



# **IP Office 7.0**

## **one-X Portal for IP Office User Guide**

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# **Chapter 1.**

# **one-X Portal for IP Office**



# 1. one-X Portal for IP Office

one-X Portal for IP Office is an application that runs on a web server connected to the [IP Office telephone system](#)<sup>126</sup>. Using a web browser, you can access the one-X Portal for IP Office and use it to perform actions such as:

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

The screenshot displays the one-X Portal for IP Office interface. At the top, the header shows 'Office | one-X Portal for IP Office' and 'Extn401(401) | Available | Help | Logout | AVAYA'. The main content area is divided into several panels:

- Calls:** A panel for managing calls, featuring a search bar 'Enter name or number', buttons for 'Call', 'Consult', and 'Transfer', and a call log showing a call to '1550' with a duration of '00:00:14'.
- Directory:** A panel for viewing contacts, with tabs for 'Personal', 'System', and 'External'. It includes a search bar and a list of contacts: 'Alfred', 'Brad', and 'Ethel'. A tooltip for 'Brad' shows options to 'Call mobile - 1550' and 'Call other - 402'.
- Messages (2 new):** A panel for viewing messages, with a search bar and a table of messages.
 

State	From	Time	Length
✉	301 (301)	15-Mar 12:15pm	0s
✉	311	05-Feb 02:41pm	13s
✉	311	05-Feb 02:23pm	8s
✉	311	22-Jan 12:30pm	8s
✉	313	21-Jan 07:10pm	11s
- Call Log:** A panel for viewing call logs, with tabs for 'All', 'Incoming', 'Outgoing', and 'Missed'. It includes a table of call logs.
 

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

The bottom of the interface features a navigation bar with the 'one-X Applications' logo and icons for 'World Clock', 'Agent Control', and 'Appearance'.

This documentation covers the use of one-X Portal for IP Office version 7.0.

# 1.1 How Do I...

- [Login](#) <sup>[9]</sup> / [Logout](#) <sup>[11]</sup>

<b>Make and Answer Calls</b>		
<ul style="list-style-type: none"> <li>• <a href="#">Make a Call</a> <sup>[30]</sup></li> <li>• <a href="#">...from the Call Log</a> <sup>[33]</sup></li> <li>• <a href="#">...from the Directory</a> <sup>[32]</sup></li> <li>• <a href="#">...from a Voicemail Message</a> <sup>[34]</sup></li> <li>• <a href="#">Answer a Call</a> <sup>[35]</sup></li> <li>• <a href="#">Pickup Calls</a> <sup>[36]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Hold a Call</a> <sup>[37]</sup></li> <li>• <a href="#">Retrieve a Held Call</a> <sup>[37]</sup></li> <li>• <a href="#">Park a Call</a> <sup>[46]</sup></li> <li>• <a href="#">Unpark a Call</a> <sup>[47]</sup></li> <li>• <a href="#">Switch Between Calls</a> <sup>[39]</sup></li> <li>• <a href="#">Select Do Not Disturb</a> <sup>[49]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Record a Call</a> <sup>[40]</sup></li> <li>• <a href="#">Make a Supervised Transfer</a> <sup>[43]</sup></li> <li>• <a href="#">Make an Unsupervised Transfer</a> <sup>[42]</sup></li> <li>• <a href="#">End a Call</a> <sup>[36]</sup></li> <li>• <a href="#">Send Instant Messages (Chat)</a> <sup>[48]</sup></li> </ul>
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<ul style="list-style-type: none"> <li>• <a href="#">Select a Skin</a> <sup>[22]</sup></li> <li>• <a href="#">Change the Column Widths</a> <sup>[22]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Show/Hide a Gadget</a> <sup>[23]</sup></li> <li>• <a href="#">Resize a Gadget</a> <sup>[23]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Move a Gadget</a> <sup>[23]</sup></li> <li>• <a href="#">Default the Layout</a> <sup>[24]</sup></li> </ul>
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<b>Start and Manage Conference Calls</b>		
<ul style="list-style-type: none"> <li>• <a href="#">Setup a conference.</a> <sup>[55]</sup></li> <li>• <a href="#">Turning held calls into a conference call</a> <sup>[57]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Add another party to a conference</a> <sup>[58]</sup></li> <li>• <a href="#">Mute conference parties</a> <sup>[59]</sup></li> <li>• <a href="#">Drop conference parties</a> <sup>[60]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Holding a Conference Call</a> <sup>[61]</sup></li> <li>• <a href="#">Set Your Conference Number</a> <sup>[62]</sup></li> </ul>
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<b>Access and Use Voicemail</b>		
<ul style="list-style-type: none"> <li>• <a href="#">Play My Messages</a> <sup>[97]</sup></li> <li>• <a href="#">Switch Between Phone and PC Playback</a> <sup>[99]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Add a Voicemail Caller to My Directory</a> <sup>[100]</sup></li> <li>• <a href="#">Call Someone Who Left a Message</a> <sup>[99]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Change My Voicemail Mailbox Code</a> <sup>[101]</sup></li> <li>• <a href="#">Record Mailbox Greetings</a> <sup>[102]</sup></li> <li>• <a href="#">Select Your Mailbox Greeting</a> <sup>[102]</sup></li> </ul>
<b>Use My Call Log</b>		
<ul style="list-style-type: none"> <li>• <a href="#">View My Call Log</a> <sup>[65]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Make a Call From the Call Log</a> <sup>[66]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Add a Call Log Number to My Directory</a> <sup>[67]</sup></li> </ul>
<b>Configure My one-X Portal for IP Office</b>		
<ul style="list-style-type: none"> <li>• <a href="#">Create and Manage Profiles</a> <sup>[86]</sup></li> <li>• <a href="#">Change My Keyboard Shortcuts</a> <sup>[106]</sup></li> <li>• <a href="#">Enable Sounds</a> <sup>[109]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Configure Park Slots</a> <sup>[106]</sup></li> <li>• <a href="#">Set Your Conference Number</a> <sup>[62]</sup></li> <li>• <a href="#">Upload Voicemail Greetings</a> <sup>[102]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Set Do Not Disturb Exceptions</a> <sup>[105]</sup></li> <li>• <a href="#">Change My Voicemail Mailbox Code</a> <sup>[101]</sup></li> <li>• <a href="#">Select My Language</a> <sup>[110]</sup></li> <li>• <a href="#">Configuring the World Clock</a> <sup>[107]</sup></li> </ul>
<b>Use the one-X Call Assistant (Windows PCs Only)</b>		
<ul style="list-style-type: none"> <li>• <a href="#">Install the one-X Call Assistant</a> <sup>[115]</sup></li> <li>• <a href="#">Starting one-X Portal for IP Office</a> <sup>[122]</sup></li> <li>• <a href="#">Start the one-X Call Assistant</a> <sup>[123]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">one-X Portal for IP Office Icon</a> <sup>[114]</sup></li> <li>• <a href="#">Configuring Screen Popping</a> <sup>[119]</sup></li> <li>• <a href="#">Make a Call From a Windows Application</a> <sup>[121]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Hot Key Dialing</a> <sup>[121]</sup></li> <li>• <a href="#">Missed Calls Display</a> <sup>[122]</sup></li> <li>• <a href="#">New Messages Display</a> <sup>[122]</sup></li> </ul>

## 1.2 Logging In

one-X Portal for IP Office is a licensed through licenses entered by your [system administrator](#)<sup>[128]</sup> into the [IP Office system](#)<sup>[128]</sup>. They also configure which IP Office users are allowed to use one-X Portal for IP Office. If you are licensed to use one-X Portal for IP Office, you need the following to login:

- **Computer**  
You need a computer with a network connection to the one-X Portal for IP Office server.
- **Web Browser**  
You need a web browser that has JavaScript enabled. one-X Portal for IP Office is tested using the current versions of *Google Chrome*, *Internet Explorer*, *Mozilla Firefox* and *Safari*.
  - If you want sounds to be used, for example ringing for a call waiting, or voicemail playback through the computer, a media player such as [Windows Media Player](#) or [Quick Time](#) must be installed.
  - If using Internet Explorer, check that the option Play sound in webpages is enabled (Tools | Internet Options | Advanced | Multimedia).
  - The Remember me on this computer option shown in the login menu requires the browser to allow cookies.
- **IP Office Extension**  
one-X Portal for IP Office can be used with most phones supported by the Avaya IP Office telephone system but not with Phone Manager PC Softphone.
- **User Name**  
You need your IP Office user name as set by the system administrator. Note that this is not necessarily the same as the name shown on your phone's display.
- **Password**  
Your IP Office user password. Note that this may be different from your [telephone login code](#)<sup>[128]</sup> if you also have one of those.
- **Server Address**  
You need the web address of the one-X Portal for IP Office server.

one-X Portal for IP Office 7.0 supports *English*, *French*, *German*, *Italian*, *Dutch*, *Brazilian Portuguese*, *Latin Spanish*, *Russian* and *Simplified Chinese*. The language it uses will be the best match your browser language preferences. Note that changing your browser's language preferences may also affect the languages used by other websites which you browse.

- [Google Chrome](#)<sup>[117]</sup>
- [Internet Explorer](#)<sup>[118]</sup>
- [Mozilla Firefox](#)<sup>[117]</sup>
- **Safari**  
The Safari browser does not have its own language settings. Instead it will match the language preferences of the computer on which it is running. Refer to the computer help.

## Logging In

1. Using your web browser, browse to the address you have been given for the one-X Portal for IP Office.
2. The login menu is displayed.



- If the page is blank, your browser is not configured to support JavaScript and cannot be used for one-X Portal for IP Office, contact your system administrator to enable JavaScript.
3. Enter your user name and password.
    - If you tick the Remember me on this computer option, your user name will be remembered using a browser cookie. Only use this option if you are the only person who uses the computer.
    - You can use one-X Portal for IP Office to also login at any extension on the phone system. That phone will then assume your extension number and settings. To do this, select Login My Phone and enter the Base Extension number of the phone extension at which you want to be logged in. For more information see [Hot Desking](#) <sup>197</sup>.
  4. Click Login.
    - The message *"Invalid user credentials"* indicates that either the name or password was incorrect.
    - The message *"Your telephone is logged out. Please log your telephone in, then try again"* indicates that you are not currently logged in at an [IP Office](#) <sup>126</sup> phone.
    - The message *"A license could not be assigned to you. Please contact your administrator"* indicates that you are either not licensed for one-X Portal for IP Office usage or that one-X Portal for IP Office could not connect to the telephone system.
    - The message *"Csta Resource not available"* indicates that your browser will not support one-X Portal for IP Office.

## 1.3 Logging Out

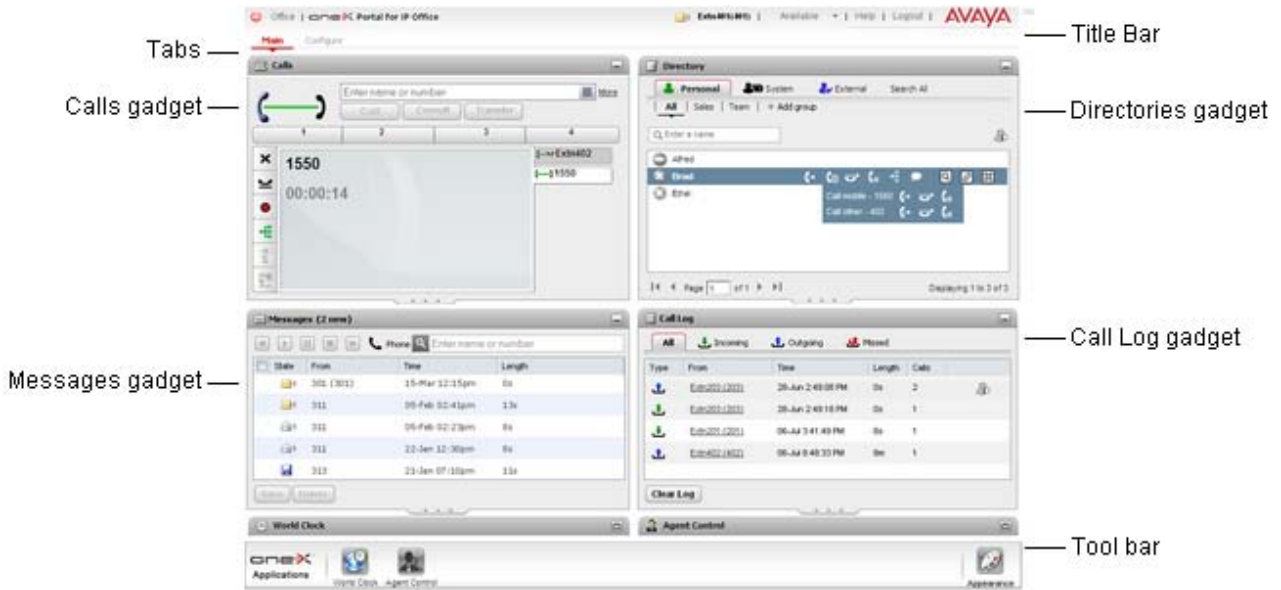
When you have finished using one-X Portal for IP Office, you should click on the Logout link shown in the top right. This will end your one-X Portal for IP Office session and return the browser to the [log in screen](#)<sup>[9]</sup>. It also frees up the license consumed by your one-X Portal for IP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

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

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

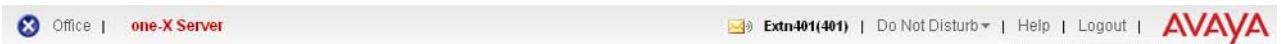
# 1.4 The Main Page

The one-X Portal for IP Office consists of two tabs or pages; Main and [Configure](#)<sup>[104]</sup>. The elements displayed on the Main tab are described below.



## Title Bar<sup>[16]</sup>

The title bar shows you information about yourself.



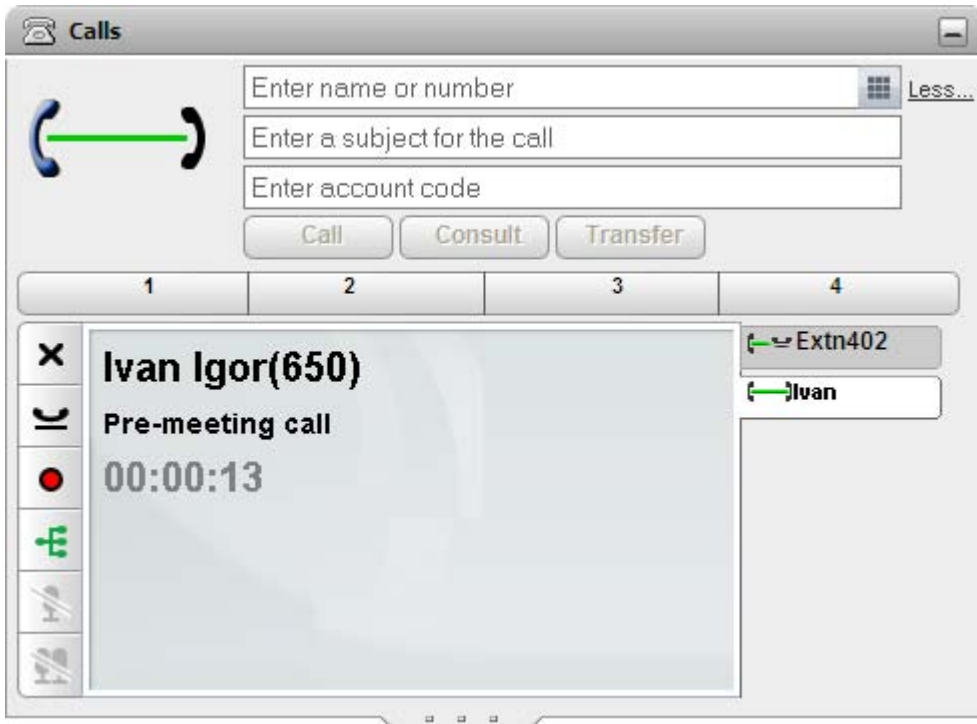
## Toolbar

The toolbar at the bottom is used to access controls for the one-X Portal for IP Office [appearance](#)<sup>[22]</sup> and to display icons for [minimized gadgets](#)<sup>[23]</sup>.



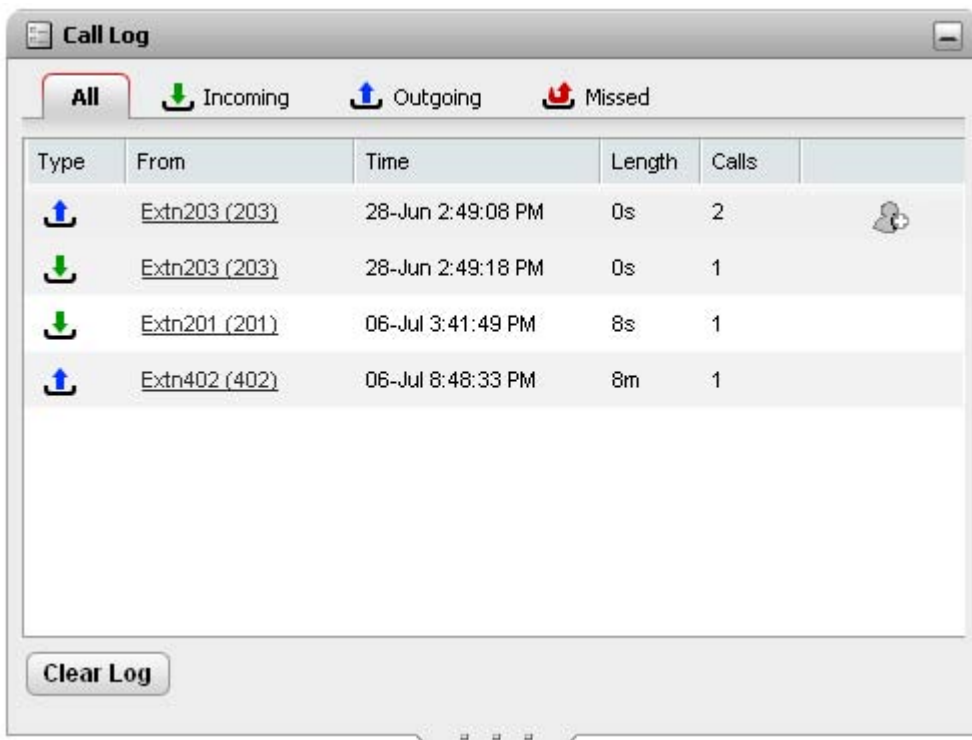
 [Calls Gadget](#) <sup>65</sup>

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



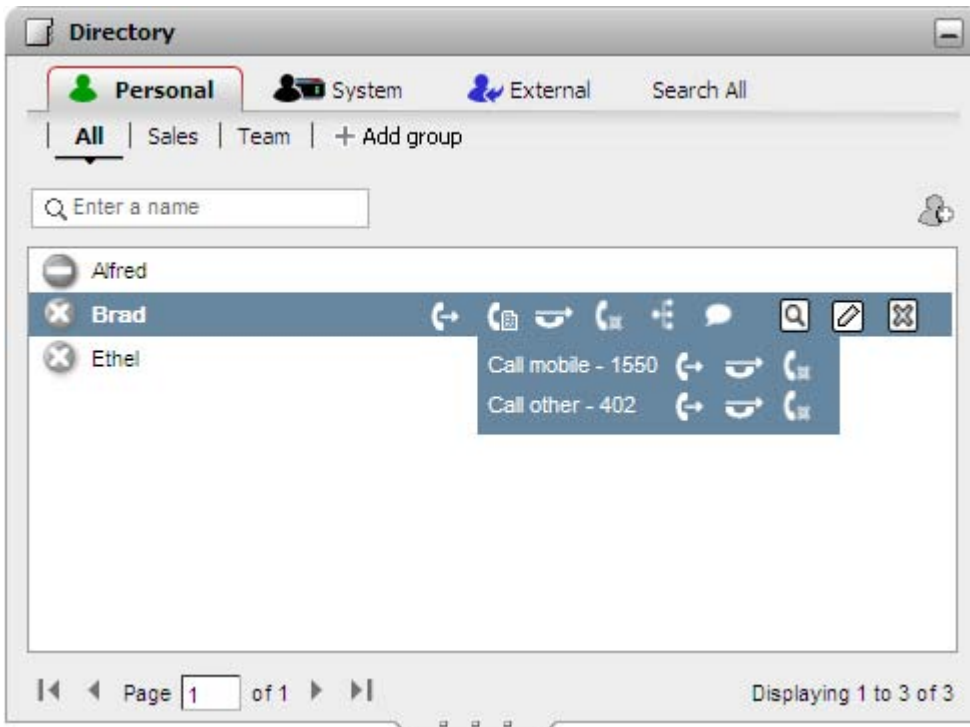
 [Call Log](#) <sup>65</sup>

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



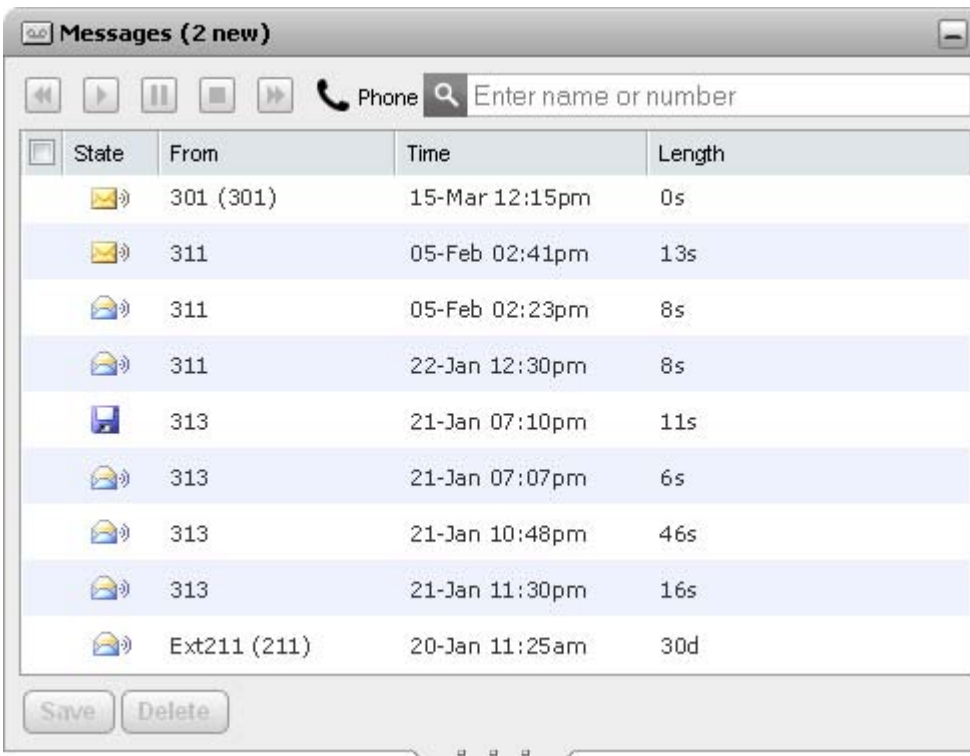
## Directory

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



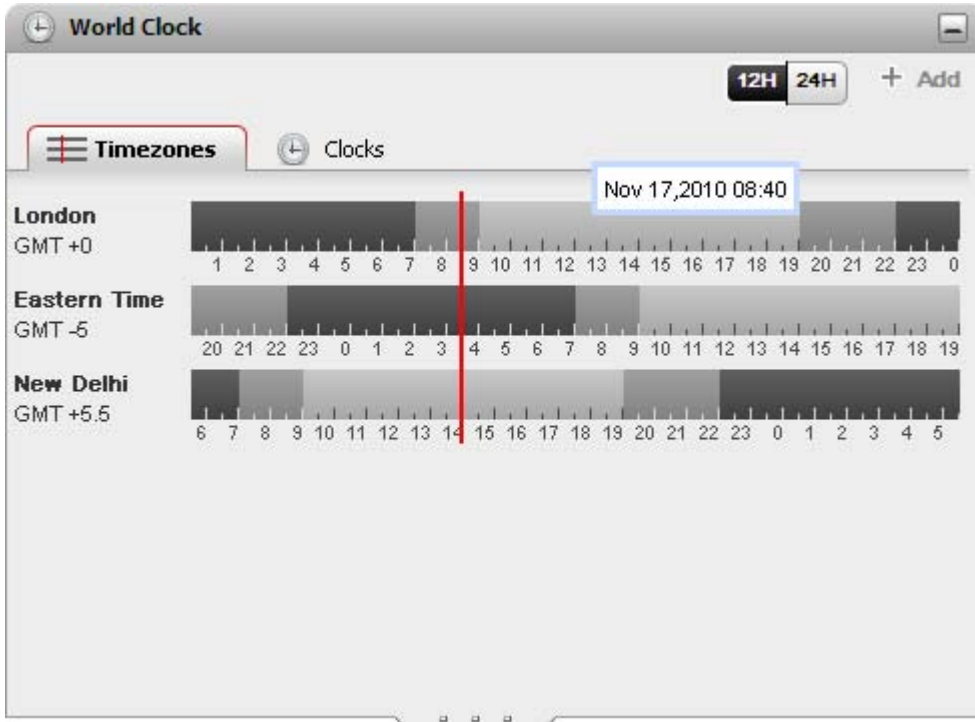
## Messages

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



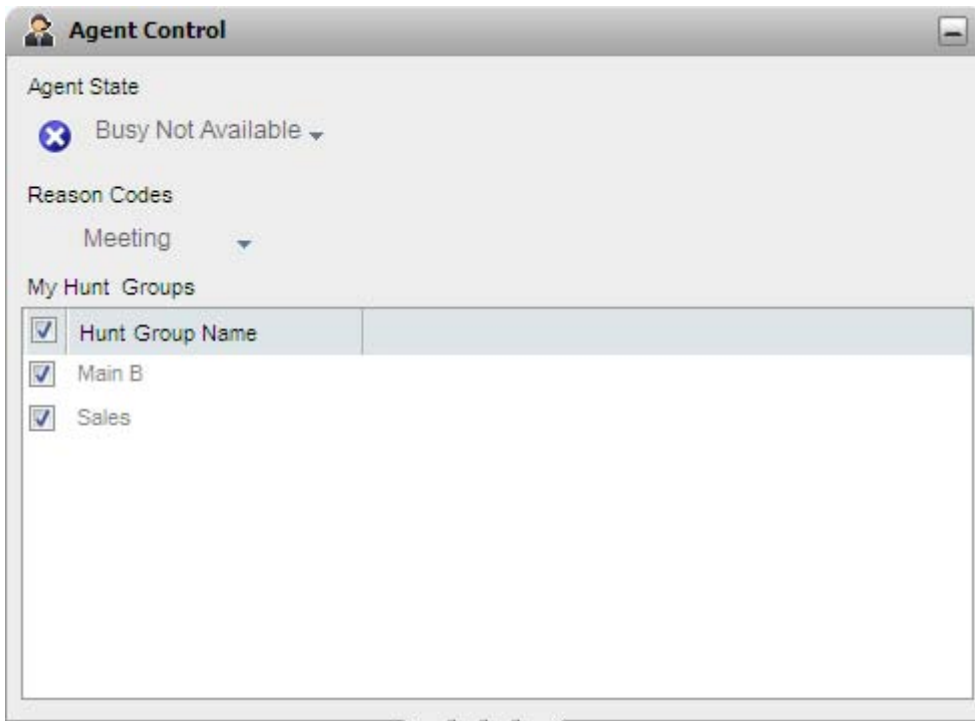
 [World Clock](#)

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



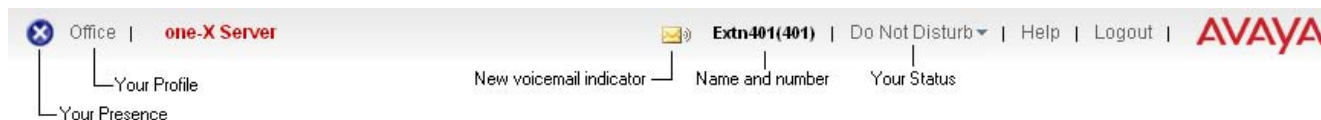
 [Agent Control](#)

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









## 1.5 Your Presence and Status

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




The items on the left of the title bar show:

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

Icon	Presence	Description
	Available	This icon shows that you are currently not on any call.
	Busy	This icon shows that you currently have a call in progress.
	Do Not Disturb	This icon shows that you have enabled Do No Disturb status (see below). While in this state calls to you are redirected to voicemail if available or otherwise receive busy tone. The exception is calls from numbers that you have added to your list of <a href="#">Do Not Disturb Exceptions</a> <sup>[108]</sup> . In this state you can still make calls.
	Offline	This icon shows that you have enabled Offline status (see below). While in this state you cannot be <a href="#">instant messaged</a> <sup>[48]</sup> by other one-X Portal for IP Office users.
	Logged Out	This icon shows that you are not actually logged in at an extension on the phone system. While in this state, all calls to you are redirected to voicemail if available or otherwise receive busy tone. In this state you cannot make calls. However you can still use one-X Portal for IP Office to alter your configuration settings.

- Office** Your Profile  
 Your currently [active profile](#)<sup>[86]</sup>. Profiles allow you to pre-configure sets of telephone settings and then apply them at any time by selecting which profile is active. You can select your current profile and edit profiles on the [Configure](#)<sup>[86]</sup> page.

The items on the right of the title bar show:

- 
**New Voicemail Indicator**  
 This icon is displayed in the title bar when you have a new voicemail message.
- Extn401(401)** Name and Number  
 Just in case you forget!
- Do Not Disturb** Your Status  
 This drop down shows you your current status and allows you to select between the following states:

Status	Description
Available	This is the normal state in which you can make and receive calls.
Do not disturb	While in this state, calls to you are redirected to voicemail if available or otherwise receive busy tone. The exception is calls from numbers that you have added to your list of <a href="#">Do Not Disturb Exceptions</a> <sup>[108]</sup> . In this state you can still make calls.
Offline	You can select this state if you want to continue using one-X Portal for IP Office but do not want other one-X Portal for IP Office users to be able to send you <a href="#">instant messages</a> <sup>[48]</sup> using one-X Portal for IP Office.

- Help**  
 Use this link to open the one-X Portal for IP Office help in a new browser tab or window.
- Logout**<sup>[11]</sup>  
 Use this link when you have finished using one-X Portal for IP Office. It will return you to the one-X Portal for IP Office [login screen](#)<sup>[9]</sup>.

## 1.6 Phone Notes

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

### one-X Portal for IP Office Call Log

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

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

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

### Phone Call Log

If you are using a 1400, 1600, 9400, 9500 or 9600 Series phone with a Call Log or History button, or an M-Series or T-Series phone, by default the same call log as shown by one-X Portal for IP Office is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal for IP Office. The two will change in parallel.

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

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

### Personal Directory

If you are using a 1400, 1600, 9400, 9500 or 9600 Series phone with a Contacts button, or M-Series, T-Series or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.

1. As Personal directory contacts are added, they are stored by both the one-X Portal for IP Office application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal for IP Office only.
2. The contacts can be edited through the phone or through one-X Portal for IP Office.
3. Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current [Primary phone](#)<sup>[129]</sup> number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal for IP Office if that selection is changed.

### Number of Calls

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

- **Phones With Appearance Buttons**  
Many Avaya phones have programmable buttons that are configured by the [system administrator](#)<sup>[129]</sup> as [appearance buttons](#)<sup>[128]</sup>. When using one of these phones, each call that you make or receive normally uses an appearance button and can be controlled using that button (press to hold, retrieve, view details, etc).
  - For an incoming call, the call is presented on a suitable appearance button if available. If no suitable appearance button is available, the telephone system will treat the call as if you are [busy](#)<sup>[128]</sup> to any further incoming calls.
  - For outgoing calls, you can use one-X Portal for IP Office to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.
- **Phones Without Appearance Buttons**  
If the phone you are using does not have appearance buttons, your Calls Waiting On setting, as set by your system administrator, controls the number of calls that you can receive.
  - If your Calls Waiting On setting is [enabled](#), you can use one-X Portal for IP Office to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being [busy](#)<sup>[128]</sup>. However, using one-X Portal for IP Office you can still make additional outgoing calls.
  - If your Calls Waiting On setting is [not enabled](#), once you have one connected call to which you are talking the phone system treats you as being [busy](#)<sup>[128]</sup>. However, using one-X Portal for IP Office you can still make additional outgoing calls.

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## 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](#) can disable Auto Hold for the whole system. If this is done, when you connect to a call, any current call is disconnected.
2. Calls that have been parked are not included. Unlike held calls they are parked on the phone system rather than held at your phone.

## Incoming Calls

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

## Outgoing Calls

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

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

## Call Gadget Buttons

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

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

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

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

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

- This typically applies to phones on a DECT system and to SIP phones.
- Avaya 1400, 1600, 9400, 9500, 9600, M-Series and T-Series phones can be optionally set to use en-bloc dialing.

## 1.7 Hot Desking

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

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



AVAYA  
one-X™

Version: 6.0.3.6

### Portal for IP Office

User name  
MarkG

Remember me on this computer

Password

▼ Phone Login

Login My Phone

Base Extension      Switch

4311      Eng\_V5\_Dev ▼

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Login

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



# Chapter 2.

## Changing the Layout

## 2. Changing the Layout

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


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

- [Select a Skin](#) <sup>22</sup>
- [Change the Column Widths](#) <sup>22</sup>
- [Show/Hide a Gadget](#) <sup>23</sup>
- [Resize a Gadget](#) <sup>23</sup>
- [Move a Gadget](#) <sup>23</sup>
- [Default the Layout](#) <sup>24</sup>

### 2.1 Selecting a Skin

The one-X Portal for IP Office provides a choice of skins from which you can choose.



1. Click on the  Appearance icon.
2. The appearance icons are displayed.
3. Click on one of the skin icons to select it and apply it to your one-X Portal for IP Office.




4. Click any other part of the one-X Portal for IP Office screen to close 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 on the  Appearance icon.
2. The appearance icons are displayed.
3. Click on the Layouts icons to select the ratio of columns widths it represents.



4. Click any other part of the one-X Portal for IP Office screen to close the settings.

## 2.3 Show/Hide Gadgets

### Hide/Minimize a Gadget

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



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



- [Calls Gadget](#) <sup>26</sup>

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](#) <sup>96</sup>

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



- [Call Log Gadget](#) <sup>64</sup>

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



- [Directory Gadget](#) <sup>70</sup>



- [World Clock Gadget](#) <sup>107</sup>


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



- [Agent Control Gadget](#) <sup>50</sup>

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

### Show/Restore a Gadget

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

## 2.4 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 the  resize icon shown on the gadgets bottom edge.

## 2.5 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 required column and position.

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## 2.6 Default Layout

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




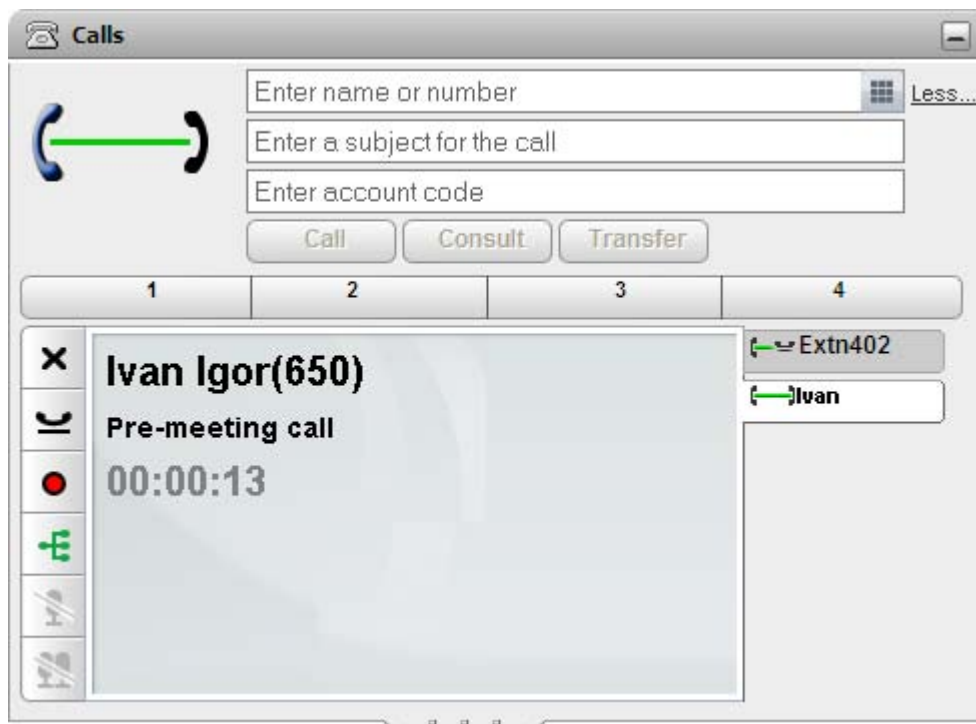
1. Click on the  Appearance icon.
2. The appearance icons are displayed.
3. Click on the  Reset to Factory UI icon.
4. Click any other part of the one-X Portal for IP Office screen to close the settings.

# **Chapter 3.**

# **Making and Answering Calls**

### 3. Making and Answering Calls

This section covers how you can use one-X Portal for IP Office to make and answer calls. Using the  Calls gadget, details of each call are shown on separate tabs. The [buttons](#)<sup>[28]</sup> shown will vary but generally indicate actions that you can perform with the currently displayed call.



#### Make and Answer Calls

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>• <a href="#">Make a Call</a><sup>[30]</sup></li> <li>• <a href="#">...from the Call Log</a><sup>[33]</sup></li> <li>• <a href="#">...from the Directory</a><sup>[32]</sup></li> <li>• <a href="#">...from a Voicemail Message</a><sup>[34]</sup></li> <li>• <a href="#">Answer a Call</a><sup>[35]</sup></li> <li>• <a href="#">Pickup Calls</a><sup>[36]</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Hold a Call</a><sup>[37]</sup></li> <li>• <a href="#">Retrieve a Held Call</a><sup>[37]</sup></li> <li>• <a href="#">Park a Call</a><sup>[46]</sup></li> <li>• <a href="#">Unpark a Call</a><sup>[47]</sup></li> <li>• <a href="#">Switch Between Calls</a><sup>[39]</sup></li> <li>• <a href="#">Select Do Not Disturb</a><sup>[49]</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Record a Call</a><sup>[40]</sup></li> <li>• <a href="#">Make a Supervised Transfer</a><sup>[43]</sup></li> <li>• <a href="#">Make an Unsupervised Transfer</a><sup>[42]</sup></li> <li>• <a href="#">End a Call</a><sup>[36]</sup></li> <li>• <a href="#">Send Instant Messages (Chat)</a><sup>[48]</sup></li> </ul> |
|--|--|---|

### 3.1 Call Details

The lower part of the calls gadget displays call details.



- Call Tabs

The call tabs on the right show a tab for the current connected call and one for each held and alerting call. Each tab has a [call status icon](#) <sup>[29]</sup> its call and the caller's number or associated name.

- You can click on the tabs to select which call's details are shown in the center panel without affecting the currently connected call.
- When a new calls arrives, its tab is automatically selected in order to show the new calls details. Similarly when you make a new call its tab is automatically selected.
- The call details for a new call also show if it has come via another user.
  - If a call has been transferred, the name of the caller being transferred is shown followed by the source of the transfer in brackets.



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



- Call Buttons

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

- Call Details

The calls details in the center panel show the following:

- Caller Name and Number
 

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

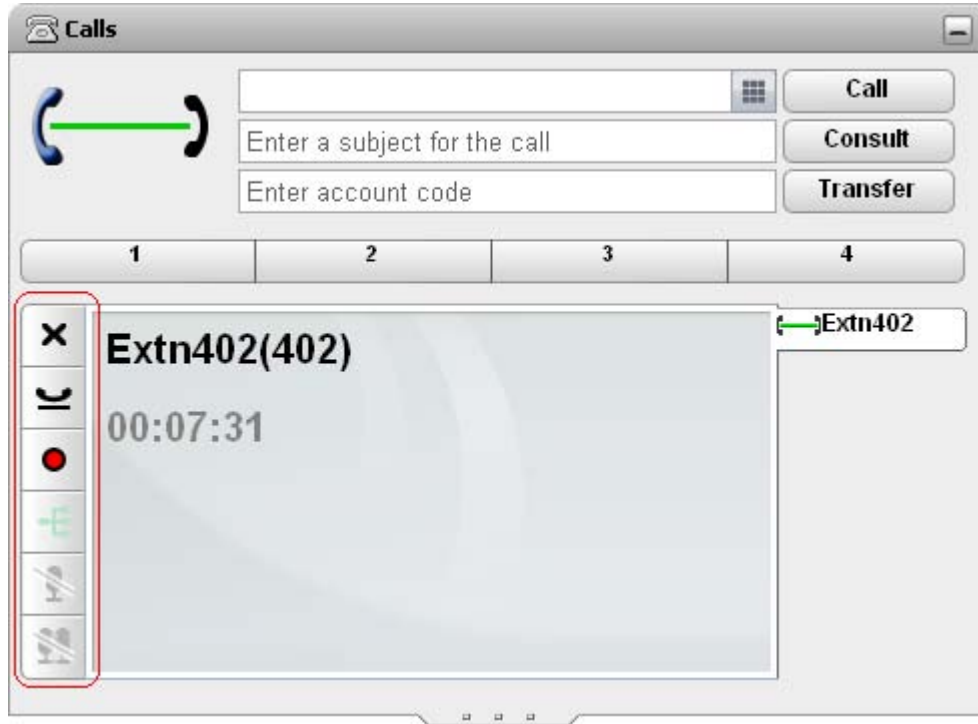
The middle row is not always shown as it shows information not always present on calls.

  - If there is an account code associated with the call, the account code is displayed. Using one-X Portal for IP Office, an account code can be entered when [making a call](#) <sup>[30]</sup> or, for incoming calls, the telephone system can automatically associate an account code based on the caller's number.
  - If there is a tag associated with the call, the tag is displayed. The tag overrides display of the account code if there is also an account code associated with the call. Depending on the phone being used the tag is also displayed on the phone. A call tag is a short text message that can be associated with a call.
    - You can use one-X Portal for IP Office to enter a call tag when making or transferring a call. The tag is seen by you and also by the other party if they are another internal user and have a suitable phone or are also using one-X Portal for IP Office.
    - The telephone system can also add tags to a call in certain situations.
- Call Timer
 

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


## 3.2 Call Buttons

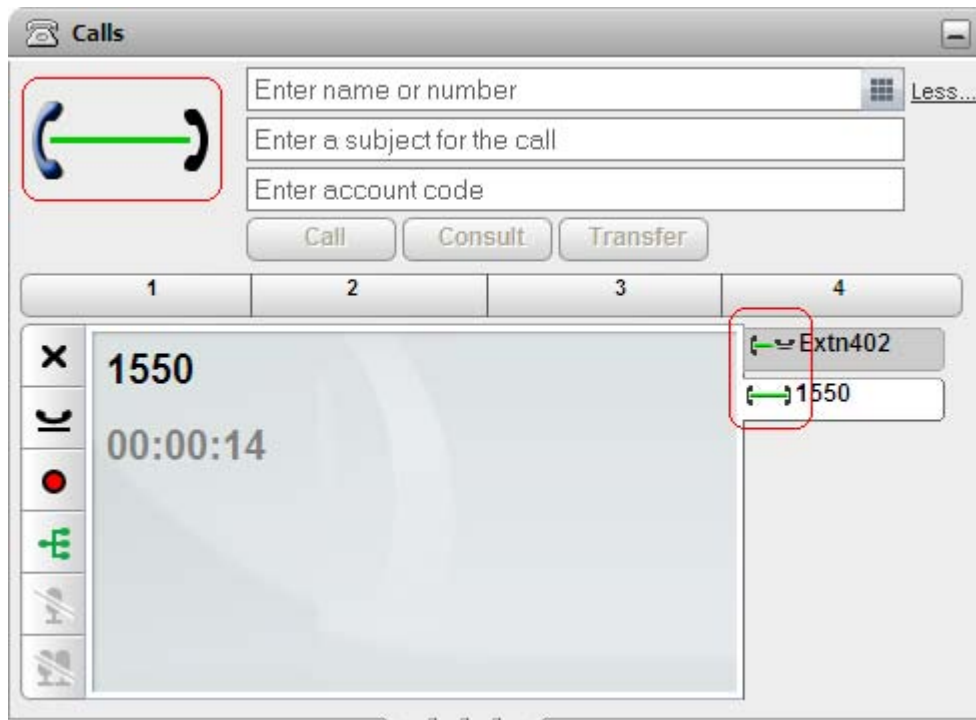
The buttons down the left hand edge of the call display are used to access features for the currently displayed call .












Icon	Action	Description
	Answer Call	Answer an alerting call. This button is not visible when you are using a phone where you must first lift the handset to answer a call.
	Drop Call	For a currently connected call, pressing <b>X</b> disconnects the call.
	Redirect Call	For an alerting call, pressing <b>X</b> will redirect the call using your a Forward on No Answer setting if set or otherwise to voicemail if available. You cannot drop a call returning from being held or parked for too long.
	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.

### 3.3 Call Icons

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



Icon	Description
	<ul style="list-style-type: none"> <li>Idle/On Hook This icon indicates that you currently have no call connected.</li> </ul>
	<ul style="list-style-type: none"> <li>Alerting/Ringing This icon indicates a call being presented to you to be <a href="#">answered</a> <sup>35</sup>. Depending on other phone settings your phone may also give an audible ring and flash its lamp or icons.</li> </ul>
	<ul style="list-style-type: none"> <li>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.</li> </ul>
	<ul style="list-style-type: none"> <li>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.</li> </ul>
	<ul style="list-style-type: none"> <li>Could Not Connect The icon indicates that the call you were making could not be connected for some reason.</li> </ul>
	<ul style="list-style-type: none"> <li>Connected This icon indicates the call to which you are currently talking or listening.</li> </ul>
	<ul style="list-style-type: none"> <li>Held Call This icon indicates a call that you have been put on hold.</li> </ul>
	<ul style="list-style-type: none"> <li>On Hold This icon indicates that another user on your system has put your call to them on hold.</li> </ul>
	<ul style="list-style-type: none"> <li>Conference This icon is shown when you are in a conference call that you started.</li> </ul>


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## 3.4 Making a Call

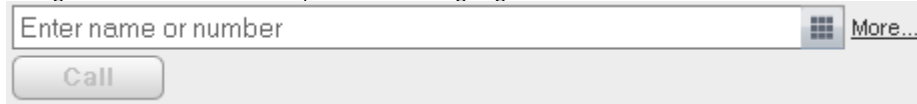
one-X Portal for IP Office provides a number of ways to make calls.

- [Using the Calls gadget.](#)<sup>[30]</sup>
- [Using the Directory.](#)<sup>[32]</sup>
- [Using the Call Log.](#)<sup>[33]</sup>
- [Using the Messages gadget.](#)<sup>[34]</sup>

### 3.4.1 ... from the Calls Gadget


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

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






- For external calls, remember to add any external dialing prefix used by your telephone system.
- You can also enter a name. If it matches a contact in your Personal or System directory, the [primary phone](#)<sup>[129]</sup> number stored with that contact will be dialed.
- You can also add a subject and or an account code to a call. Click on More.... Use the additional text boxes to enter the required information. To hide the text box again, click on Less....

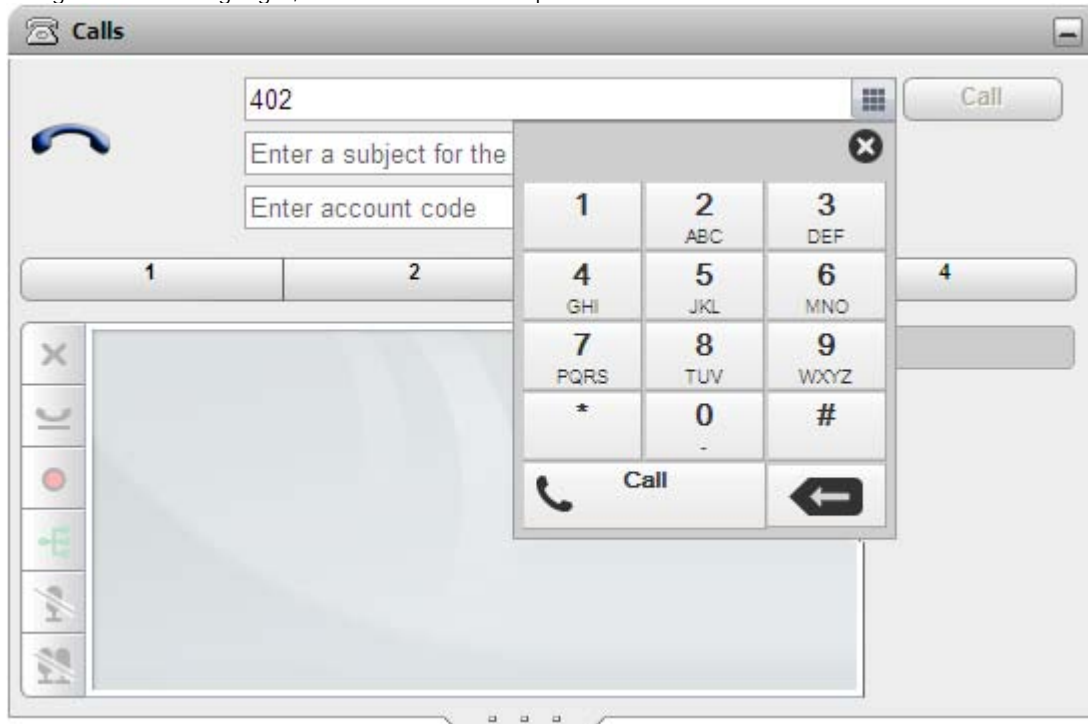






- If you enter a subject it will be added to the call details. If you are calling an internal user, it may be displayed on their phone or in their one-X Portal for IP Office call display.
  - If you enter an account code, it will be included in the call log details output by the telephone system after the call. For some users, entry of a valid account code is required to make external calls.
2. When the details are set as you require, click Call. If you already have another call in progress, that call will be [automatically put on hold](#)<sup>[128]</sup>.
- The progress of the call is displayed on a tab in the  Calls gadget.

### 3.4.2 ... using the Dial Pad


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

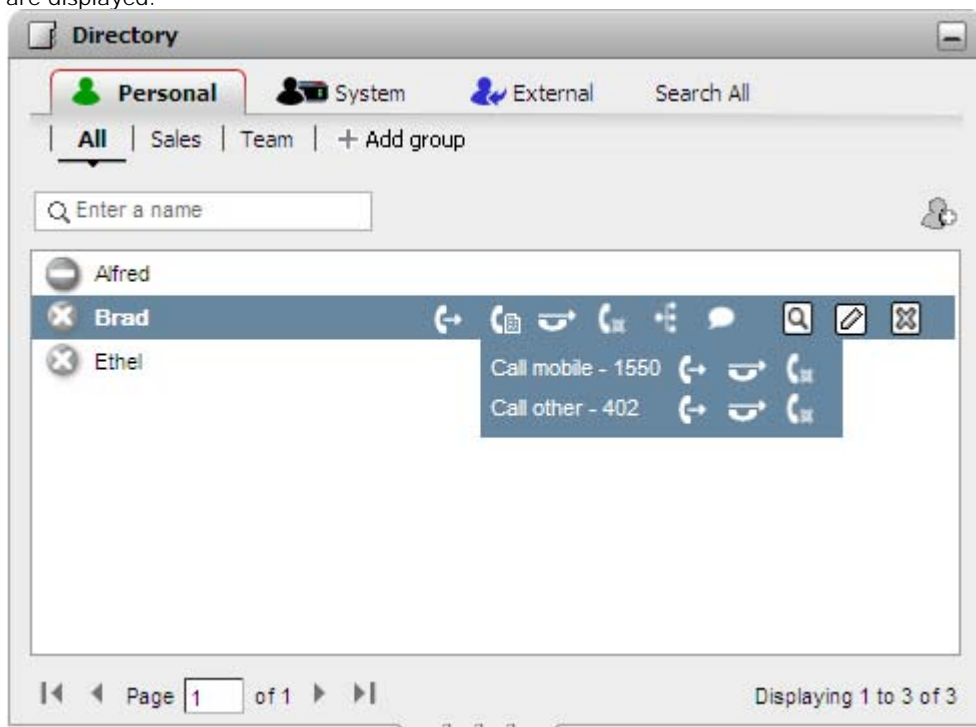
- Using the  Calls gadget, click on the  dial pad icon.






- Using the dial pad enter the number you want to call. For external calls, remember to add any external dialing prefix used by your telephone system.
  - To delete the last digit entered, click on the  delete icon.
  - At any time you can exit the dial pad to continue entering call details into the other fields if required. Click the  dial pad icon to hide the dial pad.
  - When the details are set as you require, click the  Call icon. If you already have another call in progress, that call will be [automatically put on hold](#) <sup>(128)</sup>.
- The progress of the call is displayed on a tab in the  Calls gadget.

### 3.4.3 ... from the Directory


1. Using the  Directory gadget on the Main tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. To call the contact shown, hover your cursor over it. [Directory icons](#)<sup>72</sup> for the directory functions you can perform are displayed.

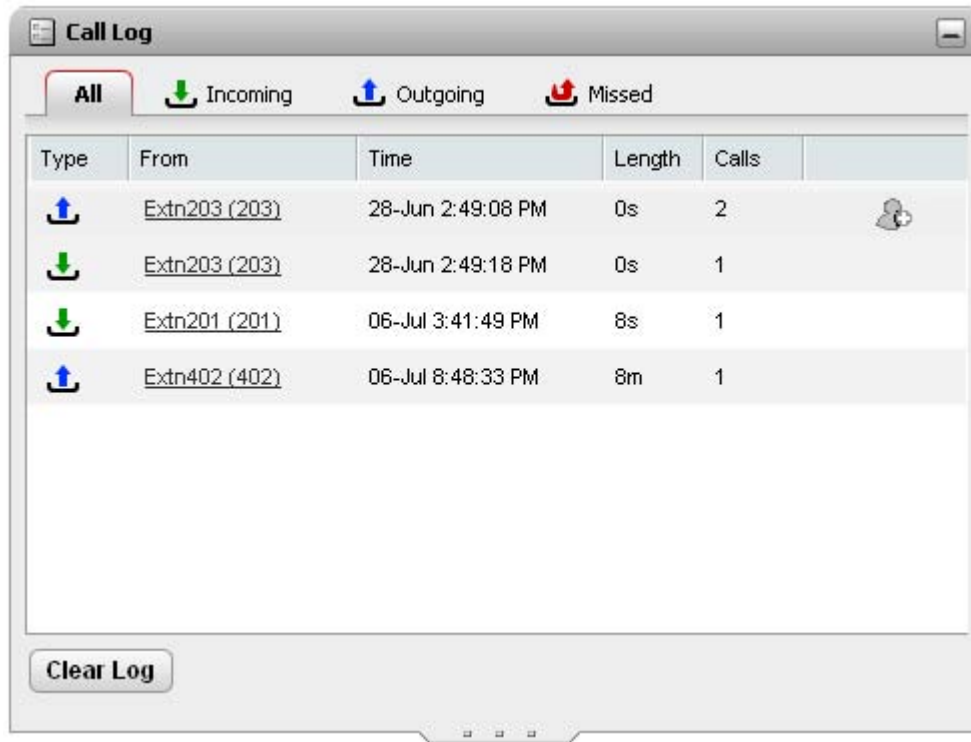



4. To make a call to the contacts primary number, click on the  call icon. If the  icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.
- The progress of the call is displayed on a tab in the  Calls gadget.

### 3.4.4 ... from the Call Log

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


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

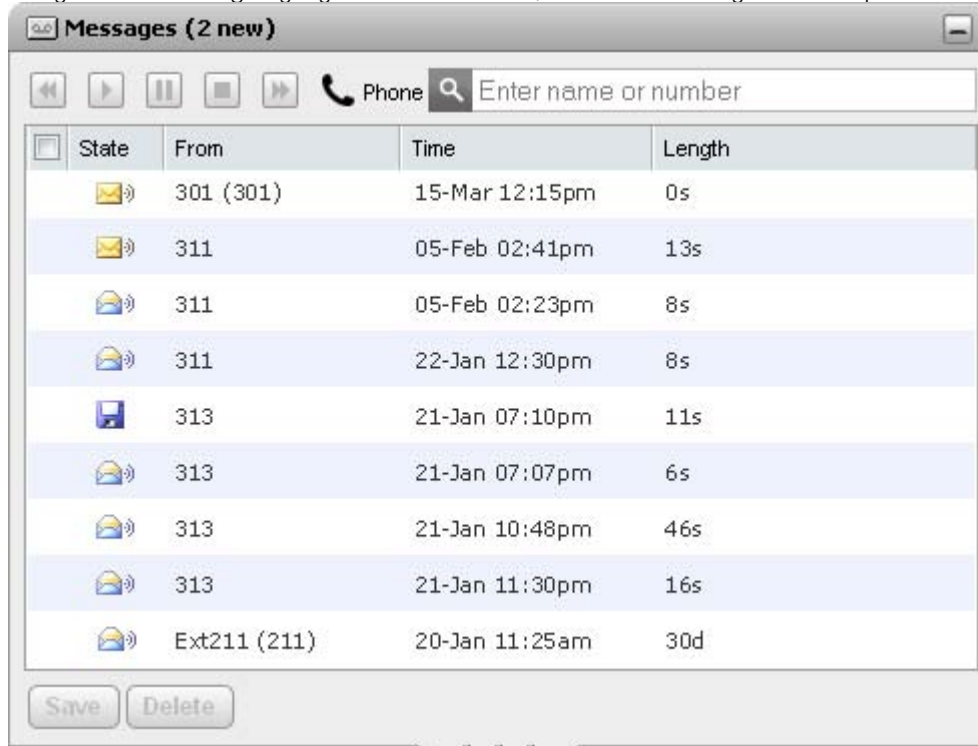


2. Click on the name or number to make a call.
  - The progress of the call is displayed on a tab in the  Calls gadget.


### 3.4.5 ... from Voicemail

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


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





2. Click on the name or number details of the caller to make a return call.

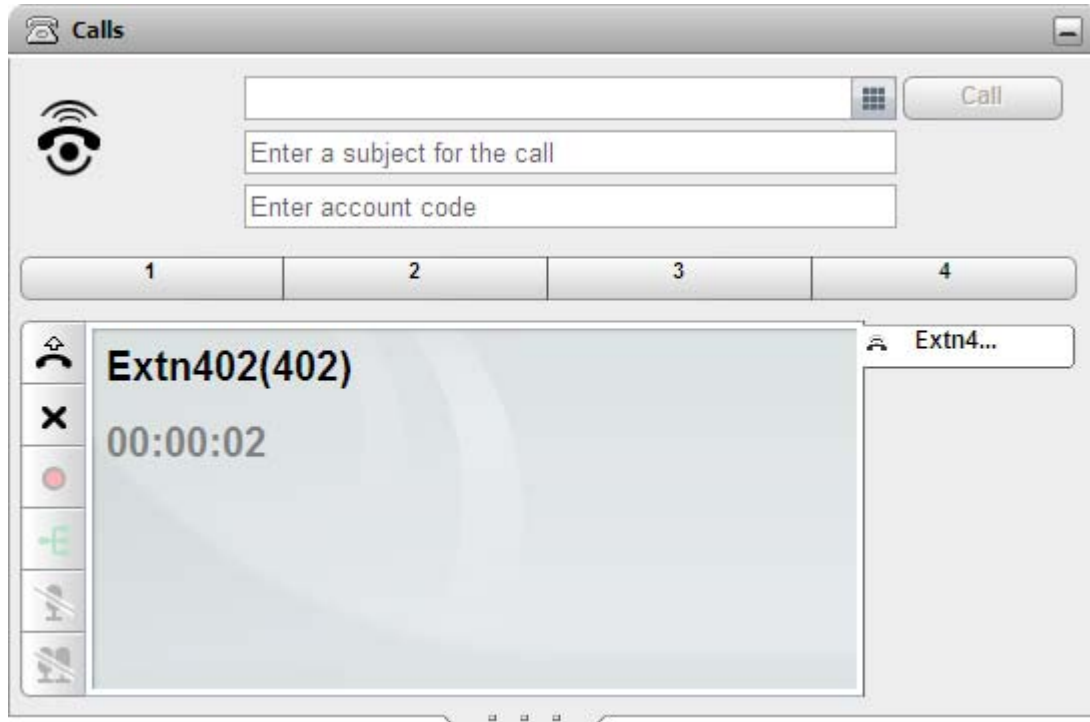
- The progress of the call is displayed on a tab in the  Calls gadget.





## 3.5 Answering a Call

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

By default new calls will ring your phone for 15 seconds before following your [forward on no answer](#)<sup>[12b]</sup> settings or going to voicemail. If you already have a call connected, answering another call using one-X Portal for IP Office will automatically put the existing call on [hold](#)<sup>[38]</sup>.

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




2. To answer the call, either use your phone or click the  call answer button. If you already have another call in progress, that call will be [automatically put on hold](#)<sup>[12b]</sup>.
  - Alternatively, pressing the  call drop button will redirect the call using your forward on no answer setting if set or otherwise to voicemail if available.
  - The  call answer button is not present for phones that cannot answer calls without the handset first being lifted or some other phone control being used. For those phones, answer the call by lifting the handset or using the phone's own controls for answering calls.
  - The  Calls gadget can display a range of [other buttons](#)<sup>[28]</sup> indicating actions that you can perform.

---

## 3.6 Pickup a Call

Each one-X Portal for IP Office user, including you, has an active profile that includes a [Call Pickup](#) setting. When this setting is enabled, other one-X Portal for IP Office users can answer your calls when they see that you have a call waiting to be answered. Note that this is not applied to all calls waiting to be answered, for example it is not used for hunt group calls.

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

To pickup a call

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



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



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

## 3.7 Unanswered Calls

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

### For Calls Direct To You

Using the [IP Office](#) 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](#) enabled, the call will be redirected to that number to ring for another period of your No Answer Time before going to voicemail if available.
  - If your Forward on No Answer destination is an external number, the phone system will try to retrieve the call and send it to voicemail if it is still unanswered, however that may not be possible in all cases.
  - You can switch forwarding on/off and change the destination number using a one-X Portal for IP Office [profile](#).
- If you are enabled to use voicemail, the caller will hear your mailbox greeting. You can switch voicemail on or off using a one-X Portal for IP Office [profile](#).
- 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](#) as a missed call.

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

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





## 3.8 Ending a Call

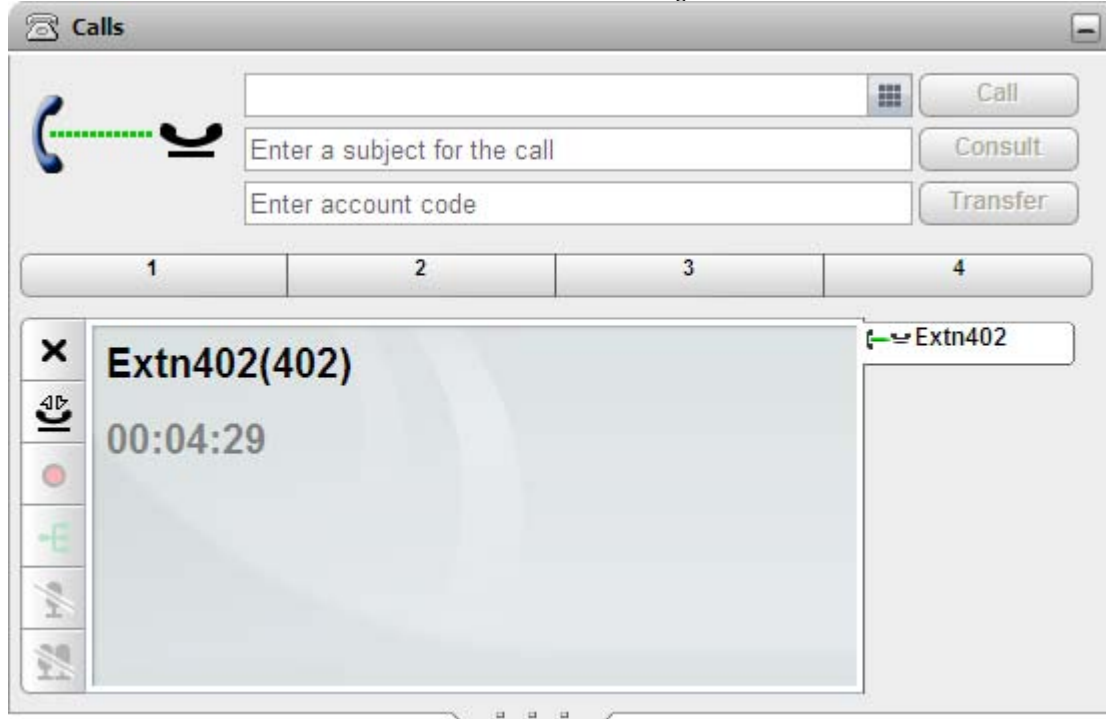
You can end a call by clicking on the  button displayed with the call details in the  Calls gadget.

## 3.9 Holding Calls

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

### 3.9.1 Holding a Call

1. Using the  Calls gadget on the Main tab, select the call tab for the connected call. It will be the tab with two connected handset  icon on the right.
2. Click on the  hold call button on the left. The call icon changes to .





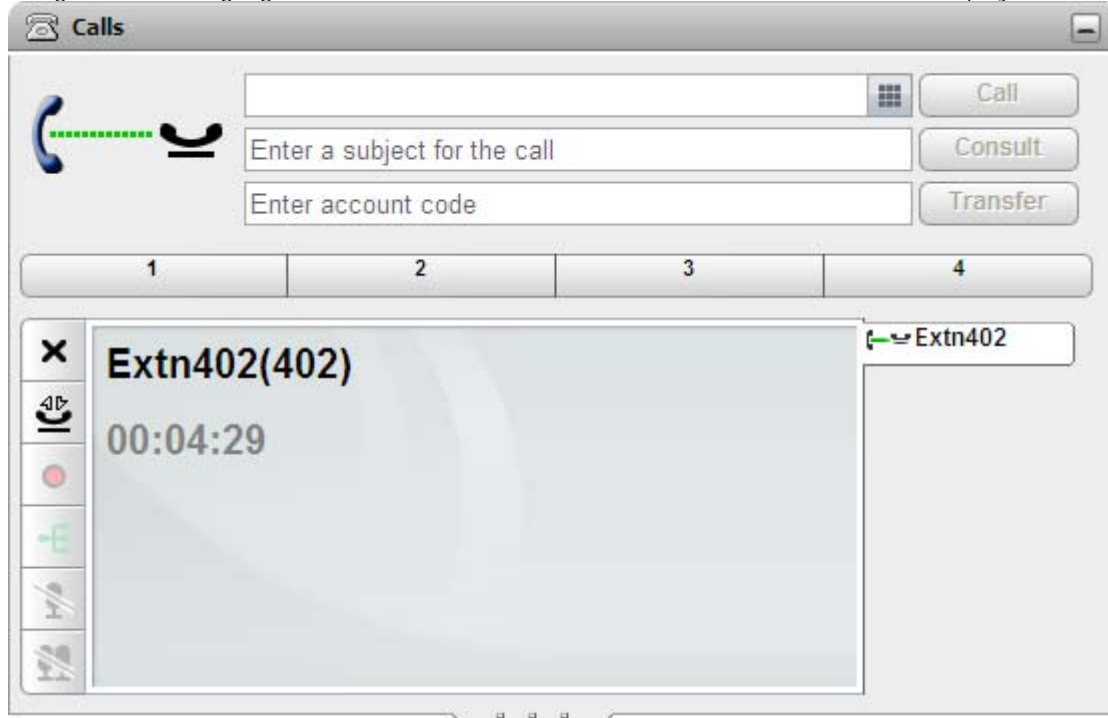
3. If you are not connected to another call, then after a set time the held call will automatically alert your phone again.



#### 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](#)<sup>[129]</sup>. By default it is 15 seconds but it can be changed or switched off. The returning held call ignores any forwarding or [do not disturb](#)<sup>[128]</sup> 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](#)<sup>[128]</sup> to further incoming calls.



### 3.9.2 Retrieving a Held Call

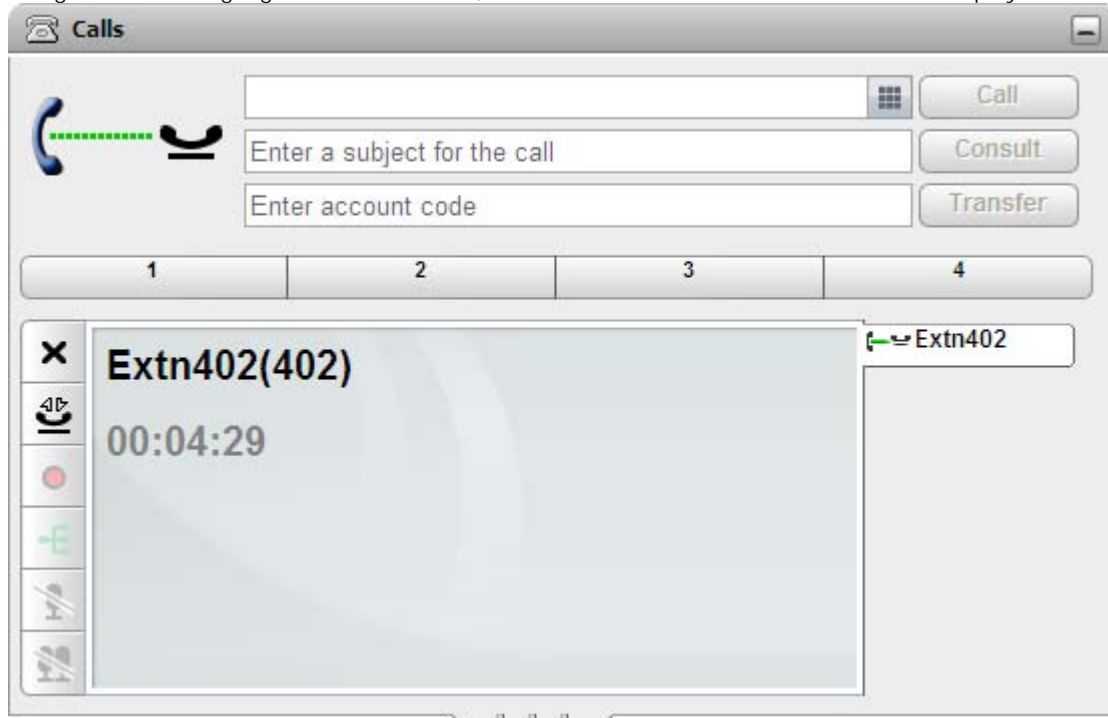
1. Using the  Calls gadget on the Main tab, select the call tab for the held call. It will display a  icon.




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

### 3.9.3 Ending a Held Call

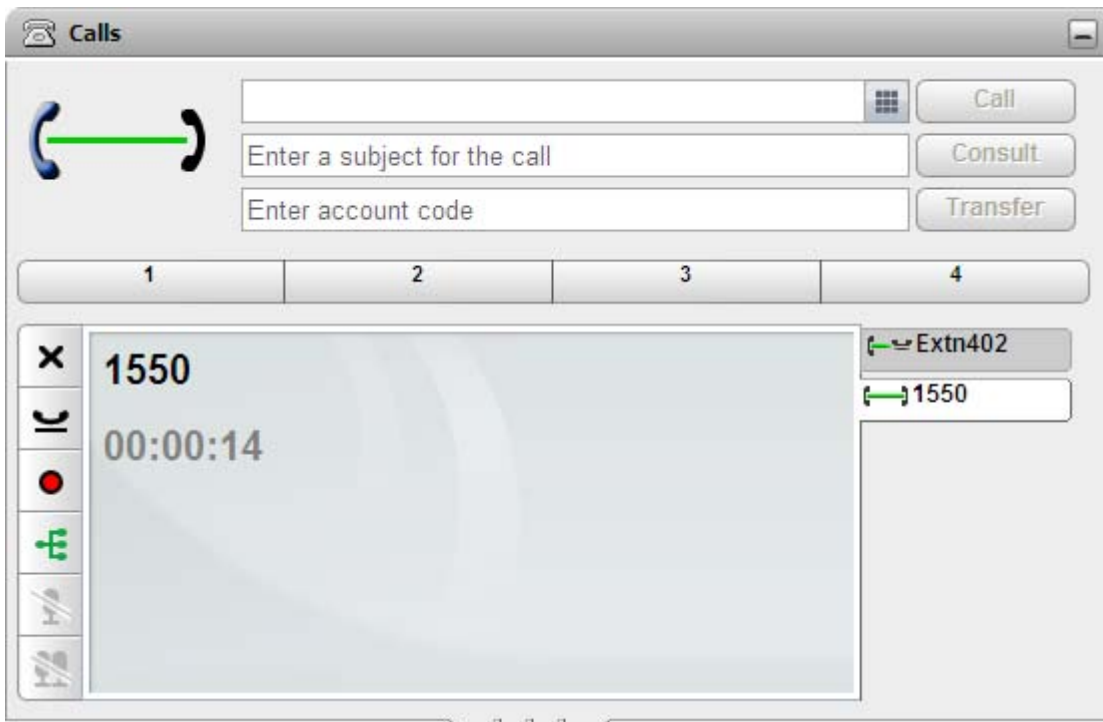
1. Using the  Calls gadget on the Main tab, select the call tab for the held call. It will display a  icon.





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

## 3.10 Switching Between Calls

You can have several calls in progress at the same time. That includes calls that are alerting you and calls that are on hold. However, you can only have one connected call at any time. Each call is shown by a tab on the left and the icon will indicate the [state of that call](#)<sup>[129]</sup> (connected, held, alerting, etc).



To view the details of any call, simply click on the tab for that call. Just viewing the call details does not answer or otherwise affect the call. To switch to another call, click on the  call answer or  retrieve held call button. The call to which you were connected will be [automatically put on hold](#)<sup>[128]</sup>.

### Number of Calls

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

- **Phones With Appearance Buttons**  
Many Avaya phones have programmable buttons that are configured by the [system administrator](#)<sup>[129]</sup> as [appearance buttons](#)<sup>[128]</sup>. When using one of these phones, each call that you make or receive normally uses an appearance button and can be controlled using that button (press to hold, retrieve, view details, etc).
  - For an incoming call, the call is presented on a suitable appearance button if available. If no suitable appearance button is available, the telephone system will treat the call as if you are [busy](#)<sup>[128]</sup> to any further incoming calls.
  - For outgoing calls, you can use one-X Portal for IP Office to make additional outgoing calls even when all your phone's appearance buttons are in use. If you do this, some calls will not be represented by and therefore controllable by an appearance button on the phone.
- **Phones Without Appearance Buttons**  
If the phone you are using does not have appearance buttons, your Calls Waiting On setting, as set by your system administrator, controls the number of calls that you can receive.
  - If your Calls Waiting On setting is [enabled](#), you can use one-X Portal for IP Office to answer an additional incoming call. Once you have two calls being handled, for any additional incoming calls, the phone system treats you as being [busy](#)<sup>[128]</sup>. However, using one-X Portal for IP Office you can still make additional outgoing calls.
  - If your Calls Waiting On setting is [not enabled](#), once you have one connected call to which you are talking the phone system treats you as being [busy](#)<sup>[128]</sup>. However, using one-X Portal for IP Office you can still make additional outgoing calls.

### Notes



1. You can only have one connected call at a time. If you connect to another call (by making a call, answering a call, unpark a call, retrieve a call from hold, etc.), the existing call to which you were connected is automatically put on hold. This is called Auto Hold. Your [system administrator](#)<sup>[129]</sup> can disable Auto Hold for the whole system. If this is done, when you connect to a call, any current call is disconnected.
2. Calls that have been parked are not included. Unlike held calls they are parked on the phone system rather than held at your phone.

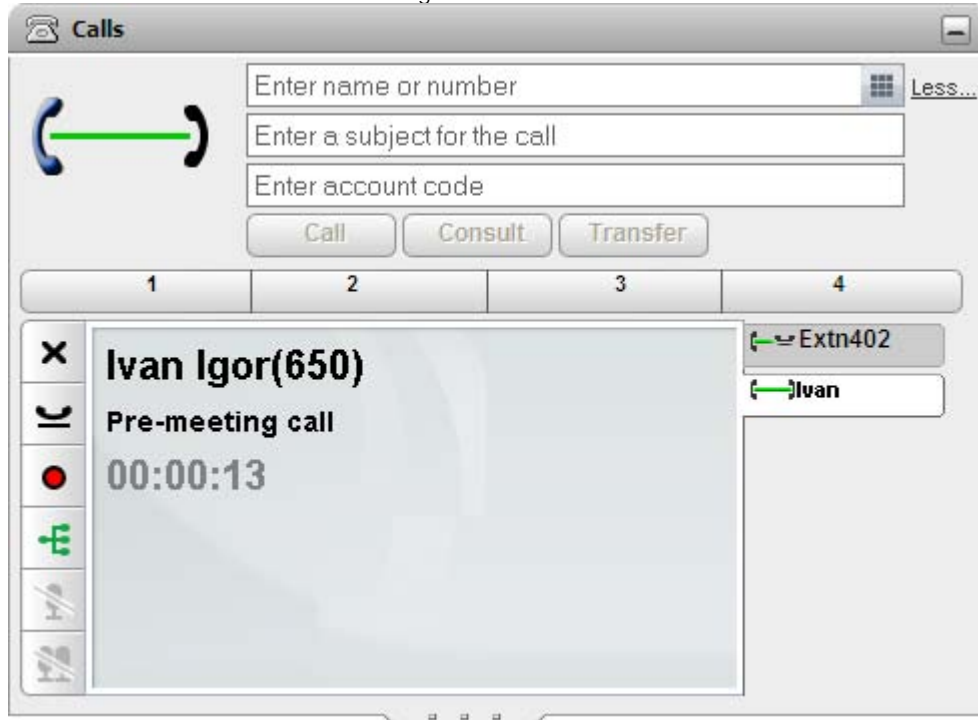
## 3.11 Recording a Call




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](#)<sup>129</sup> can switch off the call recording warning message, however doing this may be prohibited or subject to legal requirements.
- By default the recording is placed into your own voicemail mailbox. Your system administrator can change the mailbox into which your call recordings are placed.
- The recording will continue while you are connected to the call. If you transfer the call to another user or number, the recording ends.

To Start Call Recording

1. Using the  Calls gadget on the Main tab, select the call tab for the connected call. It will be the tab with two connected handset  icon on the right.



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

## 3.12 Transferring Calls

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



Unsupervised Transfer	An unsupervised transfer is one where, having dialed the number of the transfer destination, you complete the transfer without waiting for the call to be answered.
Supervised Transfer	<p>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.</p> <p>This method of transferring calls allows you to confirm if the transfer target is present and wants to accept the call.</p>
Conference Transfer	You can also transfer a call by <a href="#">starting a conference</a> <sup>[57]</sup> between all the parties and then leaving the conference.

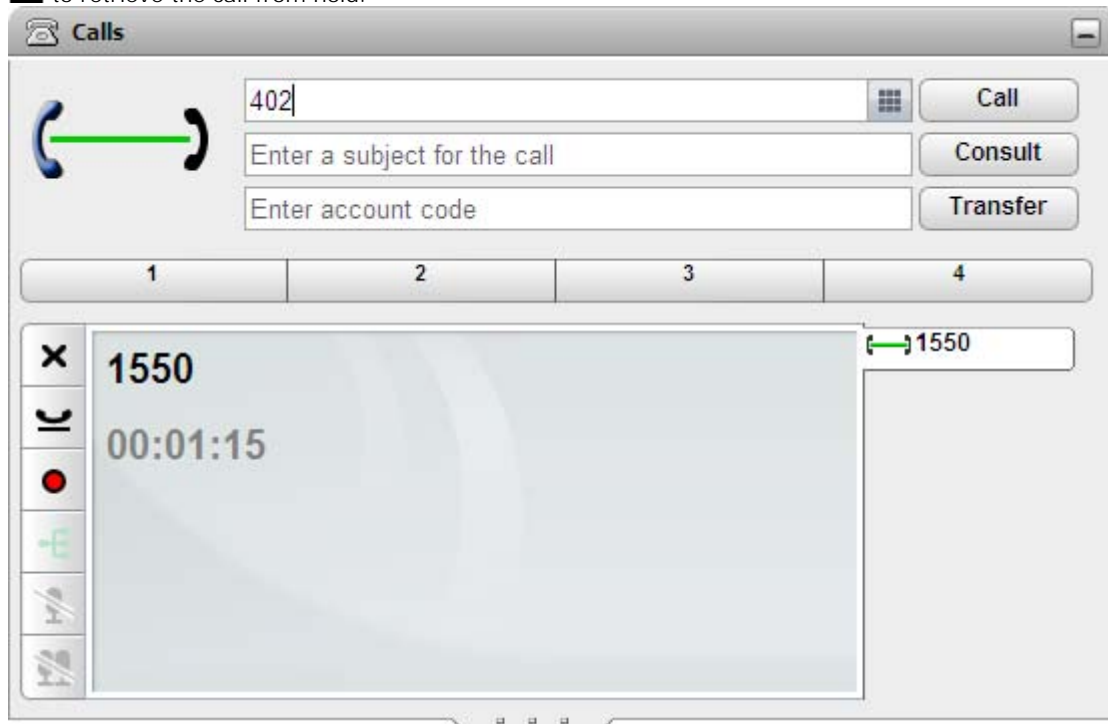
### Notes


1. Your [system administrator](#)<sup>[129]</sup> can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it may recall to you.
2. The ability to transfer an external call to another external number can be restricted by your system administrator.

### 3.12.1 Making an Unsupervised Transfer

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

1. Using the  Calls gadget on the Main tab, select the call tab for the call you want to transfer. If necessary click  to retrieve the call from hold.



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



#### Notes

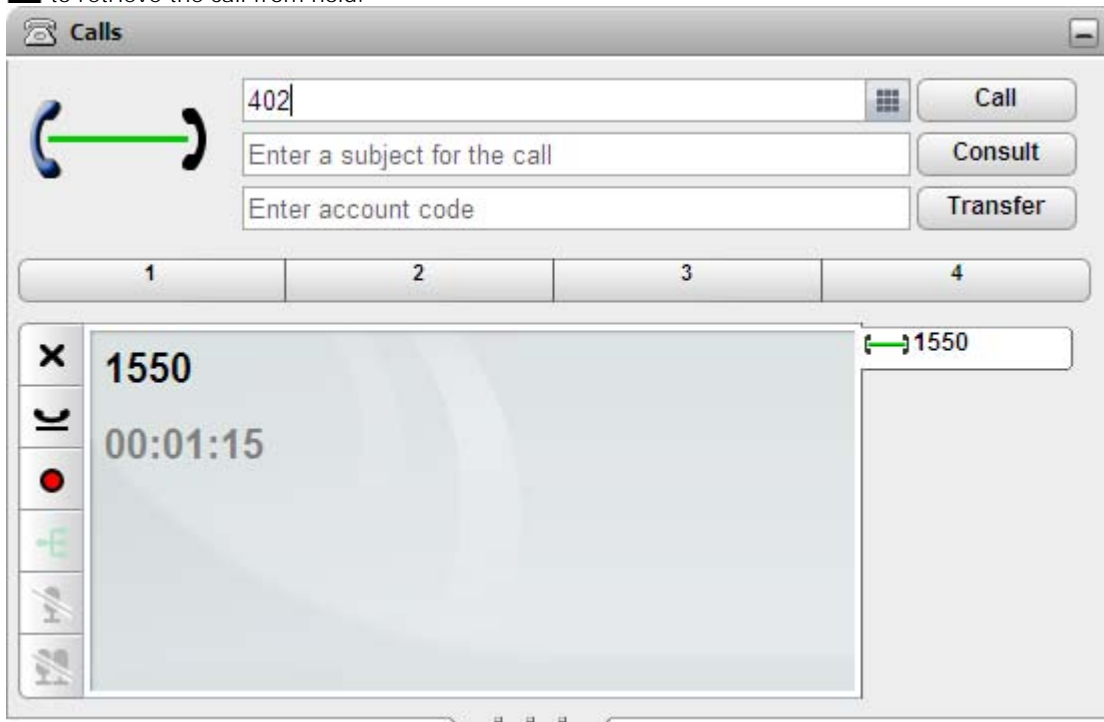
1. Your [system administrator](#) <sup>[129]</sup> can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it may recall to you.
2. The ability to transfer an external call to another external number can be restricted by your system administrator.








### 3.12.2 Making a Supervised Transfer

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

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

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




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

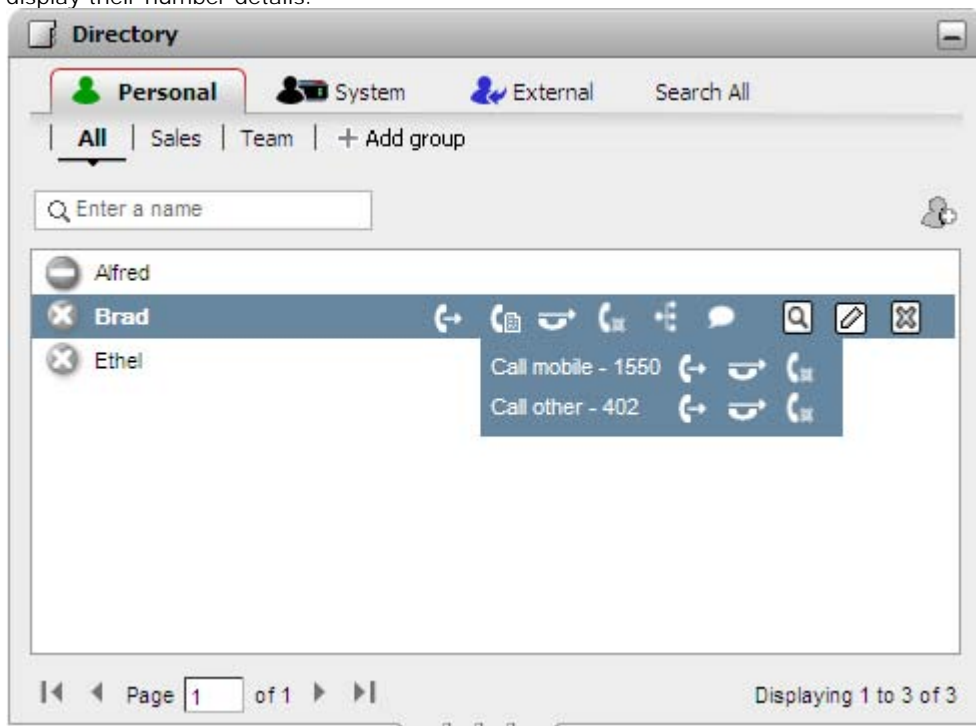
#### Notes

- Your [system administrator](#) <sup>129</sup> can enable a Transfer Return Time for you. When set, if a transferred call is not answered within that time, it may recall to you.
- The ability to transfer an external call to another external number can be restricted by your system administrator.





### 3.12.3 Transferring Calls Using the Directory

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

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



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

- Use the  transfer icon to do a simple [unsupervised transfer](#) <sup>[42]</sup> to the contact's primary number.
- Use the  consult icon to start a [supervised transfer](#) <sup>[43]</sup> to the contact's primary number.
- Use the  conference icon to conference yourself, the held call and the contact's primary number.
- If the  icon is displayed, the contact has alternate numbers. You can click on the icon and select the same options as above for those numbers.

## 3.13 Parking Calls

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

### Notes

1. If you park a call and leave it parked too long it will recall to you. The default is to recall after 5 minutes but your [system administrator](#)<sup>[129]</sup> can adjust this. You cannot drop a parked call that recalls your phone.
2. Park slots are unique to your telephone system. Park and unpark is not supported between different phone systems in a [Small Community Network](#)<sup>[129]</sup>.

### 3.13.1 Configuring Your Park Slots


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

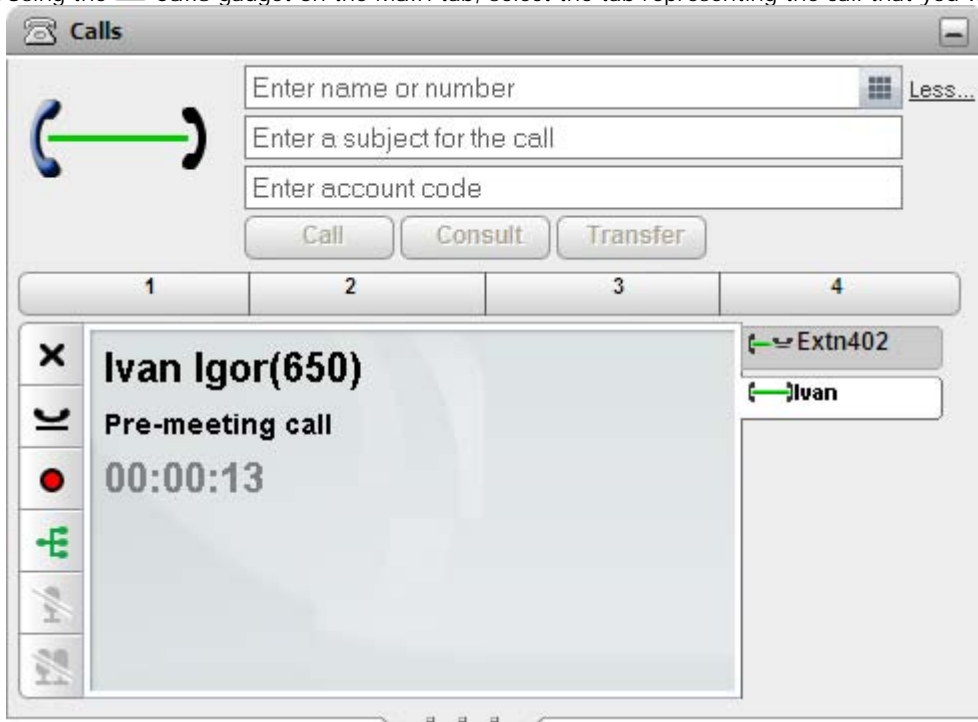
1. Click on the Configure tab and scroll down to the Park Slots section.


Park Slots	<input type="text" value="1"/>
	<input type="text" value="2"/>
	<input type="text" value="3"/>
	<input type="text" value="4"/>

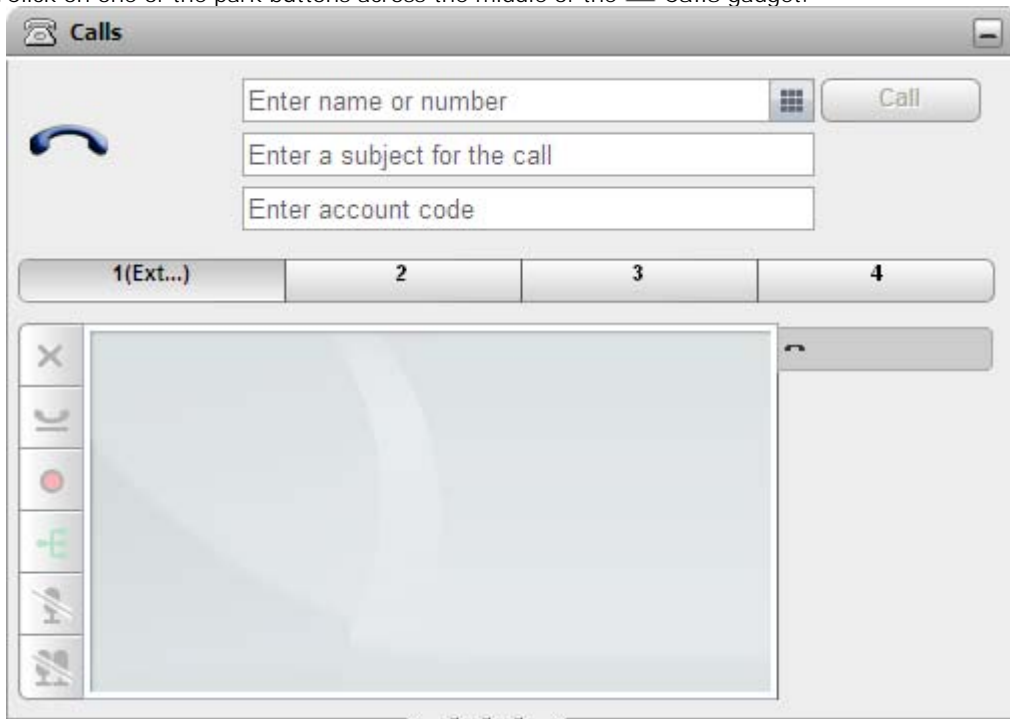
2. For each of the park slot buttons that your one-X Portal for IP Office supports, enter the park slot number or name that it matches. Typically numbers are used, with everyone using 1 to 4 as their defaults.
3. Click Save.

### 3.13.2 Parking a Call

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



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




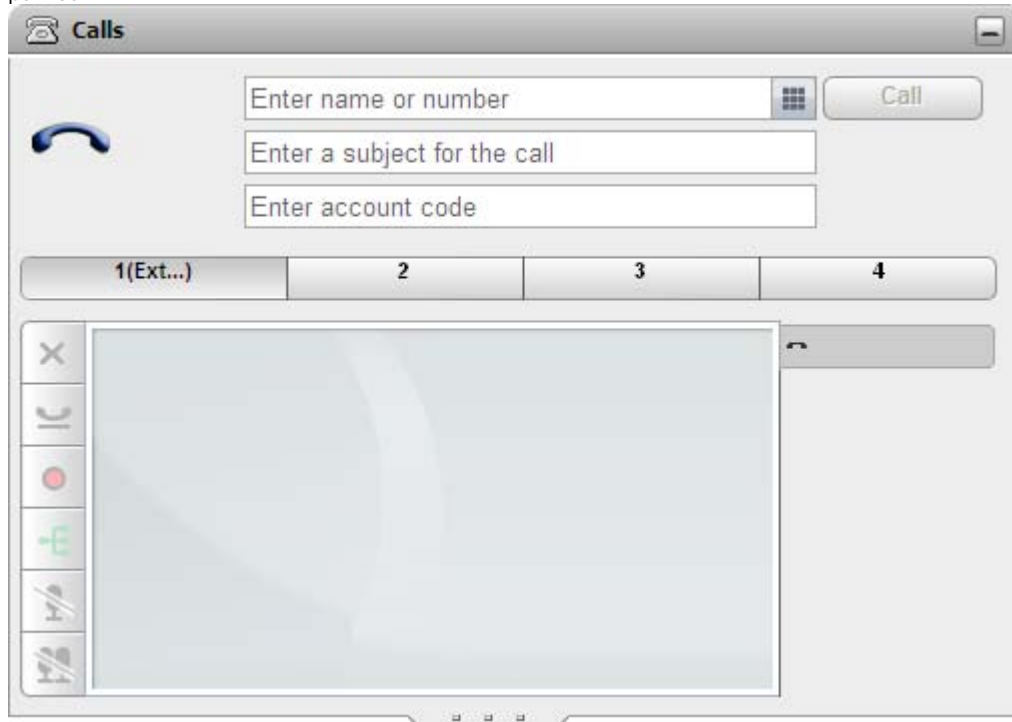
3. The call is parked and the button now indicates that that system park slot is in use.

#### 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](#) <sup>[129]</sup> can adjust this. You cannot drop a parked call that recalls your phone.


### 3.13.3 Unparking a Call

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




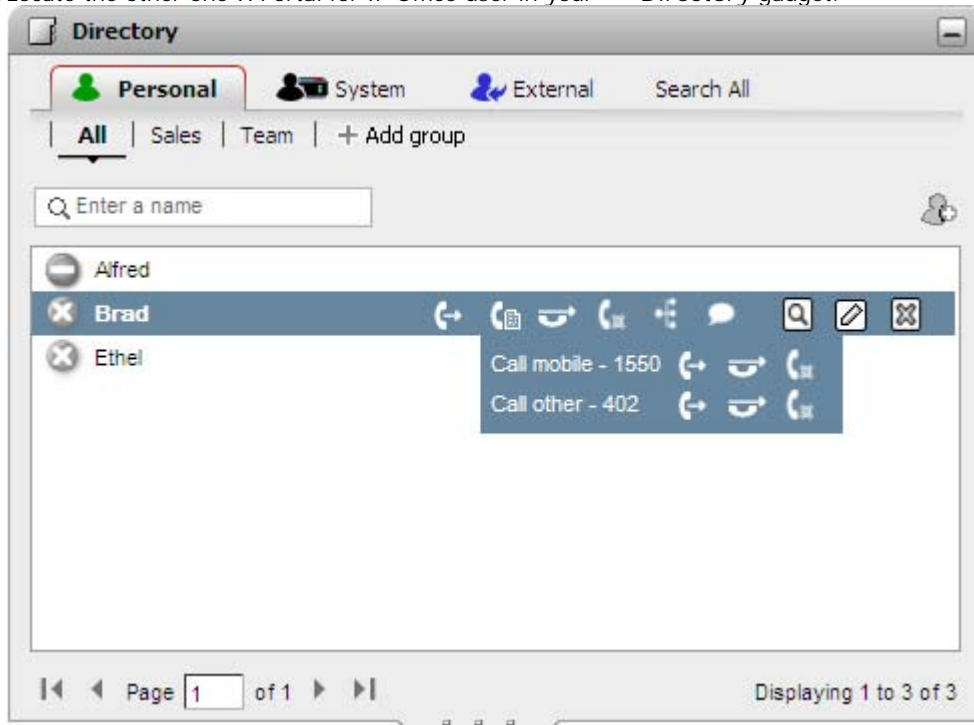
2. Placing your cursor over the button will display the name and number of the parked caller if known.
3. Click on the parked call button to unpark the call.



## 3.14 Instant Messaging Other Users

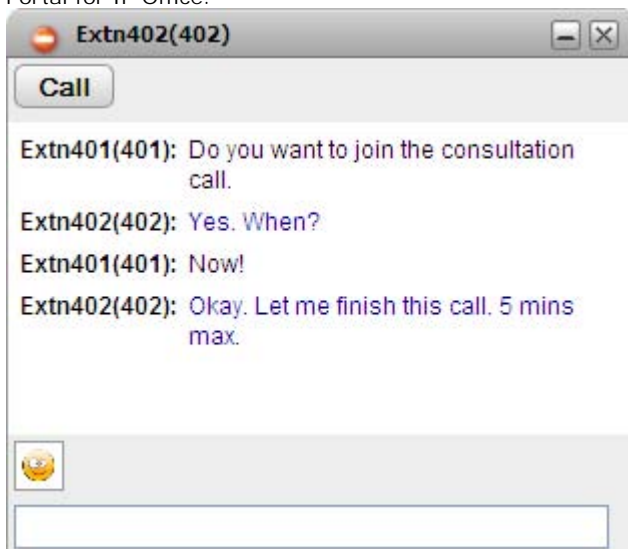
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

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

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



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

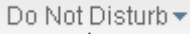



4. You can start typing your messages and they can reply.
5. You can start instant messaging session with other one-X Portal for IP Office users at the same time. Each will appear in a separate popup.

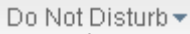


## 3.15 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your [Do Not Disturb Exceptions](#)<sup>[105]</sup>. All other callers are routed to voicemail if available or otherwise receive busy tone. You can still make calls while in the Do Not Disturb state.

To switch Do Not Disturb On

1. At the top-right, click on the  status selector.
2. Select *Do Not Disturb*.
3. Your status icon will change to  do not disturb.

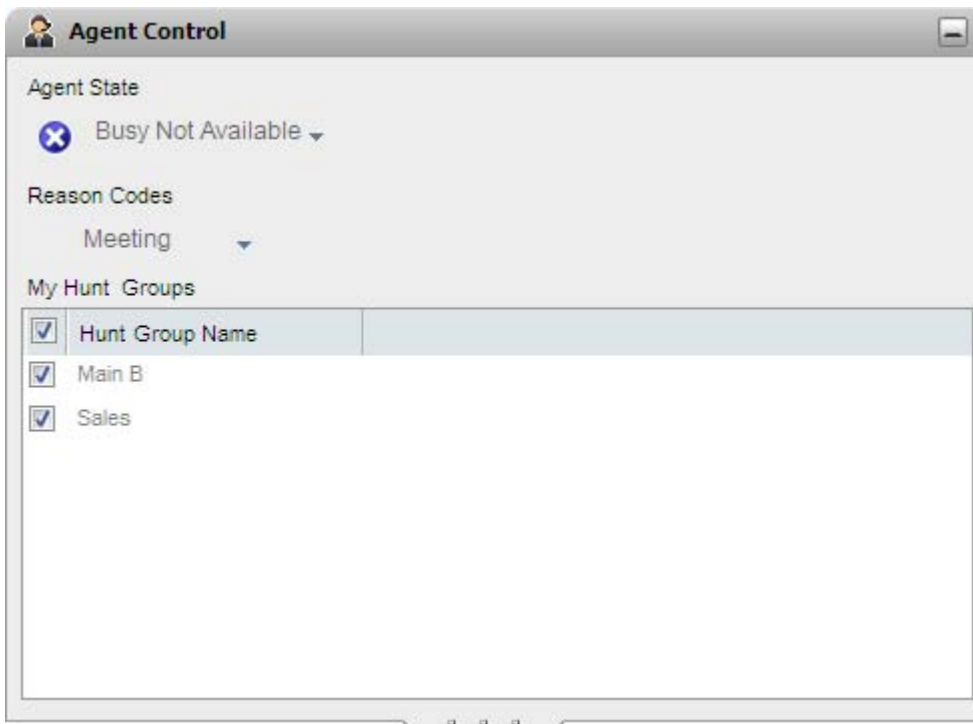
To switch Do Not Disturb Off

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

## 3.16 Agent Controls

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

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



### Changing Your Agent State

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

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

### Your Queues

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

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

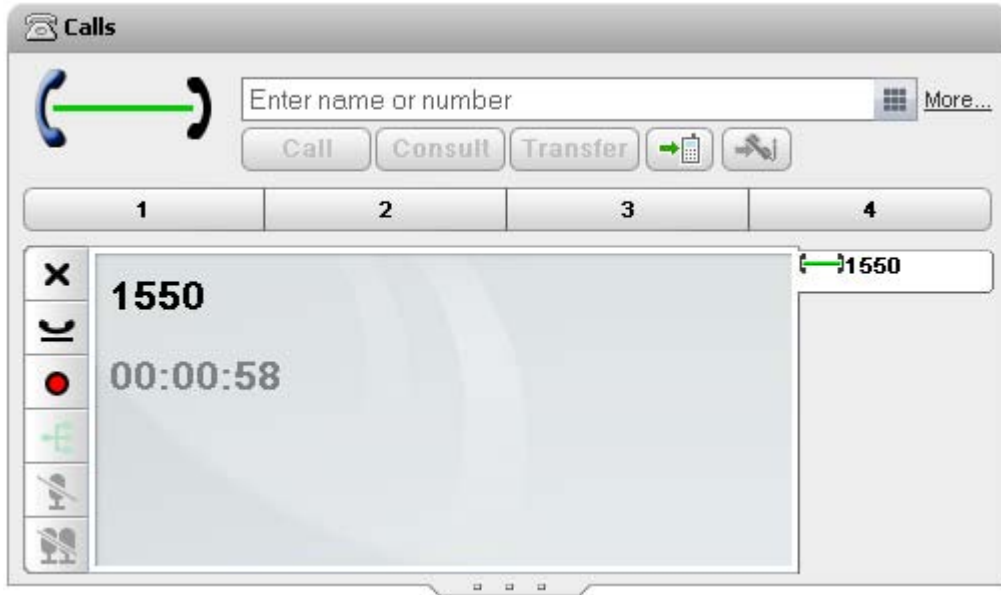
- Which Queues Can I Control?  
Your telephone system administrator is able to configure for which queues you can change your membership state, by default it is none. Refer to the one-X Portal for IP Office Installation Manual. The group name is greyed out if you cannot control your membership status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



### 3.17 Twinned Call Control

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

If you are allowed to use mobile twinning, you can switch it on or off and set the destination number as part of your current one-X Portal for IP Office [profile](#)<sup>914</sup>. It can also be configured for you by your system administrator or through your desk phone's menus.

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 may also return if answered too quickly, such as the call going immediately to a cell phone's voicemail because the cell phone was busy or off.
- 
**Claim from Twin**  
 When you have a call twinned call that you answered on at your twinned extension number, you can have it transferred back to your normal extension by clicking this button.

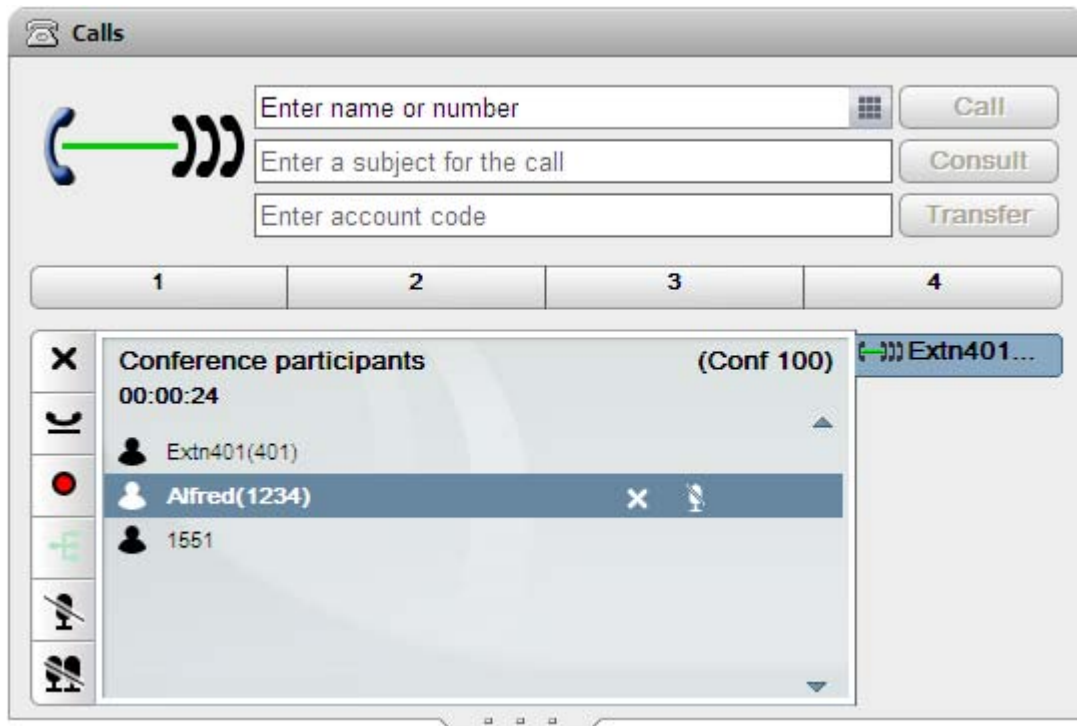


# Chapter 4.

# Conference Calls

## 4. Conference Calls

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



### Start and Manage Conference Calls



- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"><li>• <a href="#">Setup a conference.</a> <sup>[55]</sup></li><li>• <a href="#">Turning held calls into a conference call</a> <sup>[57]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Add another party to a conference</a> <sup>[58]</sup></li><li>• <a href="#">Mute conference parties</a> <sup>[59]</sup></li><li>• <a href="#">Drop conference parties</a> <sup>[60]</sup></li></ul> | <ul style="list-style-type: none"><li>• <a href="#">Holding a Conference Call</a> <sup>[61]</sup></li><li>• <a href="#">Set Your Conference Number</a> <sup>[62]</sup></li></ul> |
|---|---|--|

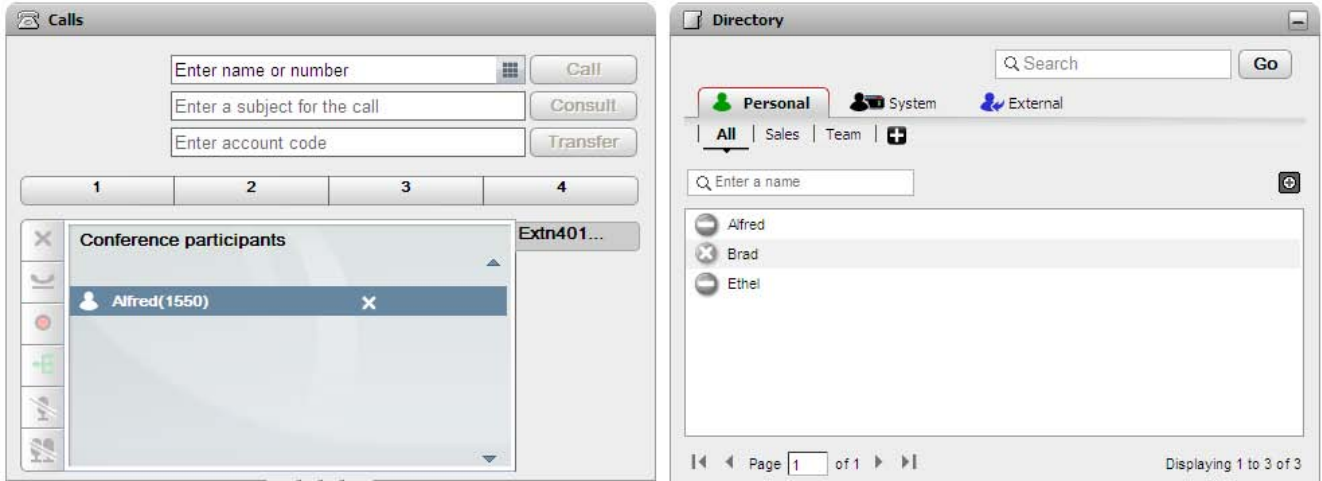
### Notes


1. The maximum number of participants in any particular conference is 64. However that may be limited by the number of participants in other conferences already in progress. It may also be limited by other features, for example call recording, that also use the telephone system's conference facilities.
2. Depending on phone system settings, a conference can automatically end if all internal users exit leaving only external users.
3. The conference controls are not supported for a users whose on another phone system than the one where the conference started.

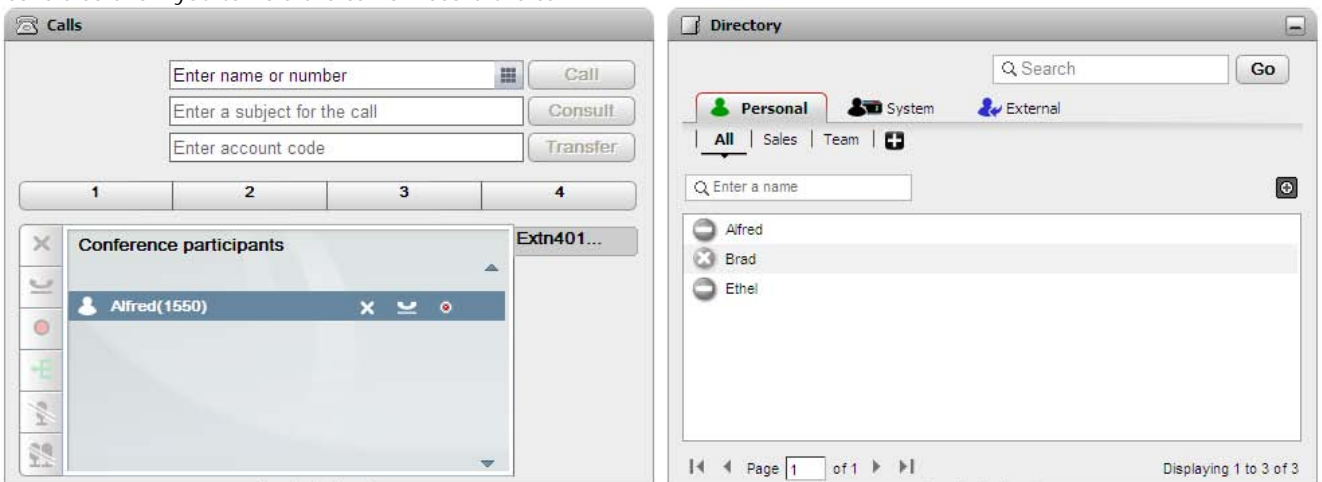
## 4.1 Setup a Conference


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

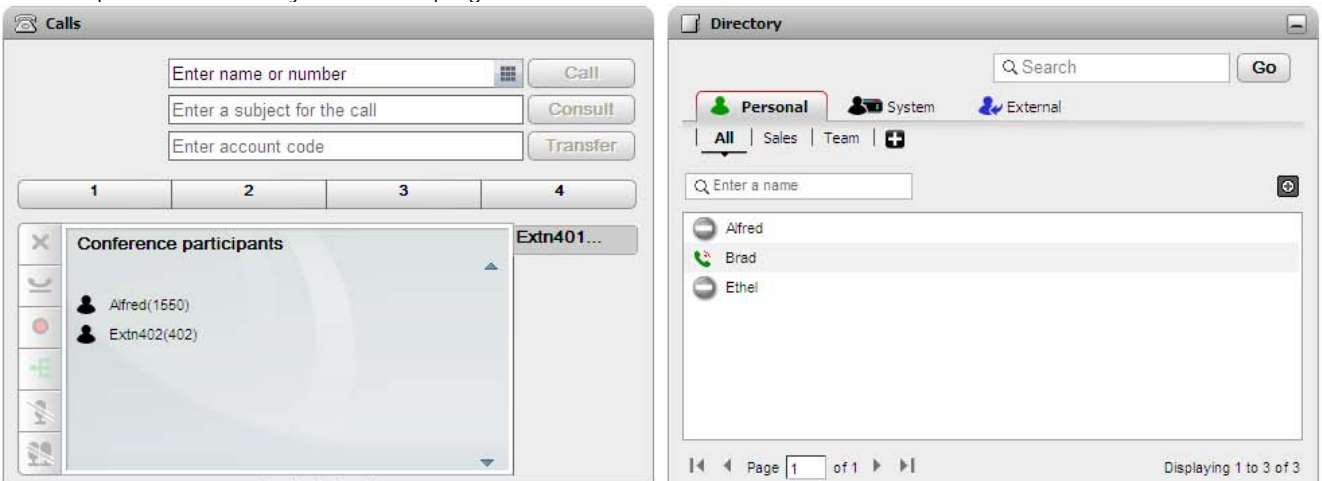
1. In the  directory gadget, locate and hover over the contact you want to add to start a conference with. Click on the  icon. This will start a call to that contact but with the calls gadget using the conference information display rather than the normal call information display.



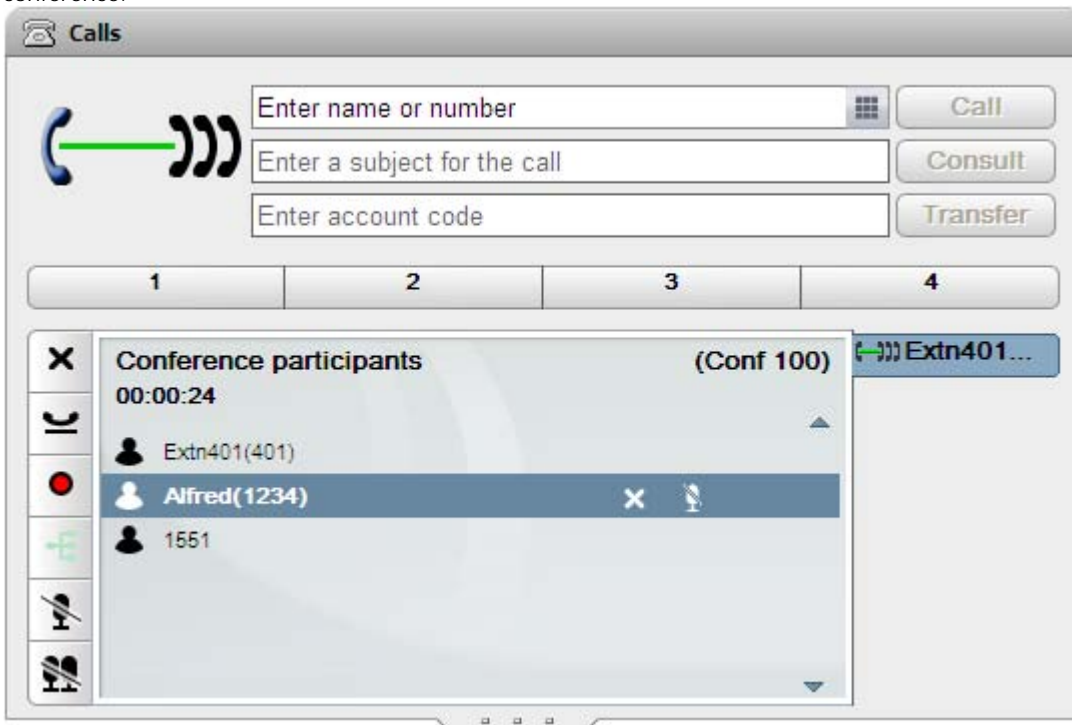
2. When the party answers, inform them that you want to include them in a conference. If they do not answer or do not want to be included in the conference, hover over them in the calls gadget and click on the  icon shown. The icons also allow you to hold the call or record the call.



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




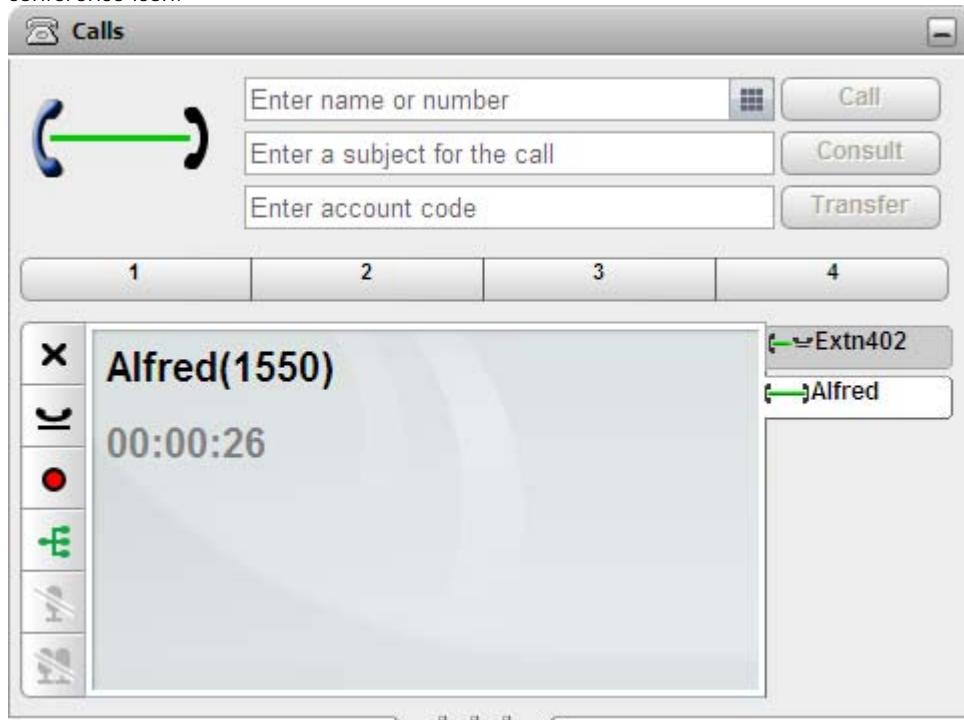
4. When you have added all the contacts, click on the  conference icon in the calls gadget in order to start the conference.




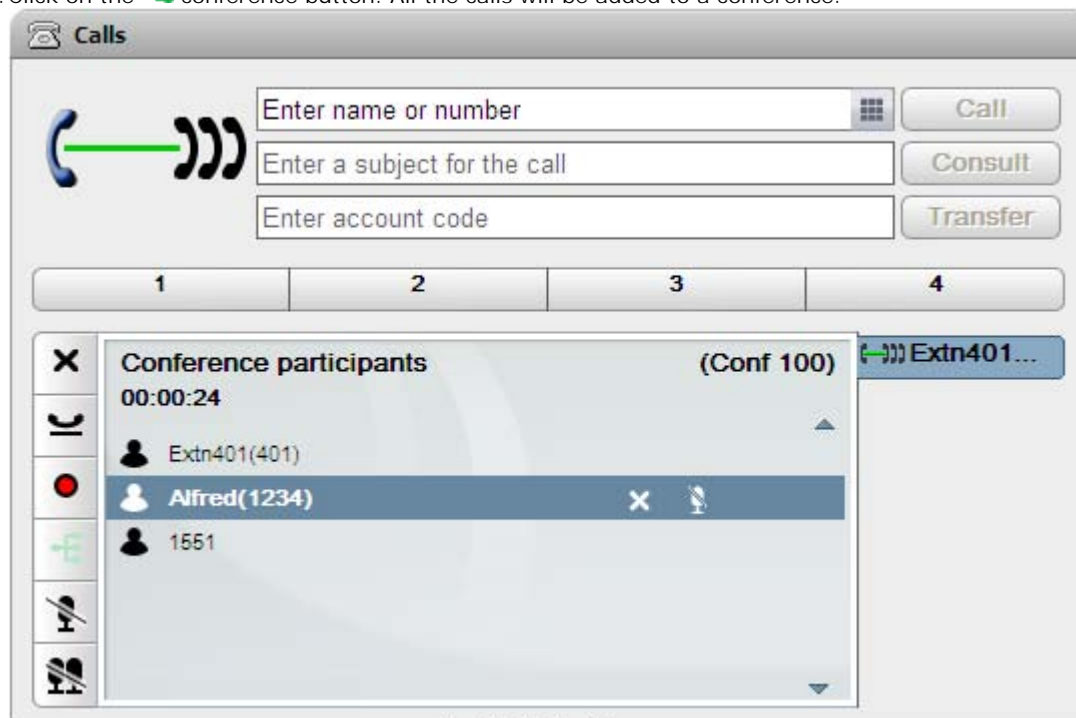
## 4.2 Turning Held Calls into a Conference

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

1. When you have several held calls, or a call in progress and other calls on hold, the call gadget displays a  conference icon.



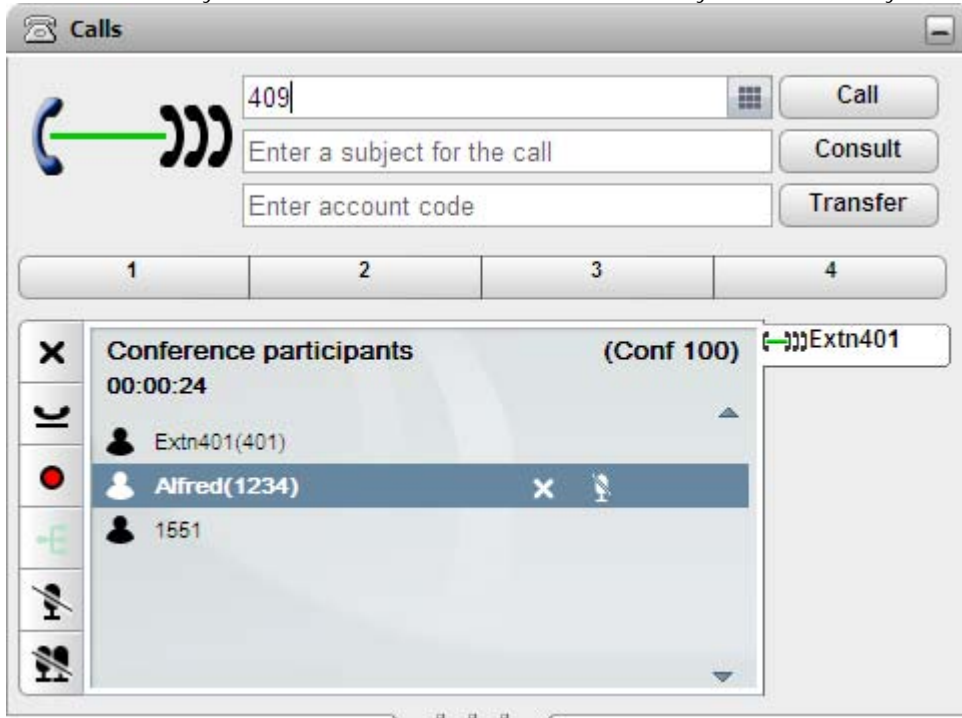
2. Click on the  conference button. All the calls will be added to a conference.



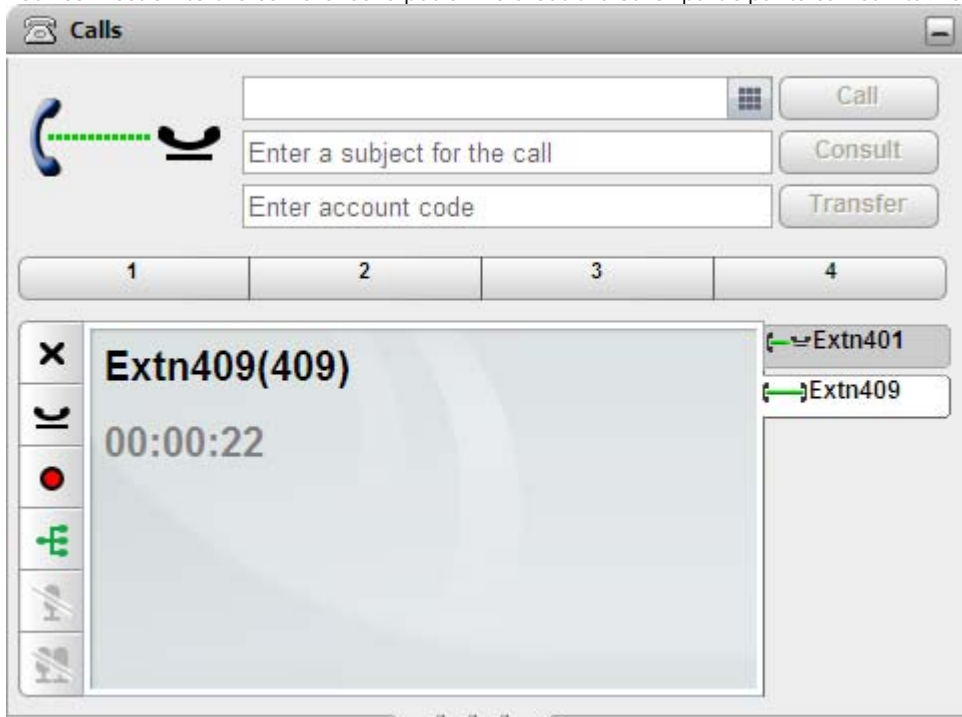
### 4.3 Adding a Another Call to a Conference




You can add an additional party to the conference.

1. Enter the number you want to call and click on Call. Alternatively use the directory to call a contact.




2. Your connection to the conference is put on hold but the other participants can still talk to each other.



- If the other party is happy to join the conference, click on .
- 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.

## 4.4 Muting Conference Parties

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

While a party's connection to the conference is muted, they are shown with a  muted party icon.

Note that the mute functions detailed here are performed by the telephone system. They do not switch on or off any mute function that may be provided by your phone.






### To Mute Yourself

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



### To Mute Another Party in the Conference

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



-  Drop: This option allows you to drop the party from the conference. Their icon is changed to  to show that they are no longer in the conference.
-  Mute: This option allows you to mute the party. While muted their icon is changed to .
-  Unmute: Reconnect a party whose icon indicates that they were muted.

### To Mute All Other Parties in the Conference

If you are able to do this, a  button will be displayed at the bottom of the  Calls gadget. Clicking on this will mute all the parties in the conference except you.

While all the other parties are muted, your  Calls gadget will display an  button.

---

## 4.5 Dropping Conference Parties

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

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






### To Drop Yourself

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

### To Drop Other Parties in the Conference

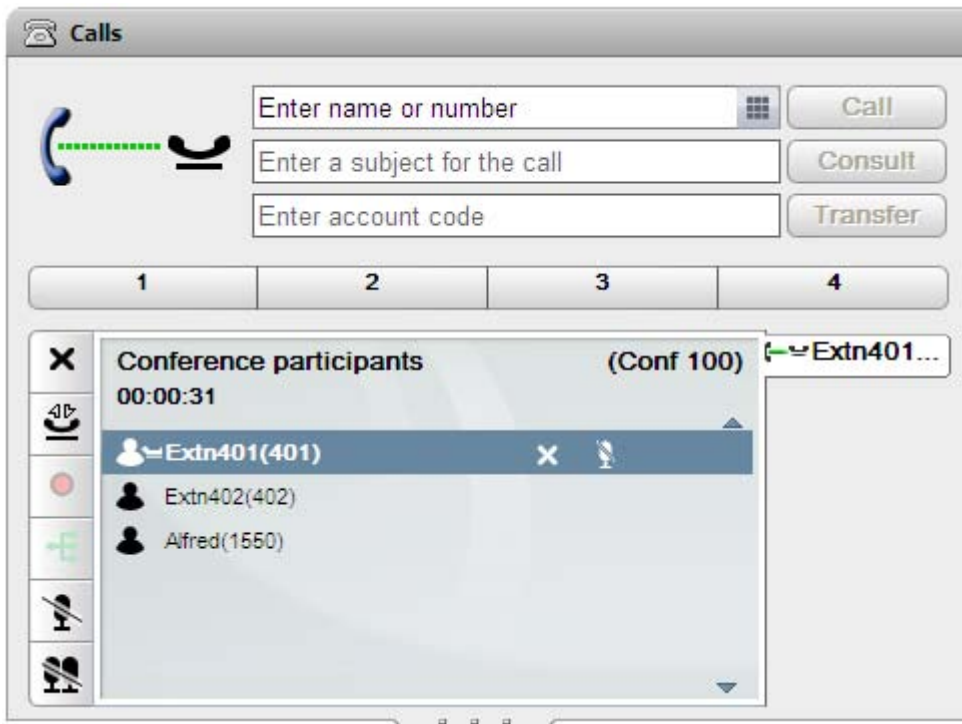
1. If you hover your cursor over a party in the conference, you will be displayed a list of the actions that you can perform. The options will vary depending on the conference party's current state and on whether you started the conference or not.



-  Drop: This option allows you to drop the party from the conference. Their icon is changed to  to show that they are no longer in the conference.
-  Mute: This option allows you to mute the party. While muted their icon is changed to  .
-  Unmute: Reconnect a party whose icon indicates that they were muted.

## 4.6 Holding a Conference

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



- **! WARNING**










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

## 4.7 Conference Call Controls

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

### Conference Buttons

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






Icon	Action	Description
	Drop Call	For a currently connected call, pressing <b>X</b> disconnects the call.
	Record Call	Start recording the current call.
	Stop Recording	Stop recording the current call.
	Hold Call	Puts the call on hold.
	Retrieve Held Call	Take a call back from hold.
	Mute	Mute your connection to a call.
	Mute All	For conferences which you initiate, this control allows you to mute all the other conference parties.
	Unmute	Unmute your connection to a call.
	Unmute All	For conferences which you initiate, this control allows you to unmute all the other conference parties.

### Using the Conference Party Icons

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

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



-  Drop: This option allows you to drop the party from the conference. Their icon is changed to  to show that they are no longer in the conference.
-  Mute: This option allows you to mute the party. While muted their icon is changed to .
-  Unmute: Reconnect a party whose icon indicates that they were muted.

## 4.8 Configuring Your Conference Bridge Number

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

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

1. Select the Configure tab.
2. Locate the Conference Bridge Number field.


Conference Bridge Number

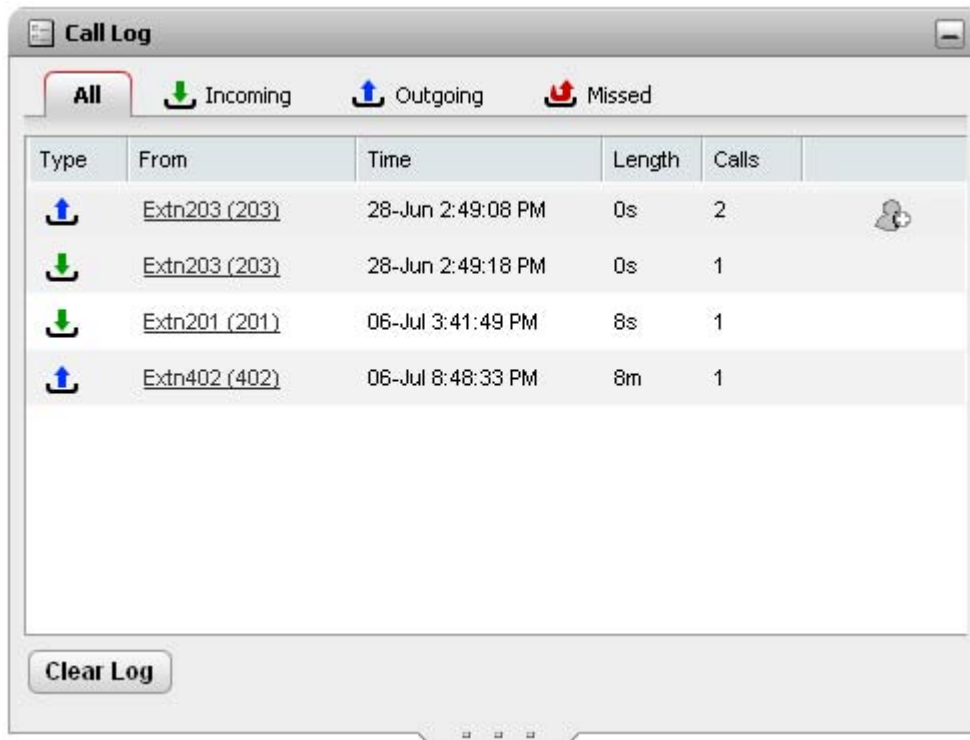
3. Enter the name or number of the conference meet me that you want to control.
4. Click on Save.






# Chapter 5.

## The Call Log

## 5. The Call Log

The  Call Log gadget displays details of calls you have made, received and missed. You can use the call log to [make a call](#)<sup>[30]</sup> or [add the caller's details to your Personal Directory](#)<sup>[67]</sup>.



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

Clear Log

### Use My Call Log

- [View My Call Log](#)<sup>[65]</sup>
- [Make a Call From the Call Log](#)<sup>[66]</sup>
- [Add a Call Log Number to My Directory](#)<sup>[67]</sup>

### one-X Portal for IP Office Call Log

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

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

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


### Phone Call Log

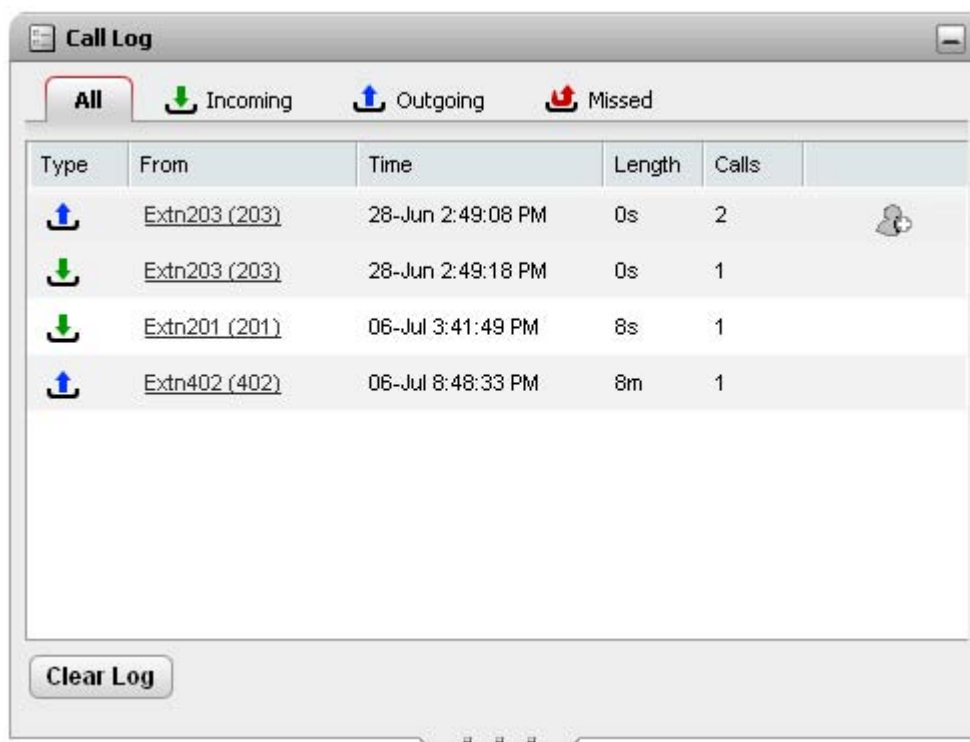
If you are using a 1400, 1600, 9400, 9500 or 9600 Series phone with a Call Log or History button, or an M-Series or T-Series phone, by default the [same call log](#) as shown by one-X Portal for IP Office is also shown on the phone. You can then use and edit your call log from the phone or from one-X Portal for IP Office. The two will change in parallel.

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


## 5.1 Using the Call Log

The  Call Log displays details of calls you have made, received and missed. You can use the call log to [make a call](#)<sup>[30]</sup> or [add the caller's details to your Personal directory](#)<sup>[67]</sup>.




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

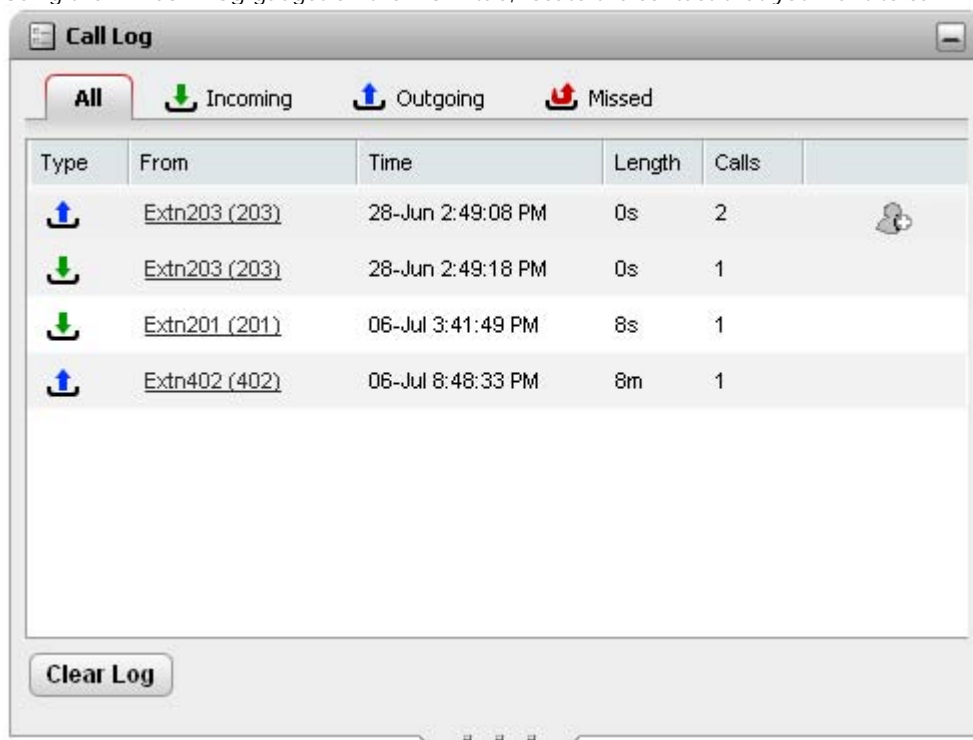
Tab	Description
All	This tab shows all the records from the other sub-tabs.
 Incoming	This tab shows records for calls direct to your extension number that you have answered. Details of the 10 most recent callers are included.
 Outgoing	This tab shows records for calls that you made. Details of the 10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


- **Hunt Group Calls**  
Your [system administrator](#)<sup>[129]</sup> can configure whether your missed calls call log includes missed calls for selected [hunt groups](#)<sup>[128]</sup>. Missed hunt group calls are calls not answered by a member of the hunt group. They do not have to actually rung you and they may have been answered by a non-group member or voicemail; if so that will be indicated in the missed call details. When this option applies to your call log, the Name column is relabeled From and a To column is also displayed so you can distinguish between your own calls and calls to a hunt group.
- **▼ ▲ Sort**  
You can sort the call log entries by clicking on the column headers. The current column being used for sorting is indicated by a down arrow ▼ or up arrow ▲ icon. Clicking on the same column header again reverses the sort order.
-  [Add the Caller Details to Your Personal Directory](#)<sup>[67]</sup>  
You can add the name and number to your Personal directory.
- **Clear Log**  
Delete all records from the currently viewed tab.
- **Name**<sup>[66]</sup>  
The entries in the name column are underlined and can be clicked to make a return call to the number stored by the call log.

## 5.2 Making a Call from the Call Log

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


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

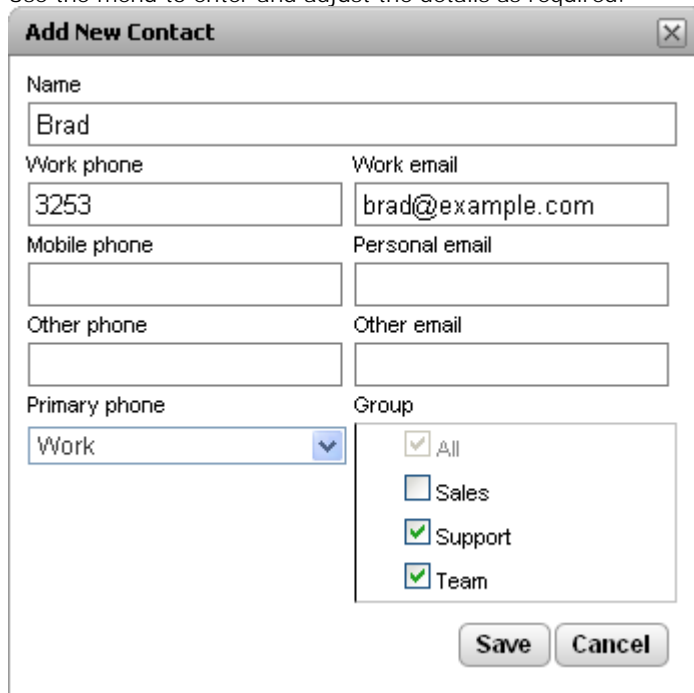


2. Click on the name or number to make a call.
  - The progress of the call is displayed on a tab in the  Calls gadget.

## 5.3 Adding a Caller to Your Directory

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

1. Locate the call in your call log.
2. Click on the add  icon next to the call details.
3. The contact details menu will be displayed pre-filled with the information from your call log.
  - Use the menu to enter and adjust the details as required.




- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#)<sup>[72]</sup> of the user. This applies even if another number is currently selected as the [Primary phone](#)<sup>[129]</sup>.
- You can use the Group list to select which of your personal [contacts tabs](#)<sup>[81]</sup> the contact should appear on.
- You can add email addresses. These allow you to [start an email](#)<sup>[82]</sup> from the one-X Portal for IP Office directory.
- When finished, click Save.

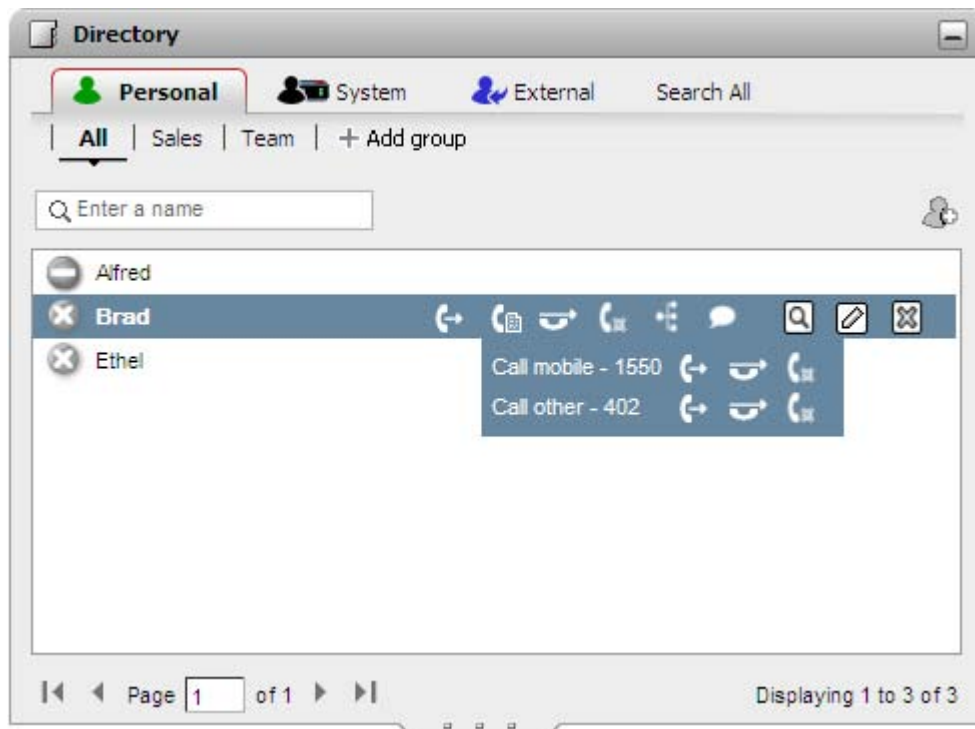


# Chapter 6.

# Directories

## 6. Directories

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




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

- **Personal**  
This tab shows your personal contacts stored by the phone system. If you are using an Avaya phone, these contacts may also be accessible on the phone. You can group your personal contacts into up to 5 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.
- **Results**  
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.

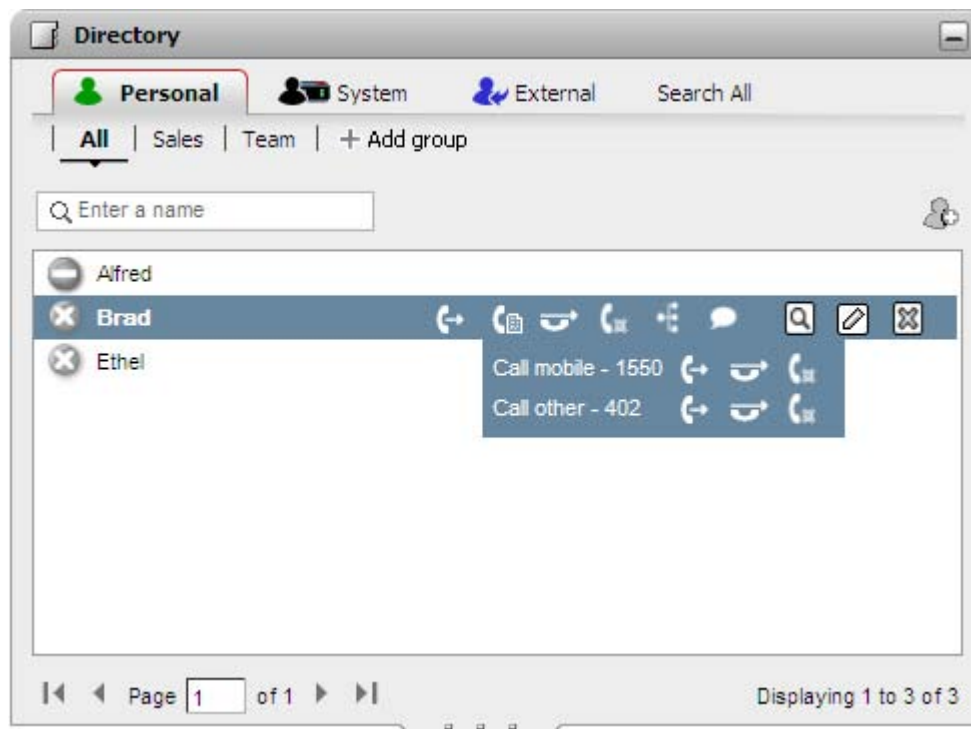
### Use the Directories

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• <a href="#">View the Directories</a> <sup>71</sup></li> <li>• <a href="#">Search the Directories</a> <sup>73</sup></li> <li>• <a href="#">Make Calls from the Directory</a> <sup>74</sup></li> <li>• <a href="#">Adding a Contacts Group Tab</a> <sup>81</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Add a Directory Contact</a> <sup>76</sup></li> <li>• <a href="#">...from My Call Log</a> <sup>67</sup></li> <li>• <a href="#">...from a Voicemail Message</a> <sup>100</sup></li> <li>• <a href="#">...from the System Directory</a> <sup>77</sup></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#">Delete a Directory Contact</a> <sup>81</sup></li> <li>• <a href="#">Edit a Directory Contact</a> <sup>80</sup></li> <li>• <a href="#">Transfer a Call to a Directory Contact</a> <sup>44</sup></li> <li>• <a href="#">Email a Contact</a> <sup>82</sup></li> <li>• <a href="#">Instant Messaging a Contact</a> <sup>83</sup></li> </ul> |
|--|--|--|

- **Dialing by Name**  
When making calls using the  [Calls](#) <sup>30</sup> gadget, you can enter a name rather than a number. If the name matches a contact in your Personal directory or the System directory, the primary number of that contact is dialed.
- **Name Display on Incoming Calls**  
When receiving a call, if the number of the caller matches a contact in your Personal directory or the System directory, the name of the contact is displayed by your one-X Portal for IP Office.

## 6.1 Viewing the Directories

Your one-X Portal for IP Office can display several directories (System, Personal and External) of names and associated telephone numbers.



- **Personal Directory**  
 This is your own directory of names and numbers. You can associate multiple numbers with a name and select which number to use when making a call. You can edit and change the directory contacts using one-X Portal for IP Office. You can also setup sub-groups of selected contacts. For some types of phone (*see below*), you can also access, use and edit your Personal directory from the phone.
- **System Directory**  
 This is the directory of names and numbers from your telephone system plus all the users and [groups](#)<sup>[128]</sup> on the telephone system. Your one-X Portal for IP Office administrator can also add System directory contacts. You cannot change these contacts. However, you can copy a System directory contact into your [Personal directory](#)<sup>[77]</sup>.
- **External Directory**  
 Your [system administrator](#)<sup>[129]</sup> can configure one-X Portal for IP Office to access an external directory. If your one-X Portal for IP Office server has been configured to do this, you can perform a search of the external directory. The results of the search are shown here.
- Results**  
 This additional option is used to display the results of a [cross directory search](#)<sup>[73]</sup>.

### Personal Directory

If you are using a 1400, 1600, 9400, 9500 or 9600 Series phone with a Contacts button, or M-Series, T-Series or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.

- As Personal directory contacts are added, they are stored by both the one-X Portal for IP Office application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal for IP Office only.
- The contacts can be edited through the phone or through one-X Portal for IP Office.
- Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current [Primary phone](#)<sup>[129]</sup> number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal for IP Office if that selection is changed.

## 6.2 Directory Icons

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



### Call Actions

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

### 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

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

State	Icon	Description
Available		<p>The normal state for a user showing that their work extension is available and not in use.</p> <ul style="list-style-type: none"> <li>Grey is not using one-X Portal for IP Office or they have set their portal <a href="#">presence</a> <sup>[16]</sup> to offline.</li> <li>The icon is green if the user is also logged into one-X Portal for IP Office (unless they have set their presence to offline).</li> </ul>
Busy		The normal state for a user showing that their work extension is currently on a call.
Do Not Disturb		The user has set <a href="#">Do Not Disturb</a> <sup>[16]</sup> . Calls to them will go to voicemail if enabled or else get busy tone unless you are in the user's <a href="#">Do Not Disturb exception list</a> <sup>[10]</sup> .
Logged Out		The user has <a href="#">logged out</a> <sup>[12]</sup> from their phone. Calls to them will most likely go to voicemail if available.
Other		This icon is used when the status is not known or cannot be known, for example external numbers.
Ringling		This icon is used for an internal contact that is currently ringing.





## 6.3 Searching the Directories

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

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

### Searching the Personal and System Directories

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

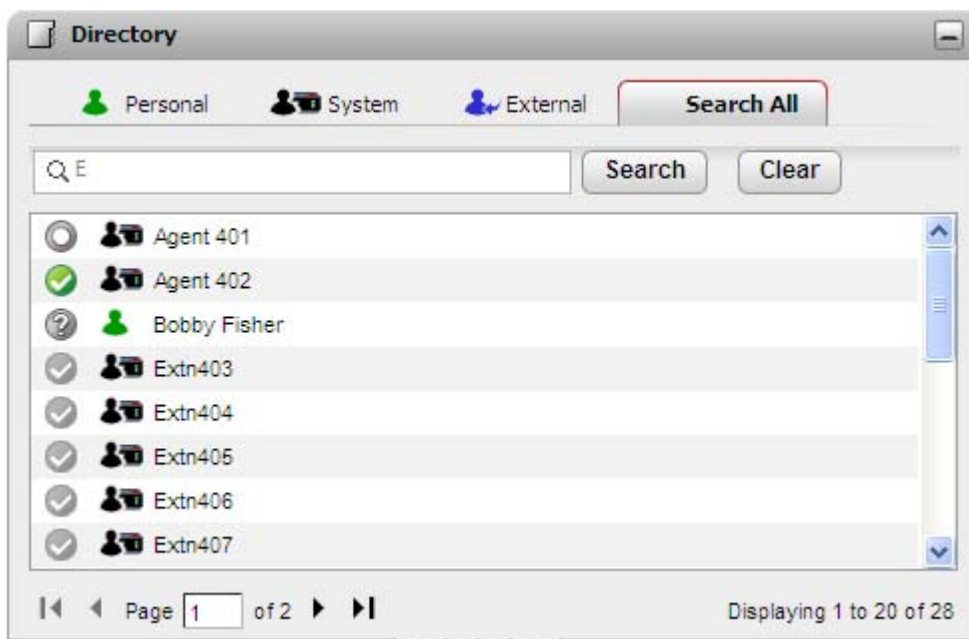
When there are multiple matches, you can use the   Page  of 2   page icons at the bottom left to move between pages. Alternatively, add more details to the search term to improve the search matching and so reduce the number of contacts displayed.

### Searching the External Directory


To search the External directory, enter a name or number in the text box at the bottom and click on the Go button. one-X Portal for IP Office will then send a search request to the remote directory and display the results.

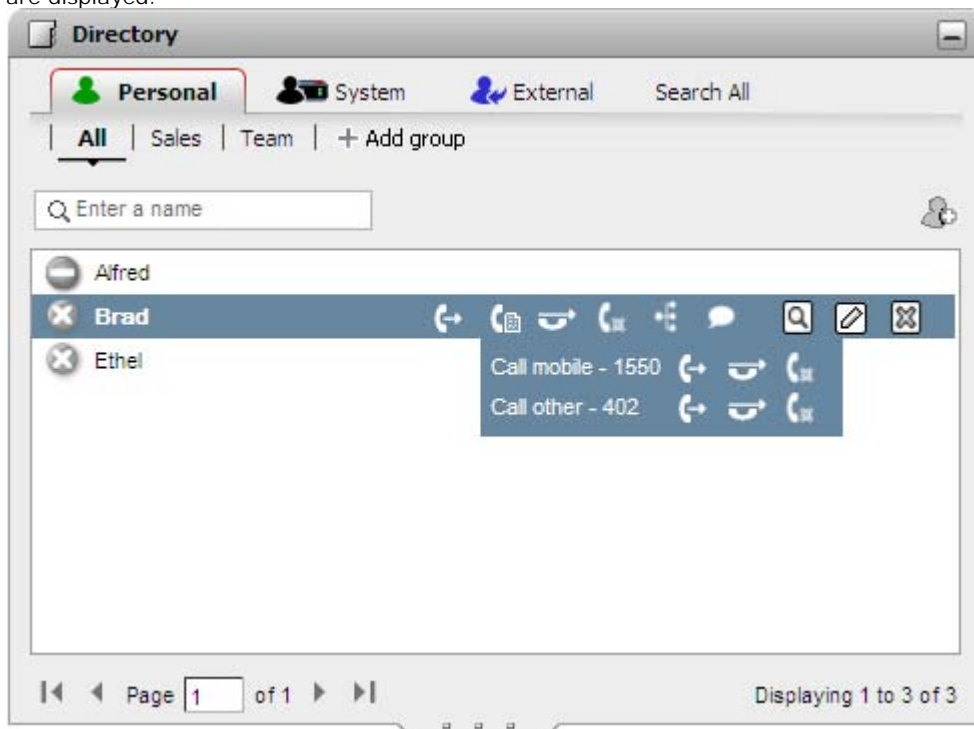
### Searching All the Directories




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



## 6.4 Making a Call


1. Using the  Directory gadget on the Main tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. To call the contact shown, hover your cursor over it. [Directory icons](#)<sup>72</sup> for the directory functions you can perform are displayed.

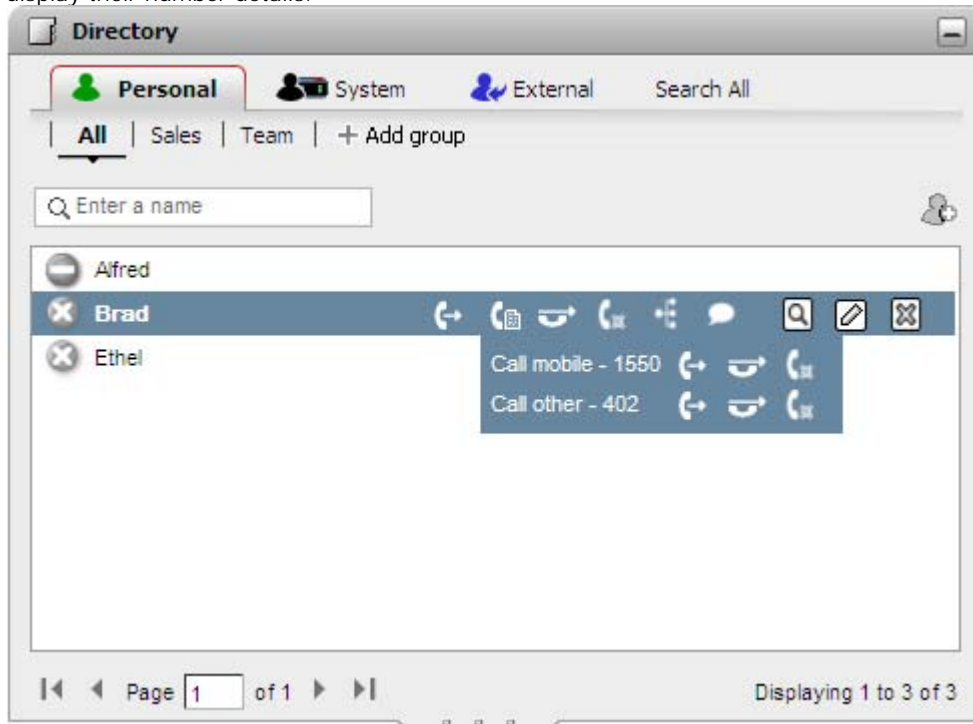


4. To make a call to the contacts primary number, click on the  call icon. If the  icon is displayed, you can click on this to display the contacts alternate numbers and click one of those numbers for the call.
- The progress of the call is displayed on a tab in the  Calls gadget.





## 6.5 Transferring a Call

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

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





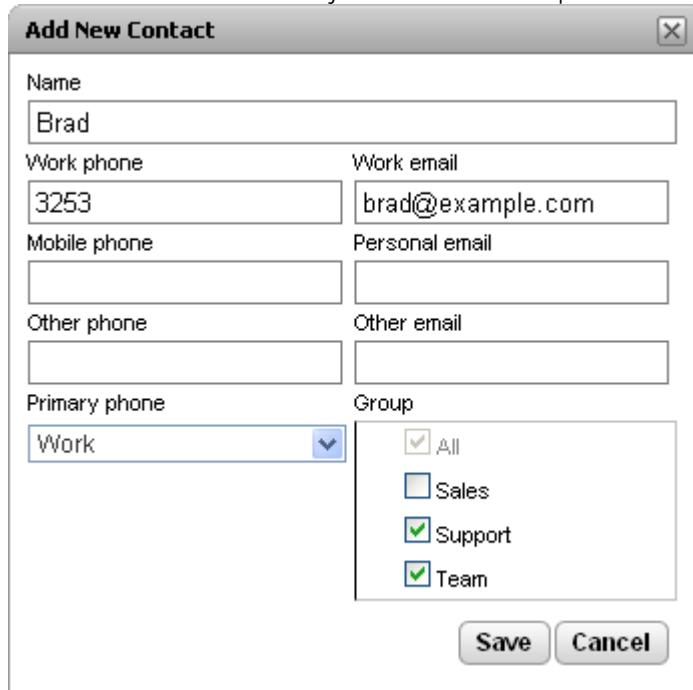
2. Because you already have a connected call, additional options are shown when you hover the cursor over a directory contact.

- Use the  transfer icon to do a simple [unsupervised transfer](#)<sup>[42]</sup> to the contact's primary number.
- Use the  consult icon to start a [supervised transfer](#)<sup>[43]</sup> to the contact's primary number.
- Use the  conference icon to conference yourself, the held call and the contact's primary number.
- If the  icon is displayed, the contact has alternate numbers. You can click on the icon and select the same options as above for those numbers.

## 6.6 Adding a New Personal Directory Contact

In addition to the method below, you can add caller details from a [voicemail message](#)<sup>[100]</sup>, the [call log](#)<sup>[67]</sup> or the [System directory](#)<sup>[77]</sup> to your personal directory.

1. Using the  Directory gadget on the Main tab, select the Personal directory tab.
  2. In the box at the bottom of the tab, enter the name or number you want to add and click the add  icon.
  3. The menu for entering contact details is displayed.
- Use the menu to enter and adjust the details as required.



**Add New Contact**

Name  
Brad

Work phone: 3253      Work email: brad@example.com

Mobile phone:      Personal email:

Other phone:      Other email:

Primary phone: Work

Group:  
 All  
 Sales  
 Support  
 Team

Save      Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#)<sup>[72]</sup> of the user. This applies even if another number is currently selected as the [Primary phone](#)<sup>[129]</sup>.
  - You can use the Group list to select which of your personal [contacts tabs](#)<sup>[81]</sup> the contact should appear on.
  - You can add email addresses. These allow you to [start an email](#)<sup>[82]</sup> from the one-X Portal for IP Office directory.
- When finished, click Save.

### Personal Directory

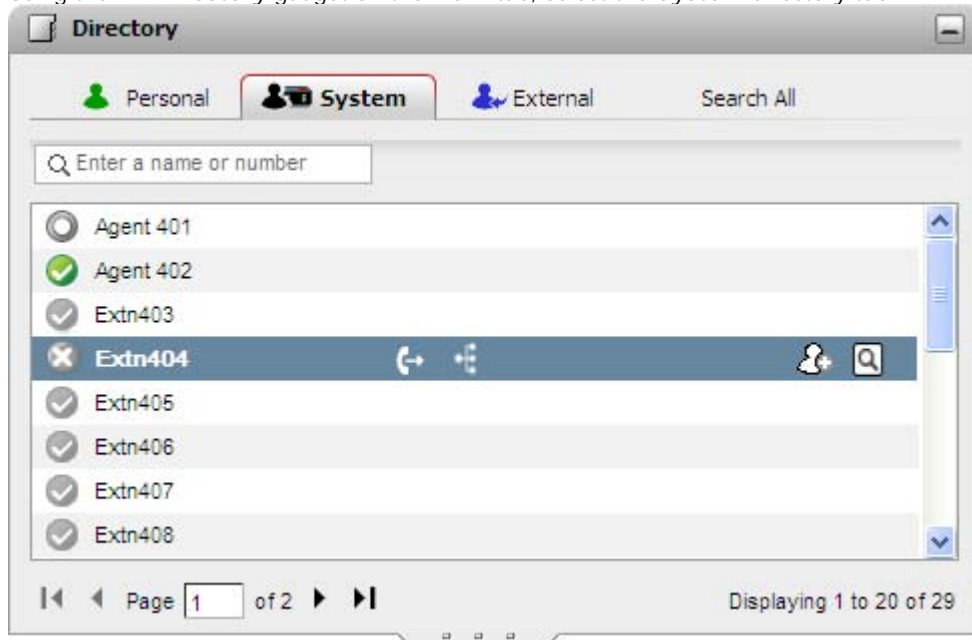
If you are using a 1400, 1600, 9400, 9500 or 9600 Series phone with a Contacts button, or M-Series, T-Series or T3 Series phone, you can also use your Personal directory contacts through the phone and edit them using the phone.



1. As Personal directory contacts are added, they are stored by both the one-X Portal for IP Office application and by the telephone system and kept in sync. The telephone system can only store up to 100 Personal directory contacts per user (subject to its own system limits), any additional contacts beyond that are stored by one-X Portal for IP Office only.
2. The contacts can be edited through the phone or through one-X Portal for IP Office.
3. Personal directory contacts shown by the one-X Portal for IP Office can contain several numbers with one selected as the current [Primary phone](#)<sup>[129]</sup> number. The matching telephone system record contains just one number, which will be changed to match the currently selected Primary phone number on one-X Portal for IP Office if that selection is changed.

## 6.6.1 Adding a Contact from the System Directory

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

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



- Locate the contact that you want to add. Hover the cursor over the contact and click on the  add icon.
- You cannot edit the contact details but you can select to which of your [personal contacts tabs](#)  you want to add the system contact.


- Click on Save. The contact is added to the selected tab.

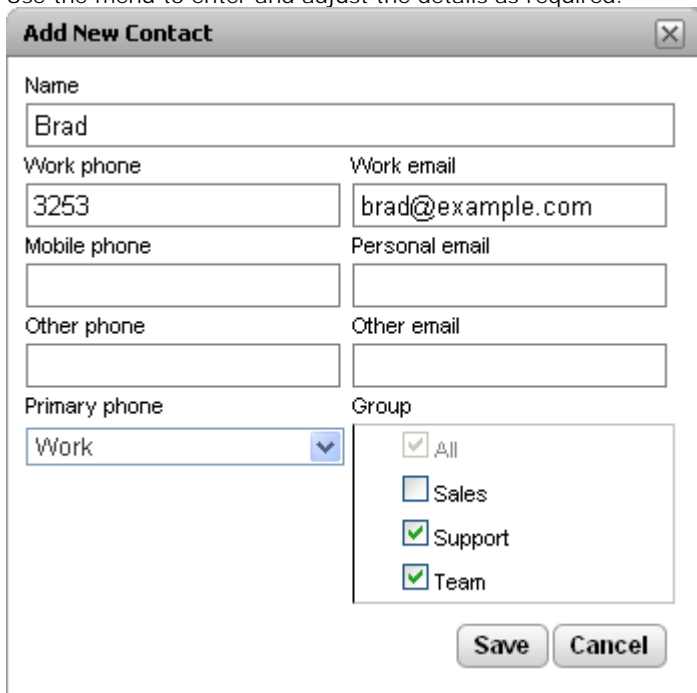
### Hint

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

## 6.6.2 Adding a Caller from the Call Log

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

1. Locate the call in your call log.
2. Click on the add  icon next to the call details.
3. The contact details menu will be displayed pre-filled with the information from your call log.
  - Use the menu to enter and adjust the details as required.



**Add New Contact** [X]

Name  
Brad

Work phone: 3253      Work email: brad@example.com

Mobile phone:      Personal email:

Other phone:      Other email:



Primary phone: Work [v]      Group:  
 All  
 Sales  
 Support  
 Team

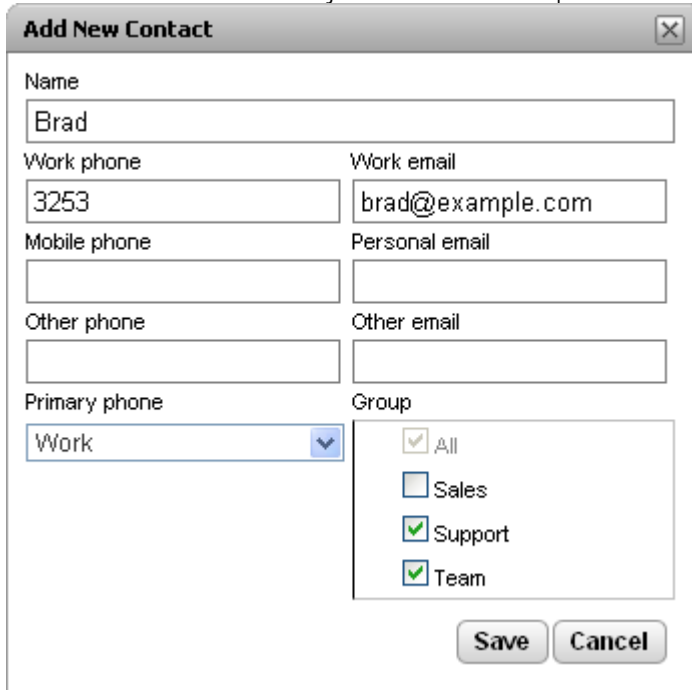
Save      Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#) <sup>[72]</sup> of the user. This applies even if another number is currently selected as the [Primary phone](#) <sup>[129]</sup>.
- You can use the Group list to select which of your personal [contacts tabs](#) <sup>[81]</sup> the contact should appear on.
- You can add email addresses. These allow you to [start an email](#) <sup>[82]</sup> from the one-X Portal for IP Office directory.
- When finished, click Save.

### 6.6.3 Adding a Voicemail Caller to the Directory

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

1. Click on Main.
2. View the  Messages gadget.
3. Click on the add  icon shown in the message details.
  - Use the menu to enter and adjust the details as required.



**Add New Contact**

Name  
Brad

Work phone  
3253

Work email  
brad@example.com

Mobile phone  
[Empty]

Personal email  
[Empty]

Other phone  
[Empty]

Other email  
[Empty]

Primary phone  
Work



Group

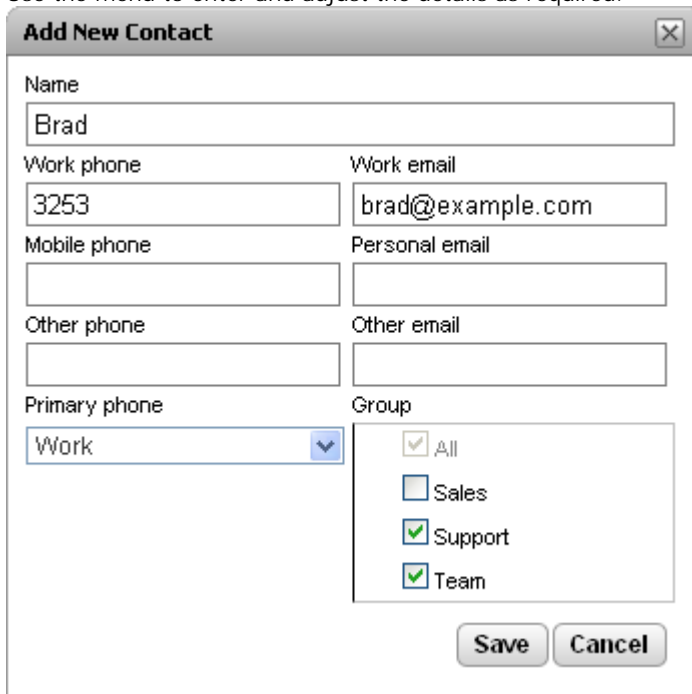
- All
- Sales
- Support
- Team

Save Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#) of the user. This applies even if another number is currently selected as the [Primary phone](#).
- You can use the Group list to select which of your personal [contacts tabs](#) the contact should appear on.
- You can add email addresses. These allow you to [start an email](#) from the one-X Portal for IP Office directory.
- When finished, click Save.

## 6.7 Editing a Personal Contact

1. Using the  Directory gadget on the Main tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. Hover the cursor over the directory contact.
  - Click the  edit icon. Note that this option is not available for contacts that have been added from the system directory, they remain linked to the matching entry on the System directory tab.
  - Use the menu to enter and adjust the details as required.



**Add New Contact** [X]

Name  
Brad

Work phone: 3253      Work email: brad@example.com

Mobile phone:      Personal email:

Other phone:      Other email:

Primary phone: Work [v]      Group:



- All
- Sales
- Support
- Team

Save      Cancel

- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#) <sup>[72]</sup> of the user. This applies even if another number is currently selected as the [Primary phone](#) <sup>[129]</sup>.
  - You can use the Group list to select which of your personal [contacts tabs](#) <sup>[81]</sup> the contact should appear on.
  - You can add email addresses. These allow you to [start an email](#) <sup>[82]</sup> from the one-X Portal for IP Office directory.
- When finished, click Save.


## 6.8 Deleting a Personal Directory Contact

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



1. Using the  Directory gadget on the Main tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. Hover the cursor over the directory contact.
4. Click on the  delete icon.

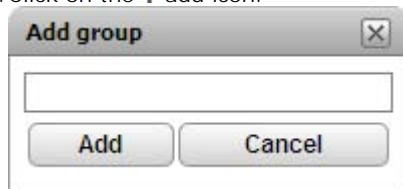
## 6.9 Adding A Personal Contacts Group

You can divide your personal directory into a number of groups (up to 5) in addition to the permanent All group. The same personal contact can appear on several sub-tabs.

The group used to display a personal contact is selected when [editing the personal contact](#) .

### Adding a Personal Contacts Group

1. Select the Personal tab in the  Directory gadget.
2. Click on the  add icon.




3. Enter a name for the new tab and click Add.
4. The new tab will be displayed.

### Renaming a Group



To rename a group, select the group and click on the  edit icon. Enter the name required and click Modify.

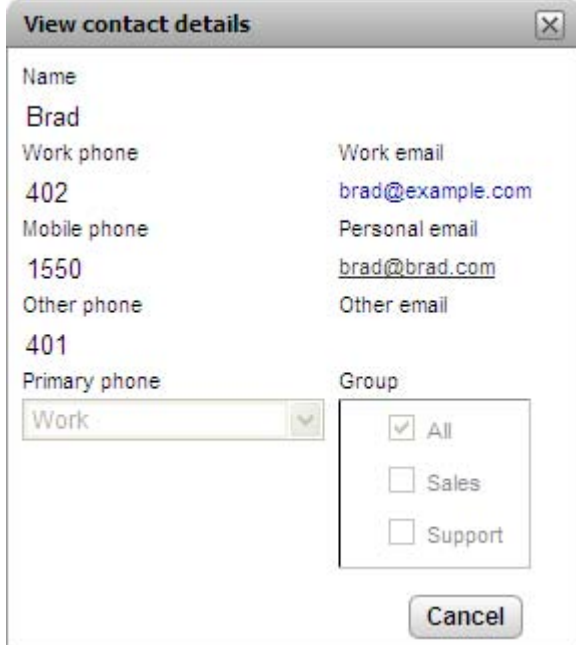
### Deleting a Personal Contacts Group

To delete a personal directory tab, select the group and click on the  delete icon.

## 6.10 Emailing a Contact


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


1. Using the  Directory gadget on the Main tab, locate the name that you require in the directory.
2. To filter the names shown, start entering a name or number in the text box at the top of the tab. As you enter a name, directory contacts that do not match are hidden from the view.
3. Hover the cursor over the contact and click on the  details icon.




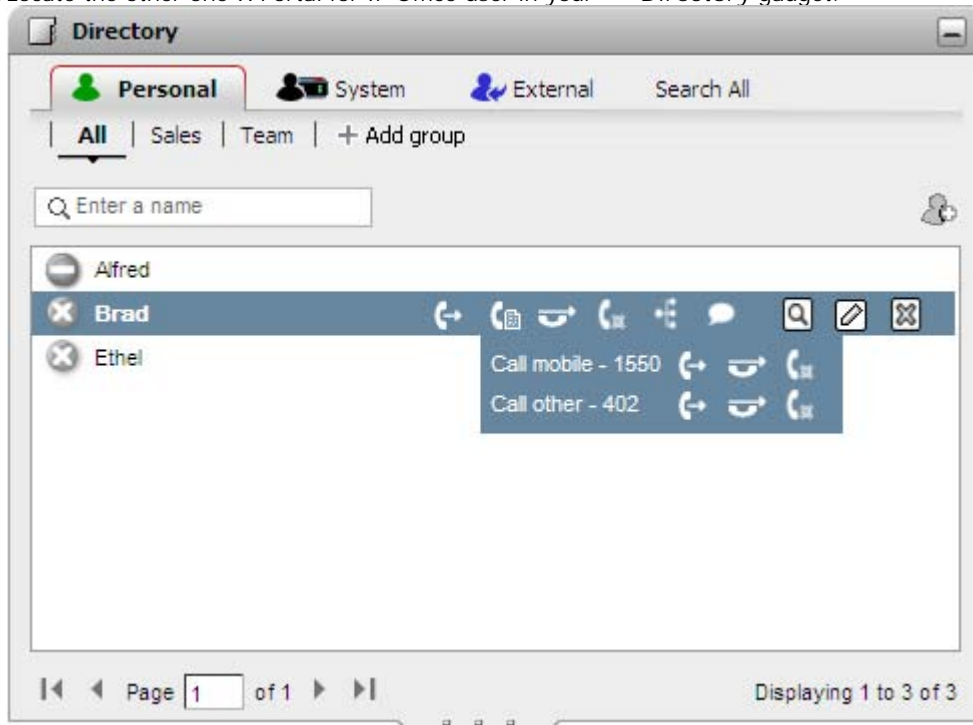
4. Click on the email address that you want to use. Some contacts can have more than one email address from which you can select.
5. A new email will be started using the computer's default email application, with the selected email address in the To field.



## 6.11 Instant Messaging a Contact

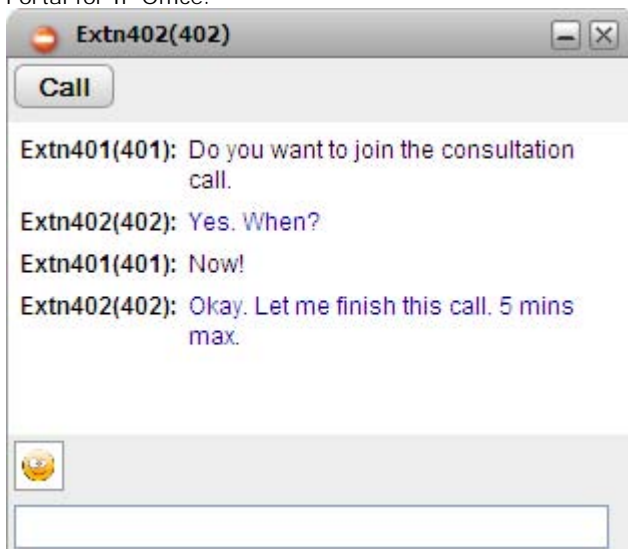
one-X Portal for IP Office allows you to have instant message chat sessions with other users currently using one-X Portal for IP Office. You can recognize them by the green  icon in the directory. You can use an instant message session even when on a call to the same user that you are messaging.

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

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



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



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



# Chapter 7.

# Profiles

## 7. Profiles

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

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

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

### Example

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

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

This user has configured the profiles to work as follows:

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

Create and Use Profiles		
<ul style="list-style-type: none"> <li>• <a href="#">Selecting Your Active Profile</a></li> <li>• <a href="#">Adding a New Profile</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Editing a Profile</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">The 'Detected' Profile</a></li> </ul>

## 7.1 The Detected Profile


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

Name	Description	Active	
Detected	At Deskphone, VM OFF, Ringback ON, Email OFF, Call Pickup OFF	<input checked="" type="radio"/>	<a href="#">View</a>
Office	Mobile Twinned at :96775655, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>
Mobile	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>
Home	At Deskphone, VM ON, Ringback ON, Email OFF, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>
<a href="#">Add a new profile definition</a>			

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

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

## 7.2 Selecting Your Profile

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

1. Select the Configure tab.
2. The list of profiles is shown at the top of the form.

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

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

## 7.3 Editing a Profile

1. Select the Configure tab.
2. The list of profiles is shown at the top of the form.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	<input checked="" type="radio"/>	<a href="#">Edit</a>
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	<input type="radio"/>	<a href="#">Edit</a>
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>

[Add a new profile definition](#)

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



4. Use the ► and ▼ arrow icons to show and hide the different sets of settings that are available to you to use within your profiles.
5. When you have set the profile as required, click on OK.
6. Click on Save.
  - When you select or edit an active profile, there is a small delay while the profile settings are applied to your settings on the telephone system. An orange background indicates that the profile changes have not yet been fully applied by the telephone system. A green background indicates that the active profile changes have now been fully applied.

## 7.4 Adding a Profile

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

1. Select the Configure tab.
2. The list of profiles is shown at the top of the form.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	<input checked="" type="radio"/>	<a href="#">Edit</a>
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	<input type="radio"/>	<a href="#">Edit</a>
Home	Forwarded to:9123456, VM ON, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>

[Add a new profile definition](#)

3. Click on Add a new profile definition.

4. Enter a name for the profile.
5. Use the ► and ▼ icons to show and hide the different sets of settings that are available to you to use within your profiles.
6. When you have set the profile as required, click on OK.
7. Click on Save.

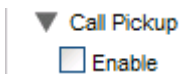
## 7.5 Profile Settings

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

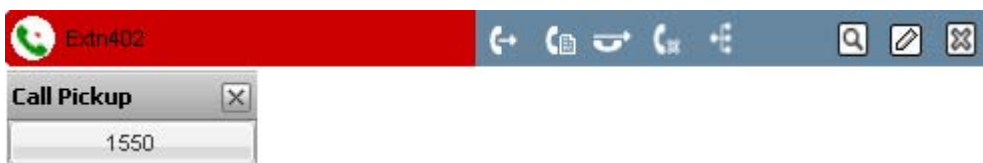
Profile Settings	
<a href="#">Call Pickup</a>	<ul style="list-style-type: none"><li>• Call Pickup on/off.</li></ul>
<a href="#">Mobility</a>	<ul style="list-style-type: none"><li>• <a href="#">Default Deskphone</a></li><li>• <a href="#">Forward calls.</a></li><li>• <a href="#">Mobile Twinning.</a></li>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

### 7.5.1 Call Pickup

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

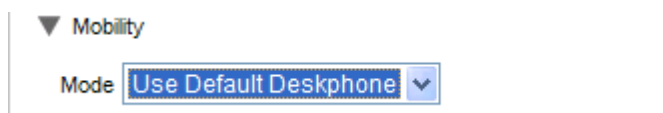


In other one-X Portal for IP Office users' Directory gadget, your contact will indicate when you have calls waiting to be answered and allow them to pickup the call.



### 7.5.2 Mobility - Use Default Deskphone

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



### 7.5.3 Mobility - Forward

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

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

▼ Mobility

Mode: Forward ,MobileTwinning ,Telecommuter ▼

Forward Unconditional

Forward On No Answer

Forward Number: 9555123456

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

- **Forward Unconditional**  
If this option is selected, the calls are forwarded immediately without ringing at your IP Office extension. This function is also called 'send all calls' or 'forward all'.
- **Forward On No Answer**  
If this option is selected, calls are only forwarded if your phone is busy or if the call has rung unanswered for a period of time.
- **Forward Number**  
This sets the number to which you want your calls to be forwarded. You can enter an internal or external number. Remember to add any external dialing prefix used by your phone system if the number is external.
- You can also use your IP Office phones menus to select your forwarding settings. If those settings differ from the one set in your profile, the one-X Portal for IP Office will change your profile to Detected.

### 7.5.4 Mobility - Mobile Twinning

Mobile twinning allows your incoming calls to ring at both your IP Office extension and at another number that you have entered. The option to use Mobile Twinning is not available to all users.

▼ 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](#) between your normal extension and your twinning number and vice versa.
- **Number**  
This sets the number to which your twinned calls will be sent in addition to ringing at your desk extension.

## 7.5.5 Mobility - Telecommuter Mode

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

- You make calls using one-X Portal for IP Office to dial the number. The phone system will make a call to your configured telecommute number and when answered it will then make a call to the number dialed as if it had been dialed from your normal internal extension. The numbers that you can call will still be subject to your normal dialing restrictions if any.
- Incoming calls to your normal extension are redirected to the telecommute number and accompanying call details are displayed in one-X Portal for IP Office.
- While telecommute mode is selected, you are logged out of your normal phone extension. When you end telecommute mode, your extension number is returned back to your normal phone extension if you have one and it is not in use by another [hot desking](#) user. If you don't have a normal extension or it is not available, you are treated as being logged off from the phone system and your calls will go to voicemail if available or receive busy.
- The phone at the telecommute number location is assumed to be a single line phone. If call waiting is enabled in your IP Office configuration it can be used for a single additional call when an existing call via the IP Office is connected.

▼ Mobility

Mode

Forward Unconditional

Forward On No Answer

Enable MobileTwinning

Enable Telecommuter

Number

Make a Test Call

Hold the Line

- **Enable Telecommuter**  
Selecting this option switches the use of telecommuter mode on and displays the current telecommute settings.
- **Number**  
Enter the telecommute number to which you want calls to your directed. This must be a number that can be dialed directly from the phone system.
- **Make a Test Call**  
If selected, when you make this profile active, the telephone system will make a call to the telecommute number. Note that if you log in to one-X Portal for IP Office with this profile already active no test call is made.
- **Hold the Line**  
This setting controls how you use the connection from the phone system to the telecommute number.
  - **If Not Selected**  
In this mode, the phone system only calls the telecommute number when required, that is when making or receiving a call for you. For example, when you make a call using one-X Portal for IP Office, the phone system will call the telecommute number and only when answered will it connect and make a call to the number you dialed in one-X Portal for IP Office. You can end the call through either using one-X Portal for IP Office or simply replacing the handset.
    - In this mode, it is possible for the telecommute number to also receive and make non-telecommute calls. You can recognize telecommute calls as they will be displayed in one-X Portal for IP Office.
    - Calls will not succeed if the phone system detects that the wrong type of trunk is being used (analog loop start or analog loop start emulation).
    - Page calls are not redirected to the telecommute number. Intercom and dial direct calls are redirected but as normal calls.
  - **If Selected**  
In this mode, once you make the profile active, the phone system will make a call to the telecommute number. When you answer you should leave the connection open (off-hook). You should then use one-X Portal for IP Office to make, answer and control calls without replacing the handset between calls.
    - This option should be used whenever analog loop start trunks or analog loop start emulation trunks are involved or you suspect they are involved. This may include cellular phones connected to cellular gateways on analog trunks.

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

## 7.5.6 Voicemail

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

▼ Voicemail




Active Greeting

Voicemail

Voicemail Ringback

Voicemail Outcalling


Listen to messages on  Browser  Phone

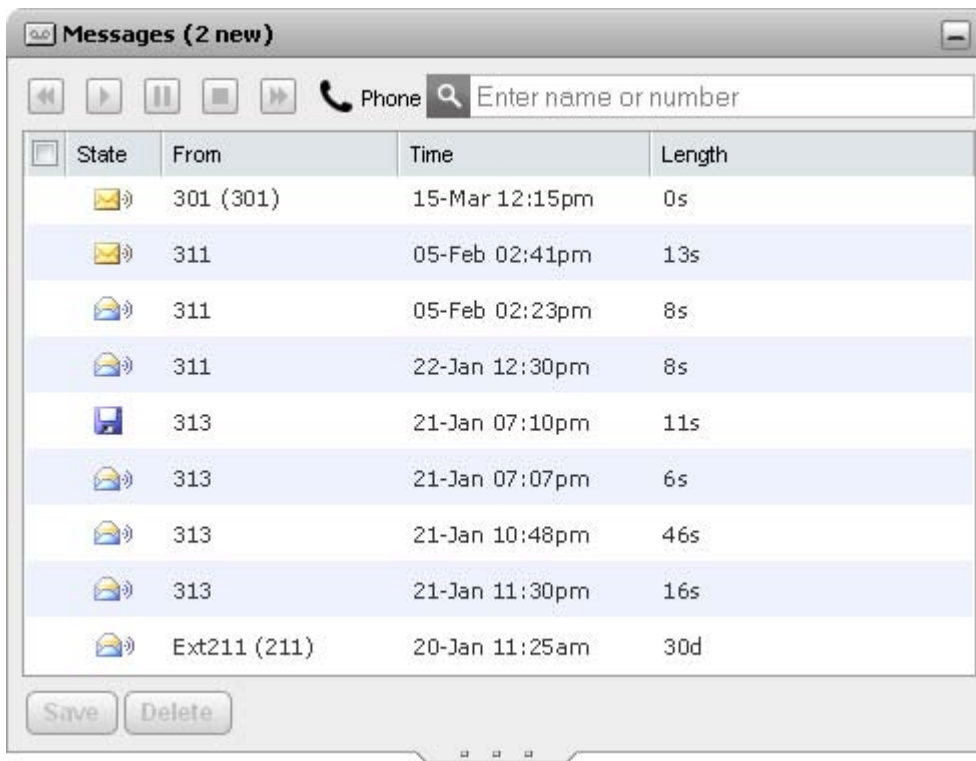
- **Active Greeting** (*Voicemail Pro only*)  
If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have [recorded](#) [102]. Within each of your one-X Portal for IP Office profiles, you can use the Active Greeting setting to select which greeting should be used for your mailbox when the profile is active.
- **Voicemail**  
This setting controls whether voicemail is used to take voicemail messages when you cannot answer calls.
- **Voicemail Ringback**  
When on, if you have any new voicemail messages, when you next use your phone extension, after that call the voicemail server will call you to alert you to the messages.
- **Voicemail Outcalling** (*Voicemail Pro only*)  
If you have outcalling configured for your voicemail mailbox, you can use this profile setting to switch the use of outcalling on or off.
- **Listen to messages on**  
This setting allows you to select whether when using the  Messages gadget, one-X Portal for IP Office should playback your messages to your phone or to your browser.
  - If using Internet Explorer, check that the option Play sound in webpages is enabled (Tools | Internet Options | Advanced | Multimedia).
  - A handset  icon is shown on your messages gadget when you are set for playback to your phone.
  - A headset  icon is shown on your messages gadget when you are set for playback to your browser. Playback to your browser is only supported for Voicemail Pro.
- **Changing Voicemail Settings Using Other Interfaces**  
one-X Portal for IP Office loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal for IP Office may be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

# Chapter 8.

# Voicemail

## 8. Voicemail

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





### Access and Use Voicemail

- [Play My Messages](#) <sup>97</sup>
- [Switch Between Phone and PC Playback](#) <sup>99</sup>
- [Add a Voicemail Caller to My Directory](#) <sup>100</sup>
- [Call Someone Who Left a Message](#) <sup>99</sup>
- [Change My Voicemail Mailbox Code](#) <sup>101</sup>
- [Record Mailbox Greetings](#) <sup>102</sup>
- [Select Your Mailbox Greeting](#) <sup>102</sup>














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

## 8.1 Checking Voicemail Messages

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






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



2. You can click on a column header to sort the messages using that column.
3. You can use the Search box at the top to filter the messages displayed to matching From value names or numbers.
4. To call the number associated with the message, click on the underlined From details.
5. You can click on the check boxes to select a message or messages and then:
  -  Save  
Mark the messages as saved. The messages' icon (see below) changes to a computer disk  icon.
  -  Delete  
Delete the messages.
  -  Play the message  
While it is playing you can use the other controls below. This only works for a single selected message. You can also select the message to play by clicking on the ,  or  message icon.
    -  Stop
    -  Pause
    -  Skip Forwards
    -  Skip Backwards
    -  This icon indicates that your current [profile](#) is set to playback messages to your phone extension.
    -  This icon indicates that your current [profile](#) is set to playback messages through your PC.

---

## Message Icons

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


## 8.2 Call Someone Who Left a Message

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



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



- Click on the name or number details of the caller to make a return call.



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

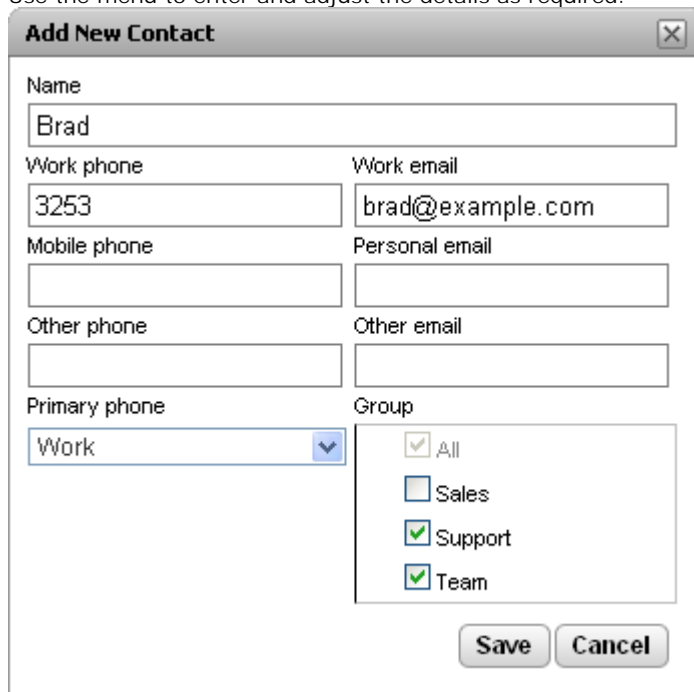
## 8.3 Switching Between Phone and PC Playback

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

## 8.4 Adding a Caller to Your Personal Directory

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

1. Click on Main.
2. View the  Messages gadget.
3. Click on the add  icon shown in the message details.
  - Use the menu to enter and adjust the details as required.



**Add New Contact**

Name  
Brad

Work phone  
3253

Work email  
brad@example.com

Mobile phone  
[Empty]

Personal email  
[Empty]

Other phone  
[Empty]

Other email  
[Empty]


Primary phone  
Work

Group  
 All  
 Sales  
 Support  
 Team

Save Cancel

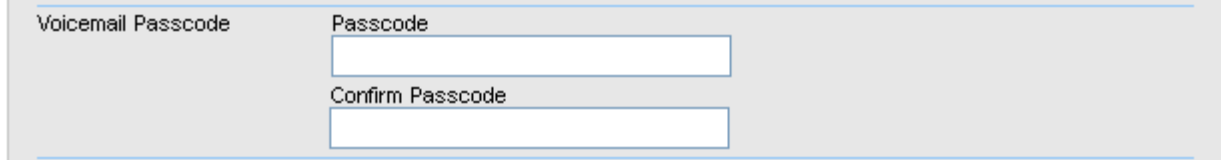
- If the Work phone setting matches a telephone system user's extension number, the directory contact will show the [user status](#) of the user. This applies even if another number is currently selected as the [Primary phone](#).
- You can use the Group list to select which of your personal [contacts tabs](#) the contact should appear on.
- You can add email addresses. These allow you to [start an email](#) from the one-X Portal for IP Office directory.
- When finished, click Save.

## 8.5 Changing Your Voicemail Code

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

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

1. Select the Configure tab.
2. Locate the Voicemail Passcode section.



Voicemail Passcode
Passcode <input type="text"/>
Confirm Passcode <input type="text"/>

3. Enter the new code that you want to use and confirm the code.
4. Click on Save.

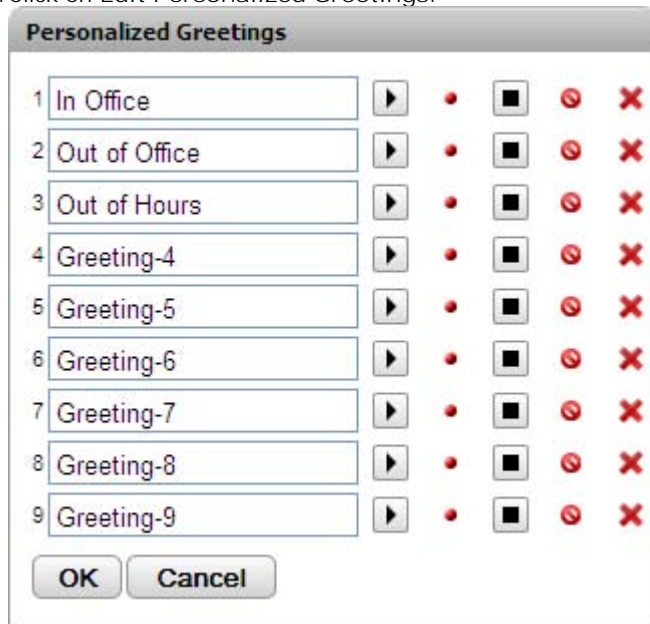
- **Changing Voicemail Settings Using Other Interfaces**  
one-X Portal for IP Office loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal for IP Office may be incorrect. If you make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

## 8.6 Recording Voicemail Greetings

You can use one-X Portal for IP Office to record up to 9 greeting files for use with your voicemail mailbox. You can then use the [Active Greeting](#)<sup>[94]</sup> setting within your profiles to select which of the greetings should be used by each profile.

- Voicemail Pro Only  
This option is only supported if your system uses a Voicemail Pro voicemail server. It is not supported if your telephone system uses embedded voicemail.
- Changing Voicemail Settings Using Other Interfaces  
one-X Portal for IP Office loads your voicemail settings when you login. If you then change your voicemail settings using another method, such as through your phone, the details held by one-X Portal for IP Office may be incorrect. If you make voicemail setting changes through a method other than one-X Portal for IP Office, you should log out of one-X Portal for IP Office and log in again.

1. Select the Configure tab.
2. Click on Edit Personalized Greetings.



3. A call will be made to your extension/
4. In the name field enter a name that will be used for the greeting.
5. Use the Record icon to start recording and the Stop icon to finish recording. While recording a red background is displayed.
6. Once a greeting has been uploaded you can use the Play and Stop icons to playback the greeting. You can also delete the file by clicking on delete.
7. To save the recording click on the save icon. You will hear a tone when the file has been saved.

## 8.7 Select Your Voicemail Greeting

If your voicemail is provided by Voicemail Pro, your mailbox can include up to 9 greetings that you have [recorded](#)<sup>[102]</sup>. Within each of your one-X Portal for IP Office [profiles](#)<sup>[88]</sup>, you can use the Active Greeting setting to select which greeting should be used for your mailbox when that profile is active.

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

# Chapter 9.

# Configuration

# 9. Configuration

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

**Main**
**Configure**

Save Changes

---

DND Exceptions [Do Not Disturb Exceptions](#)

---

Profile

Name	Description	Active	
Office	At Deskphone, VM ON, Ringback OFF, Email OFF, Call Pickup ON	<input checked="" type="radio"/>	<a href="#">Edit</a>
Mobile	At Deskphone, VM OFF, Ringback OFF, Email OFF, Call Pickup ON	<input type="radio"/>	<a href="#">Edit</a>
Home	At Deskphone, VM OFF, Ringback OFF, Email OFF, Call Pickup OFF	<input type="radio"/>	<a href="#">Edit</a>

[Add a new profile definition](#)

Consult your administrator. Telecommuter mode is not enabled in IP Office.

---

Keyboard shortcuts

Answer

Call

Hold

Drop

---

Sound Configuration  Enable sound notifications

---

Voicemail Passcode

Passcode

Confirm Passcode

---

Park Slots

1

2

3

4

---

Conference Bridge Number

---

Personalized Greetings [Edit Personalized Greetings](#)

---

one-X Call Assistant [Install one-X Call Assistant Application](#)

---

Save Changes

Configure My one-X Portal for IP Office

<ul style="list-style-type: none"> <li>• <a href="#">Create and Manage Profiles</a> <sup>[86]</sup></li> <li>• <a href="#">Change My Keyboard Shortcuts</a> <sup>[106]</sup></li> <li>• <a href="#">Enable Sounds</a> <sup>[109]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Configure Park Slots</a> <sup>[106]</sup></li> <li>• <a href="#">Set Your Conference Number</a> <sup>[62]</sup></li> <li>• <a href="#">Upload Voicemail Greetings</a> <sup>[102]</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Set Do Not Disturb Exceptions</a> <sup>[105]</sup></li> <li>• <a href="#">Change My Voicemail Mailbox Code</a> <sup>[101]</sup></li> <li>• <a href="#">Select My Language</a> <sup>[110]</sup></li> <li>• <a href="#">Configuring the World Clock</a> <sup>[107]</sup></li> </ul>
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## 9.1 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](#)<sup>[49]</sup>. This only applies for calls direct to your extension number; it does not apply for calls to any [hunt group](#)<sup>[128]</sup> of which you are a member.

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

1. Click on the Configure tab.
2. In the Presence section, click on Do Not Disturb Exceptions.

**Do Not Disturb Exceptions**

**Personal**   **System**

<input type="checkbox"/>	Masih 8549	(8549)
<input type="checkbox"/>	Mario	(4013)
<input type="checkbox"/>	MarkG	(6750)
<input type="checkbox"/>	Matt A	(8551)
<input type="checkbox"/>	MMM	(504)
<input type="checkbox"/>	NPI	(5126)
<input type="checkbox"/>	page_all	(8888)
<input type="checkbox"/>	Peter	(4714)
<input type="checkbox"/>	Philippe	(8889)
<input type="checkbox"/>	RD	(5135)

◀ 1 2 3 **4** 5 6 7 ▶

**Exceptions**

<input checked="" type="checkbox"/>	Spare 8 (4295)
<input checked="" type="checkbox"/>	David (4355)
<input checked="" type="checkbox"/>	Ashley (4266)
<input checked="" type="checkbox"/>	Alec (4160)

OK   Cancel

3. The list of exceptions is shown. Where the number in the exception list matches a number in your Personal or System directory, the name is also displayed in the exceptions list.
  - To Add a Number from the Directory  
Click on either the Personal or System tab. Select the contacts that you want added to your Exceptions. For Personal directory contacts, it will be the contact's [primary phone](#)<sup>[129]</sup> number that is added.
  - To Remove a Number  
To remove a number from the list of exceptions, click on the X next to the number.
4. Click OK.
5. Click Save.

### Note

1. Names are not stored as part of the exceptions list, only the numbers. The names shown in the list are done by the one-X Portal for IP Office matching numbers in the exceptions list to the [primary phone](#)<sup>[129]</sup> numbers of your directory contacts. If the directory contact no longer matches the number in the exceptions list, no name is displayed.
2. one-X Portal for IP Office does not currently allow the entry of the wildcards *N* and *X*, where *N* represents any numbers and *X* represents any single digit. For example, to allow all numbers from 5551000 to 5551099, add the exception number as either *55510XX* or *55510N*. These can be entered by your [system administrator](#)<sup>[129]</sup>.

---

## 9.2 Keyboard Shortcuts

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

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

### Changing Your Keyboard Shortcuts

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

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

1. Select the Configure tab.
2. In the Keyboard shortcuts section, click on the shortcut that you want to change.
3. Press the key or key combination that you want to use as your shortcut. If the key or key combination is available to be used, the key string will be added.
4. Click Save.

## 9.3 Park Slots

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

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

Park Slots	<input type="text" value="1"/>
	<input type="text" value="2"/>
	<input type="text" value="3"/>
	<input type="text" value="4"/>

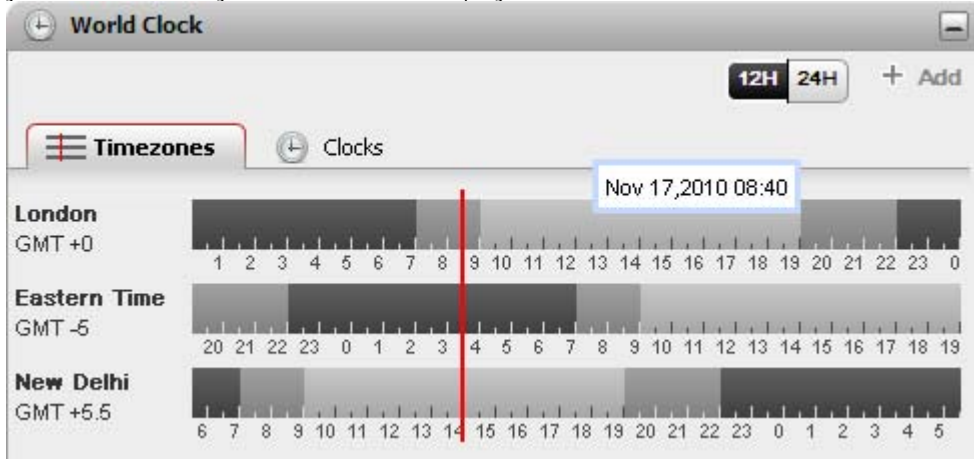
2. For each of the park slot buttons that your one-X Portal for IP Office supports, enter the park slot number or name that it matches. Typically numbers are used, with everyone using 1 to 4 as their defaults.
3. Click Save.

## 9.4 The World Clock Gadget

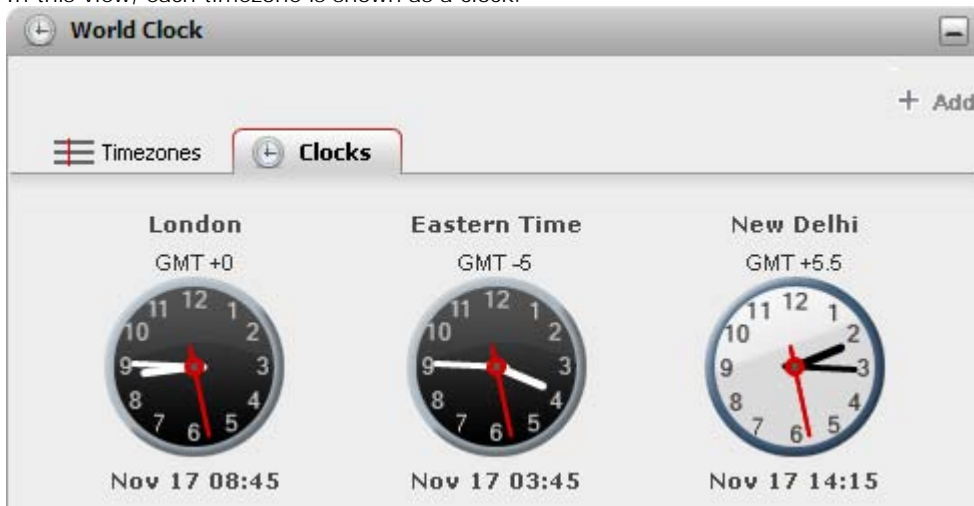
The World Clock gadget displays the time in selected time zones that you have added to the gadget. You can add up to 5 timezones to your world clock.

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

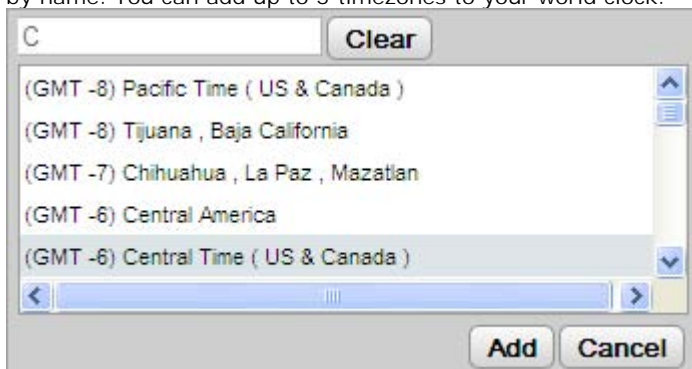
- Timezones  
In this view, each timezone is indicated as a band that indicates the current time and the daylight hours. Hovering your cursor over any of the time bands displays the current date and time in that time zone.



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



- **12H 24H** 12/24 Hour  
This option is shown in the Timezones view. Click on these buttons to switch it between 24 hour and 12 hour display. This affects both the time span shown by the bands and the clock format used beneath each band.
- + Add  
Click on the + Add icon to add another time zone band to the display. The list of world time zones is displayed from which you can select the time zone required for the new band. Use the box at the top to filter the list of time zones by name. You can add up to 5 timezones to your world clock.



- 
-   Replace/Delete

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

## 9.5 Sound Configuration

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

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

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

Sound Configuration  Enable Sound Notifications Sound configuration options for the application

---

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

3. Click on Save to save the change.

### 9.5.1 Proxy Server Exceptions

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

- Internet Explorer  
Select Tools | Internet Options | Connections | LAN settings | Advanced. Enter the IP address of the voicemail server in the Exceptions list.
- Google Chrome  
Click on the customize icon and select Options. Select Under the Hood and click on Change proxy settings. Select Connections | LAN settings | Advanced. Enter the IP address of the voicemail server in the Exceptions list.
- Firefox  
Select Tools | Options | Network | Setting | Manual proxy configuration. Enter the IP address of the voicemail server in the No proxy for list.

## 9.6 Language

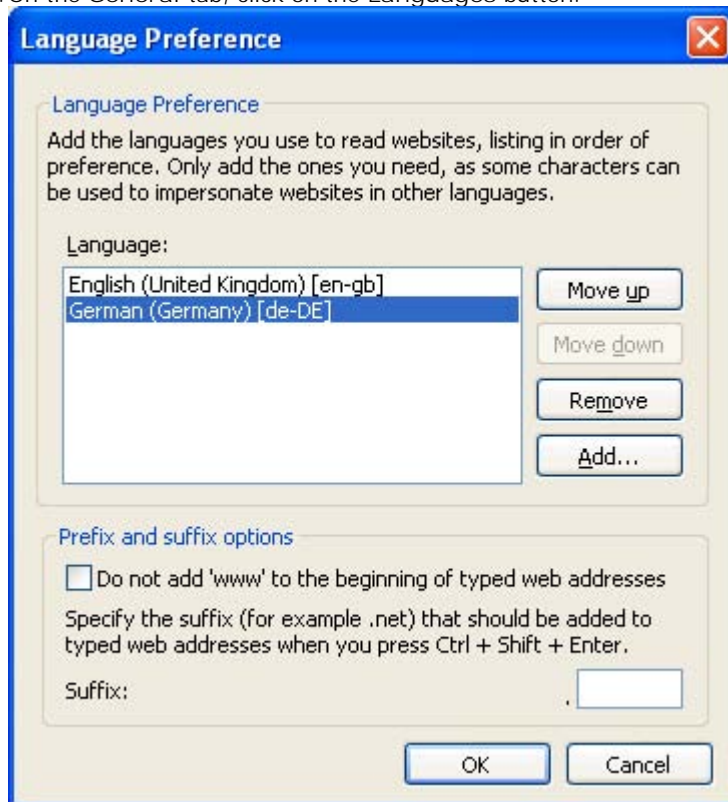
one-X Portal for IP Office 7.0 supports *English, French, German, Italian, Dutch, Brazilian Portuguese, Latin Spanish, Russian* and *Simplified Chinese*. The language it uses will be the best match your browser language preferences. Note that changing your browser's language preferences may also affect the languages used by other websites which you browse.

- [Google Chrome](#) <sup>(117)</sup>
- [Internet Explorer](#) <sup>(118)</sup>
- [Mozilla Firefox](#) <sup>(119)</sup>
- Safari

The Safari browser does not have its own language settings. Instead it will match the language preferences of the computer on which it is running. Refer to the computer help.

### 9.6.1 Internet Explorer

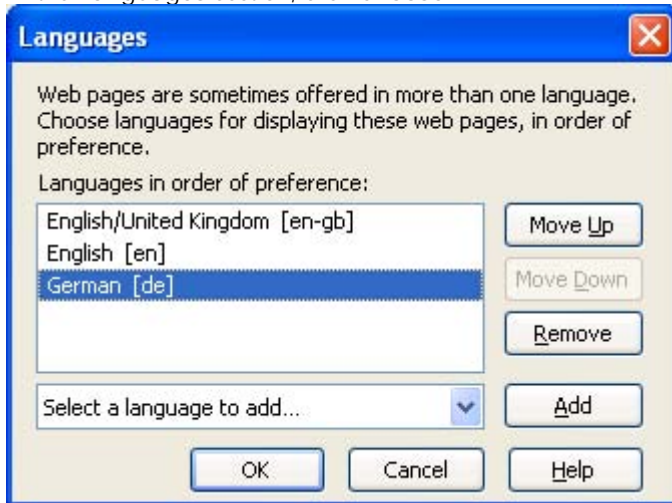
1. Click on Tools and select Internet Options.
2. On the General tab, click on the Languages button.



3. Use the menu to select languages and to configure your preferred order of preference for your selected languages.
4. Click OK twice.
5. If you are already running one-X Portal for IP Office, you will need to login again for one-X Portal for IP Office to use the new language selection.


## 9.6.2 Firefox

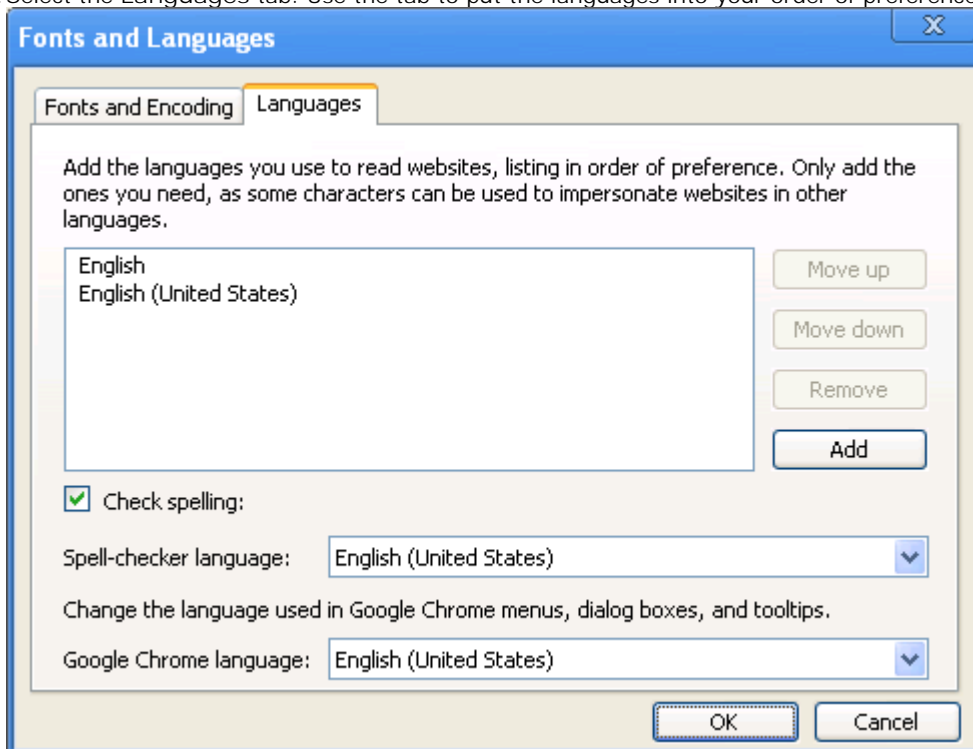
1. Click on Tools and select Options.
2. Select the Content icon.
3. In the Languages section, click Choose....



4. Use the menu to select languages and to configure your preferred order of preference for your selected languages.
5. Click OK twice.
6. If you are already running one-X Portal for IP Office, you will need to login again for one-X Portal for IP Office to use the new language selection.

## 9.6.3 Google Chrome

1. Click on the  customize icon and select Options.
2. Select Under the Hood. Scroll down and click on Change font and language settings.
3. Select the Languages tab. Use the tab to put the languages into your order of preference.





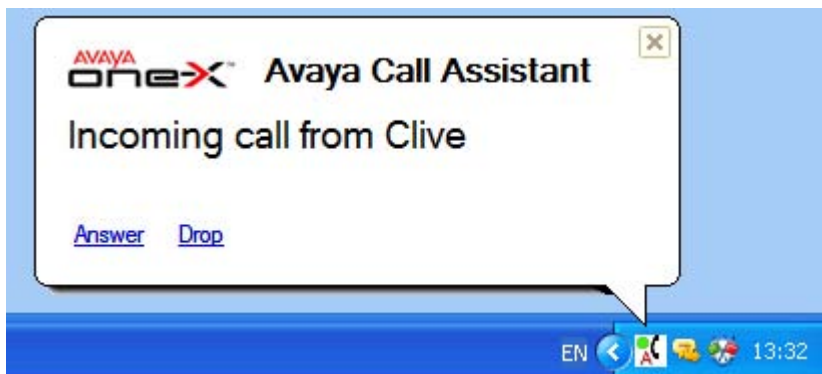
# **Chapter 10.**

## **one-X Call Assistant**

## 10. one-X Call Assistant

The one-X Call Assistant is a Windows tool that runs in the Windows taskbar. It can be used to perform a range of function, even if you have not logged your browser into one-X Portal for IP Office.

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








one-X Call Assistant can also be used to start one-X Portal for IP Office or to pop up details of calls or to show the matching contact in Microsoft Outlook if you run Outlook at the same time as the one-X Call Assistant. You can also use the one-X Call Assistant to select and dial a number shown by another Windows application.

Use the one-X Call Assistant (Windows PCs Only)		
<ul style="list-style-type: none"><li>• <a href="#">Install the one-X Call Assistant</a> <sup>[115]</sup></li><li>• <a href="#">Starting one-X Portal for IP Office</a> <sup>[122]</sup></li><li>• <a href="#">Start the one-X Call Assistant</a> <sup>[125]</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">one-X Portal for IP Office Icon</a> <sup>[114]</sup></li><li>• <a href="#">Configuring Screen Popping</a> <sup>[119]</sup></li><li>• <a href="#">Make a Call From a Windows Application</a> <sup>[121]</sup></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Hot Key Dialing</a> <sup>[121]</sup></li><li>• <a href="#">Missed Calls Display</a> <sup>[122]</sup></li><li>• <a href="#">New Messages Display</a> <sup>[122]</sup></li></ul>

### 10.1 The one-X Call Assistant Icon

The one-X Call Assistant icon is shown in the Windows system tray (normally at the bottom right of the screen). In addition to right-clicking on the icon to see available commands, the icon display information.

Hovering your cursor over the one-X Call Assistant icon displays information about its status and also the number of voicemail messages that you have. In addition, the icon changes as follows:

-  Not Connected  
A large red dot is shown when your one-X Call Assistant is not connected to the one-X Portal for IP Office server. This is normally only shown while the one-X Call Assistant software is starting. If the icon remains in this state, check the [settings](#) <sup>[117]</sup>.
-  Connected  
A large green dot indicates that the one-X Call Assistant is connected to your one-X Portal for IP Office sever.
-  Missed Calls  
Exclamation marks in the icon indicates that you have missed calls in your call log. Hovering your cursor over the icon will display the number of missed calls.
-  New Voicemail Messages  
A small red dot indicates that you have new voicemail messages. Hovering your cursor over the icon will display the number of new unplayed messages.
-  New Voicemail Messages  
The indicators for missed calls and new voicemail messages can appear at the same time. Hovering your cursor over the icon will display additional details.

## 10.2 Installing one-X Call Assistant

The one-X Call Assistant can be installed from the one-X Portal for IP Office server.

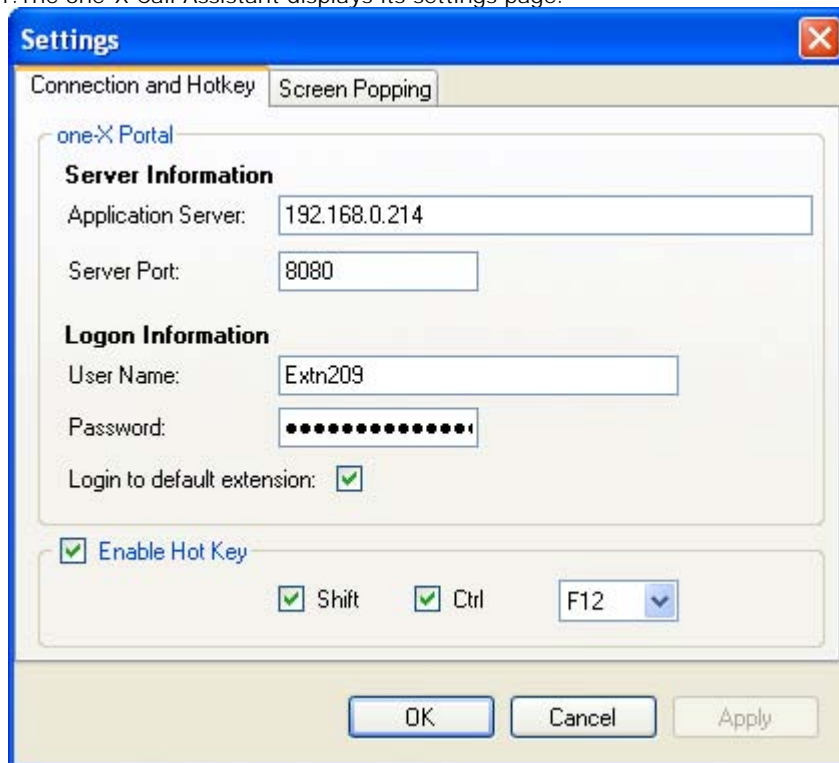
1. Login to one-X Portal for IP Office.
2. Click on the Configuration tab and scroll down to the Avaya Call Assistant section.


Avaya Call Assistant      [Install Avaya Call Assistant Application](#)

3. Click on Install Avaya Call Assistant Application.
4. The next steps will vary depending on which browser you are using:
  - Internet Explorer  
The file download menu should prompt you for what action you want to perform with the file setup.exe. Select Run.
  - Google Chrome  
When prompt select Save. Chrome will download the installation file. When the download is complete, double click on the downloaded file and select Run.
5. The installer is unpacked and prepares to install the one-X Call Assistant software. At the welcome screen click Next.
  - If a menu offering the options Modify, Repair and Remove appears it is because you already one-X Call Assistant installed. Select Modify to install this version over the existing one. Similarly if you have a different version already installed you will be asked whether you want to upgrade.
6. Enter a name for yourself and the organization you work for. These are for information only and do not affect one-X Call Assistant or one-X Portal for IP Office operation. Click Next.
7. You can select a folder into which the software is installed. However we recommend that you accept the default offered. Click Next.
8. The software is now ready to be installed. Click Next.
9. The progress of the installation is displayed.
10. Click Launch one-X Call Assistant and then click Finish.




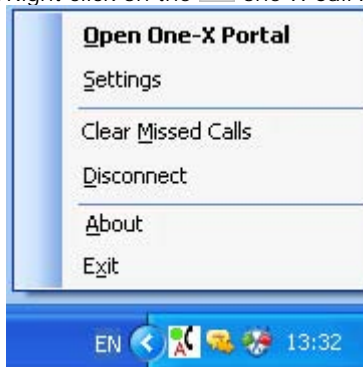
11. The one-X Call Assistant displays its settings page.



- The Server Information fields will have been completed using the information entered during the software installation. Check that this is correct.
- In the Logon Information section enter the user name and password that you use to login to one-X Portal for IP Office.
- 
- Click OK.
- The one-X Call Assistant  icon should appear in the Windows task bar and will show a message when it connects to one-X Portal for IP Office. If the icon remains with a red dot instead of green dot then it has failed to connect to one-X Portal for IP Office. You will need to check the connection settings you entered by right clicking on the icon and selecting Settings.

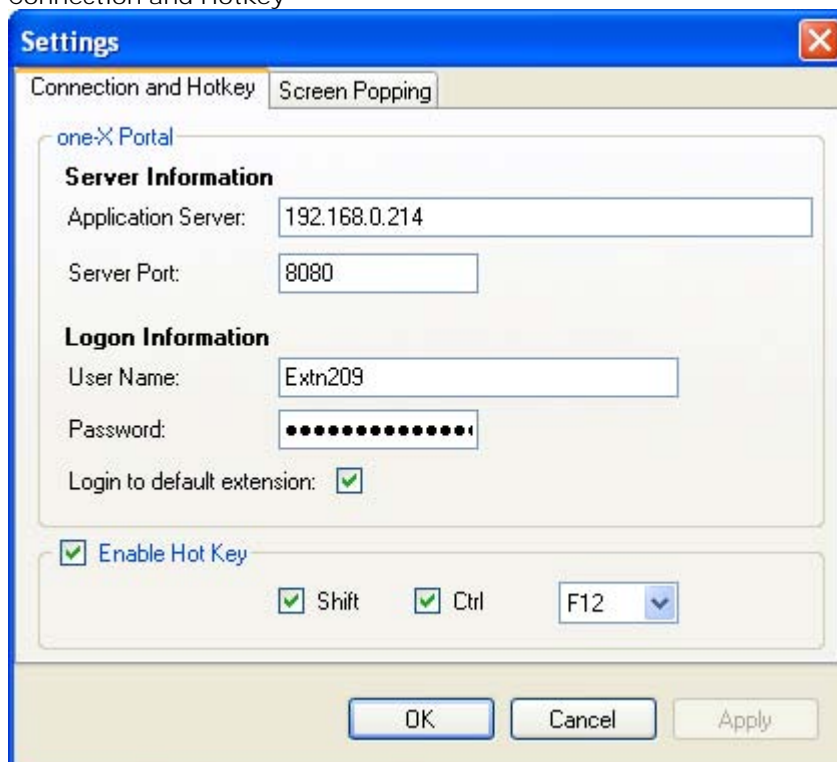
## 10.3 one-X Call Assistant Settings

1. Right click on the  one-X Call Assistant icon. The menu of options is displayed.



2. Select Settings. The one-X Call Assistant settings menus are displayed. These are separated into two tabs:

- Connection and Hotkey



- Server Information

This information should be supplied by your system administrator. In most cases it will match the web address you use in your web browser to access one-X Portal for IP Office.

- Application Server

This will match the part of your one-X Portal for IP Office web address between the // and : characters.

- Server Port

This will match the number shown in your one-X Portal for IP Office web address after the : character. The normal default is 8080.

- Logon Information

This information will match the user name and password that you use to login to one-X Portal for IP Office.

- User Name

Enter the user name that you use to login to one-X Portal for IP Office.

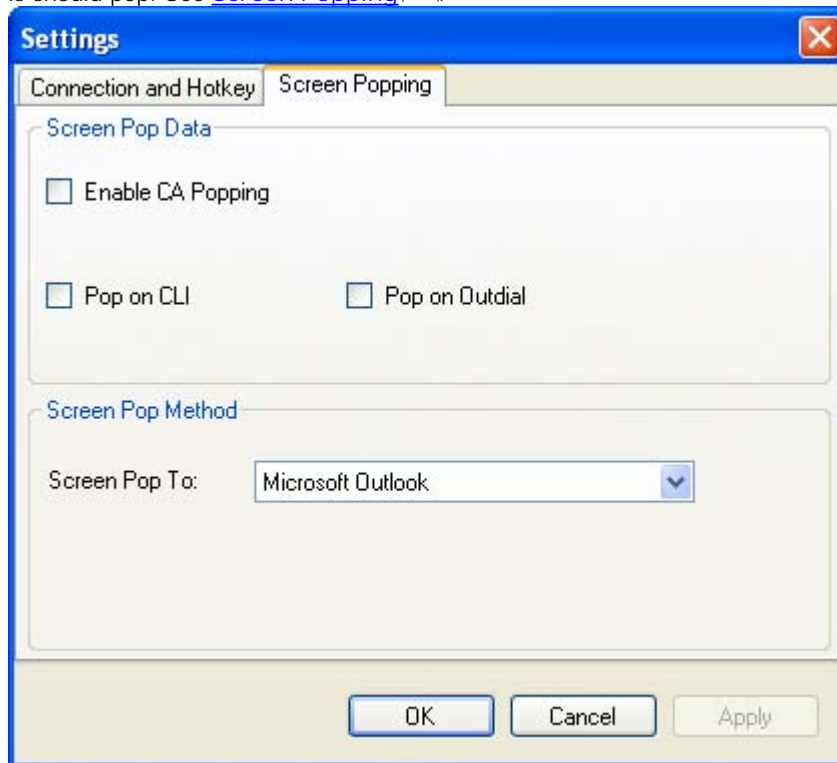
- Password

Enter the password that you use to login to one-X Portal for IP Office.

- Login to default extension

You can use one-X Portal for IP Office to also login at an extension on the phone system. That phone then assumes your extension number and settings. For more information see [Hot Desking](#) <sup>(19)</sup>.

- Enable Hot Key  
You can use these options to use one-X Call Assistant to make calls. See [Hot Key Dialing](#)<sup>[12]</sup>.
- Screen Popping  
These options are used to set when the one-X Call Assistant should user screen popping and which application is should pop. See [Screen Popping](#)<sup>[11]</sup>.



3. Click OK to save any changes you have made.

## 10.4 Screen Popping

The one-X Call Assistant can be used to display information about calls. This information appears as a [popup message](#)<sup>[123]</sup> which includes links for actions that you can perform (answer the call, drop the call, etc). If you answer a call using the popup message, the one-X Call Assistant will attempt to [display the one-X Portal for IP Office](#)<sup>[122]</sup>.




The one-X Call Assistant can also pass attempt to match call information to contacts in your Microsoft Outlook 2003 or 2007 and display the matching contact. Outlook screen popping can be done on the number received with incoming calls and or on the number you dial when making a call. You need to have Outlook running for this feature to work. 211

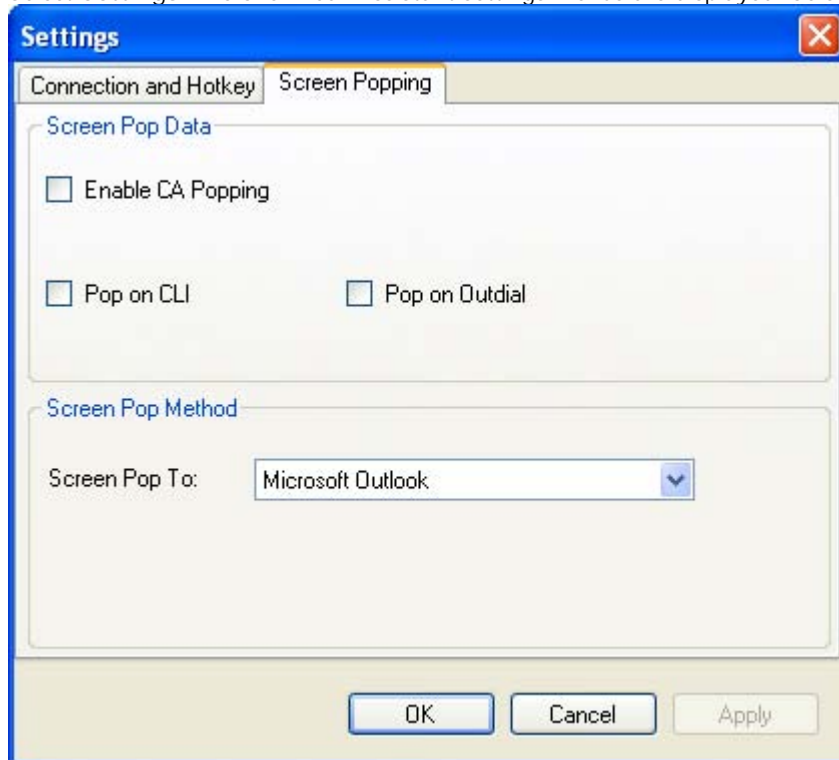
### Tip: Use the one-X Call Assistant to Login

If you enable one-X Call Assistant popping, it is recommended that you use the [one-X Call Assistant icon to log in](#)<sup>[122]</sup> to the one-X Portal for IP Office rather than logging in via the browser. In addition to logging you in to the one-X Portal for IP Office, the one-X Call Assistant caches information which makes subsequent logins during the Windows session much faster (almost immediate).

- Having logged in via the one-X Call Assistant icon, when you answer a call via the screen pop message:
  - If the existing one-X Portal for IP Office window is minimized, it is immediately restored.
  - If you have logged out, you are logged in again immediately using the cached session.
- If you use a browser to login to the one-X Portal for IP Office, answering calls via screen popping messages will cause that session to be logged out and logs you in in a new window. However this can take up to 20 seconds.

## Screen Pop Settings

1. Right click on the  one-X Call Assistant icon.
2. Select Settings. The one-X Call Assistant settings menus are displayed. Select the Screen Popping tab.



3. Configure the settings that you require:

- **Enable CA Popping**  
If selecting, screen popping is enabled using the options below and the one-X Call Assistants own [messages](#) <sup>(123)</sup>. It is recommended that you only use this option if you use one-X Portal for IP Office by launching it from the one-X Call Assistant icon, see the Tip above.
- **Pop on CLI**  
If this option is selected, the one-X Call Assistant will attempt screen popping to the selected application (see Screen Pop To below) on incoming calls using the caller ID number received with the call.
- **Pop on Outdial**  
If this option is selected, the one-X Call Assistant will attempt screen popping to the selected application (see Screen Pop To below) on calls using the number that you dialed to make the call.
- **Screen Pop To**  
Select Microsoft Outlook to enable Outlook screen popping. The screen popping will be done against contacts in your Outlook Address Book.

4. Click OK.

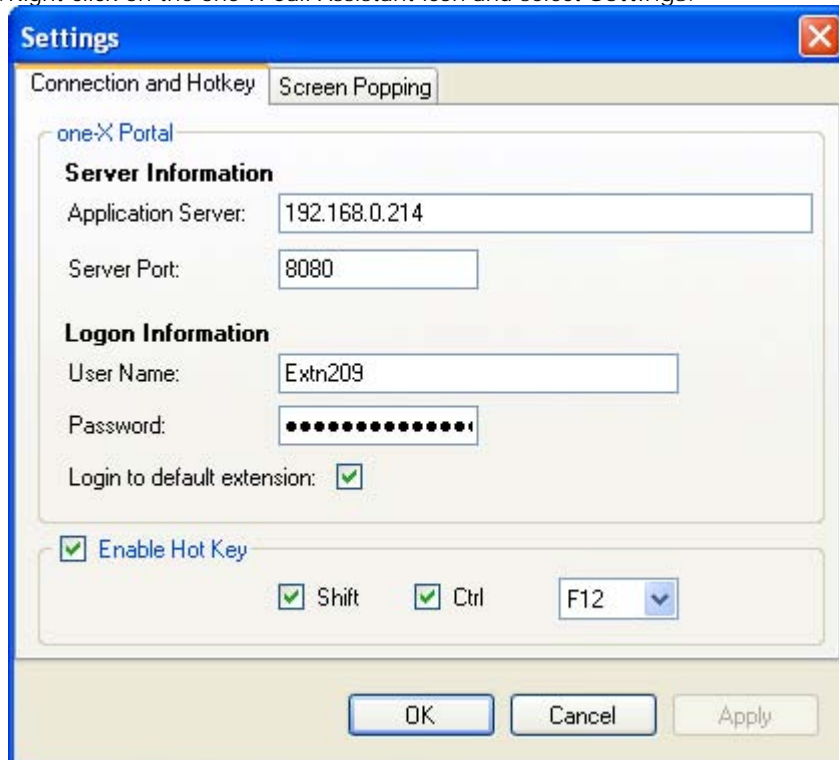
## 10.5 Hot Key Dialing

The one-X Call Assistant can be used to make a call by dialing a number selected in a Windows application. To do this, simply select or highlight the number in the Windows application and then press your one-X Call Assistant's hot key combination.

- The number selected must be suitable for dialing. For example your phone system uses an external dialing prefix that must be present in the number. It is not possible to edit the number before the one-X Call Assistant attempts to dial it.
- It is not possible to predicate which hot key combination will always work. There will be scenarios where the hot key combination you use for one-X Call Assistant will match one used by the application containing the number that you wish to dial. In that case the application function will take precedence over one-X Call Assistant dialing.

To set your one-X Call Assistant Dialing Hot Key Combination

1. Right click on the one-X Call Assistant icon and select Settings.



2. Ensure that Enable Hot Key is selected.
3. Use the options below to select the hot key combination that you want to use.
4. Click OK.

---

## 10.6 Starting one-X Portal for IP Office

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

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


1. To login via the one-X Call Assistant, click on the  icon and select Open one-X Portal to display the browser.


### Tip: Use the one-X Call Assistant to Login

If you enable one-X Call Assistant popping, it is recommended that you use the [one-X Call Assistant icon to log in](#)<sup>[122]</sup> to the one-X Portal for IP Office rather than logging in via the browser. In addition to logging you in to the one-X Portal for IP Office, the one-X Call Assistant caches information which makes subsequent logins during the Windows session much faster (almost immediate).


- Having logged in via the one-X Call Assistant icon, when you answer a call via the screen pop message:
  - If the existing one-X Portal for IP Office window is minimized, it is immediately restored.
  - If you have logged out, you are logged in again immediately using the cached session.
- If you use a browser to login to the one-X Portal for IP Office, answering calls via screen popping messages will cause that session to be logged out and logs you in in a new window. However this can take up to 20 seconds.

## 10.7 Missed Calls

The one-X Call Assistant icon shows a pair of exclamation marks  when you have any missed calls in your one-X Portal for IP Office call log. If you hover your cursor over the icon you will see information about the number of missed calls you have.

Using the one-X Call Assistant you can clear the missed calls from your one-X Portal for IP Office call log. Click on the  icon and select Clear Missed Calls.

## 10.8 Voicemail Messages

The one-X Call Assistant icon shows a small red dot  when you have any new voicemail messages your mailbox. If you hover your cursor over the icon you will see information about the number of new voicemail messages.

## 10.9 Call Assistant Messages

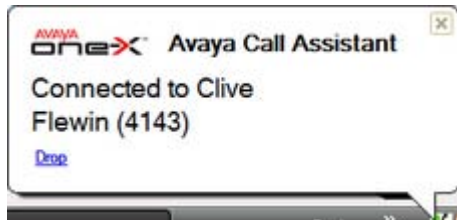
If the one-X Portal for IP Office option [Enable CA Popping](#) <sup>[119]</sup> is selected, one-X Call Assistant will display messages about itself and about the calls you make and receive.

When you make and receive calls, the one-X Call Assistant messages will show the call progress. If the name for the party at the other end of the call is known it will be shown, otherwise the number is shown.

### Incoming Call Message



- When you have a call waiting to be answered, the one-X Call Assistant message will show details of the caller. You can click on the Answer option to answer the call. This will also [restore or start a one-X Portal for IP Office session](#) <sup>[122]</sup>.



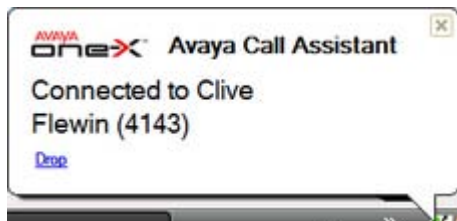
- This message indicates that the call is now connected.

### Outgoing Call Messages

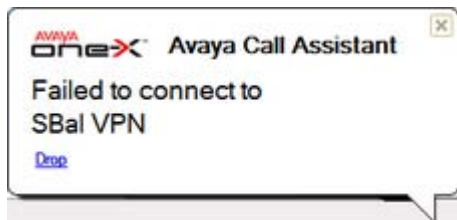


When you make a call, using your phone, one-X Portal for IP Office or [one-X Call Assistant](#) <sup>[121]</sup>, the one-X Call Assistant message will show details of the number being called and the progress of the call. You can use the Drop option to end the call.

- This message indicates that a number has been dialed and the call is now waiting to be answered.
  - For some types of external calls, for example analog phone lines, it is not possible to detect the call progress and so the call is regarded as connected (below) immediately even though the call may still be ringing.



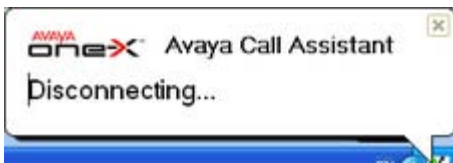
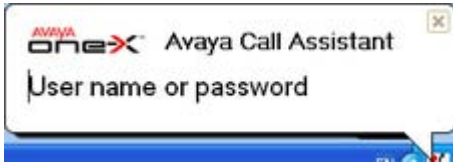
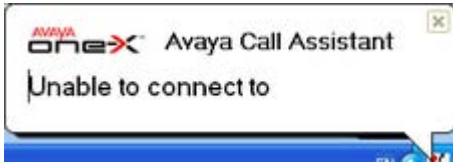
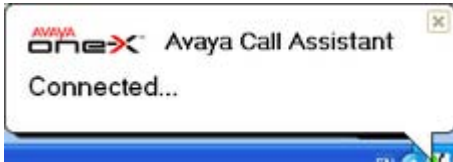
- This message indicates that the call is now connected.






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

---

## one-X Call Assistant Operation Messages






- This message is shown when one-X Call Assistant has just been started and is attempted to login to the one-X Portal for IP Office server in order to start sending and receiving information about your calls.
- This message is shown if one-X Call Assistant is unable to connect to one-X Portal for IP Office.
  - If this happens, using your web browser check that you can login to one-X Portal for IP Office. If successful, right click on the one-X Call Assistant  icon and select Settings. Check that the details on the Connection and Hot Key tab are correct and click OK.
- This message is shown if one-X Call Assistant can connect to the one-X Portal for IP Office server but the user name or password details it has been given do not match your settings for a one-X Portal for IP Office login.
  - Right click on the one-X Call Assistant  icon and select Settings. Enter the correct details on the Connection and Hot Key tab are correct and click OK.
- This message is shown if you select to disconnect the one-X Call Assistant by right clicking on its  icon and selecting Disconnect.

## 10.10 Starting one-X Call Assistant

By default the one-X Call Assistant is installed to automatically start when you start your computer. However, if required it can be started manually using the following process.

1. Click Start and select All Programs.
2. Select IP Office and click on one-X Call Assistant.
  - If this is the first time the one-X Call Assistant has been started, it will request information about your one-X Portal for IP Office login.

- The Server Information fields will have been completed using the information entered during the software installation. Check that this is correct.
  - In the Logon Information section enter the user name and password that you use to login to one-X Portal for IP Office.
  - Click OK.
3. The one-X Call Assistant icon  will appear in the Windows taskbar with a red dot, indicating that it is not connected with the one-X Portal for IP Office server. After a few seconds a message will appear indicating whether it has connected to one-X Portal for IP Office or not.
  4. If the one-X Call Assistant has successfully connected to the one-X Portal for IP Office server, the icon will change to  show a green dot or  exclamation marks if you have missed calls.
    - If you hover your cursor over the icon you will see information about the number of missed calls you have and also the number of voicemail messages.
  5. If the one-X Call Assistant does not successfully connect to the one-X Portal for IP Office server, it may be because the one-X Call Assistant settings need to be adjusted. Right click on the icon and select Settings.



# Chapter 11.

## Glossary

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## 11. Glossary

### 11.1 Appearance Buttons

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

### 11.2 Auto Hold

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

### 11.3 Busy

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

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

1. If you have a [Forward on Busy](#)<sup>[12b]</sup> destination enabled, the call is forwarded to that destination.
2. If you have voicemail enabled, the call is sent to voicemail.
3. If neither of the above is available, the caller receives busy indication.

### 11.4 Do Not Disturb

When you select this state, you only receive calls from selected numbers that you have indicated by adding to your [Do Not Disturb Exceptions](#)<sup>[10b]</sup>. All other callers are routed to voicemail if available or otherwise receive busy tone. You can still make calls while in the Do Not Disturb state.

### 11.5 Forward on Busy

A Forward on No Answer/Busy number can be set for your calls. When set and enabled; if a call arrives for you when you are [busy](#)<sup>[12b]</sup> to any further calls, it will be forwarded to that number. The number can be internal or external.

### 11.6 Forward on No Answer

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

### 11.7 Forward To

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

### 11.8 Hot Desk

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

### 11.9 Hunt Group

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

### 11.10 IP Office

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

### 11.11 Log In/Log Out

If you have a login code for the telephone system, that allows you to use any phone on the system as your own extension. You can also log out. While logged out from any phone, calls to you are treated in the same way as if your phone was [busy](#)<sup>[12b]</sup>.

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

---

## 11.12 Park

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

## 11.13 Primary Phone

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

## 11.14 System Administrator

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

## 11.15 Small Community Network

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

## 11.16 Supervised Transfer

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

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

## 11.17 Unsupervised Transfer

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



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