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Web Portal

USER GUIDE

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Chapter 1
Web Portal Help Overview

The PressOne Web Portal is web-browser-based application that allows you to manage your calls from your PC through an easy-to-use web browser interface. If you are using the Web Portal on a PC that is connected to the PressOne network, you can use point-and-click capabilities to control calls as well as manage calls.

This section provides general information about the Web Portal operations, including:

- Web Portal login
- Using Web Portal with your phone
- Web Portal Tab descriptions
- How to page through web portal directories
- Optimum web browser settings

Web Portal Login

The Web Portal allows you to control your telephone from a PC that is on the same PressOne network as your telephone.

You can log into the PressOne Web Portal by using any Web browser and entering the **IP address of the PressOne Call Agent Server** as the web address (URL). You will then see the Web Portal login page.

You must enter your phone number and then enter the password for your phone.

> **NOTE:** *You can only log into Web Portal once on a particular machine on the same phone network using the same type of browser. For example, if you log in to Web Portal using Internet Explorer, then you try to bring up another IE browser and log in as a different number on the same VOISS network, the first Web Portal browser will revert back to its login page. Web Portal recognizes the new session and logs you out. However, if you bring up IE and log in, you can then bring up Netscape and log in with a different number.*

Click to Call - This checkbox is selected by default, which allows you to dial any phone numbers that you see listed in the Web Portal by just clicking on them. You can disable this capability in the event you are not physically near your PressOne phone to prevent dialing a number and not being able to pick up the handset.

Using Web Portal in Conjunction with Your Phone

You can control your telephone using the Web Portal on a PC that is connected to the same PressOne system network as your telephone.

The Web Portal does not provide a method for you to conduct conversations using a microphone or other audio device connected to your PC. You must be near the phone when placing a call from the Web Portal because it will activate a line on your telephone. If the phone is equipped with a speakerphone, it will be activated if you do not have a headset attached or pick up handset.

Web Portal Tabs

The tools available from the Web Portal menu include:

Directory

Provides access to the Corporate Directory, listing all your company's extension numbers, as well as a Personal Directory where you can add your favorite phone numbers.

Voice Mail

Allows you to play, forward, save or delete voice mail messages or return the callers call from the Inbox or Saved tabs. You can set up voice mail Distribution Groups and set up paging so that you are notified when you receive messages. On this screen you can also change your voice mail password.

Conferencing

Provides the ability to schedule Meet-Me Conference calls or find an available time for a conference call in the PressOne system, if allowed by the system administrator. The Find feature allows any user, who may have forgotten the information for a Meet-Me Conference, to search for information about the conference.

Call Management

Allows you to view and manage a log of all calls arriving at your telephone, screen calls by setting up call handling rules based on incoming telephone numbers, manage the forwarding of calls from your phone and control calls from the Web Portal.

Options

Provides the ability to change your telephone/Web Portal password, reassign the phone number to a different phone, set up a remote phone that acts as your PressOne phone, integrate TAPI-based applications with the Web Portal, and set your personal profile for Web Portal.

Paging through Web Portal Lists

You can page through a list in Web Portal using the controls at the bottom right side of the screen.

The links have the following functionality:

- **First** – Takes you to the first page of the directory listing.
- **Previous** – Takes you to the page preceding the current page.
- **Page** – Takes you to the page selected by typing in a number.

Example: *You might remember that John Public was on Page 13 the last time you looked him up and you may want to start there this time.*

- **Next** – Takes you to the page following the current page.
- **Last** – Takes you to the last page of the listing.

Web Browser Settings

For best results with the Web Portal, you must set Internet Explorer or Netscape Navigator to allow Java applets.

NOTE: *If using Internet Explorer, it is highly recommended that you upgrade to IE Version 6.0 or greater. For Internet Explorer versions before 5.5, you must set your pages to refresh every time to avoid using cached pages.*

Internet Explorer

1. Select **Tools**.
2. Select **Internet Options**.
3. Click the **Security** tab and **Custom Level** button.
4. Makes sure that the **Reset Custom Settings** box says **Medium**. If not, select **Medium** from the drop down list and click **Reset**.
5. Click **OK** to return to the Internet Options dialog box.
6. Click **OK** again to close the Internet Options dialog box

Netscape Navigator

1. Select **Edit**.
2. Select **Preferences**.

3. Click on **Advanced** and enable JavaScript by making sure that the following fields are checked:
   - Automatically load images
   - Enable JavaScript
   - Enable JavaScript for Mail and News
   - Enable style sheets (Navigator 4.7 only)
4. Click **OK**.

Disabling Reuse of the Web Portal Active Window

You may also want to set your Internet Explorer browser so that it will not use the active Web Portal browser window when you click on shortcuts in other web sites. To do this, follow these steps:

1. On the Internet Explorer window, select the **Tools** menu.
2. Scroll down and click **Internet Options**.
3. Select the **Advanced** tab.
4. Under the “Browsing” options, uncheck the **Reuse windows for launching shortcuts** feature.

Chapter 2
Using the Web Portal Call Control

The Web Portal Call Control window provides information about the line on your phone and calls in progress as well as providing basic call control functionality.

Call Control Window Functionality

- Making a call
- Transferring a call
- Hanging up a call
- Putting a call on Hold
- Parking a call
- Picking up a parked call
- Picking up a Multi-line parked call
- Using Do Not Disturb
- Using Speed Dials

Call Control Window Description

- *Line Information* - This line of text displays the 10-digit number line currently is use under the time and date. It also has the Help link.
- *Call Progress Display* - When making or handling a call, this display shows progress messages related to the call.
- *Dial Keypad* - A standard telephone dial that can be used for dialing telephone number by clicking on the keypad buttons
- *Call Control Buttons* - These buttons allow you to perform call control functions from the Web Portal including hanging up a call (Release), placing a call on Hold or Park or sending the call to another user (Transfer). You can also activate and deactivate the Do Not Disturb (Dnd) feature. Also provided is a text box that you can use for typing in telephone numbers for transfers.
- *Speed Dials List* - If you have speed dial numbers on your telephone, they will appear in the Speed Dials area and can by used by clicking on them.

Making a Call

Calls can be made from Web Portal Call Control dialog by typing them in the field next to the **Dial** button. The phone should be nearby, however, since it will activate the speakerphone feature of the phone.

External Call

1. Enter the phone number for the outside line you wish to call.

   NOTE: *The outside access digit (such as* **9***) is* ***NOT*** *required to dial externally.*

2. Click **Dial**.

   The speakerphone is turned on, an outside line is automatically selected, and the call is connected.

3. Conduct the call using the speakerphone (if available), us a headset, or pick up the handset to continue the call.

Internal Call

1. Enter the desired extension (e.g., 1105).

   The speakerphone is turned on, an internal line is automatically selected, and the call is connected

2. Conduct the call using the speakerphone (if available), use a headset, or pick up the handset to continue the call.

Authorization Code Call

If you are required to enter an authorization code for a call, follow these steps:

1. Enter pound (**#**) then the digits for the authorization code (obtained from your system administrator).
2. Click **Dial**.

   The speakerphone is turned on and a line is automatically selected. You will hear dial tone if you entered the correct code.

3. Enter the digits for the number you want to call.
4. Click **Dial** to dial the number and connect with your party.

Transferring a Call

1. Click in the blank text window next to the **Transfer** button.
2. On your PC keyboard, type in the number to transfer the call to.

3. Tell the caller you are going to transfer them and click Transfer.
4. The call is transferred and your line is released and ready to make additional calls.

   NOTE: *If this feature is not available in Web Portal, ensure that a button on your phone has this feature assigned.*

Releasing a Call

To hang up, click Release on the Call Control dialog.

To access the Call Control dialog, click the **Call Control** link in the upper right corner of the screen.

> **NOTE:** *If this feature is not available in Web Portal, ensure that a button on your phone has this feature assigned.*

Holding a Call

On the Call Control dialog, the **Hold** button allows you to place a call on hold and retrieve the call from hold. Since the Web Portal supports only a single line appearance, no other action should be taken through the Web Portal when a call is controlled by the Web Portal. Use the buttons on your physical telephone if you need to make additional calls or perform other actions while the call is on hold.

To put a call on Hold:

1. Tell the caller you are putting them on hold.
2. Click Hold.
   - A message that the call is on hold is displayed in the lower left hand corner of the Call Control Window and notification that hold is active may be displayed on your phone to remind you about the held call.
   - Depending on your system configuration, the party may hear music, a recorded announcement, or silence while holding.
3. To resume the conversation, click Hold and begin speaking.

   NOTE: *After the party is on hold for one minute, the system rings the associated line to remind you that the party is holding.*

   NOTE: *If this feature is not available in Web Portal, ensure that a button on your phone has this feature assigned.*

Parking a Call

Parking a call is similar to placing a call on hold, except that when a call is parked, you can pick-up the parked call from anywhere in the system and the line is free again.

To park a call:

1. During the call, tell the caller that you are putting them on hold.
2. Click the Park button.
3. Hang up.
   - The telephone provides a Park reminder and the associated line is now free to make or receive other calls. After the party is parked for 1 minute, the system rings the associated line to remind you that the party is still parked.
   - To retrieve the parked call using the Web Portal, click the **Park** button.

   NOTE: *If this feature is not available in Web Portal, ensure that a button on your phone has this feature assigned.*

Picking up a Parked Call

If your system is configured to with a Park Line (see Parking a Call), and a call has been parked, then you can pick up the call using the **Pickup Park** button on the Call Control window.

NOTE: *This feature may not be available if your PressOne system has been configured to support Multi-Line Call Park. If the Pickup Park button does not work, then the call was parked using Multi-line Call Park. You can enter the extension where the call is parked and click the Call Pickup button.*

1. Click on **Call Control** in the upper right area of the display to bring up the dialog.
2. Click on the **Pickup Park** button to pick up the call.

Call Pickup for Multi-line Call Park

Your PressOne system can be configured to allow Multi-line Call Park. This means that when a user parks a call, an audio message tells the user an extension where the call is parked. To pick up the parked call, a user enters the extension specified in the message.

On Web Portal, the **Call Pickup** button on the Call Control dialog allows you to enter the parked call extension and pick up the call. This button will not operate, however, if Multi-line Call Park is not enabled for your system. In that case, try the Pickup Park button.

Adding Caller to a Conference Call using Call Control

If you are currently in a conference call, you can add another caller to the conference call from the Call Control dialog. Your system must be configured to allow Ad Hoc Conferencing and the ad hoc conference limit cannot be exceeded. The default limit is 3 callers that can be added ad hoc to a conference call, unless your system administrator has changed the limit.

To add a caller to a conference:

1. While in an active conference call, click on the **Call Control** link in the upper right area of the Web Portal display.
2. Enter the number of the person you want to add to the call in the field next to the **Conference** button, then click the button.

The caller will be added to the conference.

> **NOTE:** *If this feature is not available in Web Portal, ensure that a button on your phone has this feature assigned.*

Using Do Not Disturb

Do Not Disturb instantly routes all your incoming calls to another destination (your voice mailbox, the main operator, your secretary, a co-worker), but still lets you make calls and use other telephone features. (You can record a special voice mail greeting for callers to hear if your calls go to voice mail when you activate the Do Not Disturb feature.) The Do Not Disturb destination is set by your system administrator.

To override this feature for specific callers use the Urgent Call setting in the Call Screening feature.

To Activate Do Not Disturb

1. Click **DND**.
2. "Do Not Disturb is on" is displayed at the bottom of the Call Control window until another control is used or the window is closed.
   - *A message that DND is active may be displayed on your phone to remind you that the feature is active.*
   - *A lamp next to a Do Not Disturb button on your telephone may blink to confirm that the feature is active.*

To Cancel Do Not Disturb

1. Click **DND**.

2. "Do Not Disturb is off" is displayed at the bottom of the Call Control window until another control is used or the window is closed.
   - *A message that DND is active may be displayed on your phone to remind you that the feature is active.*
   - *A lamp next to a Do Not Disturb button on your telephone may blink to confirm that the feature is active.*

   NOTE: *If this feature is not working, ensure that a button on your phone has this feature assigned.*

Using the Speed Dial List

The **Speed Dials** list in the Call Control Window lists the numbers that are programmed into the speed dial buttons on your telephone. The numbers in this list can be used when dialing, transferring a call, or conferencing in.

To use the Speed Dial list:

1. If desired, pick up the handset on your telephone. (Otherwise, the speakerphone will be activated).
2. Click the desired speed dial number in the list.

   The number is displayed to the right in three of the fields.

3. Do one of the following:
   - **Dial** to dial the number
   - **Transfer** to transfer a call to the number
   - **Conference** to conference that party in to a currently active conference call.

Chapter 3
Using the Web Portal for Call Management

The Web Portal provides several tools for managing your calls. They include:

- Call Log - Provides a record of calls made and received from your telephone number including whether the call was answered or not.
- Find-Me Forwarding - Allows you to configure your VOISS phone so that incoming calls are routed to other phone numbers if you don't answer your VOISS phone.
- Call Treatment - This tab provides various methods of screening incoming calls and routing or forwarding your calls.

About the Call Log

The Call Log is accessed by clicking on the **Logs** tab under the **Call Management** tab. This screen provides a record of all of the incoming, outgoing and missed calls to the phone. In addition, the Call Log allows you to do the following:

- Return calls from entries
- Set up Call Screening
- Sort entries

The log is sorted by Date/Time by default, with the latest entries listed first. The following describes the fields on this display.

Direction - Indicates whether the call was *In*coming, *Out*going, or *Missed*. If the call was Missed, click the Voice Mail tab to see if the caller left a message.

Phone Number - If the caller had the caller ID feature enabled, then the phone number will be displayed. You can click on the phone number to return the call.

> **NOTE:** *You must be near the phone when placing a call from the Web Portal because it will activate a line on the telephone that the number is assigned to.*

Name - displays the Caller Name if it is reported by Caller ID. Otherwise, it displays "Private."

Date/Time - The date and time that the call began is displayed in the format: MM/DD/Year HH:MM:SS.

Length - The duration of the call is displayed in the format MM:SS.

Functions - Provides a Call Screening icon ( ) that when clicked, takes you to the Add Call Screening display where you can set up call screening functions for the call log entry.

Select - Provides checkboxes for selecting entries to be deleted. You can check one or more of these checkboxes, then click the **Delete** button at the bottom of the screen to remove entries from the Call Log.

Call Screening from the Call Log

From the **Logs** tab under Call Management, you can set up call screening actions (such as send to voice mail or forward to another number) for the numbers listed in the Call Log.

1. Find the entry you want to screen.
2. Click the Call Screening button ( ) next to that entry.

   The **Name** *and* **Incoming Number** *fields will be automatically filled in.*

3. Refer to Call Screening for a detailed description of the Time of Day Actions and Default Action.
4. Click Save for the call screening settings to be recorded or **Cancel** to exit the screen.

Sorting the Call Log

The list can be sorted in ascending (top-down.) order or descending order based on any of the columns that has an underlined title. Click a column heading to sort the list based on that column.

The column that is currently being used for sorting is marked with an up- or down-arrow. If the arrow is pointing down, then the list is sorted in ascending order (top-down, first to last, A-Z, etc.). If the arrow is pointing up, then the list is sorted in descending order based on that column.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Returning Calls from the Call Log

1. Locate the entry/message to which you want to return a call.
2. Click on the extension or telephone number of that entry/message in the *Phone Number* column.
3. The Call Control window appears and displays call progress messages while you hear ringing through the speaker in your phone.
4. To end the call you can click on:

- Release to hang up
- Transfer to transfer the call
- Hold to put the call on hold
- Park to park the call

You must have the features listed in Step 4 assigned to your phone for those features to be available from the Web Portal.

Find-Me Forwarding

The Find-Me feature lets you specify a list of phone numbers where a call will be forwarded if you do not answer your phone. This allows a caller to reach you at any one of your designated phone numbers. For example, if you will be away from the office, you can set Call Management options to forward calls to your mobile phone number, then your home office phone number, and finally your home number. If you do not pick up at the final destination, the call will be transferred to voicemail.

The following operations allow you to configure Find-Me phone numbers and choose the order in which the call is forwarded.

- Create a Find-Me phone numbers list
- Configure Sequential vs. Ring All and Show Caller ID
- Add more numbers to a Find-Me list
- Change the order of the numbers in a Find-Me list

Creating a Find-Me Phone Number List

The Find-Me feature is enabled when one or more Find-Me phone lists are created.

1. Under the **Call Management** tab, click the **Find-Me** tab.
2. Click **Add** to create a new list.
3. On the Numbers page, click **Add** to add a phone number to the list.
4. Enter a name and phone number where the phone should be forwarded if you do not answer.
5. If desired, use the pull-down lists to set the following
   - **No Answer Timeout** – the number of seconds the system will attempt to connect to this phone number.
   - **Menu Timeout** – the number of seconds the user has to respond to menu options.
6. Click the **Save** button to create a new Find-Me List with one phone number.

Once it has been initially created, you can add more phone numbers to the list or you can modify the forwarding method used (sequential or ring all). You can also specify whether or not to display the caller ID for the incoming call.

Configuring Sequential vs. Ring All and Show Caller ID

The Find-Me feature allows a call to be forwarded two ways*:*

sequential – the call will be forwarded sequentially to each phone number in the Find-Me list. If there is no answer at the first number, the call is transferred to the next number in the Find-Me list until the final phone number is reached.

ring all (parallel) – All of the phones in the list will ring simultaneously. When the call is picked up at any of the numbers, the call is completed and the other destinations will no longer ring.

To configure the Find-Me Options:

1. After creating a list and adding a number, you should be on the *Numbers* page. If not, click on **Call Management**, and click the edit button ( )under the Functions column next to the list you want to configure.
2. On the Numbers page, select the **Options** button.
3. Next to *Find-Me Strategy*, select either **Sequential** or **Ring All**.
4. If desired, uncheck the **Show Caller ID** box to prevent showing the incoming call's caller ID on the destination phone. This box is checked by default.
5. Click **Save** to store the changes.

Adding More Numbers to a Find-Me List

1. Click on **Call Management** and the **Find-Me** tab.
2. Click the edit button ( ) under the Functions column next to the list you want to configure.
3. On the Numbers page, select the **Add** button.
4. Enter the name and phone number of another call destination. If desired, modify the timeout options.
5. Click **Save** to store the changes.

Re-ordering the Numbers in a Find-Me List

After adding numbers to a Find-Me list, you may want to change the order in which the numbers are called. The numbers in the Find-Me list will be tried in ascending order, from first to last.

1. Click on **Call Management** and the **Find-Me** tab.
2. Click the edit button ( ) under the Functions column next to the list you want to configure.
3. On the Numbers page, click the up arrow ( ) to move a number up in the list. Click the down arrow ( ) to move a number down in the list.

Call Treatment

The **Call Treatment** tab under Call Management allows you to apply call handling rules for either your phone or for each specific caller.

There are two ways to look at Call Treatment:

- **Forwarding** – this is a way of configuring *your phone* so that any incoming call is routed to a particular destination.
- **Call Screening** – this is a way of controlling where *specific incoming calls* will be routed.

Call Treatment Summary

The Call Treatment Summary page lists of all forwarding and call screening rules that are in effect. There are two different types of entries in the list. The first entry shows ***Default Forwarding*** for your phone and you can modify this entry is to click on the Edit button ( ) under the Function column. The other entries indicate call screening actions that have been applied to particular incoming numbers.

The following describes the fields on the Summary page:

- **Name** – The *Default Forwarding* entry shows whether or not your phone has forwarding rules applied. The other entries show names of callers that have call screening actions applied.
- **Incoming Number** – The number shown for the Default Forwarding entry will always be *All Unscreened*. For the other call screening entries, this column lists the phone number to be screened.
- **Action** – This column lists all of the actions that have been configured for this entry. If it shows *Disabled*, then there are no actions applied.
- **Company** – Indicates the Company name for this caller, if any.
- **Phone Numbers** – Lists all of the phone numbers for this caller that have call screening applied.
- **Function** – Click the Edit button ( ) in this column to apply call screening options.
- **Select** – Click this checkbox for all entries that you want to delete, then click the **Delete** button at the bottom of the screen.

Call Treatment Operations

There are several functions that can be performed on from the Call Treatment page. Click on the following links for more information on these operations.

- Forwarding (on the Default Forwarding entry)
- Selective Forwarding **(Options)**
- Call Screening

Call Forwarding

You can forward your phone by clicking on **Call Management**, then **Call Treatment**. Forwarding is disabled when the **Action** column on the summary shows *Disabled* next to a red dot. When forwarding is disabled, all unanswered calls will be forwarded to your voice mail box. This setting is overridden by any Call Screening actions that may be set.

There are two levels of forwarding: Basic and Advanced.

- For Basic forwarding features, click the Edit button ( ) next to the *Default Forwarding* entry in the summary list.
- For Advanced forwarding features, go to the Basic page, and click the **Advanced** button.

Basic Default Forwarding

This page allows you to enter a number where all incoming calls to your phone will be forwarded. By selecting the **Default Action** pull down list, you can choose one of the following:

- Disabled
- Find-Me (if there is at least one Find-Me list defined)
- Forward to Number
- Forward When Busy/No Answer

When you select one of the actions, then fields will appear in which you can enter the forwarding destination number or numbers. Phone numbers can be entered using dashes, periods, spaces and other special characters.

Click **Save** to save the settings or **Cancel** to return to the previous display without saving.

Advanced Default Forwarding

When you click on **Advanced** at the bottom of the Basic Default Forwarding screen, a new screen is presented that has several forwarding and call screening Actions that can be applied to your phone. When you select an action, the Time of Day fields will appear that allow you to set specific times and days for the action. See Call Screening for more detailed information.

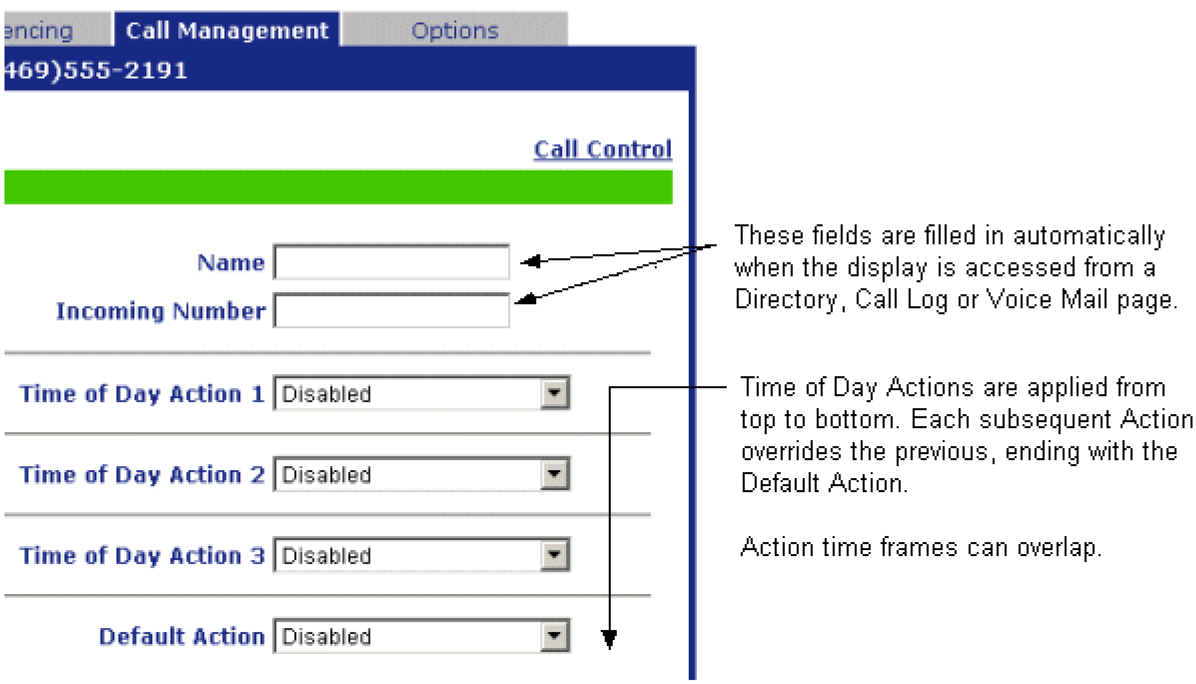
Call Screening

The Call Screening function provides a flexible method of screening and forwarding calls anytime or at specific times and on certain days of the week.

Call Screening is set up via the "Call Screening" display. This display can be accessed in several ways:

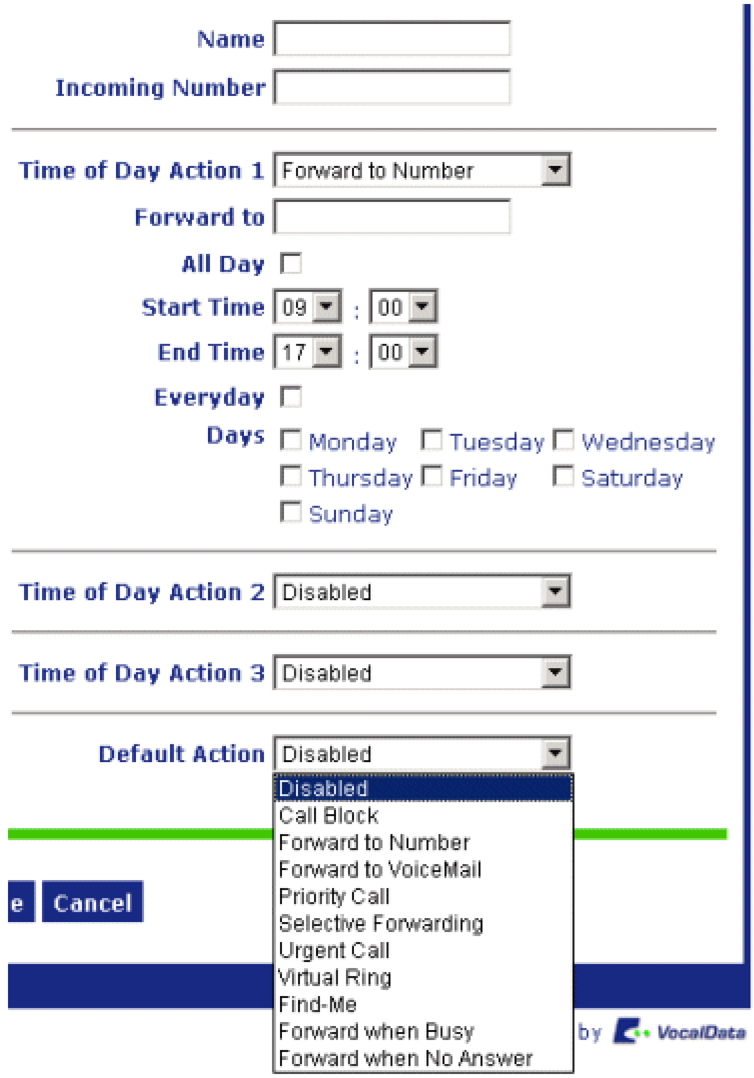
- By clicking on **Call Management** > **Call Treatment** > **Add Call Screening**
- From a **Directory**, by clicking on the Options button ( )
- From the Call Log by selecting **Call Management** > **Logs** and clicking on the Call Screening button ( ) next to the desired entry.
- From Voice Mail, by clicking **Voice Mail**, and the Call Screening button ( ) next to the desired entry.

When the Call Screening display first comes up, it will look something like this. If you access it from a Directory, the Call Log or Voice Mail, then the name and number fields will be filled in.



How Time of Day Actions Work

Each **Time of Day Action** has associated fields that are hidden until you select an action from the pull-down menu. When you select an action, you must specify some time frame for the action, and if the selection involves forwarding, you must enter a forward destination number. The following picture shows the fields that are displayed after a Time of Day Action is selected:



The pull-down menus provide several types of forwarding and call screening options. The following is a description of these choices:

- *Disabled* – This indicates the Time of Day action is not in effect.
- *Call Block* – This selection will block calls from this phone number. The caller will hear a recorded message that you are not accepting calls.
- *Forward to Number* – Calls from this number will be forwarded to the phone number that you specify in the Forward to field. The originally called number is bypassed and does not ring.
- *Forward to VoiceMail* – The call goes directly to voice mail without ringing your phone.

- *Selective Forwarding* – This caller will be forwarded to a specified number. NOTE: This option will only be displayed if a selective forwarding number has already been defined. See Selective Forwarding for more information about this feature.
- *Priority Call* – This will mark this number as a priority call and it will have a priority ring tone. The priority ring tone you will hear depends on the type of phone you have.
- *Urgent Call* – The call rings through to your telephone regardless of whether the Do Not Disturb feature is invoked. If you do not answer the phone, it is forwarded to voice mail and is tagged as an urgent message. If you want to be paged when you receive an urgent message, make sure that you have checked both the "Paging" and "Urgent" settings in Pager Notifications under Voice Mail.
- *Virtual Ring* – The caller always hears a ring. To the caller it appears as if their call is not being answered. Actually the call does not ring at your phone, nor does it go to voice mail, it is simply routed to a virtual phone.
- *Find-Me* – This option will only be displayed if at least one Find-Me list has been created. The Find-Me feature will forward the incoming call to a list of phone numbers specified by the user.
- *Forward when Busy* – If your phone is busy when this call comes in, the call will be forwarded to the number specified in the Forward to field.
- *Forward when No Answer* – If your miss the call, it will be forwarded to the number specified in the Forward to field.

Specifying a Time of Day

To specify a time of day for a particular action, select the action and then choose the appropriate time and date elements. If you want the action to occur all day on Monday, click the All Day checkbox, and the Monday checkbox. If you wanted it to occur *every* Monday, check the Everyday checkbox also. You can specify a time frame by selecting the Start Time and End Time (using a 24-hour clock).

The Time of Day Actions are implemented in order from top to bottom. If Time of Day Action time frames overlap, each subsequent one takes precedence over the previous one. The Default Action is the ultimate action that is implemented for the caller.

Example of overlapping Time of Day Actions:

- ToD Action 1 forwards to x1234 from 11:30 to 1:00 pm.
- ToD Action 2 forwards no answer to x2345 from 9:00am to 12:00pm

Result:

- An unanswered call at 10:00am will be forwarded to x2345.
- Any call at 11:15 will be forwarded to x1234 without ringing the original phone.

- An unanswered call that is before 9:00am or after 1:00 pm will result in the standard action (go to voice mail).

Adding a New Call Screening Entry

You can add one or more call screening entries from the **Call Management** > **Call Treatment** page as well as from the Corporate and Personal directories and the Call Log.

1. On the Call Treatment page, click Add Call Screening.

2. Enter a name for this entry in the Name field.

3. Enter the caller's telephone number (as you see it displayed in the Call Log or on your phone display, if you have one) in the Incoming Number field.

   NOTE: *It must match exactly since this is the telephone number the system uses to look up the action to take.*

4. Click on the down arrow in the Time of Day Action pull-down list and select the action to be taken by clicking on it.

5. If the action is a forwarding action, do one of the following:

   - For Forward to Number, enter the number of the telephone the call should be forwarded to in the Fwd field.
   - For Selective Forwarding, enter the number all Selective Forwarding calls will be forwarded to in the Fwd field. (See Selective Forwarding for more information on this option.)

6. If the action is to send to voice mail, you must have a voice mail box to which to send callers.

7. Click Add to save the current entry and add more entries or click Save to save the information and be able to select another function.

Deleting an Entry

You can delete one or more entries.

1. Click the checkbox under the *Select* column for each entry you want to delete.

2. Click **Delete**.

Editing an Entry

You can edit one or more entries directly on the **Call Management** > **Call Treatment** page by changing the information in the fields and clicking the Save button.

3. Locate the entry you want to edit.

4. Click the Edit button ( ) next to the entry you want to change.

- If you selected the Default Forwarding entry, see Forwarding for more information.
- If you selected one of the call screening entries, see Call Screening for more information.

5. Replace or correct existing information or select a new action.
6. Repeat for additional entries until all necessary changes have been made.
7. Click Save.

Selective Forwarding

The term "Selective Forwarding" means that all incoming calls that are set to be selectively forwarded are forwarded to one particular phone number.

The **Selective Forwarding** screen allows you to input the destination number where these calls will be sent.

To set up Selective Forwarding:

1. Under the **Call Managemen**t tab, click the **Call Treatment** tab, then click the **Selective Forwarding Number** button.
2. In the **Selective Forwarding Number** field, enter the destination phone number where incoming calls will be sent when the Selective Forwarding feature is set for those callers. I

To set Selective Forwarding for an incoming call:

1. Click on **Call Management** tab, then the **Call Treatment** tab.
2. Click on the **Add** button.
3. Enter **Name** and **Incoming Number** of incoming call.

   NOTE: *You can do this from the Directory page also.*

4. Select **Default Action** pull down and **Selective Forwarding**.

Chapter 4
Using the Web Portal Directories

The PressOne Web Portal provides two directories for your use - Corporate and Personal. The corporate directory provides a listing for everyone in your company while the personal directory is where you keep all your personally important telephone numbers.

Sorting the Directory

Both directories allow you to sort using the column headings. In the corporate directory these are last name, first name, title and extension while in the personal directory these are last name, first name and company. The column used for sorting is marked with a star so you don't have to remember which one you used. The order of the columns is not changed when they are sorted.

Screening Calls

Both directories also allow you to screen calls - apply call handling rules for a specific caller - with a few simple clicks of your mouse.

Navigating the Directory

The Corporate Directory provides both a paging and search tool for finding company employees. The Personal Directory requires you to scroll through entries. When combined with the sort functions, you should be able to easily find the desired information.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Using the Web Portal Corporate Directory

The Web Portal Corporate Directory provides a listing of all the employees within your company and allows you to do any of the following:

- Call from the directory
- Leave voice mail from the directory
- Set up Call Screening
- Add a person to a conference call
- Sort the directory

- Search the directory

The file containing the Corporate Directory stays in the PressOne system so that it is available to you from any PC with Internet access.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Calling From the Corporate Directory

1. Locate the entry for the person you want to call (See Searching the Directory).
2. Your telephone should be nearby. For details, see Using the Web Portal with Your Phone.
3. Click on the extension or telephone number of that person.

   HINT: *When dialing outside numbers, it is not necessary to dial the outside access digit.*

4. The Call Control window appears and displays call progress messages while you hear ringing through the speaker in your phone.
5. To end the call you can click on:
   - Release to hang up
   - Transfer to transfer the call
   - Hold to put the call on hold
   - Park to park the call

   NOTE: *You must have the features listed in Step 5 assigned to your phone for those features to be available from the Web Portal.*

Leaving Voice Mail from the Directory

Since the Corporate Directory is created by the PressOne system, it knows the voice mail address for each user (if the user has voice mail) and can connect you directly to the user's voice mail mailbox to leave a message. This eliminates having to call someone and wait for their greeting to play before leaving them a message.

To send voice mail directly to a user's mailbox:

1. Locate the person in the directory to whom you wish to send voice mail.
2. Click the Voice Mail button ( ) next to the desired entry listing.
3. Record your message.
4. Hang up or select additional options from the menu.

Screening Calls from the Directory

You can set up Call Screening actions (such as send to voice mail or forward to another number) for the callers listed in your directory.

1. Find the caller you want to set up a call screen action for.

2. Click the Options button ( ) next to the directory entry that you want to screen.

3. Click the phone number for the entry that you wish to screen (if there is more than one number).

4. Click **Add to Call Screening** to add a call screen action, or **Cancel** to exit back to the previous screen.

5. On the Call Screening display, select the desired **Default Action**. If desired, select one or more **Time of Day Action** for the number.

> **NOTE:** *The actions will be implemented from the top down. That is, Time of Day Action 1 will be implemented first, then Time of Day Action 2, etc. After enacting each Time of Day Action (if any are enabled), then the Default Action is implemented.*

6. Click Save to save the screening action for the selected number, or Cancel to exit.

Adding a Person to a Conference Call

You can add a person listed in either your Corporate or Personal directory to an *ongoing* Meet-Me Conference Call. When you click on the Meet-Me Conference button ( ) to the right of the directory entry, the Call Control dialog box will be presented showing that a call is being placed to connect the selected person to the conference call.

> ***NOTE:*** *You must already be logged into the conference yourself before you can add a person from your directory to the call.*

If you click the Conference button when there is no active conference call, the "No Active Call" message will be displayed at the top of the Call Control dialog box.

Sorting Corporate Directory Entries

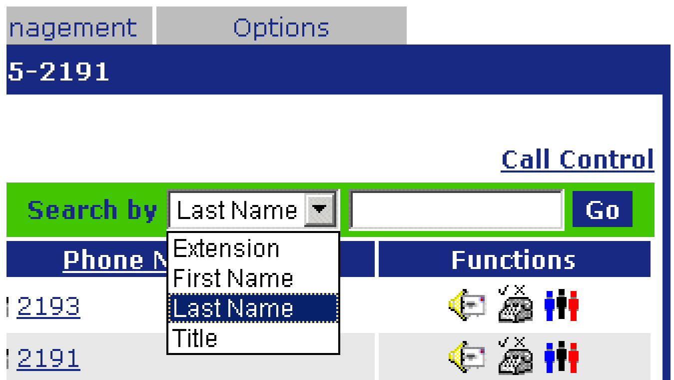
The list can be sorted in ascending (top-down.) order or descending order based on any of the columns that has an underlined title. Click a column heading to sort the list based on that column.

The column that is currently being used for sorting is marked with an up- or down-arrow. If the arrow is pointing down, then the list is sorted in ascending order (top-down, first to last, A-Z, etc.). If the arrow is pointing up, then the list is sorted in descending order based on that column.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Searching the Directory

You can search the directory for a particular entry using the pull-down menu at the top right corner of the screen.



The search menu allows you to find entries in the directory by:

- **Extension** when a number to search for is entered
- **First Name** with the desired name entered
- **Last Name** with the desired name entered
- **Title** with a title entered

Select the search type, then enter the string to search for in the text field and click the **Go** button to search for the entry. When it is found, the page that the entry is on will be displayed.

Using the Web Portal Personal Directory

The Web Portal Personal Directory provides you with a place to keep all your personally important telephone numbers and allows you to do any of the following:

- Add entries to the directory
- Import entries from a saved Comma Separated Value (CSV) file
- Delete entries from the directory
- Call from the directory (by clicking on the number)
- Send e-mail from the directory ( )
- Set up Call Screening ( )
- Add a person to a conference call ( )
- Sort the directory
- Search the directory

Adding and Editing Directory Entries

You can add entries to the Personal Directory through the Web Portal. The file containing the information stays in the PressOne system so that it is available to you from any PC with Internet access.

1. To add a new entry, click Add. To edit an entry, click on the Edit icon to the left of the name.
2. For adding or editing, enter the appropriate information in the fields.
3. Click Save to record the information in the Personal Directory.
4. If you decide you do not wish to continue adding or editing, click **Cancel**.

Importing Directory Entries from a CSV File

You can import an existing contact list that you exported from Outlook or Excel as a comma separated value (CSV) file.

Creating a CSV File

Outlook has an "Import and Export" feature under the File menu that allows you to export the Contacts list. A CSV file that has been exported by Outlook can be opened and edited in Excel. Also, a file can be created in Excel and then exported.

> **NOTE:** *If your CSV file was created in Excel and contains a long international number starting with a zero, the default cell size in Excel will display this number in exponential format. When this information is exported from Excel into a CSV file, the leading zero is no longer on the number. When the data is imported into Web Portal, the number will not be correct because the leading zero was not in the file that was imported.*

For example: phone number 011-845-882-2999, when entered in Excel with the standard cell width, will be displayed as 1.18459E+11. Therefore, 11845911 will be the number that gets exported to a CSV file by Excel.

To correct this problem, be sure to widen the columns in Excel so that the number is displayed correctly before you export it to a CSV file. This problem does not occur when exporting data from Outlook.

Checking the File Format

The CSV file that is being imported must be in a particular column order. Before attempting to import the file, open it in Excel and make sure the columns are in the following order:

- First Name
- Last Name
- Company

- Job Title
- Business Phone
- Business Fax
- Home Phone
- Mobile Phone
- Pager
- E-mail Address

Importing the File

To import a CSV file into Web Portal, do the following:

1. From the **Directory** menu, select **Personal Directory**.
2. Select the **Import** button at the bottom of the directory list.
3. On the Import page, if you want to import *all new* directory entries (none of the contacts in the CSV file already exist in your Personal Directory), then select the **Append** button.

   NOTE: *If you have contacts in the CSV file that have already been imported to the directory, and Append is selected, the import function will fail due to duplicate entries.*

4. If you want to *update* your existing Personal Directory entries because you added new contacts to the CSV file, then select the **Overwrite** button.
5. Type in the entire path name of the file you wish to import. If you do not know the path name, click **Browse** to search for the file.
6. Click **Upload File** to import the file.
7. A window will be displayed listing the contents of the file. Click the **Import** button to import the file. If you do not want to import the file shown or you wish to select a different file, click the browser's **Back** button.
8. If you clicked **Import**, you should get a message saying "Directory successfully imported".

Calling From the Personal Directory

1. Locate the entry for the person you want to call (See Searching the Directory).
2. Your telephone should be nearby. For details, see Using the Web Portal with Your Phone.
3. Click on the extension or telephone number of that person.

   HINT: *When dialing outside numbers, it is not necessary to dial the outside access digit.*

4. The Call Control window appears and displays call progress messages while you hear ringing through the speaker in your phone.

5. To end the call you can click on:

- Release to hang up
- Transfer to transfer the call
- Hold to put the call on hold
- Park to park the call

NOTE: *You must have the features listed in Step 5 assigned to your phone for those features to be available from the Web Portal.*

Deleting Directory Entries

When you are on the Personal Directory page, you can delete one or more entries. You may check multiple entries and delete them all at once.

1. Click Edit.

2. Click the checkbox in the Delete column for all the entries you wish to delete.

3. Click Delete to delete the all of the checked entries.

WARNING: *The deletion takes effect immediately when you click* **Delete**. *There is no confirmation dialog asking if you really want to delete the entries and there is no undo.*

Sending E-mail from the Directory

If an e-mail address is part of a directory listing, you can send e-mail from the Web Portal using the default mail program on your PC. You must be connected to the Internet to send the e-mail message.

To send e-mail to a person in the directory:

1. Locate the person in the directory.

2. Click on the e-mail button ( ).

3. If an email address has been specified in the directory entry, then the email will be addressed automatically. Otherwise, enter the email address for the person.

4. Enter your message and send it.

Screening Calls from the Directory

You can set up Call Screening actions (such as send to voice mail or forward to another number) for the callers listed in your directory.

1. Find the caller you want to set up a call screen action for.

2. Click the Options button ( ) next to the directory entry that you want to screen.

3. Click the phone number for the entry that you wish to screen (if there is more than one number).
4. Click **Add to Call Screening** to add a call screen action, or **Cancel** to exit back to the previous screen.
5. On the Call Screening display, select the desired **Default Action**. If desired, select one or more **Time of Day Action** for the number.

   NOTE: *The actions will be implemented from the top down. That is, Time of Day Action 1 will be implemented first, then Time of Day Action 2, etc. After enacting each Time of Day Action (if any are enabled), then the Default Action is implemented.*

6. Click Save to save the screening action for the selected number, or Cancel to exit.

Adding a Person to a Conference Call

You can add a person listed in either your Corporate or Personal directory to an *ongoing* Meet-Me Conference Call. When you click on the Meet-Me Conference button ( ) to the right of the directory entry, the Call Control dialog box will be presented showing that a call is being placed to connect the selected person to the conference call.

> ***NOTE:*** *You must already be logged into the conference yourself before you can add a person from your directory to the call.*

If you click the Conference button when there is no active conference call, the "No Active Call" message will be displayed at the top of the Cal)l Control dialog box.

Sorting Personal Directory Entries

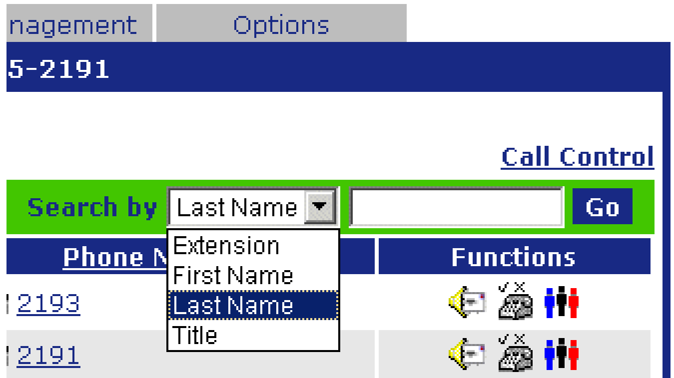
The list can be sorted in ascending (top-down.) order or descending order based on any of the columns that has an underlined title. Click a column heading to sort the list based on that column.

The column that is currently being used for sorting is marked with an up- or down-arrow. If the arrow is pointing down, then the list is sorted in ascending order (top-down, first to last, A-Z, etc.). If the arrow is pointing up, then the list is sorted in descending order based on that column.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Searching the Directory

You can search the directory for a particular entry using the pull-down menu at the top right corner of the screen.



The search menu allows you to find entries in the directory by:

- **Extension** when a number to search for is entered
- **First Name** with the desired name entered
- **Last Name** with the desired name entered
- **Title** with a title entered

Select the search type, then enter the string to search for in the text field and click the **Go** button to search for the entry. When it is found, the page that the entry is on will be displayed.

Chapter 5
Using Web Portal Meet-Me Conferencing

The Meet-Me Conference feature provides a list of scheduled conferences that multiple callers can dial into and be connected. Anyone can participate in a Meet-Me conference, but to schedule a Meet-Me Conference, your administrator must allow you access to the scheduling function. If you have not been granted scheduling permission, selecting the Conferences menu item will return a message that you are not authorized to schedule conferences.

From the Web Portal you can do the following:

- Schedule (Add) a Meet-Me Conference (with the proper authorization)
- Find a Meet-Me Conference
- Modify a Meet-Me Conference
- Delete a Meet-Me Conference
- Sort the conference listing

Scheduling a Meet-Me Conference

NOTE: *The Conferencing tab will only be present in your instance of the Web Portal if your Virtual Network and phone line's Class of Service is configured to allow Meet-Me Conferencing.*

You can create a new conference or find available conference times if the Meet-Me Conference system is heavily used and you want to be sure to get a time that is available with the number of ports for your callers.

To create a new conference:

1. Click on the **Conferencing** tab.
2. Click Add at the bottom of the list of conferences.
3. Enter a brief description of the topic of the conference in the Subject field.

   This helps members of the conference find it in the future if they need to be reminded of the time or number to call to join the conference.

4. Set the date and time for the conference to start using the pull-down lists.

   Fields are provided for month, day, year, hours and minutes. The time fields use a 24-hour clock.

5. Set the length of the conference using the **Length** pull-down list.

   NOTE: *The minimum length of a conference is 15 minutes. If you select a lenght of time less than 15 minutes, an error message will be generated. The length of a conference can be extended in increments of 5 minutes.*

6. Enter the expected **Number of Participants**.
7. Click Save to create the conference.
8. Click the **Conferencing** tab again to see the new conference listing.
   - The Moderator ID is the password that allows you to access the conference settings through the conference setup telephone number.
   - The Guest ID is the password that allows callers to access the conference through the conference join telephone number. You should provide the Guest ID and conference telephone number to those persons who are supposed to attend the conference.

Finding Available Conference Times

NOTE: *The Conferencing tab will only be present in your instance of the Web Portal if your Virtual Network and phone line's Class of Service is configured to allow Meet-Me Conferencing.*

1. Click on the **Conferencing** tab.
2. Click **Find** at the end of the list of your conferences.
3. Set the dates and times for the search period using the pull-down lists next to *Search starts* and *Search ends*.
   - Fields are provided for month, day, year, hours and minutes.
   - Conference start times are available only in 15-minute increments beginning on the quarter hour.
   - The time fields use a 24-hour clock.
4. Set the time of day during which your conference can be held using the pull-down lists in the hours and minutes fields next to the *Days start* and *Days end* fields.

   NOTE: *The time fields use a 24-hour clock.*

5. If weekends are available for conference calls and you will accept a weekend time (if available), make sure the *Include Weekends* checkbox is checked. (The default is not checked.)
6. Set the length of the conference using the pull-down list in the Duration field.
7. Enter the number of participants in the conference call in the Ports field.
8. Click **Search**.
9. A list of clickable possibilities will appear, if there are available possibilities that match your search.

10. Click one of the possibilities to open a screen with all the fields filled in except Subject.

    You can either enter a subject and be finished or adjust any of the fields and add a subject.

11. Click **Save**.
12. A screen appears confirming the conference has been scheduled and offering three choices:
    - Click **OK** to create the conference.
    - Click Modify to make a last minute change before creating the conference.
13. If you clicked **OK** and there were ports available at your time, you will see your conference listed in your conference listings.
    - The *Moderator ID* is the password that allows you to access the conference settings through the *MeetMe Setup* telephone number.
    - The *Guest ID* is the password that allows callers to access the conference through the *MeetMe Join* telephone number. You should provide the *Guest ID* and *MeetMe Join* telephone number to those persons who are supposed to attend the Meet-Me Conference.
14. If you clicked **Modify**, you will see a screen that shows the two IDs and allows you to change any of the conference parameters.
15. After making any changes, click **Save** and you are taken to the conference listings.
16. If you clicked **Delete**, you return to the conference listings.

Finding a Meet-Me Conference

NOTE: *The Conferencing tab will only be present in your instance of the Web Portal if your Virtual Network and phone line's Class of Service is configured to allow Meet-Me Conferencing.*

1. Click on the **Conferencing** tab.
2. Enter one or more of the following in the appropriate fields:
    - Moderator Name
    - Guest ID
    - Date (in MM/DD/YYYY format)
    - Subject

    TIP: *The more fields you can enter, the fewer conferences you will have to search through to find the correct one.*

3. Click Search.

4. A list of matching conferences is returned and can be sorted.

   NOTE: *Searching for a Meet-Me Conference will not provide you with the Guest ID if you have forgotten it, but will allow you to search your notes or planner for the ID based on the moderator or date and time of the conference call. If you cannot find the Guest ID, you will have to call the moderator to get it from them.*

Modify or Delete a Conference

NOTE: *The Conferencing tab will only be present in your instance of the Web Portal if your Virtual Network and phone line's Class of Service is configured to allow Meet-Me Conferencing.*

Modifying a conference

1. Click on the **Conferencing** tab.
2. Find the conference you want to modify.
3. Click on the Edit button ( ) to modify the conference parameters.
4. Click Save.

Deleting a conference

To delete a conference, click the red button in the Delete column on the desired conference listing.

Sorting Conference Entries

The list can be sorted in ascending (top-down.) order or descending order based on any of the columns that has an underlined title. Click a column heading to sort the list based on that column.

The column that is currently being used for sorting is marked with an up- or down-arrow. If the arrow is pointing down, then the list is sorted in ascending order (top-down, first to last, A-Z, etc.). If the arrow is pointing up, then the list is sorted in descending order based on that column.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Chapter 6
Using the Web Portal to Manage Voice Mail

NOTE: *The Voice Mail tab will not be available if you are using a SIP phone.*

Web Portal offers access to and management of your voice mail using the following tools:

- Accessing your Voice Mail Inbox
- Managing Saved Voice Mail
- Paging Notification
- Managing Voice Mail Distribution Groups
- Changing the Voice Mail Password

Managing Your Inbox and Saved Voice Mail

Voice mail messages that have not been read, saved or deleted are stored in the Inbox. These may include new messages as well as previously listened to messages. Voice mail is not removed from the Inbox after you listen to them until they are saved or deleted. Click on the **Voice Mail** tab, then the **Inbox** tab to see these messages.

Clicking on the **Saved** tab will display all voice mail messages that you have previously saved.

From the Web Portal you can do any of the following with voice mail messages:

- Play messages
- Forward messages
- Return a call to the caller
- Save or delete messages
- Sort messages

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Playing Messages

You can play voice mail messages through your phone or on the PC using the Web Portal.

1. Click on the **Voice Mail** tab, and select the **Inbox** or **Saved** tab
2. Find the message you want to play.
3. You can play the message two ways:
   - Click the Voice Mail () button to listen to the message on your PC speaker.
   - Click the  button listen to the message on your phone

   The Call Control Window will appear and the message will play. You can stop listening to the message at any time by clicking Release in the Call Control Window or you can wait for the message to end.

4. When the message finishes playing, the voice mail system hangs up.

   NOTE: *If you click Voice Mail button too soon after pulling up the Inbox page, you may get a dialog saying that the ActiveX component is not yet loaded. If this happens, simply wait a few more seconds before clicking on the button again. When this page first appears, there will be a small grey box under the Directory menu. When that box disappears, the ActiveX component is loaded.*

Returning Calls from the Call Log

1. Locate the entry/message to which you want to return a call.
2. Click on the extension or telephone number of that entry/message in the *Phone Number* column.
3. The Call Control window appears and displays call progress messages while you hear ringing through the speaker in your phone.
4. To end the call you can click on:
   - Release to hang up
   - Transfer to transfer the call
   - Hold to put the call on hold
   - Park to park the call

You must have the features listed in Step 4 assigned to your phone for those features to be available from the Web Portal.

Save or Delete Voice Mail

Voice mail can be saved or deleted from the Inbox and deleted from the Saved Voice Mail. Voice mail remains in the Inbox until saved or deleted and remains in Saved Voice Mail until deleted. Listening to voice mail does not cause it to be saved or deleted.

Saving voice mail (from the Inbox)

1. Find the voice mail message you want to save.
2. Click the **Select** checkbox at the end of the message so it is checked.
3. Repeat for as many messages as you want to save.
4. Click Move to Saved at the bottom of the message list.

The messages should be removed from the Inbox message list. If you select the **Saved** tab, you should see the saved messages in the message list.

Deleting voice mail

1. Find the voice mail message you want to save.
2. Click the **Select** checkbox at the end of the message so it is checked.
3. Repeat for as many messages as you want to delete.
4. Click Delete at the bottom of the message list.

The messages should be removed from the message list.

Forwarding Messages

You can forward voice mail messages under control of the Web Portal by creating a list of persons with voice mail mailboxes to receive the forwarded message.

1. Click on the Voice Mail tab and then either the **Inbox** or **Saved** tab. Find the message you want to forward.
2. Click the Forward button () in the Functions column.
3. On the next page, choose who you want to forward the message to:
   - click the **Add Extensions** button to select an individual to forward the message to. To select one or more extensions, click the **Select** checkbox and click **Save**.
   - click the **Add Distribution Groups** button to select a Voice Mail Distribution Group that you want to receive the message. Click the ***Select*** checkbox next to the desired group(s) and click **Save**.

4. On the *Forwarding* screen, click the **Select** checkboxes for all of the destinations where you want to send the voice mail.

   NOTE: *To remove a name from the list, click the* **Select** *checkbox next to the entry, and click* **Delete***.*

5. Click **Forward** to send the voice mail.

Managing Voice Mail Distribution Groups

Voice mail distribution groups allow you to send or forward messages to multiple users using a group name. You may have up to 20 personal distribution groups. You may also see company-wide distribution lists. These lists are available for your use, but you cannot edit them.

This screen allows you to:

- Add a distribution group
- Edit an exisiting group
- Delete a group

You can click on the column heading to sort the groups by Name or Number. The column used for sorting is noted by a star next to the column heading. The order of the columns is not changed when they are sorted.

ID numbers 80-99 are assigned to the groups by the PressOne system and cannot be changed. You can name the group when it is created and change it at any time using the edit feature.

When you create a group for the first time, the Name field will contain the default name "New Group" and there will be no members listed for the group. Once you save the new group, it will then appear in the Voice Mail Lookup list as a valid voice mail target.

Create a New Voice Mail Distribution Group

1. Click on the **Voice Mail** tab, then select **Dist. Groups**. Click Add.
2. Click the **Add Members** button.
3. Click the ***Select*** checkbox next to each entry in the listing that you want to add to the Distribution Group.

   NOTE: *You can search for users by clicking on the alphabet at the top of the Voice Mail Lookup window.*

4. By default, the new distribution group will be named "Dist Group NN" where NN is a sequential number. To give the group a more specific name, click **Change Distribution Group Name**.
5. Click Save.

6. Click the Voice Mail tab to return to the Distribution Groups main screen.

Editing an Existing Voice Mail Distribution Group

You can modify the members of a distribution group and the group's name using the Web Portal. To edit a distribution group, click the **Voice Mail** tab and **Dist. Groups** tab, then following the instructions below.

Changing the Name of the Distribution Group

1. Click the Edit button ( ) next to the entry in the group list that you want to modify.
2. Click the **Change Distribution Group Name** button.
3. Enter a new name for the distribution group, and click **Save**.
4. Click the **Voice Mail** tab again to return to the Distribution Group listing.

Adding Members

1. Click the Edit button ( ) next to the entry in the group list that you want to modify.
2. Click the **Add Members** button.
3. Enter a new name for the distribution group, and click **Save**.
4. For each extension you want to add, click the **Select** checkbox so that it is checked.
5. Click **Save**.
6. Click the **Voice Mail** tab again to return to the Distribution Group listing..

Deleting Members

1. Click the Edit button ( ) next to the group that you want to modify.
2. For each member you want to delete, click the Select checkbox so that it is checked.
3. Click Save.
4. Click the **Voice Mail** tab again to return to the Distribution Group listing.

Delete a Distribution Group

1. Click on the **Voice Mail** tab, then select the **Dist. Groups** tab.
2. For each group you want to delete, click the Select checkbox so that it is checked.
3. Click Delete.

Sorting Messages

The list can be sorted in ascending (top-down.) order or descending order based on any of the columns that has an underlined title. Click a column heading to sort the list based on that column.

The column that is currently being used for sorting is marked with an up- or down-arrow. If the arrow is pointing down, then the list is sorted in ascending order (top-down, first to last, A-Z, etc.). If the arrow is pointing up, then the list is sorted in descending order based on that column.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Setting Voice Mail Paging Notification

The VOISS system provides the ability for you to be alerted on your mobile phone or pager that you have received a voice mail message.

1. Click on the **Voice Mail** tab and select the **Paging** tab.
2. From the ***Notification for*** pull-down menu, select the type of calls you want to be notified of (**Urgent Calls** or ***All Calls***). Select ***None*** to disable paging.
3. Click on the *Pager Type* pull-down list and select the type of pager (***Numeric***, ***Voice Call*** or ***E-Mail***).
4. In the ***Pager Number*** field, enter the phone number for a numeric or voice pager or the e-mail address for an e-mail page in the following format:
   - For numeric or voice call paging use: 0-9, #, *, - spaces, parenthesis, commas (ex. 1-800-555-5555, 1762, (972)354-5555)
   - For e-mail, use valid E-mail addresses (ex. mybestfriend@sprint.com.)
5. In the ***Pager Message*** field, enter text information that you want to be sent to a numeric or e-mail pager.

Remember that mobile devices support different types of alerts:

- Basic numeric pages accept only keypad phone digits (1-0, * and #).
- Some cell phones support voice streaming.
- Some cell phone models can receive text-only e-mails.
- E-mail pagers accept text-only e-mail messages.

What You Receive with Paging Notification

Numeric - You receive the information you entered in the Pager Message field when you set up the pager option. The information could be the phone number of the voice mail system or a code that means something to you.

Voice - When you answer the page, voice mail plays a welcome announcement followed by a request for your voice mail account password. Enter your password and listen to the normal voice mail menu options. If the voice message is marked as "Urgent", the first voice message you receive is the urgent message. When someone leaves a voice mail message on your phone, the system immediately dials your pager or cellular phone. The system tries to reach you every five minutes, up to three times if you don’t answer. If you take the call, but you don’t enter digits at the prompt, the system acts like you never answered the call and continues trying to reach you as stated above. If you have caller id, your “office” phone number/name is displayed as the caller.

E-Mail -The message you receive reads as follows:

- Subject: Voice Mail from <calling party>
- Body: the text you enter (for example, Important voice mail, check immediately.)

If you leave the body empty, you get the following:

<calling party> called you on <date> at <time>.

- calling party = name, if known, and telephone number
- date = system date
- time = system time

Changing the Voice Mail Password

You may wish to change the voice mail password from either

- the default provided by your system administrator to give you initial access to the system; or
- from a password that has been compromised (someone figured it out, you had to tell someone so they could retrieve information for you, etc.)

To change the password:

1. Enter the old password in the ***Current Password*** text box.
2. Enter the new password in the ***New Password*** text box.
3. Enter the new password in the ***Confirm Password*** text box.
4. Click Submit.

Chapter 7
Using the Web Portal Options

The Web Portal **Options** menu provides functions for the Web Portal application as well as provides some configuration functions for the PressOne phone.

- Change Password – Allows you to change the password for your PressOne telephone and for the Web Portal.
- Remote Phone – Allows you to set up a remote phone to act as if it were the VOISS phone. Instead of placing and receiving calls from the PressOne phone, calls are made and answered from the Remote Phone. The CallerID presented on outgoing calls and the features available to the user while connected remotely make it appear to all concerned like the user is calling from the PressOne phone.
- Reassign Phone – Allows you to to reassign your phone number to a different physical phone. You can also unassign the phone number and place the phone in "out of service" mode.
- Modify your Profile – Allows you to configure specific features of the Web Portal.
- PC Integration – Allows you to download and run the PressOne TAPI application that allows TAPI-enabled programs, such as Microsoft Office, to dial through the PressOne system.

Remote Phone

NOTE: *The* ***Remote*** *tab appears under the* ***Options*** *tab only if the user has a Remote Phone button on their phone set up by the System Administrator.*

The Remote Phone feature provides the capability to set up a remote phone to act as if it were the PressOne phone. Instead of placing and receiving calls from the PressOne phone, calls are made and answered from the Remote Phone.

WARNING: You cannot dial 911 from the Remote Phone *while connected to the PressOne system. An attempt to dial 911 will produced a message telling you to hang up the phone first (which disconnects the Remote Phone feature), then dial 911.*

Your Caller ID on outgoing calls and the features available to you while connected remotely make it appear to all concerned like you are calling from your PressOne phone. For example, you could configure your cell phone to be your remote phone, and it would appear to be your PressOne phone. All calls coming into your PressOne (office) phone would ring your cell phone instead. All calls placed from the remote phone will look on the receiver's caller ID as if they are being placed from your PressOne phone.

> **NOTE:** *The Web Portal will only show the Remote Phone enabled status if the remote phone was activated from the Web Portal. If the remote phone was enabled by dialing into the PressOnesystem from the remote phone, the active status will not be shown on the Web Portal display.*

You can disconnect from an outgoing or incoming call by pressing "###". However, if you simply hang up the remote phone, then the remote status is disabled and the remote phone is no longer connected to the PressOne system.

To set up a Remote Phone:

1. From the **Options** menu, select **Remote Status**.
2. Click the **Enable Remote User** checkbox to activate the Remote Phone.
3. If desired, click the **Enable Remote Caller ID** checkbox to show the caller ID of the incoming call.
4. Enter a **Remote Phone Number** to be used as the Remote Phone.

   NOTE: *Be sure that the phone number you enter is a valid phone number.*

5. If desired, select a number of seconds to **Ring the Remote Phone** from the pull down list.
6. Click **Save**.
7. Go to a Phone Directory and make an outgoing phone call. This will cause the PressOne system to call the remote phone number and, when it is answered, it will configure that phone as the remote phone. Then it will place the outgoing phone call from the remote phone.

   NOTE: *If the remote phone is not answered in 30 seconds, then the PressOne system will disconnect and the remote phone will not be set up.*

Changing the Web Portal Password

You may wish to change the Web Portal password from either

- the default provided by your system administrator to give you initial access to the system; or
- from a password that has been compromised (someone figured it out, you had to tell someone so they could retrieve information for you, etc.)

To change the password:

1. Enter the new password in the *Password* text box.
2. Enter the new password in the *Confirm Password* text box.

3. Click Submit.

If the information displayed does not seem to be up-to-date, see Web Browser Settings.

Reassign Phone

This page of the Web Portal allows the user to reassign their phone number to another physical phone. For example, if you will be working in a different office, you may want your extension to ring in that office instead the usual location.

Requirements

The following conditions are required before you can successfully reassign a phone extension:

- The new phone must be the same type of phone that the number was originally assigned to.
- The new phone must be "out of service", meaning that it currently does not have a number assigned to it. If the phone already has a number assigned to it, you can **unassign** the phone using one of the following methods:
  - Log into that phone from the **Web Portal**, click on the **Options** menu, select the **Reassign** tab, and erase the MAC address shown. Click on the **Save** button. A dialog will ask if you want to unassign the phone. Click **OK** to unassign the phone, or **Cancel** to exit without changing it.
  - On the phone itself, enter the Internal Access Code (default 588) to enter the phone configurator. Follow the prompts to unassign the phone.

To Reassign the Phone

WARNING: *Be sure the phone to be reassigned is not being used for an active call. The phone* ***can*** *be reassigned while in an active call.*

1. Click the **Reassign** tab on the **Options** page. On the new phone, locate the 12-digit MAC address, usually found on a sticker on the underside of the phone.
2. Enter the MAC address in the **MAC Address** field and click the **Save** button.

Modifying Your Profile Settings

When you click on **Options**, then Profile, you can modify several configuration settings for your phone.

Home Page – You can choose which page the Web Portal displays on startup.

Rows Per Page – Choose how many rows you wish to display per page.

Seconds Before Voice Mail – Specify how many seconds your phone should ring unanswered before it is transferred to your voice mail box.

If you modify any of these settings, click the **Submit** button to make them take effect.

PC Integration

The PC Integration tab (from the Options tab) allows you to download the VOISS TAPI (Telephony Application Program Interface) Service Provider application. TAPI is a standard program interface that lets you and your computer "talk" over telephones or video phones to people or phone-connected resources elsewhere in the world. TAPI integration allows TAPI-enabled programs, such as Microsoft Office, to dial through the VOISS system.

> **NOTE:** *The PC Integration tab is visible only if the system administrator has configured your phone to be TAPI-enabled.*

To set up TAPI on your PC:

1. Click the **Options** tab.
2. Click the **PC Integration** tab.
3. Click **Install VOISS TAPI Service Provider** to begin the installation process.
4. On the dialog box that pops up, select a method for the installation and click **OK**. We recommend you select the **Save this program to disk** option so that the install is available if needed again.

   NOTE: *The IP address shown in the location notice will be the IP address of the web server the Web Portal is connected to.*

5. Choose where to save the TAPI.EXE file and click **Save**.
6. On your PC, find the TAPI.EXE file and double-click it to run the installation procedure.
7. Follow the instructions provided to install the software.

   NOTE: *Before you can dial from the TAPI-enabled program, you must configure Windows for TAPI configure Windows for TAPI and configure Outlook (or other dialing program) configure Outlook (or other dialing program) to use the VOISS telephone line.*

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