Optimum Lightpath Hosted Voice CommPortal User Guide

Version 11.08.10

Table of Contents

1   Introducing CommPortal

CommPortal provides a web interface to your phone settings and allows you to:

- view recent calls

- view and listen to your voicemails

- set up your contacts

- change your phone's and phone system's settings.

1.1   Accessing

To access CommPortal point a browser at http://www.optimumlightpathvoice.com/

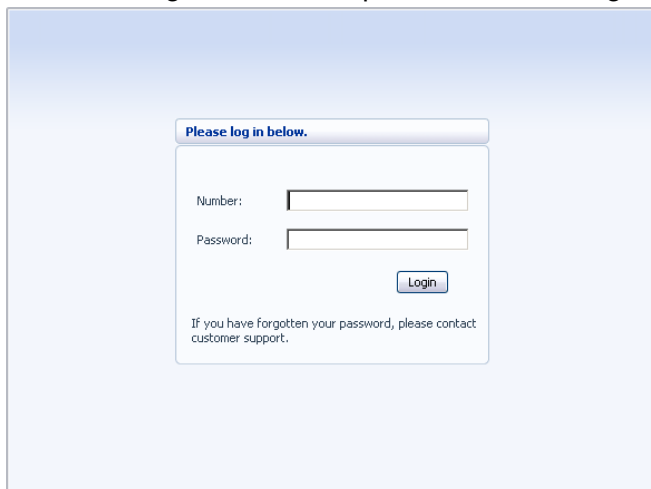CommPortal is supported on Windows 2000, Windows XP, Windows 2003 and Windows Vista, using the following browser versions:

- Internet Explorer 6
- Internet Explorer 7
- Mozilla Firefox 2.0

JavaScript must be enabled on your browser.

1.2   Logging In

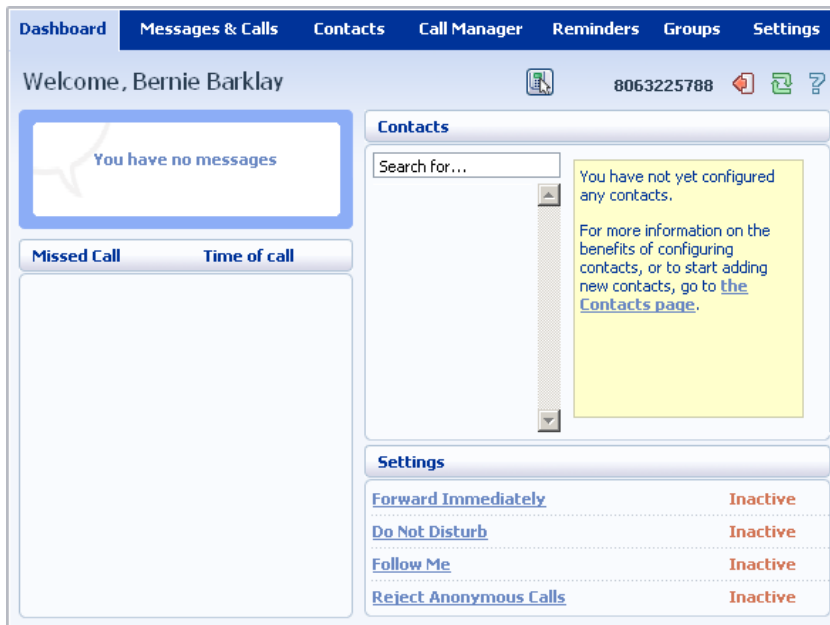The following shows a sample CommPortal login page.

To log into CommPortal enter your phone number and your password, and click on *Login*.

1.3   Using CommPortal

Once you have logged in, you will see the CommPortal Dashboard. This gives you a quick at-a-glance summary of your messages, missed calls, contacts and phone settings.

Along the top of the window are a series of tabs which you can select to take you to the different pages within CommPortal.
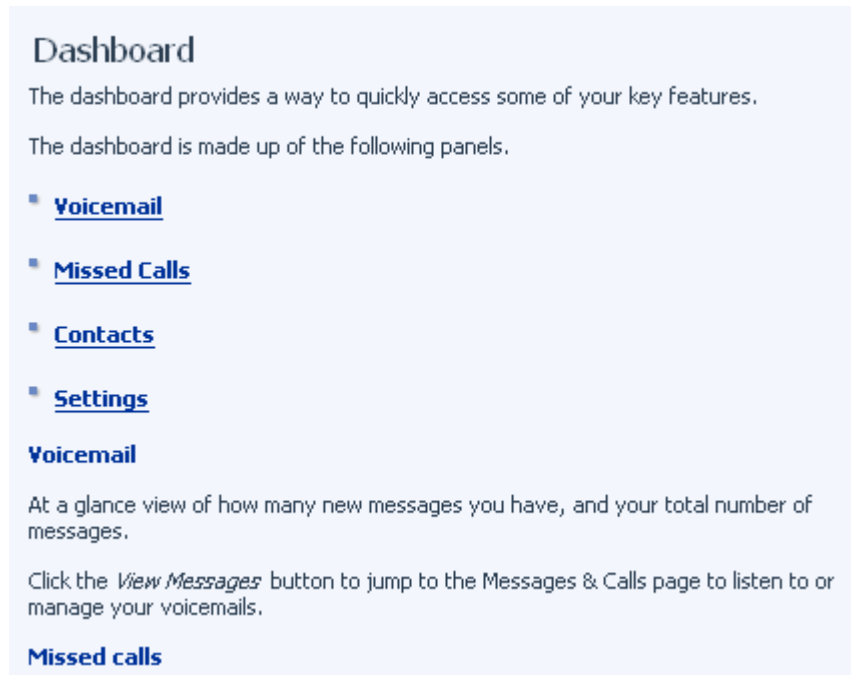
- **Dashboard**. This is the at-a-glance summary you see when you first log into CommPortal.

- **Messages & Calls**. This shows you all of your voice and fax messages, and the calls you've made, answered or missed.

- **Contacts**. You can add and view all of your contacts and their phone numbers in this tab.

- **Call Manager**. The Call Manager page lets you configure the services on your phone line, like Call Forwarding and Selective Call Rejection.

- **Reminders**. This page allows you to set up reminder calls.

- **Groups**. Here you can view any groups your line is part of in your business, such as hunt groups. You can also login and logout of groups here.

- **Settings**. The Settings page gives you access to numerous other options, such as changing your passwords and PINs, and configuring the keys on your phone.

Using the functions in each of these pages is described in more detail in the rest of this document.

1.4   Getting Help

If you need some assistance with using CommPortal, you can click on the Help icon: ⏳ .

This will cause another browser window to pop-up with help for the page you are currently using:

Dashboard

The dashboard provides a way to quickly access some of your key features.

The dashboard is made up of the following panels.

- **Voicemail**

- **Missed Calls**

- **Contacts**

- **Settings**

Voicemail

At a glance view of how many new messages you have, and your total number of messages.

Click the *View Messages* button to jump to the Messages & Calls page to listen to or manage your voicemails.

Missed calls

1.5   Refreshing a Page

If you want to refresh a page, for example to check whether you've received any new voicemails since you last looked, you can click on the Refresh icon: 🔃 .
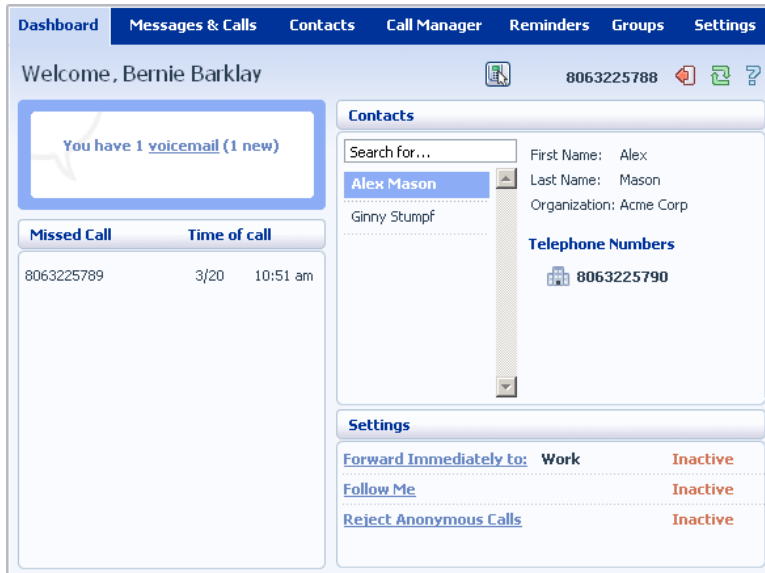
1.6   Logging Out

If you don't use CommPortal for 30 minutes you will be automatically logged out. However, if you wish to manually log out, for example because you've been accessing CommPortal using a shared computer, you can do this by clicking the Logout icon: ↩ .

1.8 CommPortal Dashboard

The CommPortal Dashboard is shown when you log into CommPortal and gives you an at-a-glance summary of your phone line. In this section we'll examine the Dashboard in more detail.
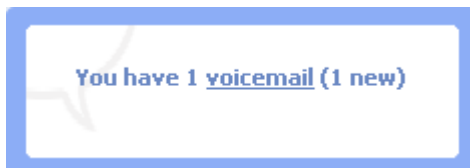
Dashboard example:

1.9 Messages

In the top left hand corner you can see if you have any new voice messages:

To view and listen to new messages, click on the *voicemail* link. This will take you to the Messages & Calls page.

1.10 Missed Calls

This section shows you the most recent calls which you have missed:

Missed Call	Time of call
8063225789	3/20 10:51 am

To see other types of calls, go the Messages & Calls page, described in Section 2.

1.10.1 Call Back

To call back a number whose call you missed using Click To Dial, follow these steps:
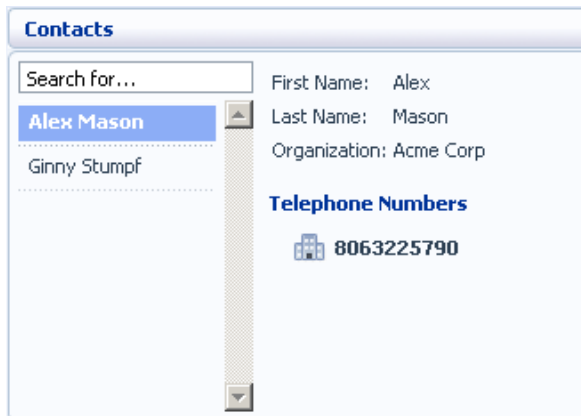
1. Right click on the number of the caller.

2. Select the *Dial* option.

Missed Call	Time of call
8063225789	3/20 10:51 am
Dial 8063225789	
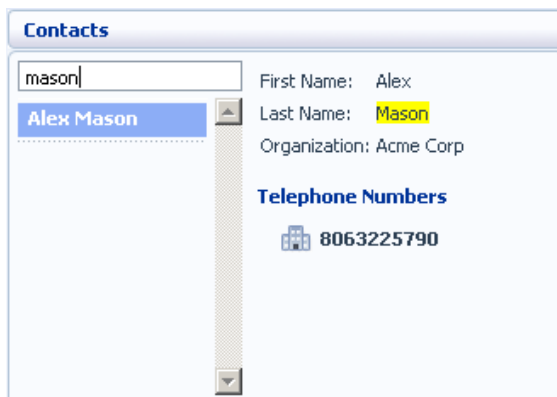
1.11   Contacts

The Contacts section displays all of your contacts and allows you to search them:

To search, enter the letters you want to search for in the text box. CommPortal will narrow down the contacts displayed as you type, and the text that matches your search will be highlighted in yellow:

To cancel the search and view all of your contacts, delete the search text you entered.

To add, modify or delete Contacts.

1.11.1 Calling a Contact

To call a contact using Click To Dial, follow these steps:

1.   Right click on the number of the contact you wish to call.

2.   Select the *Dial* option.
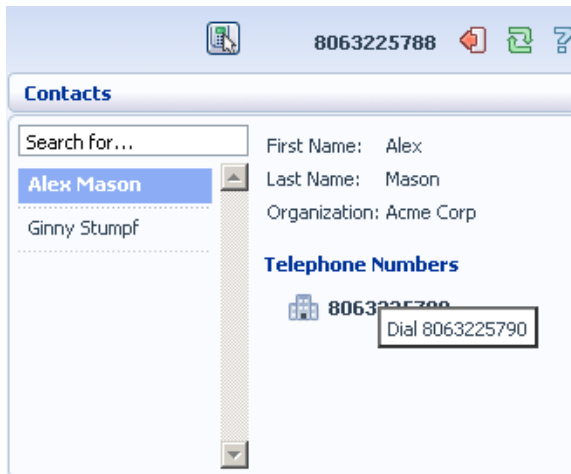
1.12   Settings

Your main settings will be shown at the bottom right of CommPortal. This shows you the current status of your main phone line settings:

In the example above Call Forwarding Immediate, the Follow Me service and Anonymous Call Rejection are all inactive (disabled).

To change one of these settings you can either click on the link for that setting, or select the Call Manager page.

2   Messages & Calls

The Messages & Calls page has a number of sections which you can select by clicking on the tab:
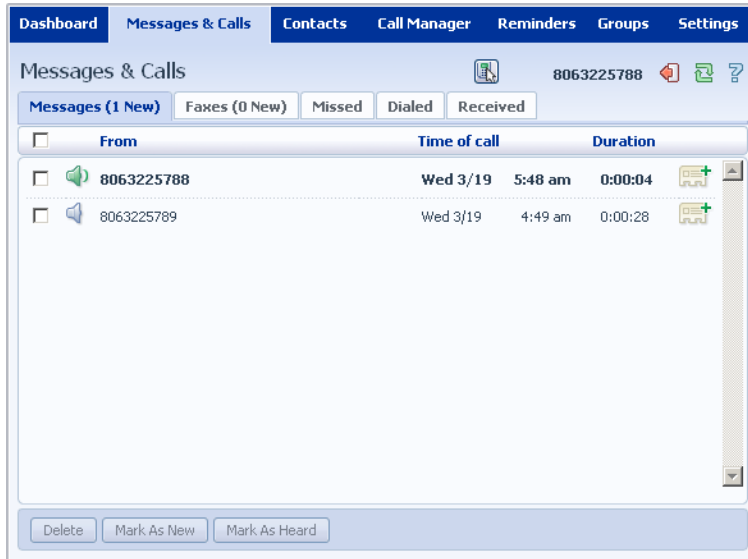
- **Messages** shows you all of your new and stored voice messages.

- **Faxes** shows you any new and stored fax messages.

- **Missed** displays the recent calls you have received and not answered.

- **Dialed** displays the recent calls you have made, including those made by Click To Dial as described in Section 8.

- **Received** shows the recent calls you have answered.

Each of these sections is described in more detail below.

2.1   Messages

This shows you all stored voice messages, both those you have listened to and those you haven't. Unheard messages are shown in bold:
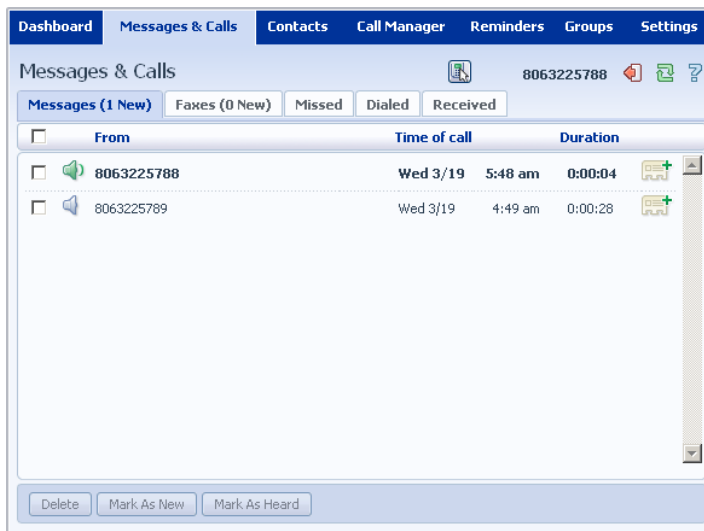
2.1.1 Listen To a Message

To listen to a message click on the loudspeaker icon to the left of the message: 🔊 .

This will pop up a Voicemail player, which loads and plays the message.
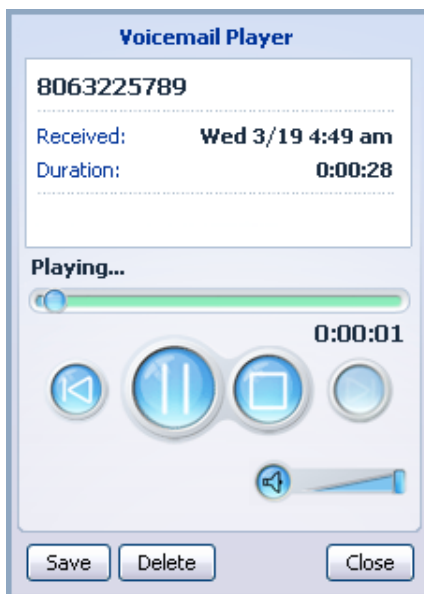
With this player you can:

- See when the message was received and how long it is.

- Pause, rewind and fast forward the message.

- Mute the player or change the volume.

- Delete the message, or Save it to disk.

- Close the player.

2.1.2 Deleting a Message

To delete a voice message:

Select the voice message (or messages) to delete by selecting the checkbox to the left of the message:
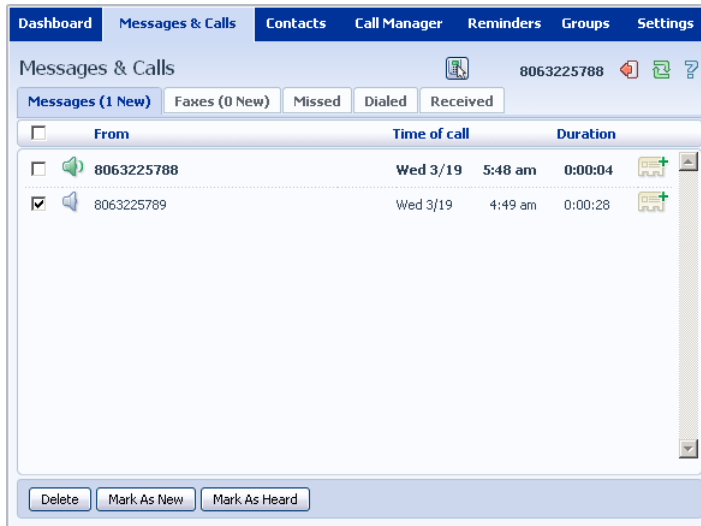
Click on *Delete*.

2.1.3 Marking a Message as Heard

Listening to a voice message will mark it as heard. If you want to mark a message as heard without listening to it:

1. Select the voice message (or messages) to mark as heard by selecting the checkbox to the left of the message:
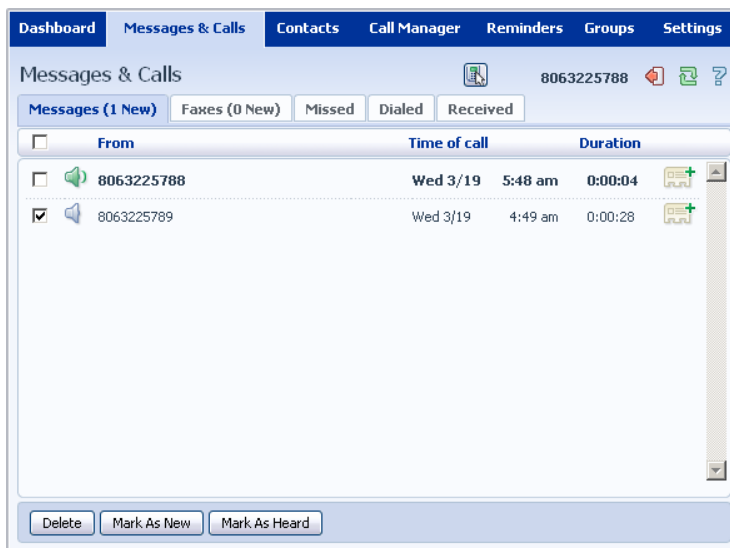
Click on *Mark As Heard*.

2.1.4 Marking a Message as New

To mark a message as new:

1. Select the voice message (or messages) to mark as new by selecting the checkbox to the left of the message:

Click on *Mark As New*.
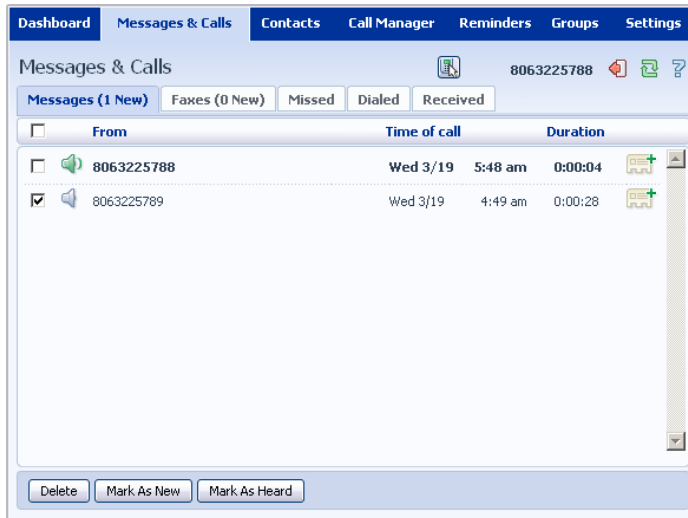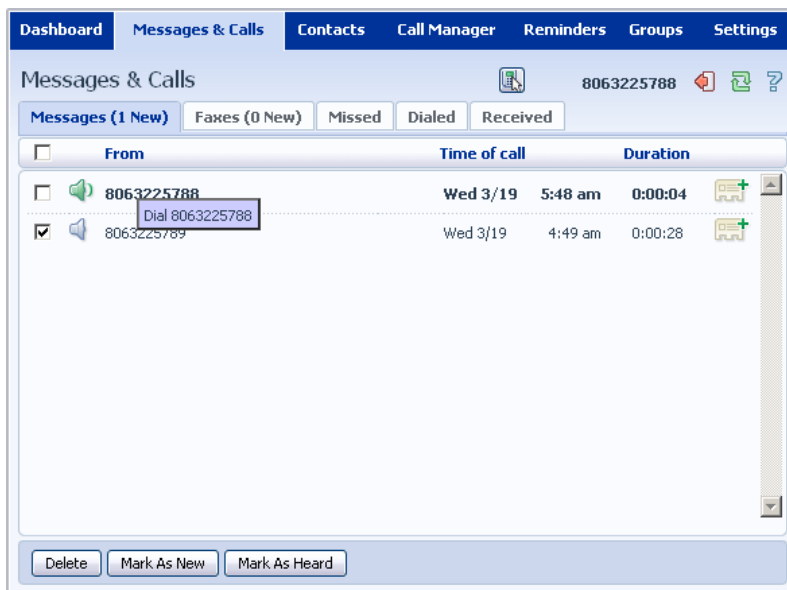
2.1.5 Call Back

To call back a caller who left you a voice message:

1. Right click on the number of the caller.

2. Select the *Dial* option.

2.1.6   Add Caller to Contacts

To add the number of someone who left you a voicemail to your Contacts:
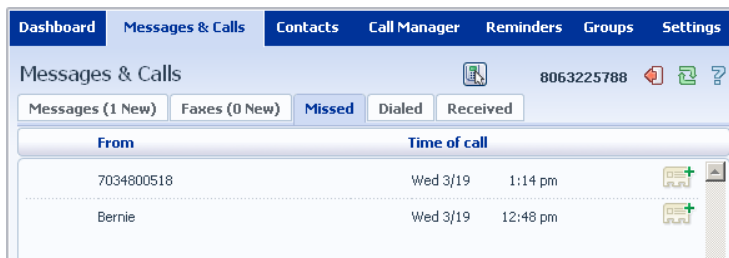
1. Click on the Add to Contacts icon to the right of the voicemail: .

2. This will take you to the Contacts page. Enter the details for your new contact and click on *Save*.

2.2   Faxes

The Faxes tab lets you view your read and unread fax messages in the same way as the Messages tab does for voice messages.
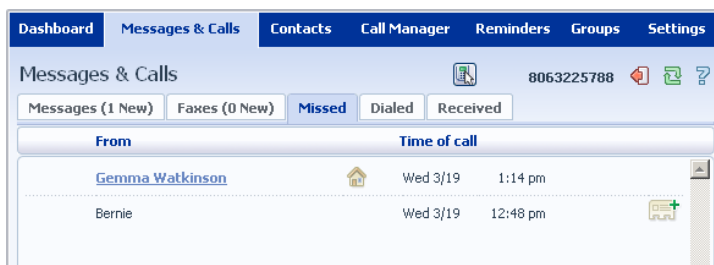
2.3   Missed

The Missed section shows you the recent calls that you have received but did not answer:

If a caller is in your Contacts list then their name will be shown instead of their number, and an icon indicating which of that Contact's numbers they used to call you:

2.3.1   Add Caller to Contacts

To add the number of someone who called you to your Contacts:

1. Click on the Add to Contacts icon to the right of the call information: .

2. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*.

2.4 Dialed

This page shows you all of the recent calls you have made, including those which you made using Click To Dial (described in Section 8):
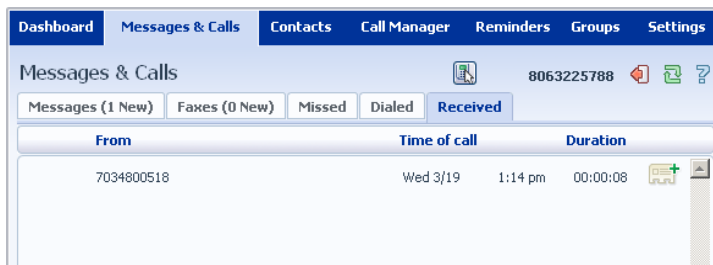
2.4.1 Add Dialed Number to Contacts

To add the number of someone you called to you to your Contacts:

1. Click on the Add to Contacts icon to the right of the call information: .

2. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*.

2.5 Received

This page shows you all of the recent calls you have answered:

2.5.1 Add Number to Contacts

To add the number of someone who called you to your to your Contacts:

1. Click on the Add to Contacts icon to the right of the call information:

2. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*.

3   Contacts

The Contacts page consists of a number of different sections, which you can select by clicking on the tabs:
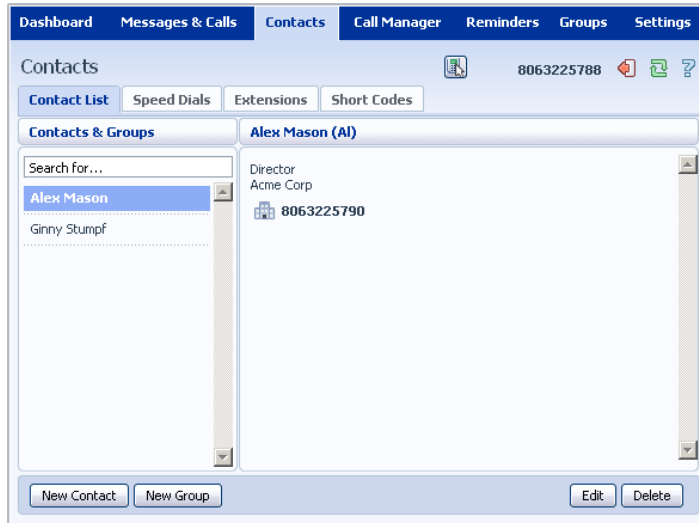
- **Contact List** allows you to manage your personal contact list.

- **Speed Dials** is where you configure your numeric speed dials.

- **Extensions** shows you the extensions within your business.

- **Short Codes** shows you your business's numeric speed dials.

Each of these sections is described in more detail below.

3.1 Contact List

The Contact List shows you all of your contacts:
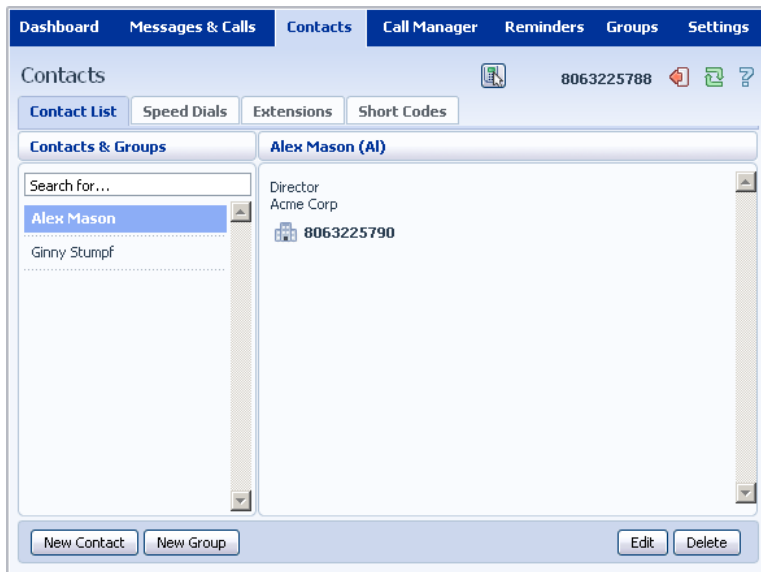
3.1.1 Searching

To search, enter the letters you want to search for in the text box. CommPortal will narrow down the contacts displayed as you type, and the text that matches your search will be highlighted:
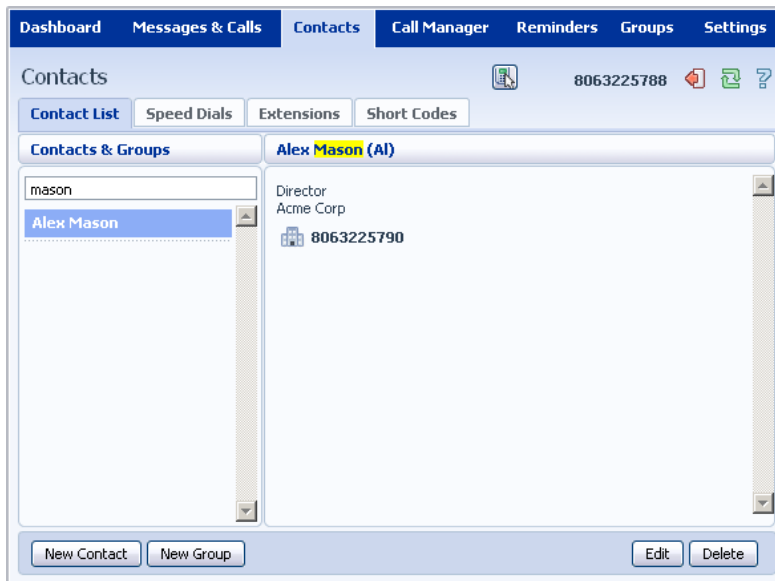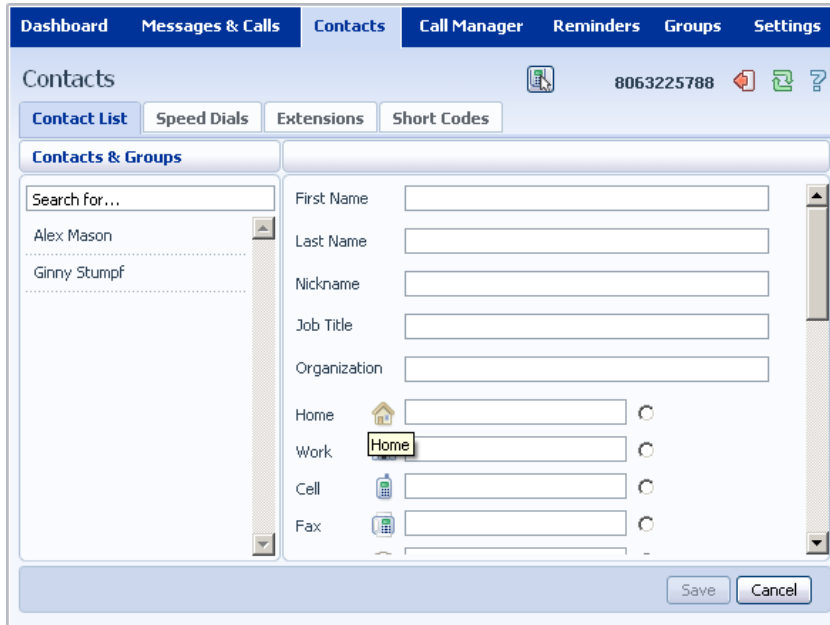
To cancel the search and view all of your contacts, delete the search text you entered.
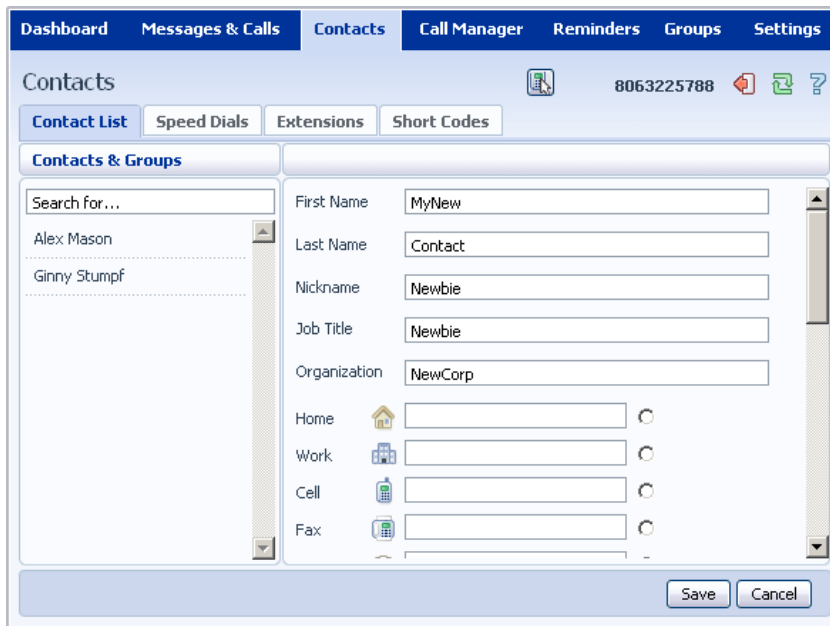
3.1.2 Add a New Contact

To add a new Contact:

1. Click on *New Contact*.
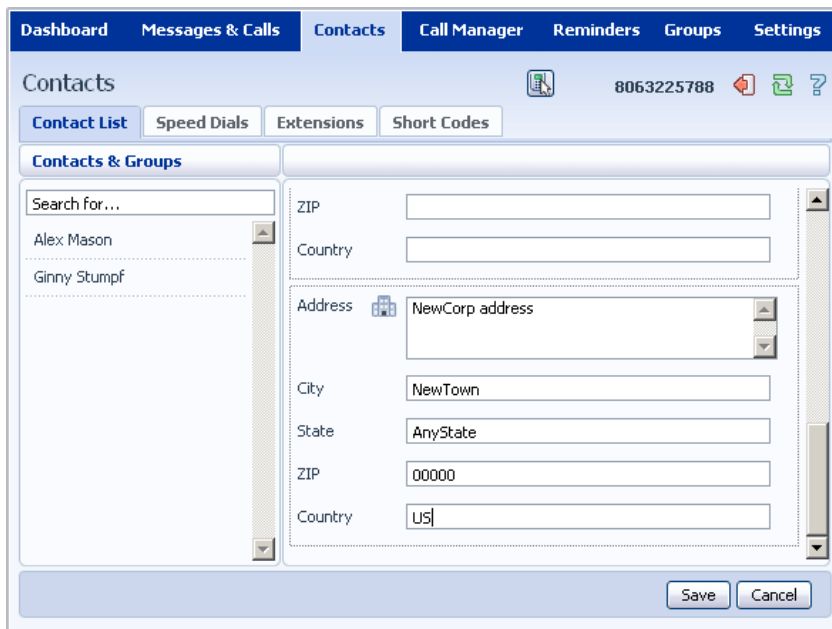
Enter the details for your new contact in the text boxes provided.
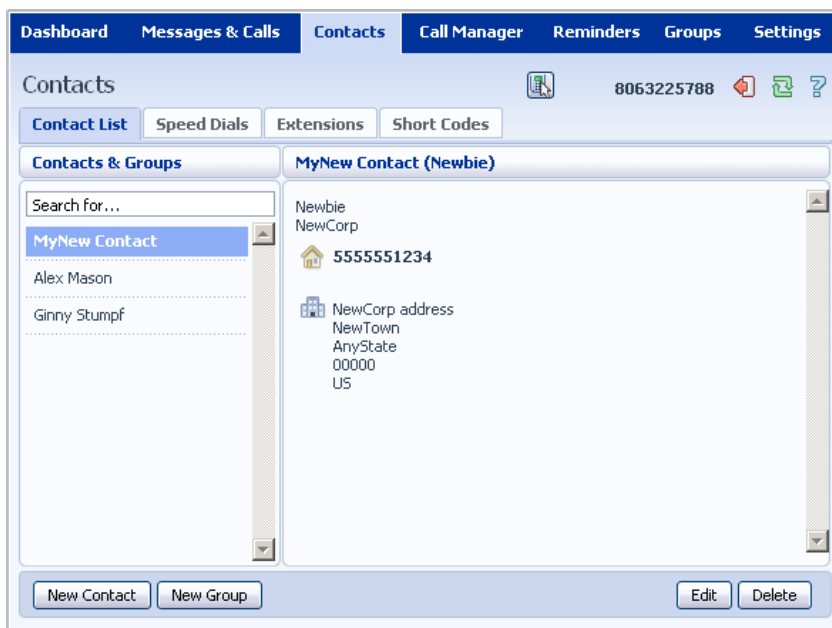
Enter any phone numbers for your contact in the text boxes provided. You can select the radio button to the right of a number to indicate that it is the preferred number for this Contact.

Enter any addresses for your contact in the text boxes provided.

Hit *Save*. - You new contact will now have been added.

3.1.3 Editing a Contact

To edit a contact:

1. Select the contact you wish to edit from the list on the left hand side of the screen.

2. Click *Edit*.

3. Modify or add any details.

4. Click *Save*.

3.1.4 Deleting a Contact

To delete a contact:

1. Select the contact you wish to delete from the list on the left hand side of the screen.

2. Click *Delete*.

3.1.5 Calling a Contact

To call a contact using Click To Dial:

1. Right click on the number of the contact you wish to call.

2. Select the *Dial* option.
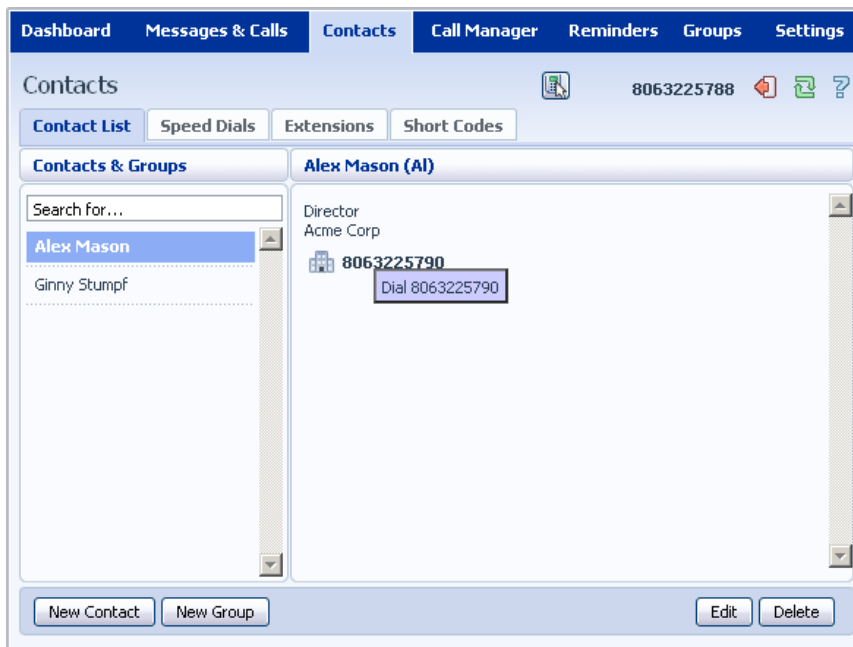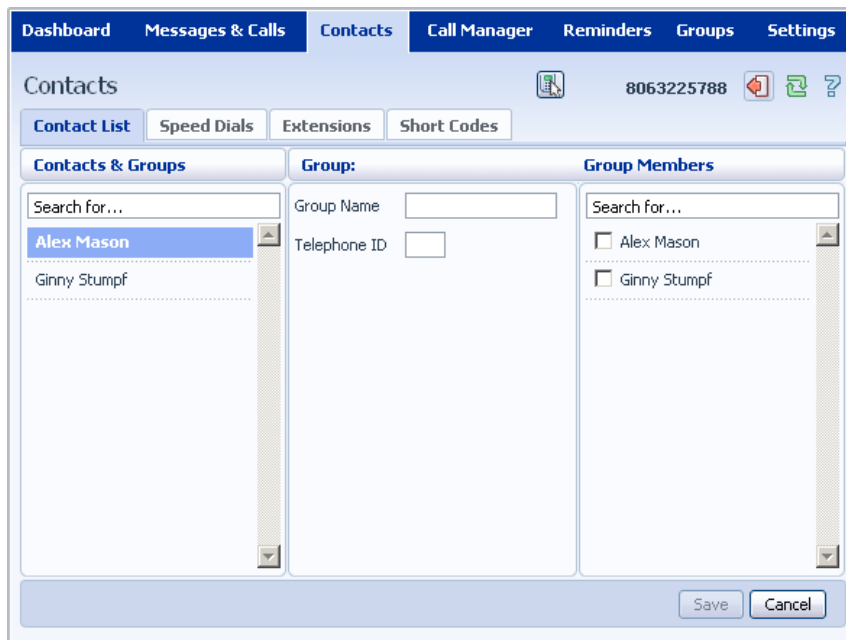
3.1.6 Groups

You can manage your contacts by assigning them to groups. For example you might have a group for "Work" contacts and another group for "Personal" contacts.

To add a new group:

1. Click on *New Group*.
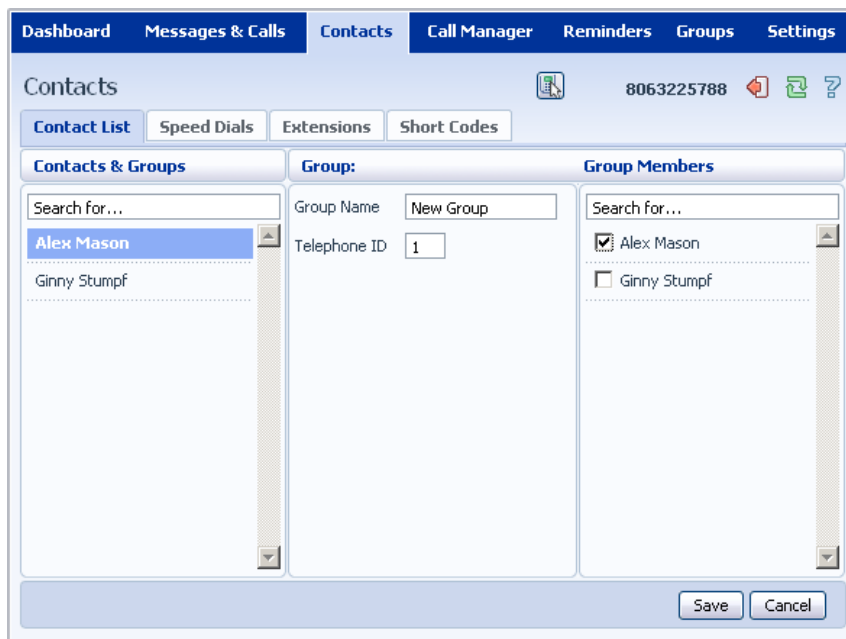
Enter a name for the group in *Group Name*.

Enter an ID for the group in *Telephone ID*.

Select any contacts you want to be in the group from the list on the right hand side.

Click on *Save*.

The new group will now appear in the *Contacts & Groups* section:
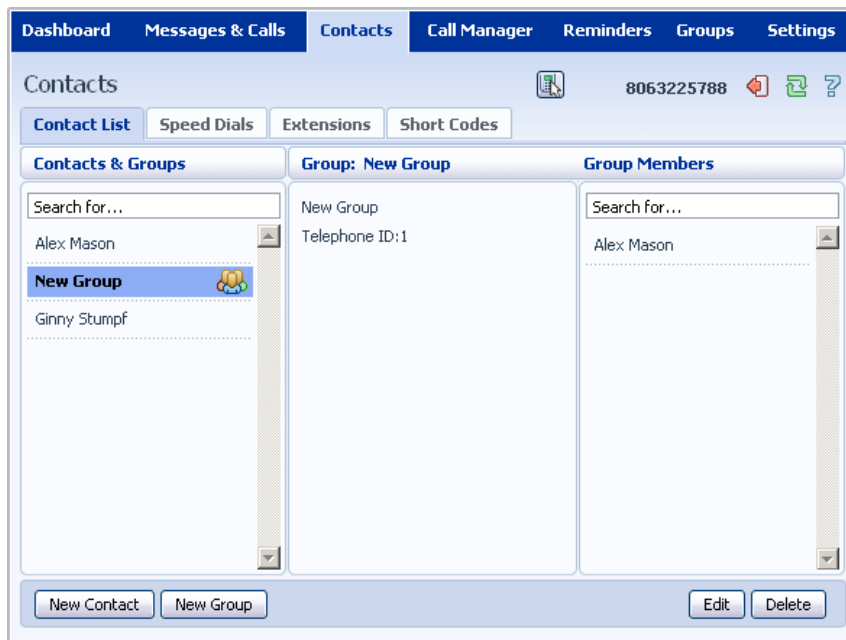
By selecting a group you can search within it for the group members, by using the Search for box on the right hand side of CommPortal.

To edit a group:
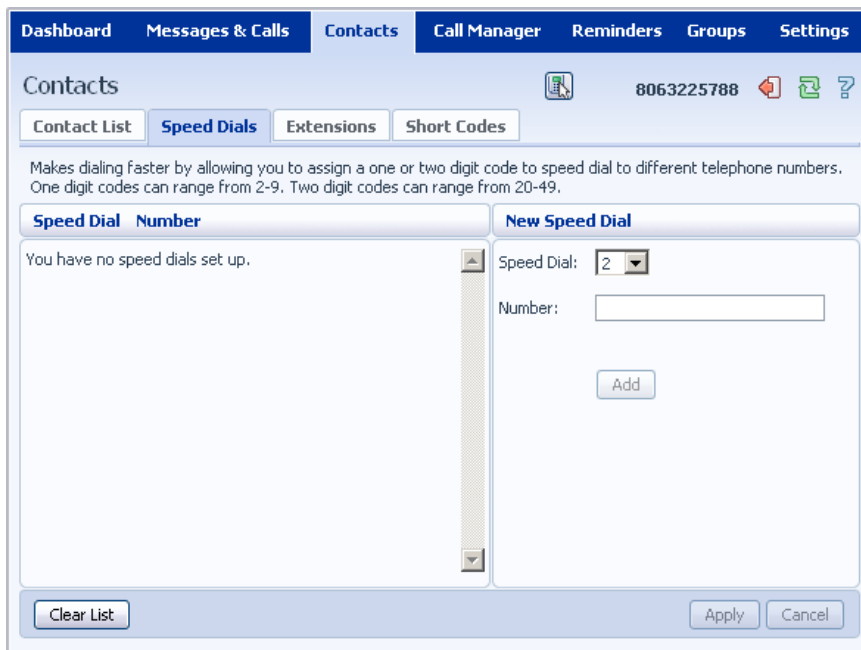
1. Select the group on the left hand side.

2. Click on *Edit*.

3. Change the group settings, or members.

4. Click on *Save*.

To delete a group, follow these steps:

1. Select the group on the left hand side.

2. Click on *Delete*.

3.2　Speed Dials

The Speed Dials section allows you to configure numeric speed dials:

You use these speed dials by dialing the one or two digit speed dial number from your phone. They are different from speed dials which are assigned to particular keys on your phone.

3.2.1　Adding a Speed Dial

To add a speed dial:

1. Select the number for the speed dial you'd like to set up from the Speed Dial drop down list.

2. Enter the number this speed dial should call, as you would dial it. For example, if you dial 9 before a number, enter 9 and the number here.

3. Click on *Add*.

4. Repeat steps 1-3 for any other speed dials you want to set up.

5. Click on *Apply* to save your changes.
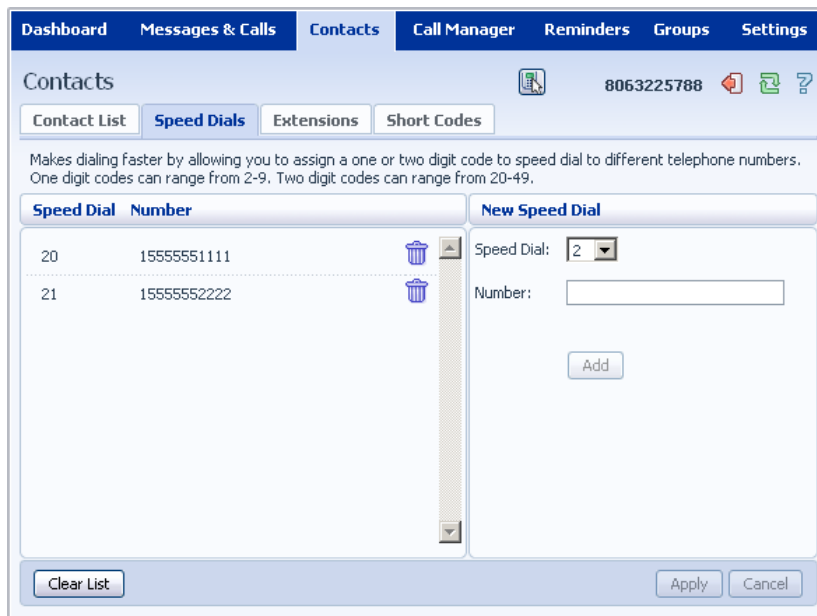
3.2.2 Deleting a Speed Dial

To delete a Speed Dial:
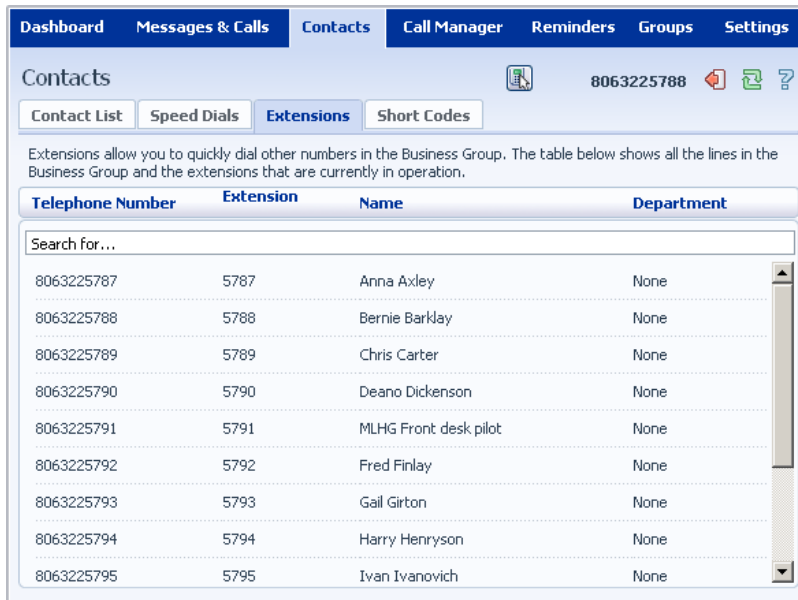
1. Click on the Trash Can icon to the right of the speed dial: 🗑.

2. Click on *Apply*.

Alternatively to delete all of your speed dials, follow these steps:

1. Click on *Clear List*.

2. Click on *Apply*.

3.3 Extensions

The Extensions section lists of all the extensions in your business:

To use Click To Dial to call any of these extensions:

1. Right click on the number of the extension you wish to call.

2. Select the *Dial* option.

Your administrator sets up these Extensions.

3.4   Short Codes

The Short Codes section shows you all of the speed dials set up for all the phones in your business:

You can dial these short codes from any phone in the business to reach the destination. Your administrator sets up these Short Codes.

4 Incoming Call Manager (ICM)

Incoming Call Manager provides users with a powerful rules based routing services allowing them to configure when, where and which calls are delivered to them. Use the advanced rules based routing to configure an advanced Sets of Rules for incoming calls. For example, a user might want to forward calls from family and friends to a home phone, while forwarding calls from the office directly to voicemail, or to screen calls from a particular number.
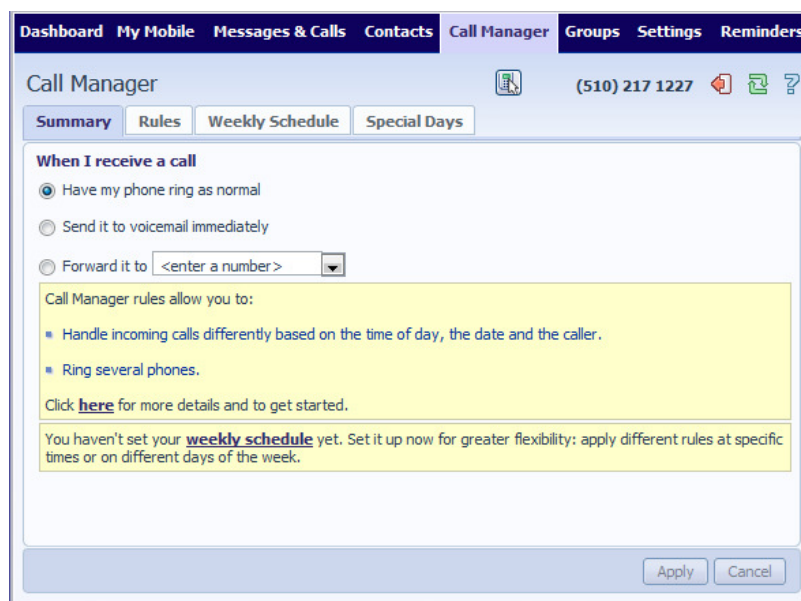
To configure Incoming Call Manager follow the steps defined in this section.

• **Summary** gives you a description of what will happen to incoming calls.

• **Rules** allows you to view and change your Call Forwarding settings.

• **Follow Me** lets you view and set up an advanced Find Me Follow Me service.

• **Screening** lets you screen different types of incoming calls.

Each of these sections is described in more detail below.

4.1 Summary

The ICM summary page provides you with a single view of how your calls are currently routing and is the CommPortal interface for changing your ICM forwarding setting. From this page you can quickly change your forwarding settings by selecting a radio button under the "When I Receive a Call" section.

4.2   Rules Based Routing

Rules based routing allow the user to configure how all calls are routed based on a set of pre-configured rules. Rules based routing is configured by selecting the rules tab from the Incoming Call Manager page. If setting up rules for the first time, a short description of rules based routing is displayed along with a link to "Get Started with some Typical Sets of Rules". By selecting this link, three rules will be created, "Normal", "Reject Calls and "Screen Calls".

For each rule, there will be to type of routing, match the call to a rule, and route calls not matching a rule. To modify how your "Normal" calls will be handled with no rules defined or when an inbound call does not match a rule, click on the "Normal Calls" Rule, then click on the link contained in the text under the "*Normal*" rule section

From this page, you can select you can configure the following

1. Ring your phone with a standard or distinctive ringtone

2. Send the call to voicemail

3. Inform the caller that I am unavailable and reject the call

4. Prompt the caller to record their name then prompt you to accept or reject the call

5. Ring more than one phone simultaneously or in sequence

6. Prompt the caller to record their name then ring more than one phone and prompt you to accept or reject the call.

In order to define a new rule for Normal calls, select the click on the Normal call rule and click the "*Add New Rule*" button.

Begin configuring your rule by selecting which caller or callers the rule will apply to. The options are:

1. This individual contact - Apply to individual contact (in your contact directory)

2. This group of contacts - Apply group of contacts as defined in my contact directory.

3. Anyone in my contact list – Apply to all callers for which you have a contact defined.

4. Anyone in my business group – Apply to all other members of your business, with the hosted voice service.

5. This phone number – Apply to a specific phone number. Can be any number.

6. A withheld number – Apply to any caller that has restricted their calling number.

Select the individual or group of callers that this rule will apply to and click the "*Next"*

Select the individual or group of callers that this rule will apply to and click the "*Next*" button.

Next you will select how the system will route your calls when you receive a call from selected user or group. The available routing options are:

1. Ring your phone with a standard or distinctive ringtone

2. Send the call to voicemail.

3. Inform the caller that I am unavailable and reject the call.

4. Prompt the caller to record their name then prompt you to accept or reject the call.

5. Ring more than one phone simultaneously or in sequence.

6. Prompt the caller to record their name then ring more than one phone and prompt you to accept or reject the call.

To have the system route calls to one or more phones, select the appropriate option, click the "*Next*" button and follow the steps below.

Add a new rule to the "Normal" set of rules

Choose which phones you would like to ring when you receive a call from anyone on your contact list

1. Add the first phone number to ring by entering a number in the Phone Number Field.

2. Enter the start ring time and end ring time for the phone (one ring cycle is 6 seconds, however for mobile phones, you may have to allow more time depending on the mobile networks post dial delay)

3. Click the "Add" button.

4. Continue to add numbers as defined in steps 1-3 until all numbers have been added.

5. Select the preferred ringtone for your desk phone.

6. Select the number to transfer calls to in the event the lines are all busy or not answered. Options are voicemail or any Dial able number.

7. Click Finish

4.3   Schedule Based Routing

The Weekly Schedule functionality of Incoming Call Manager allows you to apply different routing rules based on time of day and day of week. For instance you may want all calls to ring your desk phone during working hours and ring your mobile phone during lunch or after business hours. When first configuring your weekly schedule, you will be presented with two options:

1.   Begin with a blank weekly schedule that you can set up from scratch.

2.   Begin with a typical weekly schedule that you can fine tune.

For ease of use, select option 2 - Begin with a typical weekly schedule that you can fine tune, and follow the steps below.
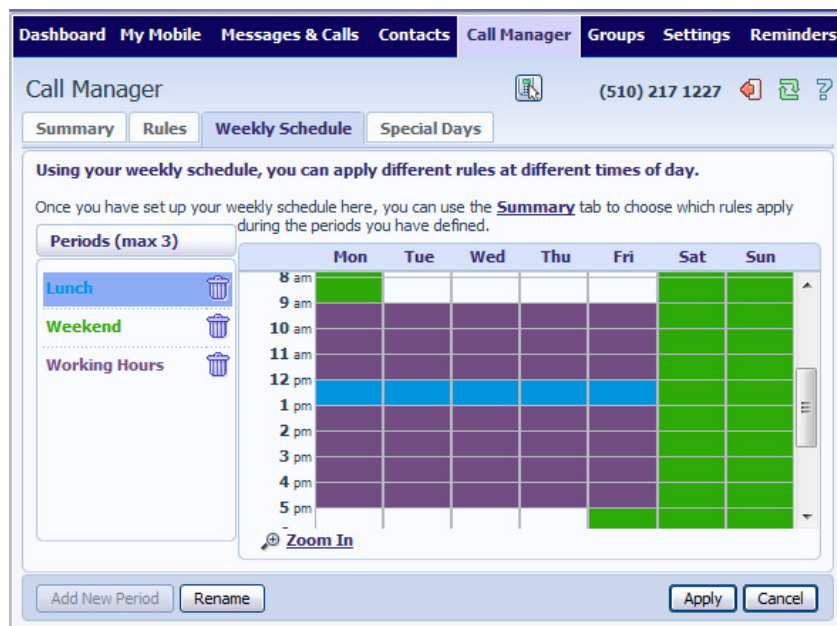
1.   Select the period that you want to modify.

2.   Using your mouse, point to the day and time you want to change and click the mouse. To change multiple time periods, left click and hold the mouse button and drag across the days and time periods you wish to change.

3.   To rename a period, click the rename button and enter the new name.

4.   Click apply.

4.4   Special Days (Holidays)

You can define special days such as Holidays or days when you are away from the office and would like special call treatments. To configure Special Days, select the Special Days tab and follow the steps below:
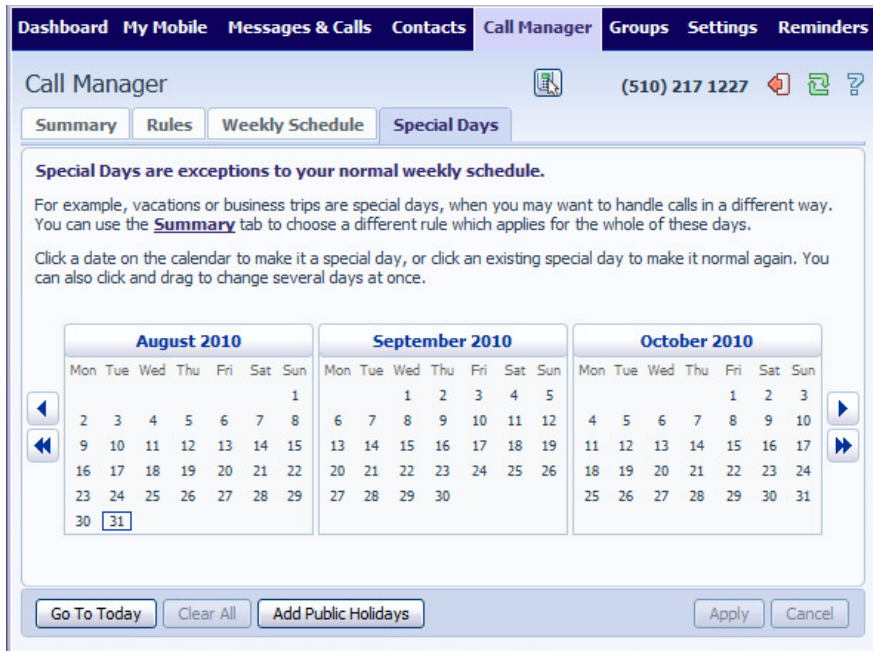
To select individual special days:
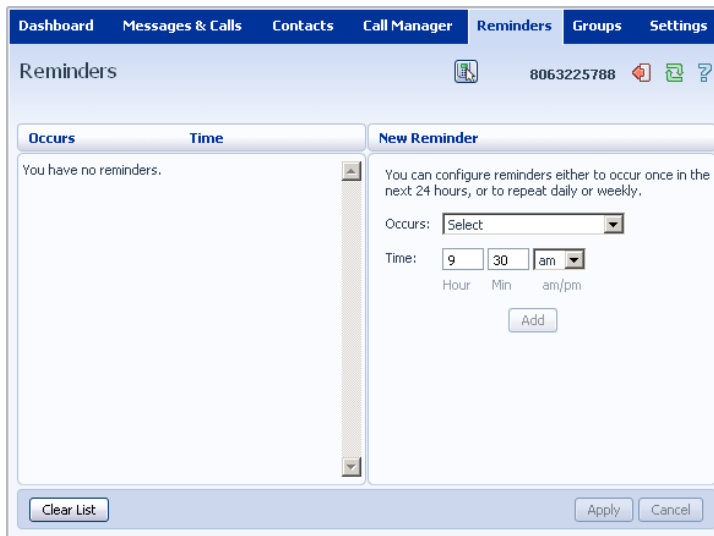
1.   Select the month using the ▶ key and the year using the ▶▶ Key

2.   Click on an individual day, or click and drag to select multiple days

3.   Click Apply

To have the system automatically define public holidays:

1.   Click on the "Add Public Holidays" button

2.   Select the holidays you wish to add (US Public Holidays)

3.   Click Apply

5 Reminders

The Reminders page lets you set up reminder calls:

5.1 Adding Reminders

To add a new reminder, you use the New Reminder section:

To add a new reminder:

1. Select when you want the reminder call to happen from the dropdown list. You can either choose for it to happen once in the next 24 hours, or for it to happen weekly on a certain day of the week:

Enter the time you would like the reminder call using the *Time* boxes and dropdown list.

Click on *Add*

Click on *Apply*.

5.2   Deleting Reminders

To delete a reminder, you use the Reminders list:

To delete a reminder:

1.   Click on the Trash Can icon to the right of the reminder in the list: .

2.   Click on *Apply*.

Alternatively to delete all of your reminder calls:

1.   Click on *Clear List*.

2.   Click on *Apply*.

6 Groups

The Groups page shows you all of the groups that your phone line is in:
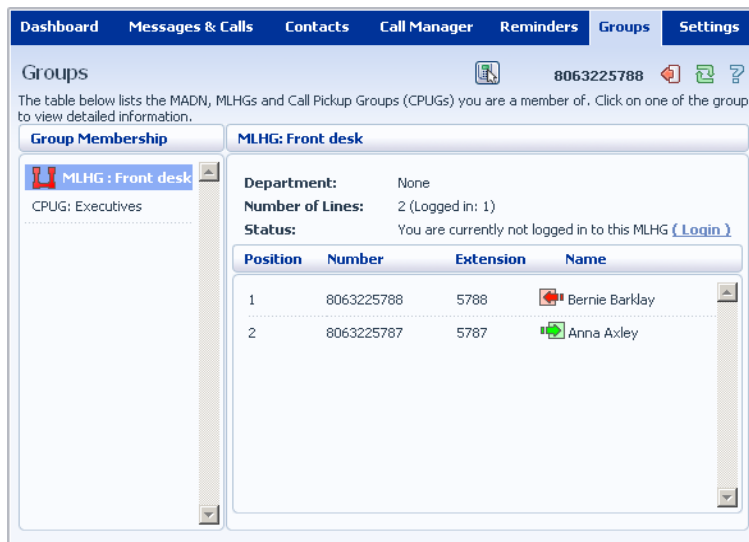
There are a number of different types of groups:

- **Multi Line Hunt Group**. When a call comes in to a Multi Line Hunt Group, each line in the group is rung in turn until someone answers the call. Depending on how your administrator has set up your Multi Line Hunt Group you may be able to log in and out of the Multi Line Hunt Group. When you're logged in calls to that Multi Line Hunt Group will ring your phone. When you're logged out they won't.

- **Call Pickup Group**. If your phone line is in a Call Pickup Group then you can pick calls that are ringing on any other lines in that group by picking up your phone and dialing the Group Call Pickup code.

- **Multiple Appearance Directory Number**. This is a special phone number that, when called, will ring all of the phones within the Multiple Appearance Directory Number group. The first person to answer their phone will take the call, at which point all the other phones will stop ringing.

6.1 Multi Line Hunt Groups

6.1.1 Viewing Multi Line Hunt Groups

If your phone line is in a Multi Line Hunt Group then there will be an entry in the *Group Membership* section for it called *MLHG ....* Click on this entry to view that Multi Line Hunt Group:

The following information is shown:

- What department this Multi Line Hunt Group is in, if any. If your business does not use departments then this will say *None*.

- How many lines are in the group, and how many are logged in.

- Whether you are currently logged in.

- The lines which are in this group and whether each line is currently logged in. Your line will be in this list.

6.1.2 Using Multi Line Hunt Groups

Calls that come into your phone line from a Multi Line Hunt Group will ring your phone as normal, and you can answer the calls as you usually would.

If you have permissions to log in and out of the Multi Line Hunt Group you can either use CommPortal to log in and out, or you can use your phone.

Using Your Phone

To log into a Multi Line Hunt Group using your phone:

1. Pick up your phone handset.

2. Dial the Multi line Hunt Group login access code: *321 followed by the number of the Multi Line Hunt Group.

To log out of a Multi Line Hunt Group using your phone:

1. Pick up your phone handset.

2. Dial the Multi line Hunt Group logout access code: *322.

Using CommPortal
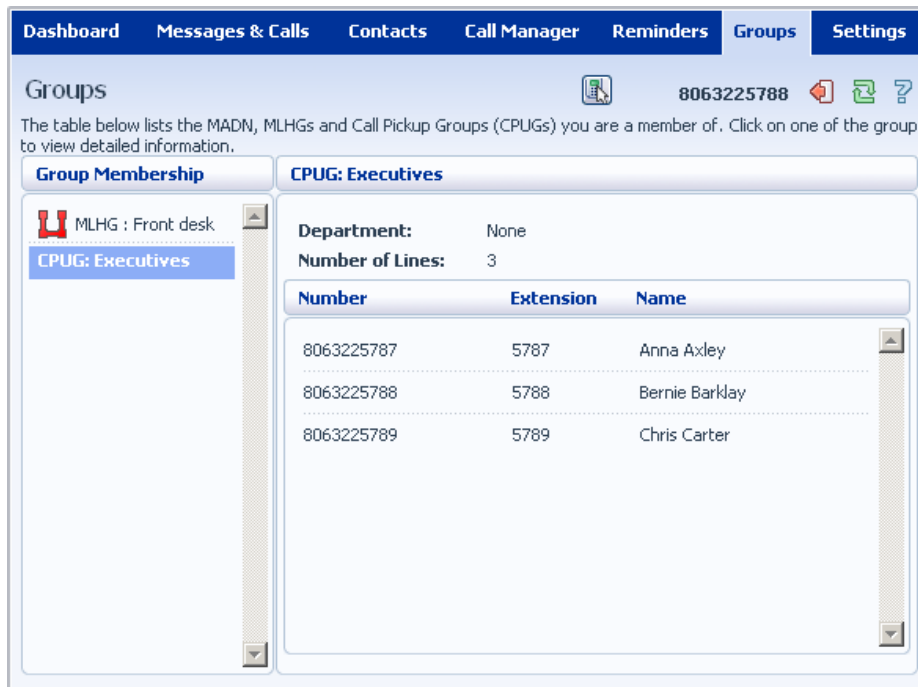
To log into the Multi Line Hunt Group using CommPortal click on *Login*. Your line will be marked in the list with:

To log into the Multi Line Hunt Group using CommPortal click on *Logout*. Your line will be marked in the list with:

6.2   Call Pickup Groups

6.2.1   Viewing Call Pickup Groups

If your phone line is in a Call Pickup Group then there will be an entry in the *Group Membership* section called *CPUG: ….* Click on this entry to view that Call Pickup Group:

The following information is shown:

- The department this Call Pickup Group is in, if any. If your business does not use the departments then this will say *None*.

- The number of lines in this Call Pickup Group.

- The lines which are members of this Call Pickup Group. Your line will be in this list.

6.2.2   Using Call Pickup

To pick up for a call that is ringing on another phone in your Call Pickup Group:
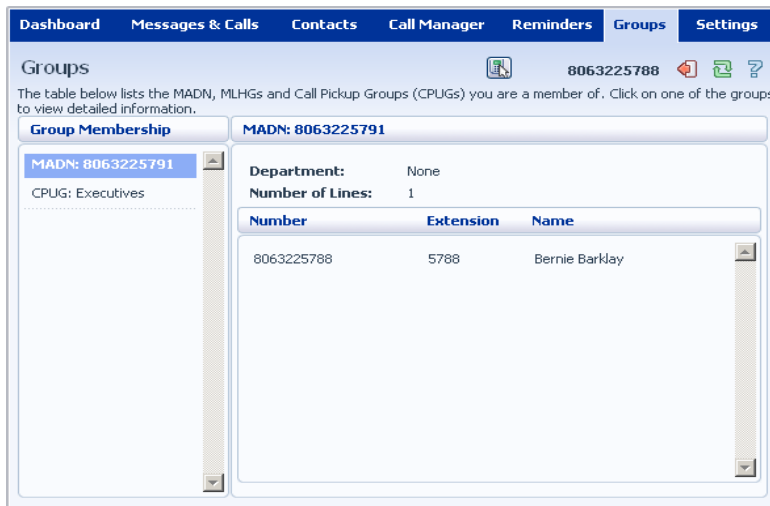
1.   Pick up your phone handset.

2.   Dial the Call Pickup access code: *311.

Alternatively, if two or more phones are ringing and you want to pick up the call that is ringing on a particular extension number:

1.   Pick up your phone handset.

2.   Dial the Directed Pickup access code: *312.

3.   Dial the extension number on which the call is ringing.

6.3   Multiple Appearance Directory Numbers

If your phone line is in a Multiple Appearance Directory Number group then there will be an entry in the *Group Membership* section for it called *MADN ….* Click on this entry to view that Multiple Appearance Directory Number:

The following information is shown:

•   What department this Multiple Appearance Directory Number is in, if any. If your business does not use departments then this will say *None*.

•   How many lines are in the group.

•   The lines which are in this group. Your line will be in this list.

Only an administrator can make changes to a Multiple Appearance Directory Number group.

7 Settings

The Settings page consists of a series of tabs allowing you to configure the phone system:
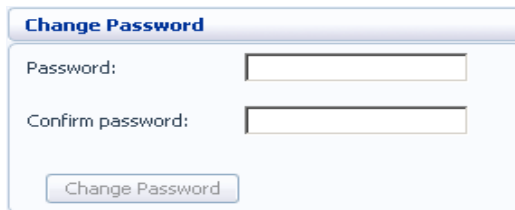
- *Security* lets you change your passwords and PINs.

- *Account Codes* lets you set up your account codes, if you have appropriate permissions.

- *Blocking* lets you set up blocking for different types of outgoing calls.

- *Preferences* lets you configure a number of properties which apply to your phone calls.

- *Messaging* allows you to configure your voice mailbox.

- *Phones* lets you configure your phone's keys, if you have a compatible phone model.

- *Toolbar* lets you install the CommPortal Assistant Toolbar which provides quick easy access to your CommPortal settings on your PC.

7.1 Security

The Security tab lets you set up the security options for your phone account.

7.1.1   Changing Your CommPortal Password

The Change Password section lets you change your CommPortal password:
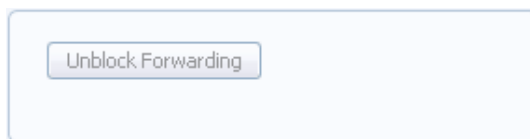
Change Password

Password:	
Confirm password:	

Change Password

To change your CommPortal password, follow these steps:

1. Enter your new password in the *Password* text box.

2. Enter your new password in the *Confirm password* text box.

3. Click on *Change Password*.

7.1.2   Unblocking Remote Access to Call Forwarding

If you make too many unsuccessful attempts to access Remote Access to Call Forwarding using an incorrect PIN, the service will be blocked. To unblock this service, click on *Unblock Forwarding*.

Unblock Forwarding
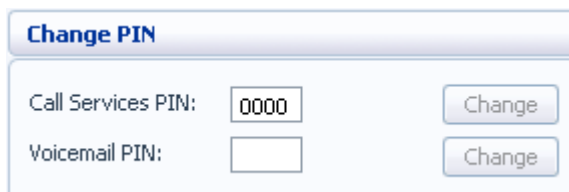
7.1.3   Changing your PINs

You have two different PINs.

1. Your **Call Services PIN**, which you use to access Remote Access to Call Forwarding.

2. Your **Voicemail PIN**, which you use to access your Voicemail.

To change either of these PINs, follow these steps:

1. Enter the new PIN in either the *Call Services PIN* or *Voicemail PIN* text box.

2. Click on *Change* to the right of your new PIN.

Change PIN

Call Services PIN:	0000	Change
Voicemail PIN:		Change

7.1.4   Unblocking Account Codes

If your phone line is configured to use account codes, and an incorrect account code is entered too many times when making calls, your service will be blocked. To unblock this service, click on *Unblock Account Codes*.
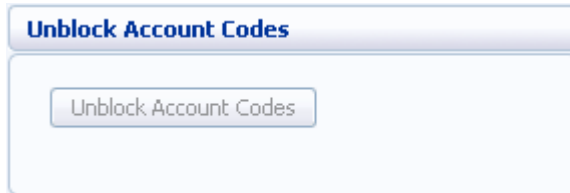
For more details on Account Codes, speak to your administrator.

7.2   Account Codes
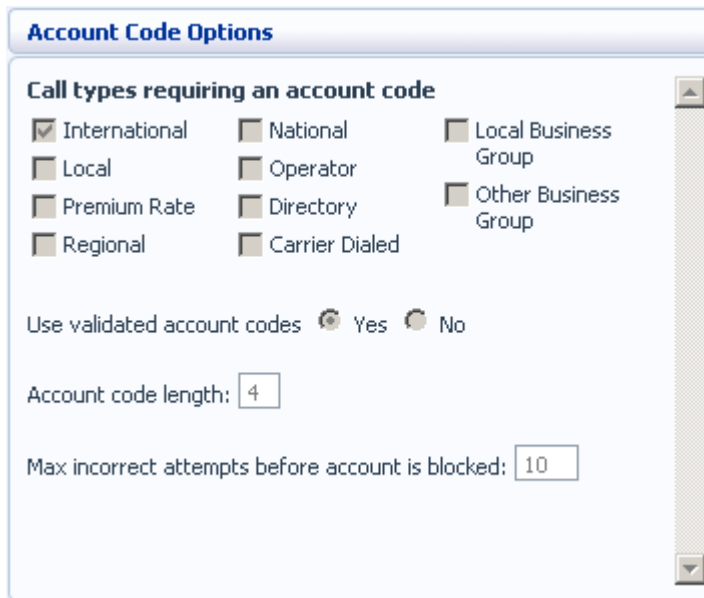
The Account Codes tab lets you configure your Account Codes service. Exactly what is configurable within this section will depend on the permissions that your administrator has given you.
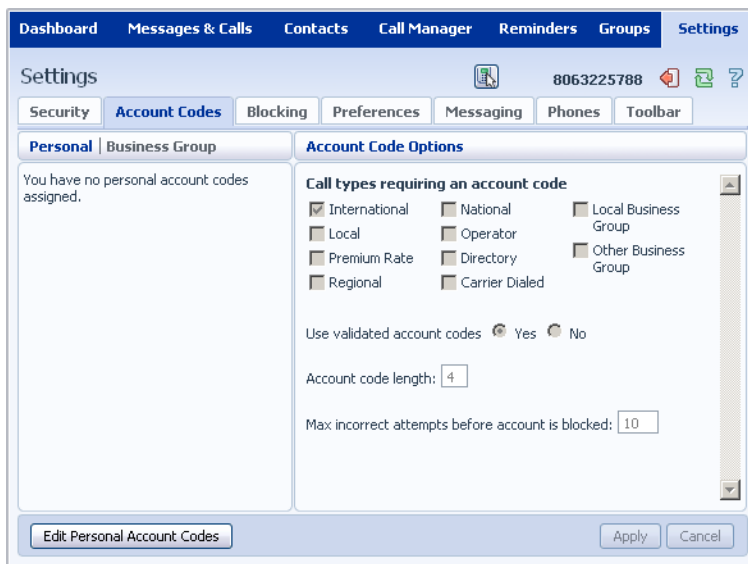
For more details on the Account Codes services, speak to your administrator.

7.2.1 Account Code Options

The Account Code Options window shows you the settings which your administrator has set up for the Account Code service.

- *Call types requiring an account code* show you the types of calls which will require you to enter a code once you have dialed the number. In the example above, account codes are only required for International calls.

- *Use validated account codes* specifies whether your system uses validated or non-validated account codes.

- *Account code length* specifies the length of account codes you must enter.

- *Max incorrect attempts before account is blocked* specifies how many incorrect attempts to enter account codes are allowed in a row, before all calls requiring account codes are blocked.

7.2.2 Business Account Codes
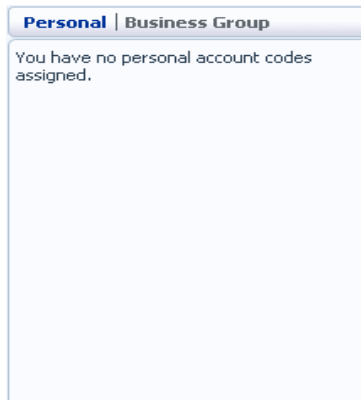
To view the list of valid account codes for your business, click on the *Business Group* link:

7.2.3   Personal Account Codes

To view and edit your personal list of valid account codes, click on the *Personal* link:

Personal | Business Group

You have no personal account codes assigned.

To edit your list of valid account codes, click on *Edit Personal Account Codes*.

Manage Assigned Account Codes

Account code: Description: [Add]

You have no account codes assigned.

[Clear List]   [OK] [Cancel]

To add an account code, follow these steps:

1. Enter an account code in the *Account Code* text box.

2. Enter a description for the *Description* text box.

3. Click on *Add*.

4. Click on *OK*.

5. Click on *Apply*.
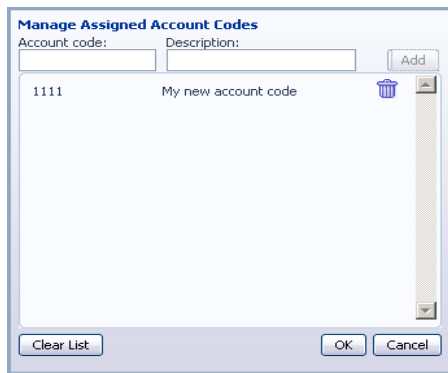
To delete an account code, follow these steps:

1. Click on the Trash Can icon to the right of the account code:

2. Click on *OK*.

3. Click on *Apply*.

Alternatively, to delete all of your account codes, follow these steps:

1. Click on *Clear List*.

2. Click on *OK*.

3. Click on *Apply*.

7.3   Blocking

The Blocking tab lets you configure what types of outgoing calls should be blocked from your line:
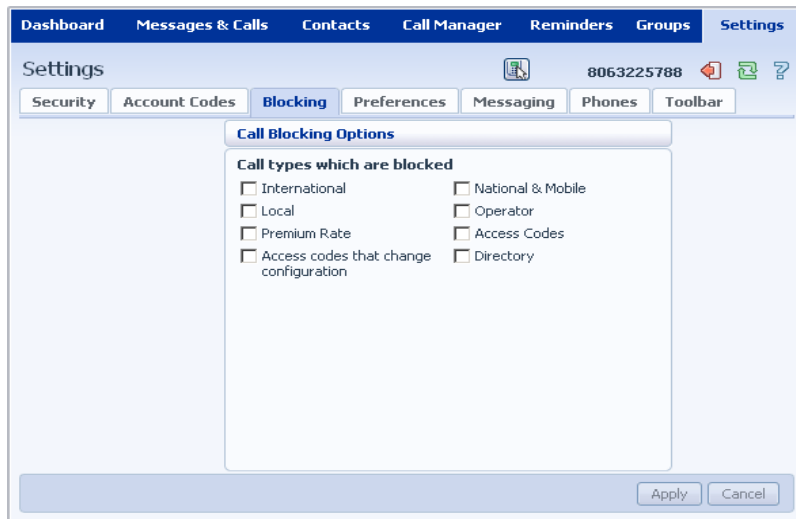
To block certain types of call, follow these steps:
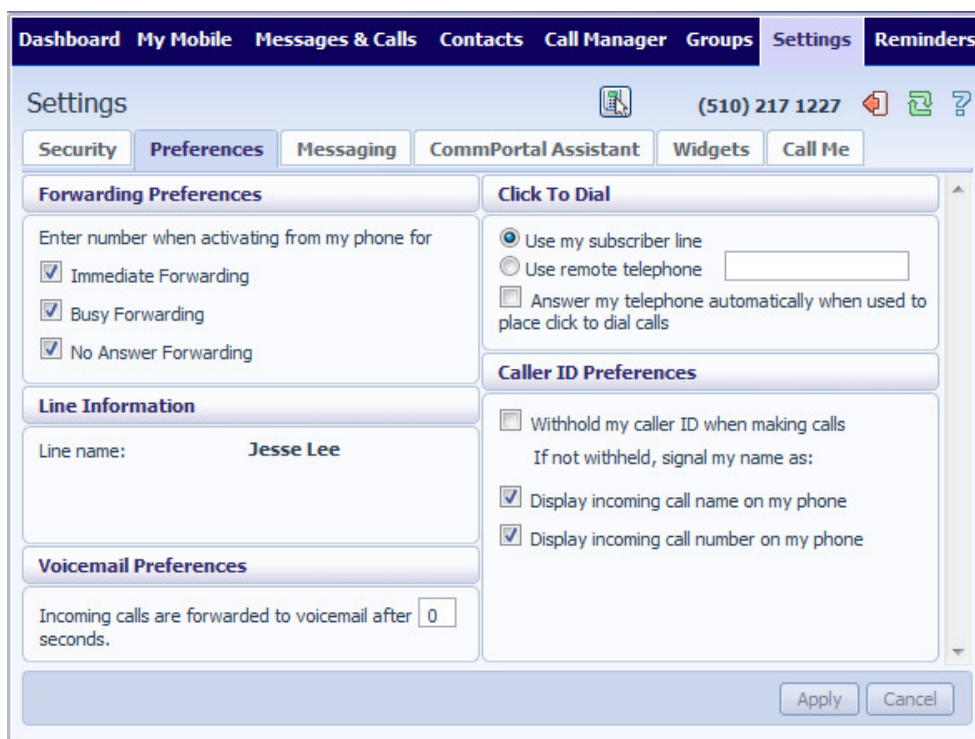
1. Check the type of call you want to block.

2. Hit *Apply*.

To unblock a type of call, follow these steps:

1. Uncheck the type of call you want to allow.

2. Click on *Apply*.

7.4 Preferences

The Preferences tab lets you view and change some general settings for your phone line which you are unlikely to want to change often.

7.4.1 Forwarding Preferences

The Forwarding Preferences section lets you configure whether, when you dial the Call Forwarding access codes to enable Call Forwarding, you need to enter a phone number. If you don't want to enter a phone number then your Call Forwarding service will use the number you last configured through CommPortal.

To change whether you need to enter a number when enabling Call Forwarding from your handset, follow these steps:

1. Check (to require a number to be entered) or uncheck (to mean a number is not required) the type of Call Forwarding you want to change.

2. Click on *Apply*.

7.4.2 Line Information

The Line Information section shows you information about your line:

- *Line name* shows the name this line is configured as. Your administrator can change this if it is incorrect.

- *Member of Departments* shows whether your line is in a department, and if so the name of the department. If departments are not used in your business, this will say None.

- *Admin for Department* shows if you are an administrator, and if so, for which department.

7.4.3 Voicemail Preferences

The Voicemail Preferences section lets you configure how quickly calls should forward to voicemail if you don't answer:

To change the time after which calls should forward to voicemail, follow these steps:

1. Enter a new value in the text box.

2. Click on *Apply*.

7.4.4 Click To Dial

The Click To Dial section lets you configure settings for your Click To Dial service:

For more information on using Click To Dial.

If you want to use your regular phone for your calls using Click To Dial:

1. Select *Use my subscriber line*.

2. Click on *Apply*.

To use another phone as the phone for your calls using Click To Dial:
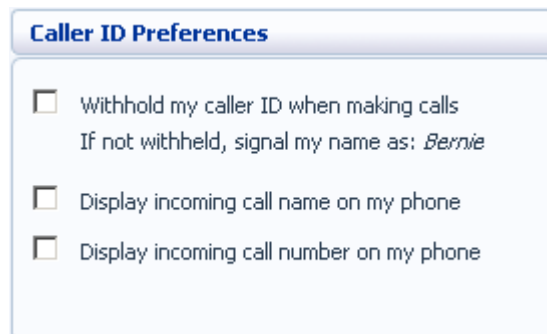
1. Select *Use remote telephone*.

2. Enter the number of the phone line you want to use in the text box.

3. Click on *Apply*.

When using your regular phone for your calls using Click To Dial, if you want this phone to automatically answer:

1. Check *Answer my telephone automatically when used to place click to dial calls*.

2. Click on *Apply*.

7.4.5   Caller ID Preferences

The Caller ID Preferences section lets you configure your caller ID service.

To withhold your caller ID when making calls:

1. Select *Withhold my caller ID when making calls*.

2. Click on *Apply*.

To display the name of a caller when your phone rings:

1. Select *Display incoming call name on my phone*.

2. Click on *Apply*.

To display the number of a caller when your phone rings:

1. Select *Display incoming call number on my phone*.

2.   Click on *Apply*.

Note that not all models of phone will display the caller's name and number.

7.5   Messaging

The Messaging tab lets you change the operation of your Voice and Fax messaging service, and has a series of sections:
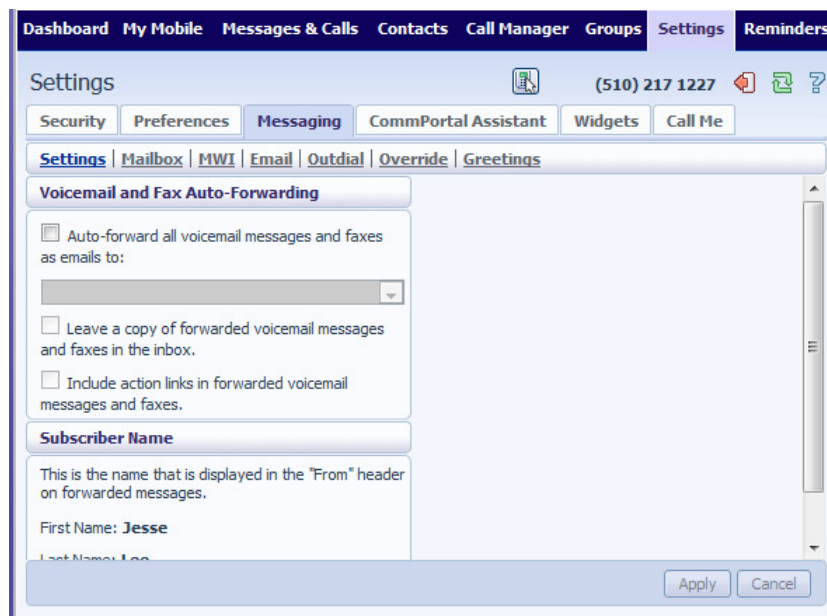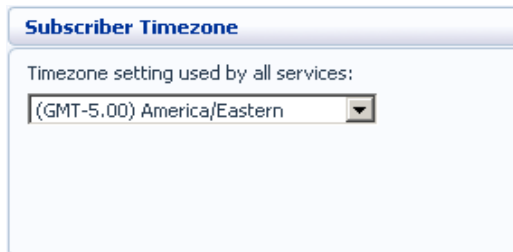
- *Settings* lets you configure some general Messaging settings.

- *Mailbox* lets you configure your Voice mailbox.

- *MWI* lets you configure whether your phone notifies you when you have messages waiting.

- *Email Notification* lets you configure whether you are alerted via email when messages arrive.

7.5.1   Settings

Timezone

To change the timezone that you are in:
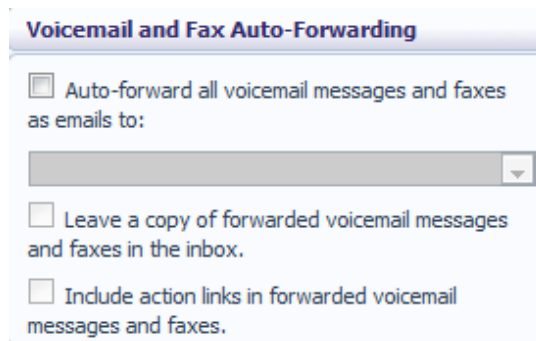
1.   Select the new timezone from the drop down list in the *Subscriber Timezone* section.

2.   Click on *Apply*.

Subscriber Timezone

Timezone setting used by all services:

(GMT-5.00) America/Eastern

Voice and Fax Forwarding

This section lets you enter an email address to which all your voice and fax messages should be sent when they are left in your mailbox:

Voicemail and Fax Auto-Forwarding
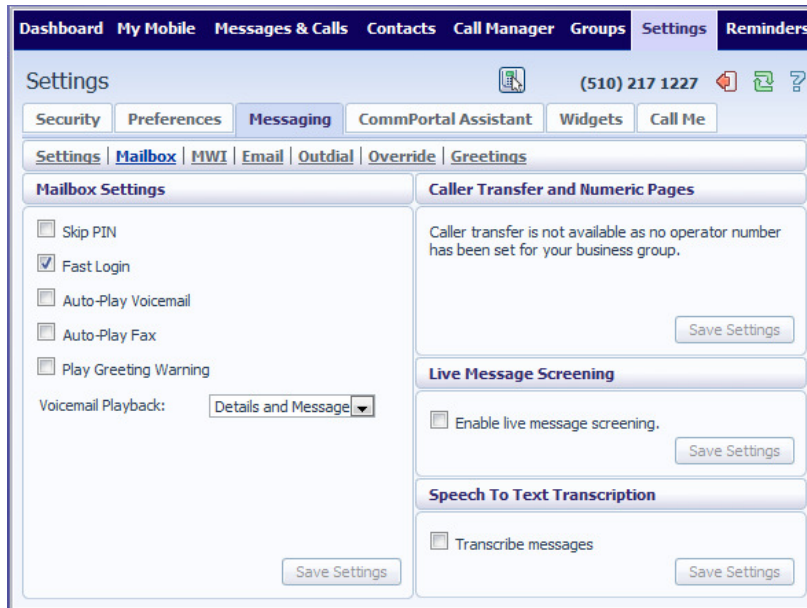
☐ Auto-forward all voicemail messages and faxes as emails to:

☐ Leave a copy of forwarded voicemail messages and faxes in the inbox.

☐ Include action links in forwarded voicemail messages and faxes.

To set up forwarding of your messages to your email:

1.   Check *Auto-forward all voicemail messages and faxes to this email address*.

2.   Enter your email address in the text box.

3.   If you want to also leave a copy of the message in your mailbox (so you can view them in CommPortal), check *Leave a copy of forwarded voicemail messages and faxes in the inbox*.

4.   If you would like to be able to include action links such as delete in the email copies of your voice messages, select the *Include action links in forwarded voicemail messages and faxes*.

5.   Click on *Apply*.

7.5.2　Mailbox

The Mailbox section lets you configure your mailbox settings:

Greetings

To configure a greeting which should be played during business hours:

1.　Select the greeting you have recorded from the drop-down list.

Click on the *business hours* link:
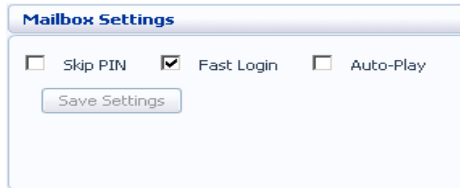
Define your business's hours of operation, by selecting the days you operate, and the times you operate between. Then click on *OK*.

Click on *Save Settings*.

Mailbox Settings

To configure your mailbox so that it does not require you to enter a PIN when you collect your messages:

1. Check *Skip PIN*.

2. Click on *Save Settings*.

To disable the Skip PIN setting:

1. Uncheck *Skip PIN*.

2. Click on *Save Settings*.

To configure your mailbox so that it logs you directly into your mailbox when you collect your messages:

1. Check *Fast Login*.

2. Click on *Save Settings*.

To disable the fast login feature of your mailbox:

1. Uncheck *Fast Login*.

2. Click on *Save Settings*.

To configure your mailbox so that it automatically plays your new messages when you've logged in:
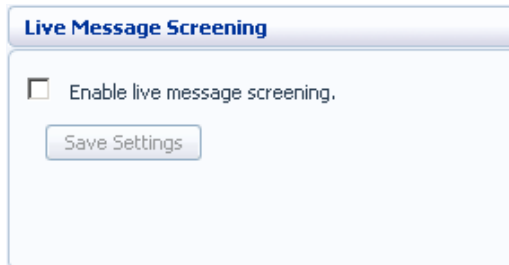
1. Check *Auto-Play*.

2. Click on *Save Settings*.

To disable the auto play feature of your mailbox:

1. Uncheck *Auto-Play*.

2. Click on *Save Settings*.

Live Message Screening

Live Message Screening lets you listen to callers who are leaving voice messages while they are doing so. If you have Live Message Screening enabled, your phone will ring with a distinctive ringtone when someone is leaving you a message. If you answer your phone you will be able to hear the caller leaving the message.

To enable Live Message Screening:
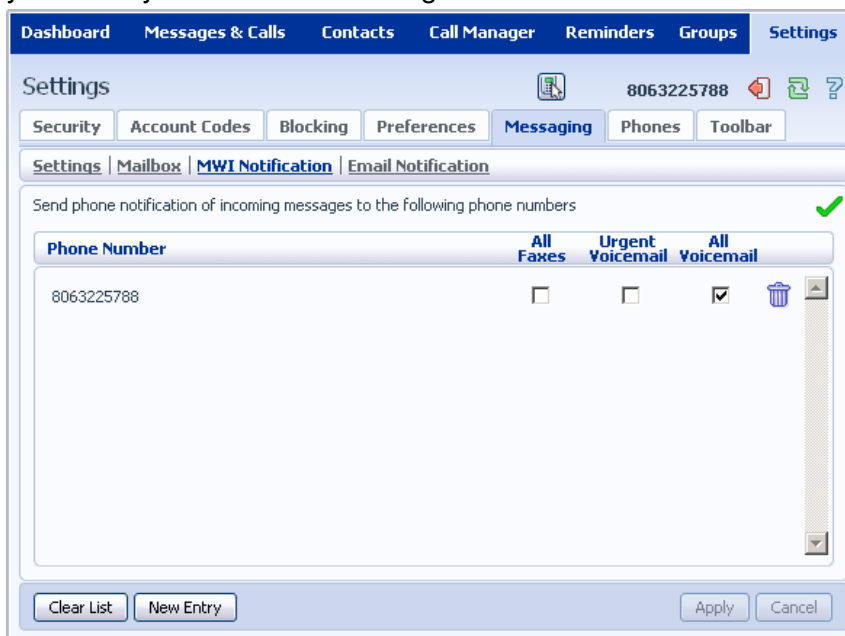
1.   Check *Enable live message screening*.

2.   Click on *Save Settings*.

To disable Live Message Screening:

1.   Uncheck *Enable live message screening*.

2.   Click on *Save Settings*.

7.5.3   MWI Notification

You can use the MWI Notification section to configure whether your phone should indicate to you when you have new messages.

To have your phone's messages light lit when any new faxes are waiting:

1. Check *All Faxes*.

2. If there is a red cross on the screen: ✖ click it so that it becomes a green tick: ✔.

3. Click on *Apply*.

To have all new voice messages light your phone's messages light:
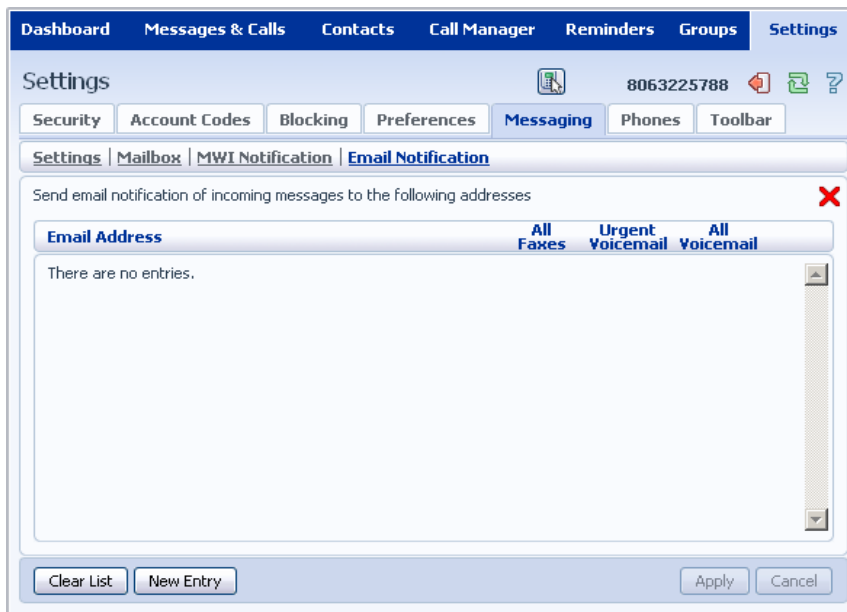
1. Check *All Voicemail*.

2. If there is a red cross on the screen: ✖ click it so that it becomes a green tick: ✔.

3. Click on *Apply*.

To have only urgent new voice messages light your phone's messages light:

1. Check *Urgent Voicemail*.

2. If there is a red cross on the screen: ✖ click it so that it becomes a green tick: ✔.

3. Click on *Apply*.

7.5.4   Email Notification

Email notification lets you notify different email accounts when different sorts of messages are waiting. This will override any settings you have in the Settings section.

To add an email address to be notified:

1.   Click on *New Entry*:

2.   Enter the email address.

3.   Click on *Add*.

4.   Check whether you want *All Faxes*, *Urgent Voicemail*, or *All Voicemail* sent to this address.

5.   If there is a red cross on the screen: ✖ click it so that it becomes a green tick: ✔ .

6.   Click on *Apply*.

To delete an email address from this list:

1.   Click on the Trash Can icon to the right of the email address: 🗑 .

2.   Click on *Apply*.

To delete all email addresses from this list:

1.   Click on *Clear List*.

2.   Click on *Apply*.

7.6 Phones

The Phones section allows you to modify your phone's settings, ie adding speed dials.
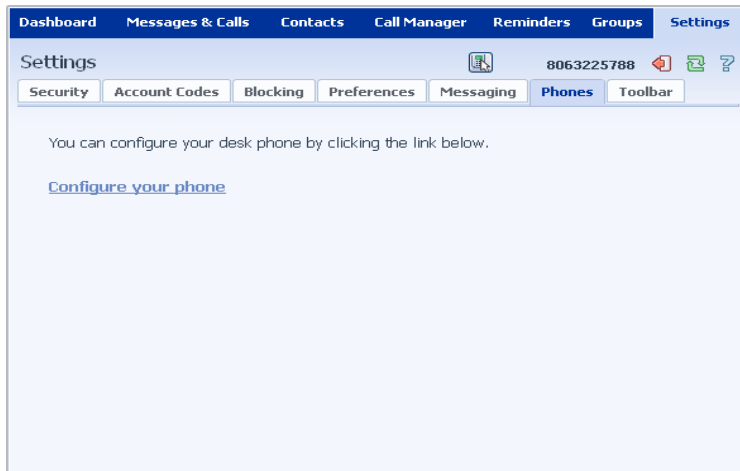
To modify your phone's settings click on *Configure your phone*. This will launch a new browser window for the Phone Configurator.

7.7 Toolbar

The Toolbar section allows you to download the CommPortal Assistant toolbar to install on your Microsoft Windows PC. This gives you fast access to the commonly used phone settings from your desktop, along with Click To Dial.
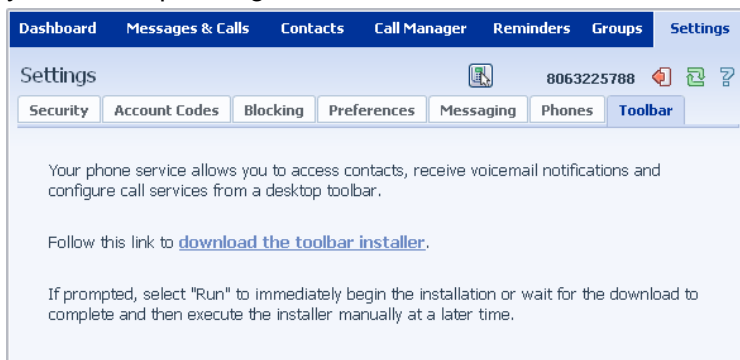
To download and install the CommPortal Assistant toolbar:

1. Click on the download the toolbar installer link.

2. If prompted, select *Run* to start the installation.

3. Follow the on-screen instructions to install CommPortal Assistant.

For instructions on using CommPortal Assistant, see the Help provided with it.

8   Click To Dial

You can make a phone call from within CommPortal by clicking on the Click To Dial icon:

This pops up a window in which you can enter the number you want to dial:
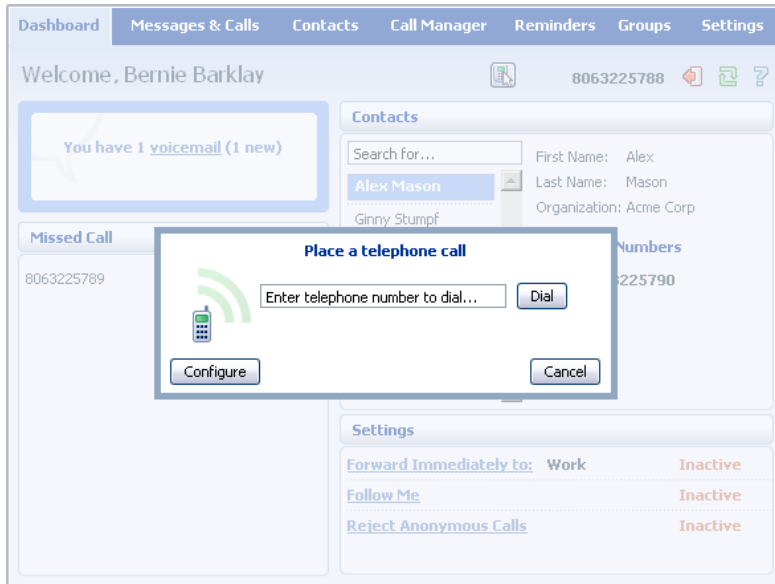
8.1   Calling from your Regular Phone

To make a call from your regular desk phone, enter the phone number you want to call in the space provided and click *Dial*. Your phone will now ring.
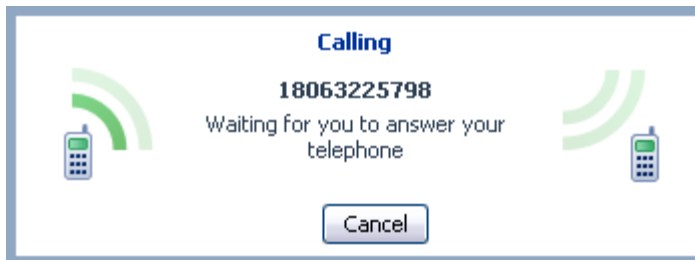
When you answer it the number you entered will be called.
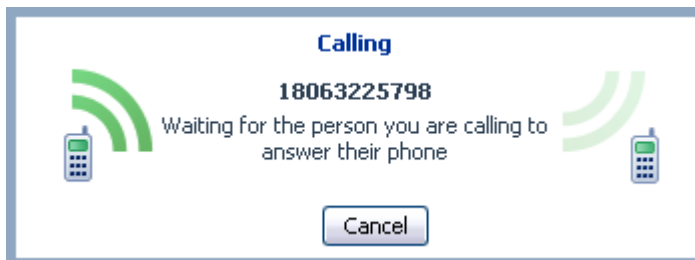
Once the person you called has answered this will be displayed on your screen:
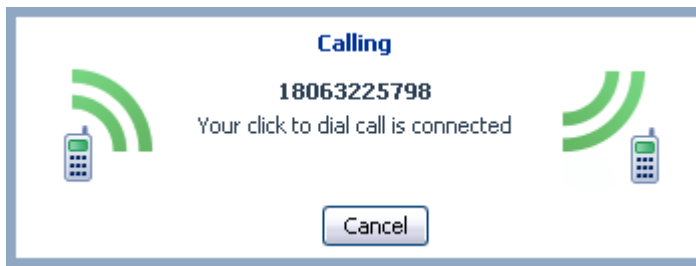
8.2 Calling from Another Number

Click To Dial also allows you to make calls, from any phone with a direct dial number, so that they appear to come from your business line. This could be your cell phone, a payphone, or your home number.

Once you've selected a Click To Dial call, select *Configure*.
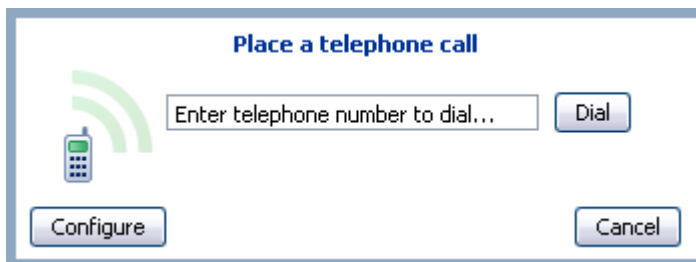
This takes you to the *Preferences* section of the *Settings* page. Under *Click To Dial* select *Use remote telephone* and enter the number of the phone you want to use to make your call.
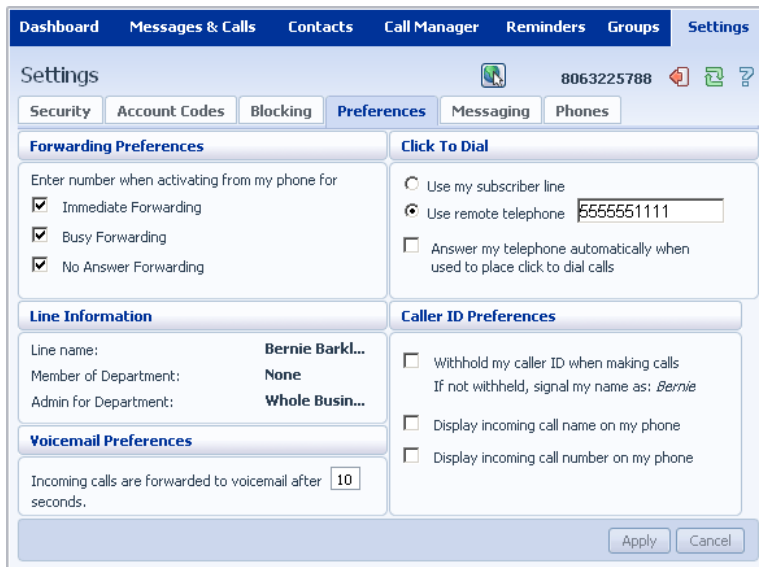
If you have a remote telephone number configured the Click To Dial icon changes to: .

You can now place a Click To Dial call. This will cause the number you entered as the remote telephone to ring. When you answer this phone your Click To Dial call will be set up.

9   Configuring Your Phone's Keys

You configure your phone's keys using the Phone Configurator. To launch the Phone Configurator:

1. Select the *Settings* page in CommPortal.

2. Select the *Phones* tab.

3. Click on the *Configure Your Phone* link.

This launches a new browser window for the Phone Configurator. You must have Adobe Flash Player version 9 or later installed to use the Phone Configurator.

9.1   Using the Phone Configurator's Graphical View

Once you have launched the Phone Configurator you will be presented with an image of your phone:

The examples shown in this document show a Cisco SPA 508G phone with a Cisco 932 sidecar. Your phone model may differ from the one shown.

If you have a phone with one or more sidecars, you can zoom in on the phone, or a sidecar, by hovering your mouse pointer over it:

You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.

To select a key, click on it. This will launch a pop-up allowing you to configure the key:

Use the drop-down list to select the operation you'd like that key to perform:

The possible options are as follows (although not all of these options may be enabled on your phone system):

- Nothing – this is used when a key is not assigned a function.

- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.

- Speed Dial – this configures the key as a speed.

  - Enter the number you want this Speed Dial to call in the box provided.

- Do Not Disturb – configures the key as a Do Not Disturb key. Monitored Extension – allows you to monitor another line.

  - Enter the number of the extension you want to monitor in the box provided.

- Other Service – this is reserved for future services.

- Park Call – this is used to park calls.

- Retrieve Parked Call – this is used to retrieve parked calls.

- Automatic Recall – this sets up the key as a speed dial to call the Automatic Recall access code.

- Call List – this configured the key to show you recent calls.

- Directory – this configures the key to provide you with the phone's list of contacts.

- Intercom – this configures the key to launch a paging call.

- Services – this configures the key to provide to access to services configured on your phone.

- Voicemail – this configures the key as a speed dial to access your Voicemail.

- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.

- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.

- Trace Call – this configures the key as a speed dial to call the Call Trace service.

- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.

- Group Pickup – this configures the key as a speed dial for the Group Pickup service.

- Directed Pickup – this configures the key as a speed dial to pickup calls ringing on a particular line.

  - Enter the number of the extension you want to pick up calls for in the box provided.

Whichever option you chose for your key you may enter a label for the key. If your phone has a display next to the key you configured this label will be shown on the phone display.

Once you have finished configuring your key click on *OK*. The picture of the phone will be updated with the label you gave your new key assignment.

Once you have finished configuring your keys, click on *Save changes* to save your changes. You phone will pick up the changes you have made overnight. If you want the phone to apply the changes immediately, reboot it, by unplugging it and plugging it back in.

9.1.1 Pages of Keys

To access these pages of keys, click on the *More* key on the phone picture:

9.2 Table View

There is a more advanced and powerful interface for configuring your phone, which can be accessed by clicking on the Table View icon at the bottom right of the screen: .

This view is normally used by the administrator to make changes to the behavior of your phone, but you can use it to make changes to your advanced settings. For more detail on doing this speak to your administrator.

10   Access Codes

This section lists your phone system's most commonly used access codes:

Immediate Call Forwarding Activation	*72 + number to forward to
Immediate Call Forwarding Deactivation	*73
Busy Call Forwarding Activation	*90
Busy Call Forwarding Deactivation	*91 + number to forward to
No Answer Call Forwarding Activation	*92
No Answer Call Forwarding Deactivation	*93 + number to forward to
Park Call	*53
Retrieve Parked Call	*54
Do Not Disturb Activation	*78
Do Not Disturb Deactivation	*79
Automatic Recall	*69
Group Call Pickup	*311
Voicemail	*318