.
   - Specify the **Max Log Duration** from the drop-down menu.
4. Click **OK**.

To access the log files:

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**.

13.13.4 Dialing Rules Settings

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
Number to dial access an outside line	The prefix that should be added to outgoing external calls.
Your country code	The country code of your country.
Your area/city code	The area code or city code of the IP Office system.
PBX main prefix	The main prefix of the PBX of the telephone server.
Number to dial for long distance calls	The digits that indicate that the number being dialed is a long distance call.
Number to dial for international calls	The digits that indicate the number being dialed is an international telephone number.
Length of internal extensions	The number of digits for internal extensions.
Length of national phone numbers (including area/city code)	The number of digits, including area or city code, for a call national calls. For multiple entries use a comma to separate each entry.
Remove area/city code when making a local call	If selected, the system removes the area/city code when you make a local call. This field is only available if you have set an area/city code.

To configure dialing rules:

1. In the top-right corner of the plug-in, click ▾☰. Click **Settings**.
2. In the left navigation pane of the **General Settings** dialog box, click **Dialing Rules**.
3. In the **Dialing Rules** dialog box, set the dialing rules.
4. Click **OK** , after you have set the dialing rules.

13.13.5 Changing Your Password

You can use the plug-in to change your IP Office user password. This is the password that you use for the plug-in and also for one-X Portal and other IP Office applications.

To change your password:

1. Either:
    - On the login screen, click the **Change Password** link. This method allows you to change a password without actually logging in and to specify the user for who you are changing the password.
    - Click ▾☰ and select **Settings**. In the navigation pane, select **User**. This method only allows you to change the password for the user you have already logged in as.
2. Click **Change Password**.
3. Enter your current password and the new password and click **Confirm**.
    - The password must meet the complexity rules set by your system administrator. You can view those rules by clicking on the **Password Complexity Rules** link.
4. Click **OK**.

13.14 Troubleshooting

13.14.1 Outlook Plugin Disabled

When starting, Outlook allows a set amount of time for each third-party add-in to start. If the add-in exceeds that time, it is automatically disabled. The timeout is applied regardless of whether the add-in is starting correctly or not.

When this happens, Outlook displays a warning message that an add-in has been disabled. Click **View Disabled Add-ins...** . If the problem add-in is the **Avaya IP Office Plug-in**, click on **Always enable this add-in**.

If you suspect this has happened but you did not follow the warning message link above, you can enable the add-in through the Outlook menus as follows:

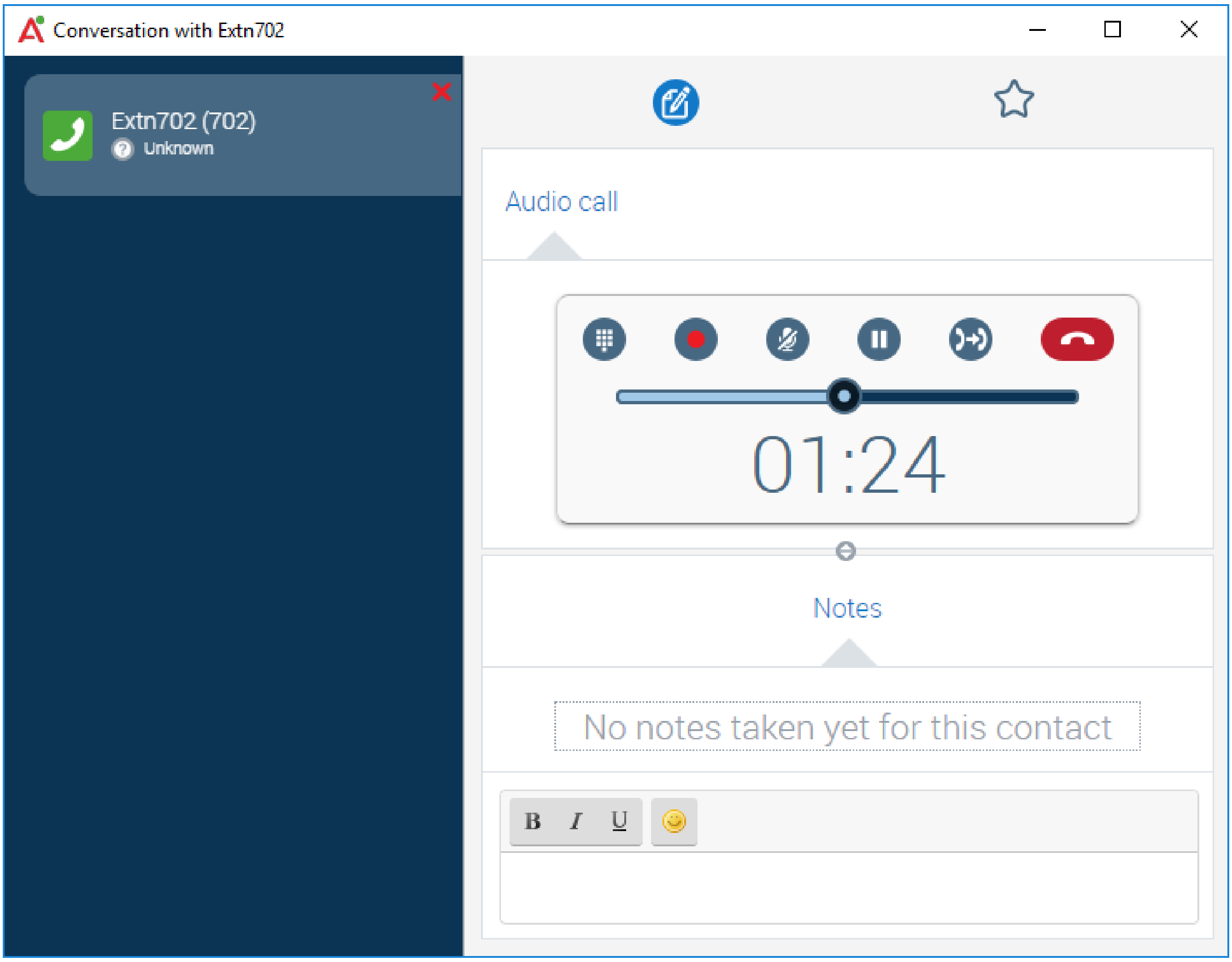
To enable the plug-in:

1. In Outlook, select **File | Options**. Select **Add-Ins**. The **Avaya IP Office Plug-in** appears in the list of **Inactive Application Add-ins**.
2. Click **Add-in Options**. From the Manage drop-down, select **Com-Add-ins** and click **Go**.
3. In the add-in, select **Avaya IP Office Plug-in**.

Chapter 14.
IP Office Web Client

14. IP Office Web Client

IP Office Web Client is a WebRTC browser based client that can be used to make and answer both voice and video calls from your PC. It is supported in Chrome on both Windows and Mac PCs.


Conversation with Extn702
Extn702 (702)
Unknown
Audio call
01:24
Notes
No notes taken yet for this contact
B
I
U

It is available to you as a portal user if your system administrator has configured the WebRTC gateway service. This is supported on Linux based portal servers except the Unified Communications Module.

A thick-client is available for Windows. The installer can be downloaded from one-X Portal The thick-client includes an embedded version of Chrome and so does not require the user's PC to have Chrome installed as a browser.

Chapter 15.
Glossary

15. Glossary

15.1 Ad hoc conference

These are a simple impromptu conferences started by making or answering a normal call and then manually adding another party or parties to the call to make it into a conference. The person who starts the conference by adding the other party to the call is the conference host. Ad hoc conferences cannot be locked and do not indicate the loudest speaker.

15.2 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.

15.3 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.

15.4 Busy

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

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** 230 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.

15.5 Conference Manager

The conference host is able to perform special functions such as muting or dropping other conference parties. The conference host is shown at the top of the call details in the **Calls** gadget.

- For an ad hoc conferences, the conference host is the person who started the conference.
- For a meet me conference, the conference host is the owner of the conference bridge number.

15.6 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** 147. 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.

15.7 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 230 to any further calls, it will be forwarded to that number. The number can be internal or external.

15.8 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.

15.9 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.

15.10 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.

15.11 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).

15.12 IP Office

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

15.13 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 230.

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

15.14 Meet Me conference

This is a conference that uses a conference bridge number. You and other parties can join the conference by various methods setup by the system administrator. However, no one can hear and talk to each other, ie. the conference does not start, until the owner of the bridge number also joins the conference.

15.15 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 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 net work 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.

15.16 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 when that contact is selected for a function.

15.17 Scheduled Conference

These are the same as meet me conferences. Using the one-X Portal, you can schedule future conferences 76 and send invitations to the other parties. You can also view the conferences to which you have been invited.

15.18 System Administrator

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

15.19 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 features will work for names and numbers anywhere in the network some features will not. For example, parking and unparking of calls is not supported between networked telephone systems. You system administrator will advise you if there are any other restrictions in your network.

15.20 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.

15.21 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.

15.22 Web Collaboration

A meet me conference is an audio conference call. In parallel with a meet me conference, the telephone system may also provide a web collaboration session where the conference parties can share documents, application windows or their PC desktop.

15.23 XMPP

XMPP is the protocol used by one-X Portal for instant messaging (IM) and sharing presence. Using XMPP allows the one-X Portal to interoperate with a number of third-party IM clients.

Chapter 16.

Document History

16. Document History

Date	Issue	Change Summary
18th September 2017	**14a**	Updates for IP Office Release 11.0. See What's New 9.
9th March 2018	**14b**	Add description of new message, bridge and web collaboration icons in title bar.
13th February 2019	**15a**	Minor text corrections. IP Office Release 11.0.4.0.
14th February 2019	**15b**	• Support for deletion of hunt group voicemail messages.
15th February 2019	**15c**	• Avatars now show in directory details.
27th February 2019	**15d**	• Scheduled conferencing features requirements (Power User) also apply to Outlook client. • Outlook 365 thick client support added.
25th April 2019	**15e**	• Tidy of the phone notes section.
20th November 2019	**15f**	• Minor updates.

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Template: 30th May 2018