

Hosted Voice
CommPortal User Guide

V01-10-13



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1 CommPortal Web and CommPortal Assistant Overview

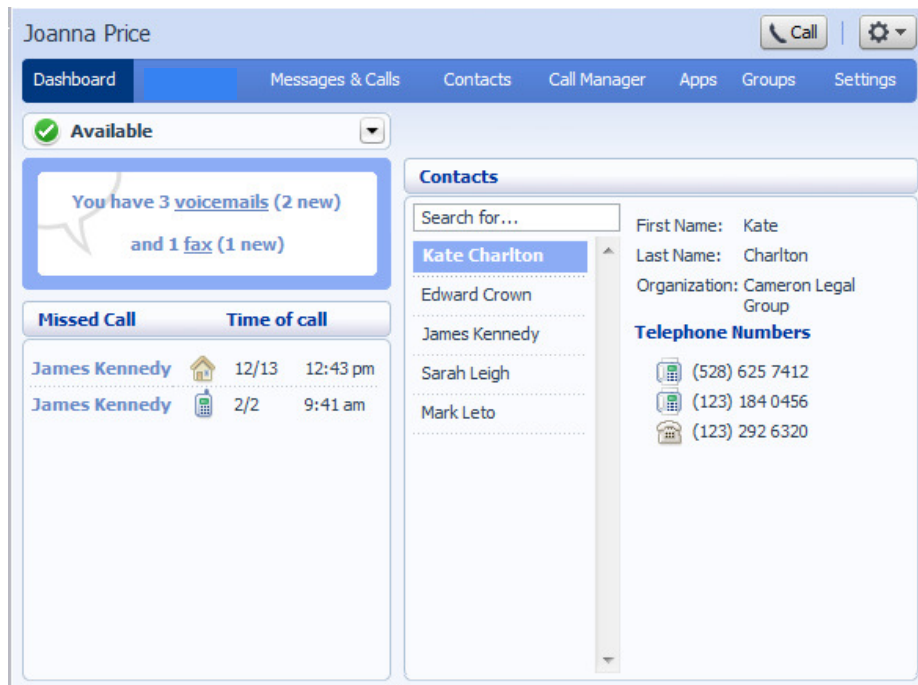
CommPortal Web is an advanced web-based self-care interface which allows users to view and manage the configuration of their account. Users can listen to their voicemails, and configure settings associated with their account.

Log into CommPortal at www.lightpathhostedvoice.com

CommPortal Assistant runs on your own PC, offering a convenient and fully-integrated route into your account. Using the toolbar you can carry out a number of tasks, all from your PC:

- enable a pop-up that appears when you receive an incoming call on the telephone number you used to log in to CommPortal – if you do not want to answer the call, you can use the pop-up to either decline the call or redirect it to another telephone number
- see when you receive new messages in your mailbox
- search your contact lists and place calls to those contacts
- make instant changes to your call settings, for example to send calls to voicemail
- synchronize your CommPortal contacts with your Microsoft Outlook 2003, 2007 or 2010 contacts
- place calls with one click from inside Microsoft Outlook.

Figure 1: CommPortal Dashboard



Each major account feature is represented on a different tab.

The user clicks on each tab to bring up a new page of details, settings and options.

1.1 Browser and Operating System support

CommPortal is supported on the latest versions of all major browsers and operating systems. This includes:

- Microsoft Internet Explorer version 6 or later
- Firefox version 3 or later
- Google Chrome version 4 or later (Windows only)
- Safari version 5 or later (Mac OS X only)

It is supported on the following operating systems:

- Microsoft Windows 2000 (with the exception of CommPortal Assistant and CommPortal Widgets)
- Microsoft Windows XP (with the exception of CommPortal Widgets)
- Microsoft Windows Vista
- Microsoft Windows 7
- Mac OS X 10.6, Snow Leopard (with the exception of CommPortal Assistant)
- Mac OS X 10.7 (Lion)

If you are not using Microsoft Internet Explorer as their default browser, and have also removed IE, they must install the IE Flash plug-in if they want to use the CommPortal Widgets.

CommPortal allows users to record new voicemails, greetings and reminders, and to add introductory messages to voicemails they are forwarding. For these functions, Version 10 or later of the Adobe Flash plug-in is required. CommPortal provides a link to a free download of the Flash plug-in from Adobe's website (which may require administrator privileges to install). If possible, you should use a computer running a Microsoft Windows OS to make your recordings, rather than one running a Mac OS. This is due to the limitations of the Flash plug-in when running on a Mac OS

The recording function requires access to the user's microphone, and Flash will query the user (using its own UI) to confirm that they allow this. By default, Flash does this every time the user attempts to start a recording, but it provides an option to permanently enable access to the microphone.

You should also ensure that the CommPortal website is in your Internet security zone, with default (Medium) security settings. For users experienced in configuring browser security, the specific settings required are to enable JavaScript and ActiveX "Binary and Script behaviors". See section 1.2 for more information on logging in to CommPortal.

1.2 Logging in to CommPortal

1.2.1 User access

Users log in to CommPortal at www.lightpathhostedvoice.com or www.optimumlightpathvoice.com

and enter their telephone number followed by a PIN.

- A user will be locked out of their CommPortal account if they enter an incorrect password or PIN six times in succession. This restriction protects against malicious use – the System Admin can unlock an account that has been blocked.

Figure 2: CommPortal Login.



The screenshot shows a login form with a blue header bar containing the text "Please log in below." Below the header, there are two input fields: "Number:" and "Password:". Below the "Password:" field is a checkbox labeled "Remember me on this computer." To the right of the checkbox is a "Login" button. At the bottom of the form, there is a link: "If you have forgotten your password, please contact customer support."

1.2.2 Password validity checks

Validity checks are created on the PIN that you use to access CommPortal (and the TUI) to prevent the use of PINs that could easily be guessed by someone else. When PINs are changed or password, the system reject any that

- are not of the permitted length
- contain all of the user's telephone or extension number, or any other mailbox number associated with the account
- consist entirely of part of the user's telephone or extension number, or any other mailbox number associated with the account
- use an ascending or descending series of numbers
- have single digits or characters repeated more than a specified number of times in a row
- contain fewer digits than a specified minimum
- contain fewer special characters than a specified minimum.

2 CommPortal Features

2.1 CommPortal common items


The CommPortal UI has several buttons on it that are present whichever screen you are on. These common items are found at the top of the interface.

Figure 3: CommPortal common items



-  – Account/device selector

This shows the telephone number of the user.

-  – Call

This button displays the Click-to-Dial dialer. This feature is described in more detail in section 2.1.1.

-  – More Options.

This button displays a drop-down menu containing the following options:

- Help

Pressing this button brings up the CommPortal help pages and displays the page containing help for the current screen. From here, users can view help for various features of CommPortal and view step-by-step tutorials describing how to perform common tasks such as checking voicemail or forwarding calls.

- Refresh

Pressing this button will refresh the details shown on the current page. For example, when a user is looking at their messages this will check whether there are any new ones.

- Logout

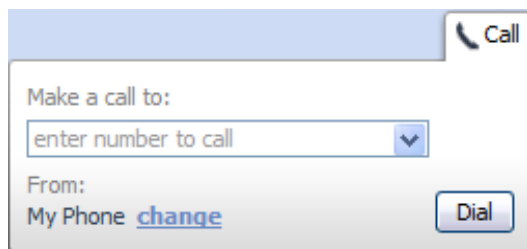
Users use this button to log out of their current CommPortal session.

2.1.1 Click-to-Dial

Click-to-Dial allows users to initiate calls using CommPortal.

A user can start a call by using the Call button to display the pop-up dialer interface illustrated below. Alternatively, they can click on a number elsewhere in the CommPortal interface to display a drop-down menu allowing them to make a call to that number.

Figure 4: Click-to-Dial pop-up



The user manually enters the name or number they want to call, either by selecting an entry from a dropdown list of the user's contacts, or by using their keyboard to enter the number directly. Letters can be entered as well as numbers, to facilitate the calling of vanity numbers such as 1-800-FLOWERS.

- When expanded, the drop-down list displays the names and directory numbers of the user's contacts. For Business Group lines, the list also displays extension numbers along with their names. The drop-down list has an auto-suggestion mechanism which filters the contacts (and extensions) as the user enters digits/letters.
- The user can also see which phone the call will be made from.

My Phone indicates the user's primary phone number. Another telephone number may be shown here if the user has previously made a call from an alternative number.

To initiate remote Click-to-Dial calls on alternative numbers, the *change* button will be visible. The user can click this button to select another number to use for the call from the pre-configured list that will appear, or manually enter the number of the device they wish to use for the call by clicking on *enter a new number*.

Once the call has been set up and initiated, Click-to-Dial then calls the user and, when they answer their phone, goes on to make the outgoing call. The user's Class of Service may allow them to configure Click-to-Dial not to wait for them to pick up the phone before dialing the contact number; if available, this option can be configured via the *Preferences* section of the *Settings* tab.

The pop-up displays the status of the Click-to-Dial call and allows the user to end the call. This is particularly helpful if the user inadvertently started a Click-to-Dial call as they'd otherwise have to pick up and hang up their phone. It also allows them to cancel the call if they are unable to reach the phone with which they chose to make the call, or if the call gets caught between two voicemail systems.

The pop-up remains visible until the call ends or until the user clicks on another area of the CommPortal UI (this will not end the call if it is still in progress).

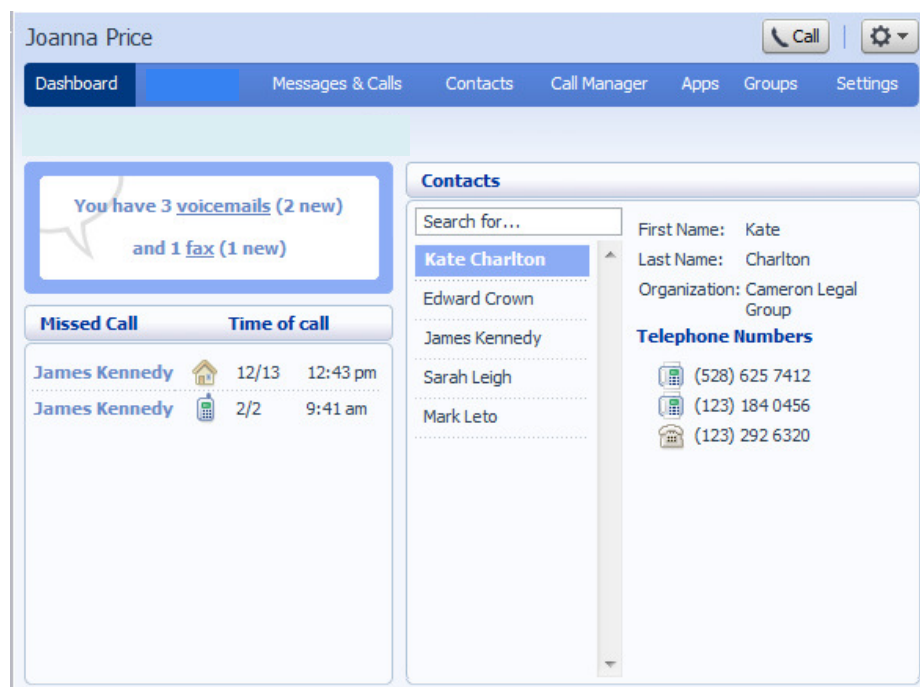
2.2 Dashboard tab

The Dashboard, shown in Figure 5, is the initial screen that most users see when they first log in to CommPortal.

The Dashboard provides a quick view of the most common CommPortal functions at a glance. For example, users will see the following:

- a drop-down panel that allows them to select between configurable call handling profiles or go to the Call Manager tab to edit their settings
- a count of voicemail and fax messages in their mailbox, with an indication of how many are new
- their contact list, for quick access to names and telephone numbers
- a list of missed calls.

Figure 5: CommPortal Dashboard



Each of these functions is displayed in its own area of the screen, and the user can click on the links for more details or to modify the settings. Many users will find they can access all the functions required for everyday use simply by using the information and links displayed on the Dashboard.

The tabs across the top of the Dashboard provide access to more detailed information and settings, as described in the following sections in this chapter. This banner will be scrollable if you offer your users a large number of services. The scroll button will be grayed out when the user has scrolled as far as possible in a given direction.

2.2.1 Call handling profiles

Users can also select to move to the **Call Manager** tab, described in section 2.5, to change the settings for each call handling profile.

2.2.2 New Messages

The Dashboard provides an instant check of whether there are any new (unheard) voicemail or fax messages for this user. It also displays the total number of voice and fax messages currently held in the user's mailbox. A single click on either the voice messages or fax link takes the user to the Messages and Calls display, described in section 2.3, for access to all these messages.

2.2.3 Missed Calls

The Dashboard shows a list of the most recent missed (unanswered) calls to the user's phone.

- If the missed caller's number matches an entry in the contact list, the caller is shown by name, with an image showing whether the matched number is the caller's home, office or mobile number. Clicking on this name takes the user to the appropriate entry in the contact list.
- If the caller has Calling Name Delivery (CNAM) enabled and CommPortal can successfully determine this on the incoming call, the caller's name will be displayed.
- If there is no match from the contact list and the call cannot be determined using Caller Name information, the caller's number is shown.
- If the caller has withheld their identity, the caller's name/number will be displayed as unknown.
- The entry also shows the date and time of the call.

Clicking on a number will display a drop-down menu allowing users to add the number to their contact list or use Click-to-Dial to return the call. The Click-to-Dial feature is described in more detail in section 2.1.1.

2.2.4 Contacts

The Dashboard provides quick access to the user's Contact List – the address book of known callers' names and telephone numbers. For each contact, the display shows the contact's name, organization name, and up to three different telephone numbers (home, office and mobile).

The user can add or edit entries in this list using the Contacts tab, described in section 2.4. Also, if the user has access to Click-to-Dial, they can click on the contact to make a call. The Click-to-Dial feature is described in more detail in section 2.1.1.

2.2.5 Settings

The Dashboard also has a panel that shows a summary of the settings for some important call services. The information displayed in this panel will depend on the type of telephony switch hosting the user, and on the services to which he or she is subscribed.

Clicking on the name of a service in this list moves to the **Call Manager** tab, described in section 2.5, allowing the user to change the settings.

2.3 Messages and Calls tab

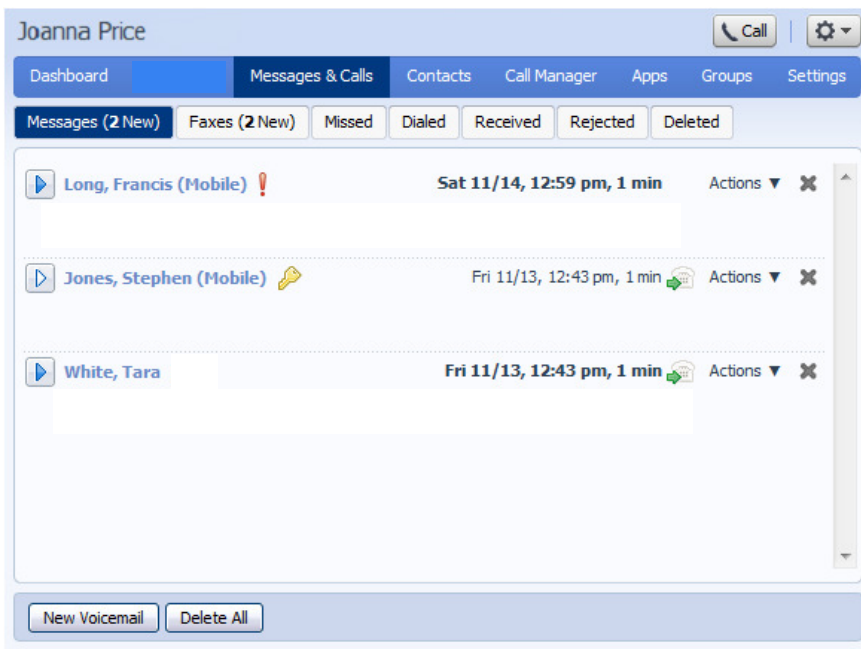
The Messages and Calls tab provides access to:

- voicemail and fax messages
- lists of calls made, received and missed
- deleted messages stored in the Deleted folder

2.3.1 Messages








Figure 6 shows the Messages tab.




Figure 6: CommPortal Messages & Calls display




All of the user's voicemail messages are displayed in a list within CommPortal. Additionally, any system messages (for example Delivery reports, Read reports and indications that the user has missed a reminder) are also displayed in this list. If the user is using Firefox as their web browser, each message will be highlighted with a colored background as the user mouses over it.


Using this display, users can:

- listen to a specific voicemail by clicking on the  play icon to launch the Voicemail player – with no need to listen to all messages to find the relevant one, as you would in a telephone user interface
- see whether
 - a message has already been heard
 - a message has been marked urgent () , or private ()
 - a message was sent to their landline () , fax () or wireless () device – if they have more than one device configured and the called number can be determined. Hovering over the icon reveals the called number. If the called device cannot be determined, an "unknown device" icon is shown ()
 - the sender called from a landline or wireless device – when a number matches an entry in the user's Contacts, the caller's name is followed by one of *(cell)*, *(home)*, *(work)* or *(other)* as appropriate

- the sender has requested a read receipt
- delete messages when they are no longer required by pressing  on the right hand side of the screen. This moves the message to the Deleted tab.
- save a message to their own computer
- click on the caller's name or number to display a menu that allows them to add them to their Contacts or view their details if the message is from an existing contact, or use Remote dial to call them.
- click on the  button on the right hand side of the screen alongside a voicemail message to carry out the following Actions:
 - record and send a voicemail message to another user in reply to a selected message
 - mark a message as read or new – the user will see an error pop-up if the action cannot be carried out for any reason
 - forward a selected voicemail to another user, with the option to record an introductory message
 - forward a selected voicemail as an email attachment, to one or more email addresses, and with the option to mark the email urgent or private.
- click on the  button on the right hand side of the screen alongside a video message to:
 - mark a message as played or new – the user will see an error pop-up if the action cannot be carried out for any reason
 - forward a selected voicemail as an email attachment, to one or more email addresses, and with the option to mark the email urgent or private.
- use the *Delete All* button at the foot of the screen to delete all the messages in their Inbox, either permanently or by moving them to the *Deleted* tab if they have this feature in their account.

Messages marked with the  private icon cannot be forwarded to another recipient.

Message Quotas

The  icon appears in the top left hand corner when a user's mailbox has exceeded 95% of its quota for faxes and voicemail messages.

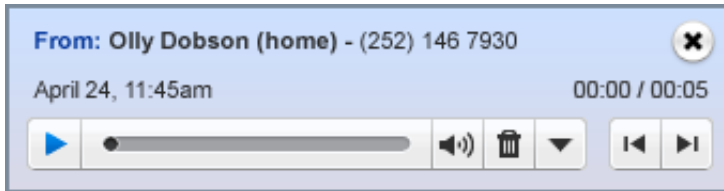
The user can click on this icon to see a pop-up that shows the current status of their mailbox.



- If the user's mailbox is nearly full, the pop-up shows how much of the mailbox's quota is being used. This may refer to the number of messages or the total quantity of data, depending on the cause of the quota excess. It also shows what the quota limits are for the account
- If the user has actually met this quota limit, the pop-up displays the message Your inbox is full and gives details of how the quota has been used up, along with the quota limits that apply to this mailbox. Users then have to delete old messages in order to receive new ones.

The Voicemail Player

Users can click on the  icon alongside any of their messages to launch the Voicemail Player. They can do this either from the *Messages and Calls* or the *Deleted* tabs.

Figure 7: Voicemail Player



Information about the selected message will be displayed, and users can listen to or view the message by clicking on the Play button , and adjust the volume of the playback by clicking on the speaker icon  and adjusting the volume slider.

The user can click on the   icons to move to the previous or next message in their mailbox, without having to return to the Messages and Calls screen.

Deleting messages using the Voicemail Player

It is also possible to delete messages using the Voicemail Player by pressing the trash can icon.

Restoring messages using the Voicemail Player

If the user is listening to a message that is in their Deleted tab, the Voicemail Player will instead offer the opportunity to restore the message, which will return it to their Messages (or Faxes) tab.

Voicemail Reply and Voicemail Composer pop-ups


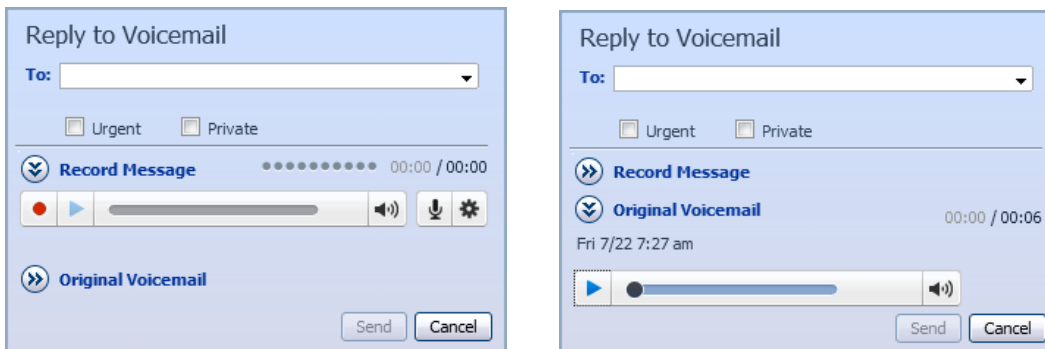


The Reply to Voicemail pop-up illustrated below appears when a user clicks on the  icon alongside a voicemail message, and selects the *Reply* menu option.

Figure 8: Reply to Voicemail



The user can use the  and  symbols to expand and close the panels to Record a Message or listen to the Original Voicemail as appropriate.

Users can use this UI to:

- record a reply to this voicemail (internal users only)
- send it to one or more users
- optionally mark the voicemail message urgent and/or private

- listen to the original voicemail and the reply once they have recorded it.

The telephone number of the original sender will automatically be filled in when the pop-up opens, but the user can change this or add other recipients. Multiple recipients should be entered with ";" separators.

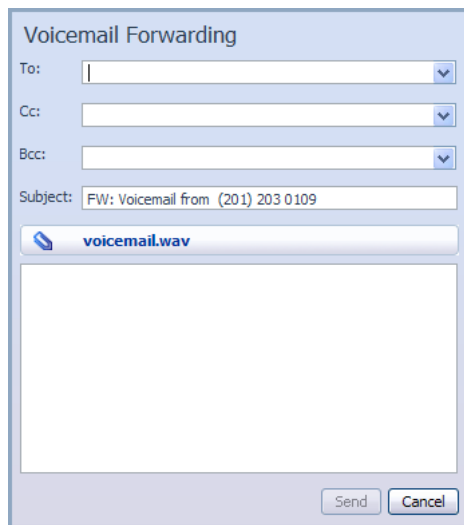
The *To* field uses an auto-complete function, which provides a list of suggestions with phone numbers retrieved from the user's Contacts list. Alternatively, clicking on the downward arrow alongside this field displays the user's entire Contact List, from which the user can select one or more recipients.

Alternatively, if a user wants to record a completely new voicemail, they should select the *New Voicemail* button at the foot of the screen to launch the Voicemail Composer pop-up. This UI enables the user to record a new voicemail and is very similar to the Reply to Voicemail pop-up shown above.

Forwarding voicemails as emails

The Voicemail Forwarding pop-up appears when a user selects the *Forward as Email* menu option after clicking the ▼ icon alongside a selected voicemail.

Figure 9: Voicemail Forwarding pop-up



- The user can type in the required email address(es) in the *To*, *Cc* and *Bcc* fields, separated by a semicolon (";") if there is more than one recipient.
- Alternatively, the user can enter some text in these fields – for example the first name of the recipient – to display a list of possible matches from the Contacts List that can then be selected and automatically added. Clicking on the downward arrow alongside these fields displays the user's entire Contact List, from which the user can select one or more recipients.
- The source email address is always set to an email address containing the user's telephone number. This cannot be changed using CommPortal, and so is not displayed. The Reply-To address is always set to a "no-reply" address at the service provider's domain.
- The Subject field defaults to that shown above, but the user can edit this if they wish.
- The message itself is automatically attached to the email. A voicemail is always forwarded by email as a .wav attachment.
- The user can type a message for the recipient(s) in the email body.

Forwarding voicemails as voicemails

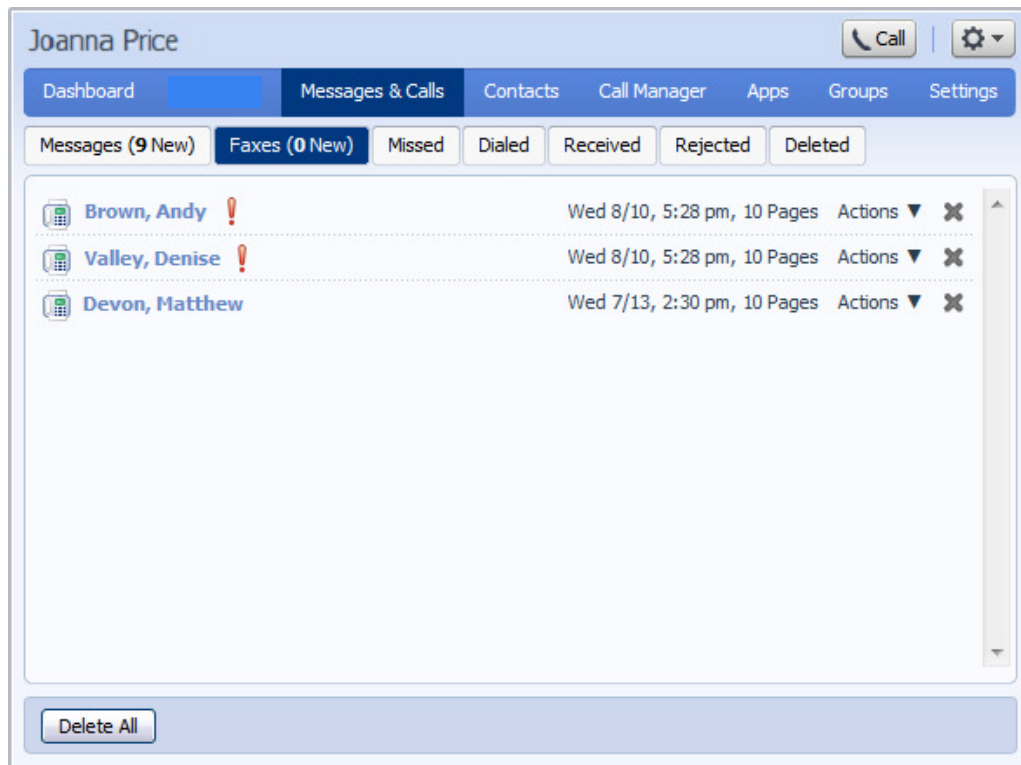
The Forward as Voicemail pop-up appears when a user selects the *Forward as voicemail* menu option after clicking the ▼ icon alongside a selected voicemail.

- As with the other forwarding options, the user can select one or more recipients, and mark the message urgent or private.
- The user can also record an introduction that will be played before the original voicemail, or listen again to the original voicemail, using the ⏪ and ⏩ symbols to expand and close the panels to Record an Introduction or listen to the Original Voicemail as appropriate.

2.3.2

Faxes

Figure 10: Fax display



Using this display, users can:

- click on the fax icon to read a fax message on their own PC, either as a PDF or in TIFF format using a TIFF viewer (for example Windows Picture and Fax Viewer)
- right-click on the fax icon to download and save the fax to their PC, again in either PDF or TIFF format
- click on the caller's name or number to display a menu that allows them to add them to their Contacts or view their details if they are an existing contact, or use Remote dial to call them
- see whether a fax has already been read
- delete individual faxes when they are no longer required by pressing X alongside the fax details on the right hand side of the screen. The fax is moved to this tab (from where it can be permanently deleted)

- If for some reason the fax cannot be deleted, a pop-up will also be displayed instructing the user to check their inbox and try again
- click on the ▼ icon on the right hand side of the fax details to:
 - mark a fax as new or read
 - forward the selected fax to one or more users as an email attachment, and mark the email urgent or private
 - forward the selected fax to another user's fax machine.
- use the *Delete All* button to delete all the faxes in their Inbox, either permanently or by moving them to the *Deleted* tab if they have this feature in their account.

Forwarding faxes as emails

The *Fax Forwarding* pop-up appears when the user selects the *Forward as email* menu option after clicking the ▼ icon alongside the fax. This pop-up behaves in exactly the same way as the Voicemail Forwarding pop-up described above, with the fax being forwarded either as a .pdf or .tif attachment, depending on the format set by the user's Class of Service.

Forwarding faxes as faxes

The *Fax Forwarding as Fax* pop-up appears when the user selects the *Forward as fax* menu option, after clicking the ▼ icon alongside the fax. Using this pop-up, the user can send the fax to another user within their deployment.

Using the pop-up, the user can:

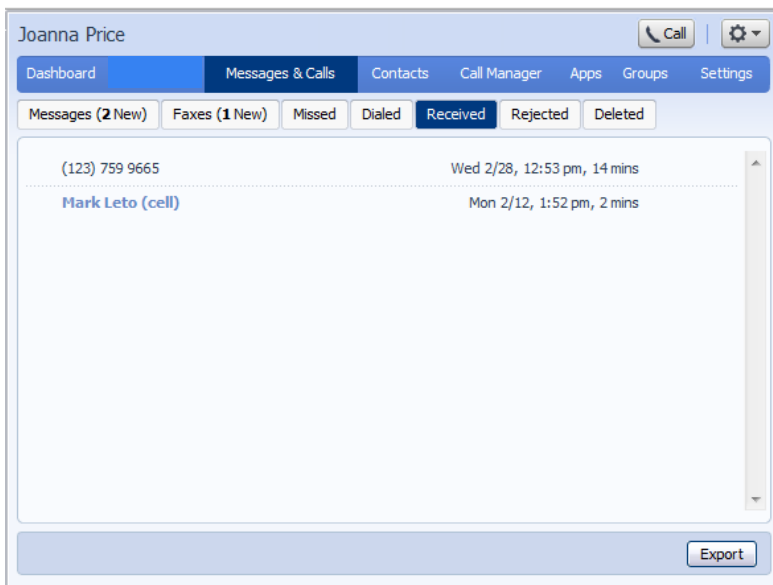
- select one or more recipients
- mark the fax as urgent
- see details of the original fax, and click on *Original Fax* to view it.

2.3.3 Call lists

Call lists record activity on the user's telephone line. Whenever a user makes a call, receives a call, or misses a call, the details of the call are recorded and displayed in the CommPortal UI.

Figure 11 shows the Received Calls display. The Dialed Calls and Missed Calls displays are similar, but the Missed Calls display does not include the duration of each call.

Figure 11: Received Calls display



Each of the tabs offers similar features.

- The caller's name is shown if it can be determined from the contact list, described in section 2.4, or if the caller has Calling Name Delivery (CNAM) enabled. Otherwise, the caller's number is shown. If the caller has withheld their identity, the caller will be shown as unknown. If a caller was identified from the user's contact list, the caller's name is followed by one of *(mobile)*, *(home)*, *(work)* or *(other)* as appropriate to indicate the device that was used to make the call.
- Clicking on a name or telephone number in these lists brings up a menu allowing the user to view an existing contact's details or create a new contact list entry for this caller, with the telephone number and, where available, the first and last name already filled in. The user can then add further details for this caller.
- Mousing over *Show Rule* displays a tool tip with the name of the rule used to process the message.
- Clicking on the *Export* button opens a pop-up that downloads the call lists to the user's PC. The user can opt to export any or all of Received, Dialed, Rejected, or Missed calls (provided each Call List is available to the user).

The exported data is a comma separated variable file, with default filename *callistdata.csv*, that contains call list information for each call type selected. This file format can be exported into Microsoft Excel or many other third-party applications.

2.3.4 Deleted

Figure 12 shows deletion of a voicemail.

Figure 12: Confirm deletion popup – voicemail variant

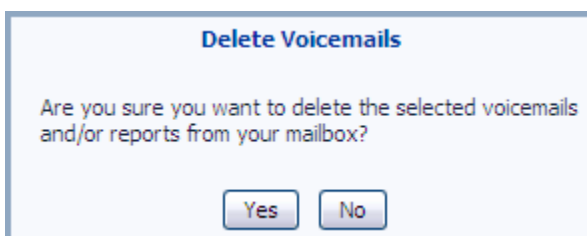
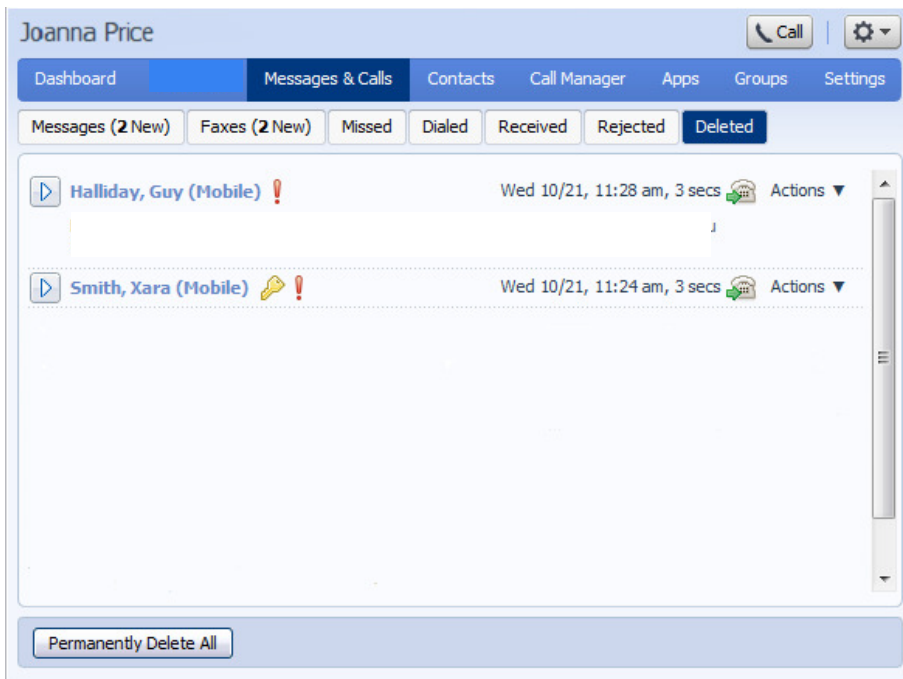


Figure 13 shows the Deleted tab. This tab contains all deleted messages, including faxes, voicemails, and delivery reports.

Figure 13: Deleted tab display



The Deleted tab is similar to the Messages and Faxes tabs, showing an overview of when the message or fax was received, who it was from, and how long the message or fax is.

The user can

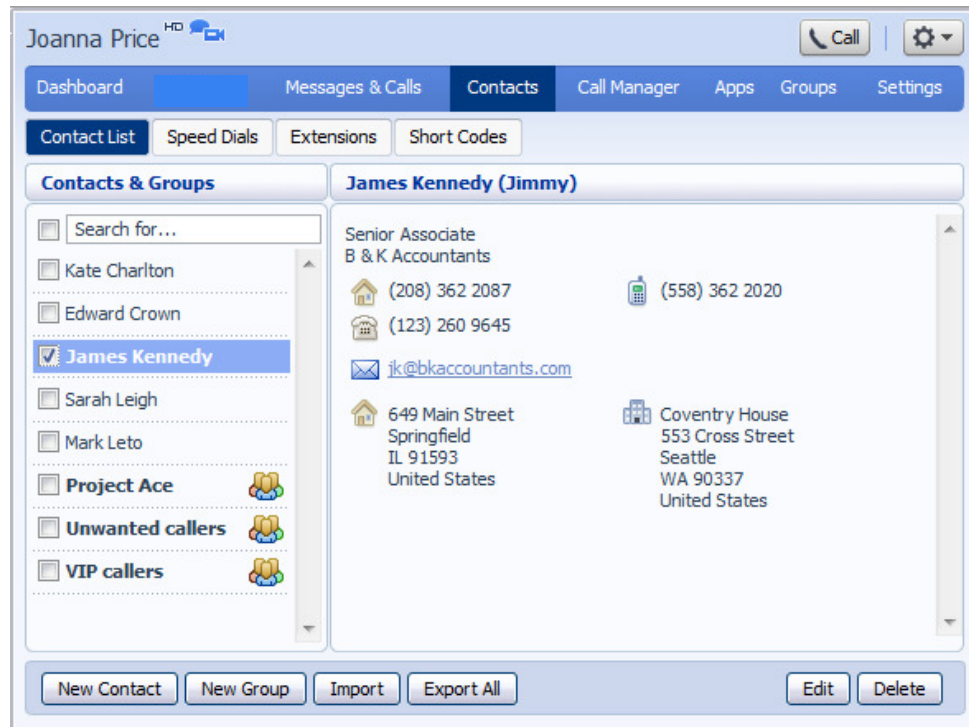
- listen to the messages again, using the Voicemail Player as described in The Voicemail Player
 - When listening to deleted voicemails, the *Delete* button on the Voicemail Player is replaced with a *Restore* button which returns the message to the inbox.
- view faxes again, as described in section 2.3.2
- undelete messages by pressing ▼ and selecting *Restore*
- permanently delete
 - a single message, using the *Delete Permanently* option available under the ▼ icon
 - all messages, using the *Permanently Delete All* button at the foot of the screen.

2.4 Contacts tab

Contact lists allow your users to associate the name and details of a caller with one or more telephone numbers (such as home, office and mobile phone numbers). Users can also record postal and email addresses for their contacts and can have a total of up to 1,000 contacts in their account.

The interface includes a powerful search facility, allowing the user to look up a contact by name, organization name, telephone number or address. The user can also delete their contacts and contact groups from this page, selecting multiple items as desired (standard ctrl and shift selection behavior is retained).

Figure 14: CommPortal Contact List display



As well as being useful simply as a way of storing and retrieving contact details, Contact Lists enhance other services within CommPortal.

- The Messages and Calls tab makes use of the contact list to display the names of callers, or of people that the user has called, rather than just their telephone numbers.
- The **auto-complete** function provides a list of suggestions retrieved from the contact list when a user enters data in a To, Cc or Bcc field, while sending messages to other users.
- Services such as Call Manager allow users to specify accepted callers by selecting them from the contact list, without having to type in their numbers.

2.4.1 Synchronization with Outlook Contacts using CommPortal Assistant

CommPortal Contact Lists can be integrated with a user's Outlook 2003, Outlook 2007 and, if you are using the standard 32-bit version, Outlook 2010 contacts. If a user has downloaded CommPortal Assistant (CPA), as described in section 2.6.1, and has an Outlook profile, the user can configure CPA to automatically synchronize any changes made to a contact in CommPortal with the corresponding entry in Outlook, and vice versa.

This synchronization can be used alongside the Import and Export method described below, without any unwanted duplication occurring.

2.4.2 Import and export

Your users can download their contacts to a comma separated value file, for use outside CommPortal, by pressing the *Export All* button. The user can select the format of CSV file they want to create from *Outlook/Outlook Express compatible*, *Windows Contact on Vista* and *Native Format*.


Your users can also upload a file containing contacts into CommPortal.

- If the user already has contacts in CommPortal, they can select whether CommPortal will ignore, duplicate or overwrite any matched entries.
- Before the import starts, CommPortal checks the file is suitable for upload. The file must use the Windows comma separated variable format (CSV) and contain a suitable header line that describes the column contents for each contact. A maximum of 1,000 contacts can be included in this file. However, since a user can only have a maximum of 1,000 contacts, they should also ensure that the import file and choice of import method will not cause the total number of contacts in their account to exceed 1,000.
- During the import procedure, CommPortal checks each contact in turn and rejects invalid entries. The import progress dialog also has a *Details* button that shows the result for each contact in the file. It shows whether the contact was added, ignored or updated as applicable.

2.4.3 Contact Groups

Your users can also use their Contact Lists to set up groups of contacts, by clicking on the New Group button at the foot of the Contact Lists screen.

- The user is then prompted to give the new Group a name and a two-digit numeric telephone ID for use within the TUI.
- All the entries on their Contact List will also be displayed, and the user can use the checkboxes to select the people or Groups who should be members of this Group.
- Contacts can be members of more than one Group, and a Group can also be a member of another Group.

Groups are shown in bold type in the Contacts list, identified by the  icon. The details and membership of the user's Groups can subsequently be edited or deleted by clicking on the Group entry in the Contact List.

When using the TUI, users can select these Contact Groups to conveniently address a single message to several users. Your users can also use these Groups when setting up rules for call handling using Call Manager.

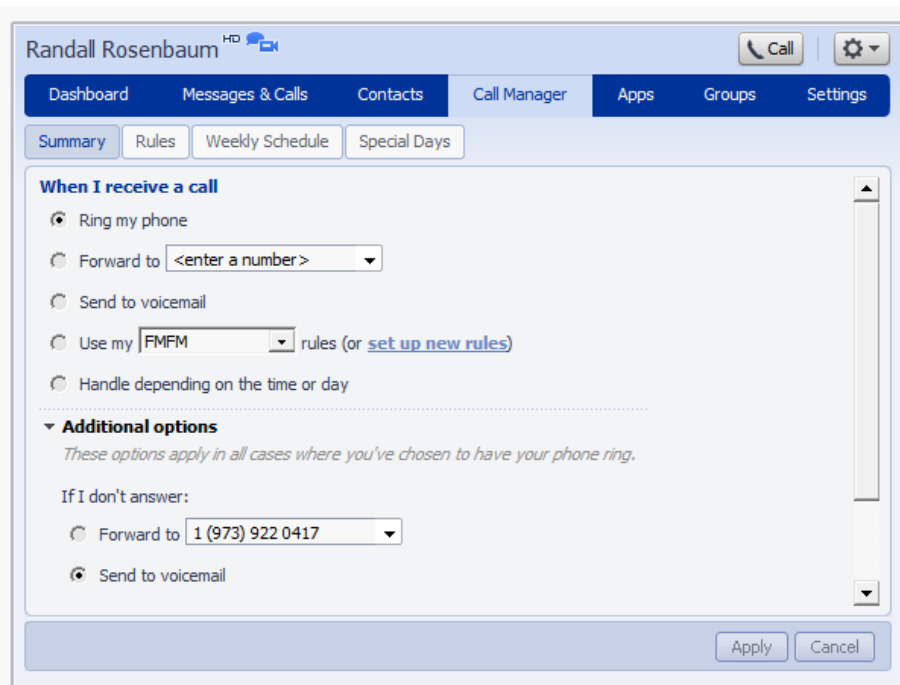
2.5 Call Manager tab

The **Call Manager** tab allows users to manage how incoming calls are handled. It provides a single management interface for all the services affecting incoming calls that the user is subscribed to, so that he or she can easily see which services are active and how they interact.

Note that the Call Manager service will not send calls to MLHGs or MADNs to voicemail or any other service that automatically answers a call (such as a rejection notice). This way the call can be answered by other members of the MLHG or MADN as applicable. However, if the call is made directly to the member, Call Manager will behave as normal.

2.5.1 Call Manager

Figure 15: CommPortal Call Manager display



The **Summary** tab provides a narrative description of how the user's incoming calls will be handled, according to the services that are currently enabled. This allows the user to check at a glance how the services combine and interact, and to verify that the settings are correct. The other tabs each provide control of a particular service or group of services.

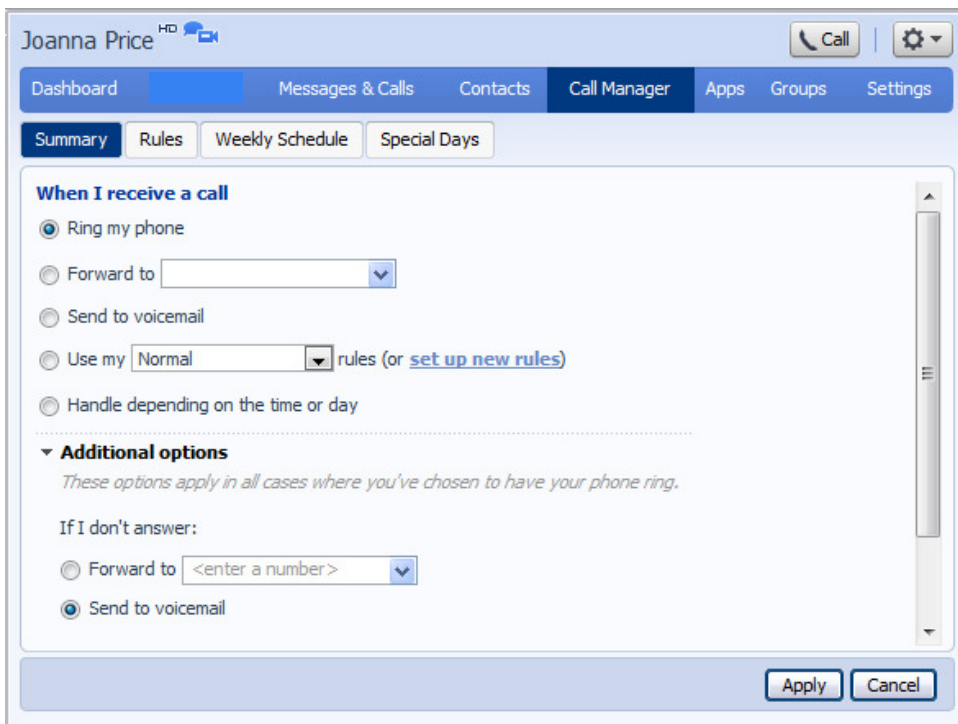
After using one of these tabs to change the settings for a service, the user can return to the **Summary** tab to check how the updated services interact.

2.5.2 Incoming Call Manager

Incoming Call Manager offers an integrated call handling service, with a powerful set of configurable rules. For users who want a highly customizable call handling service, Incoming Call Manager provides more flexible and detailed configurations.

The tabs shown in Figure 16 allow users to configure sets of rules, and set schedules for when specific rules should apply to incoming calls.

Figure 16: Incoming Call Manager display



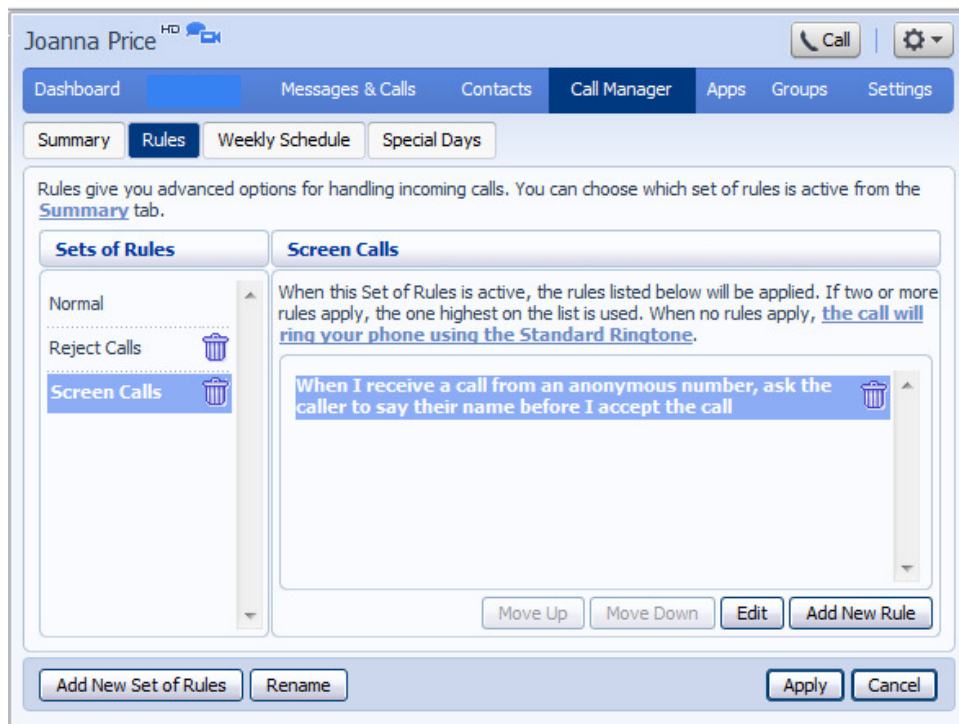
The **Summary** tab allows the user to view and configure their call-handling options. For example, a user may wish their phone to ring as normal, or divert all calls directly to voicemail, or apply some of their call handling rules depending on the time of day. The user also has the option to automatically forward calls to a different number or send calls to voicemail when their line is busy or when they don't answer their phone.

If a user has not yet configured any call handling rules, for example when they initially access the Call Manager Summary tab, only the first three radio buttons and the additional options shown in Figure 16 are displayed. The user will see an introductory message explaining how Call Manager rules work and prompting them to click on a link that takes them to the Rules tab so that they can configure these.

Once the user has configured at least one Rule, all five radio buttons will be displayed on the Summary tab. If a user has not yet set up a weekly schedule, they will see a message prompting them to do so by clicking on a link that takes them to the Weekly Schedule tab. The schedule-specific sub-settings shown on Figure 16 will be hidden unless the *Handle the call depending on the day or time* radio button is selected.

Users can use the **Rules** tab to configure more advanced Sets of Rules for their 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.

Figure 17: Incoming Call Manager Rules Tab

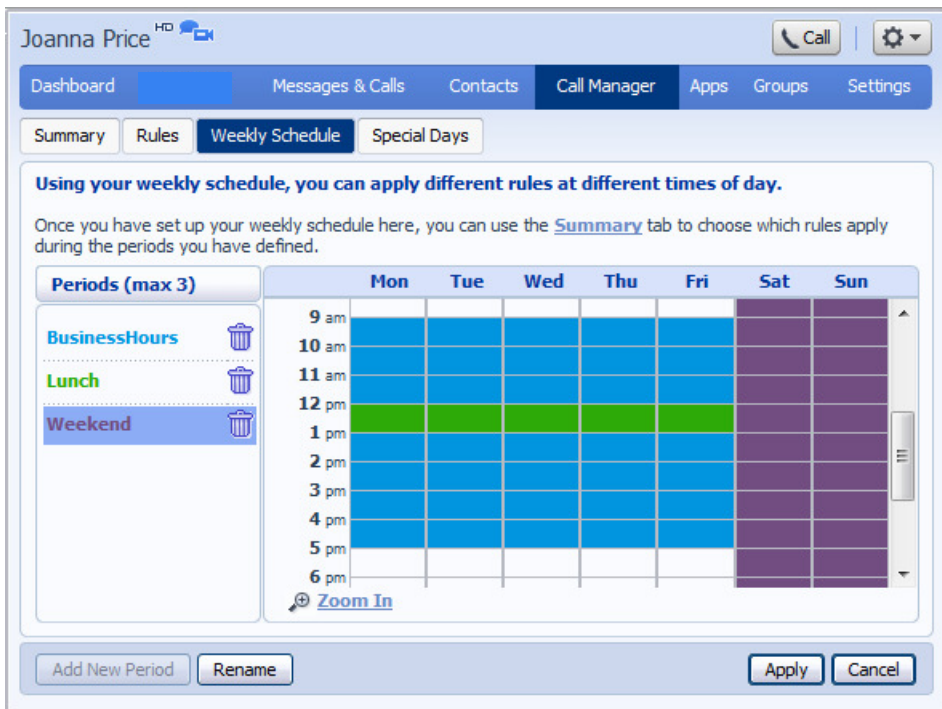


When configuring a rule, users can use wildcard number matching that allows a single call-handling rule to apply to ranges of calling numbers – for instance, to all numbers within a particular area code. Rather than having to specify multiple numbers, users can use a ? to match any digit, or a * to match any series. For example, 555 123 44?? matches every number from 555 123 4400 to 555 123 4499, while 555* matches any calls from phone numbers starting with 555.

- * may only be used as the final character in a pattern and hence may appear once in a pattern, or not at all.
- ? may be used more than once in a pattern, and may appear in any character position within a pattern.
- Wildcards can be mixed with Business Group prefixes. These prefixes may *start with* an asterisk (being a literal asterisk character in the number, not a wildcard) but can then be followed by the wildcard *. Therefore, specifying ** would allow a user to set a rule that applied to incoming calls from all the extensions in a Business Group.

Users can then use the **Weekly Schedule** tab to split their week into defined periods, during which they wish their different call processing rules to be applied. Using the options on the **Summary** screen, they can then apply different Sets of Rules at different times of the day or week, according to their Weekly Schedule. Figure 18 shows the Weekly Schedule covering a user's working hours and lunch break.

Figure 18: Incoming Call Manager Weekly Schedule display



The **Special Days** tab allows the users to set dates that are exceptions to their normal weekly schedule, for example vacations or business trips. This screen includes the option to add the public holidays for their region automatically at the click of a button.

2.6 Apps tab

The **Apps** tab gives users access to and information about applications, widgets and accelerators that allow them to use CommPortal features on various platforms, which may include their personal computer, mobile phone, or television.

Figure 19: Apps tab summary screen



2.6.1 Apps for personal computers

Users can download and use CommPortal apps for personal computers that enable them to access CommPortal features in a web browser without opening CommPortal. These include:

- CommPortal Assistant, a desktop application that provides access to most CommPortal features
- CommPortal Widgets and Accelerators, which run in various third-party environments and provide quick access to specific CommPortal functions

You will find more details about downloading and using these apps in the following of this document. These sections could be used to form the basis of end-user documentation that you might wish to write for your users.

- Appendix A: CommPortal Assistant
- Appendix B: CommPortal Widgets and Accelerators

Users can only download apps that are compatible with their computer's operating system and web browser. When a user views an app that is not compatible with their system, the link to download the app is gray and inactive.

Call Me Buttons

In addition to accessing apps, a user can create **Call Me Buttons** that they can add to emails and web pages, and which allow other people to easily set up phone calls to the user.

When a third party clicks on a CommPortal Call Me button, their web browser is directed to a page that is used to set up the call. The page prompts them to enter their telephone number and click on the Call Me button. The Call Me service then dials out to the specified number and, once the third party answers their phone, initiates the call to the user.

Call Me buttons are set up within the Apps tab, using a simple interface that allows users to select a design for the button before copying and pasting it directly from CommPortal into their web page or email. The user can enable and disable these settings, and cancel their Call Me Buttons, using the options in the *Calls* section of the *Settings* tab, as described in the section entitled "Call Me Buttons".

For instructions on how to configure and use Call Me Buttons, from a user's perspective, see Appendix C.

2.6.2 Apps for mobile phones

Users can use CommPortal apps for mobile phones to access CommPortal features, such as voicemail and conferencing, from iPhone, Blackberry or Android mobile phones.

Depending on the mobile phone for which a user wants to get a CommPortal app, the Apps tab provides either a direct link to the app store for their phone or instructions on how to get the app using their phone. Users cannot download apps for mobile phones directly from within CommPortal.

You will find more details about downloading and using these apps in the following sections of this document. These sections could be used to form the basis of end-user documentation that you might wish to write for your users.

- Appendix D: CommPortal iPhone, Blackberry and Android apps

2.7 Settings tab

The **Settings** tab provides access to various account and Call Service settings. These include, for example, changing password and PIN, configuring Phones and setting call forwarding preferences, messaging options and notifications.

The following sections describe the options that you will most commonly use.

2.7.1 Account

The **Account** tab displays information about a user's account and allows the user to configure or change some of the settings for their account, including their password or PIN, and to configure a desk phone.

Figure 20: CommPortal Settings Account tab

(501) 203 0006 ▾ Call | ⚙️

Dashboard Messages & Calls Contacts Call Manager Apps Groups **Settings**

Account Calls Messages Account Codes Notifications Reminders Group Mailbox

Personal Details [edit](#)

Name	Andy Randall
Department	Development
Admin	Sales
911 Location	set location

Security

Password	change
Call Services PIN	change
Voicemail PIN	change

Devices

Desk Phone	(501) 203 0006	set keys
My Mobile	(123) 456 7890	edit
Fax	(123) 456 9877	

The page is divided into the following panels.

Personal Details

This panel displays the user's name and, if they are a member of a Business Group, their Department. It also shows, under *Admin*, whether they are a Business Group administrator and if so, of which Business Group or Department. The user can click on *edit* to change this information. Fields that cannot be changed will be grayed out.

This panel also allows users to set their current location for 911 calls. It is important that users set their location, because their deskphone allows them to make calls using the same phone number anywhere they access the internet, and without this information, those calls cannot be directed to a local emergency operator.

Security

The user can use this panel to change their CommPortal password or Call Services or Voicemail PIN by clicking on the *change* link next to the password they want to change and entering their old and new password/PIN into the appropriate fields of the pop-up that appears.

Devices

Users can use this panel to configure settings for their desk phone if they have one, by clicking on *set keys* next to its telephone number. This will launch the CommPortal Phone Configurator, as described in section 2.8.

The panel will show a fax number if the user has a direct fax line rather than receiving faxes on their primary phone number.

2.7.2 Calls

The **Calls** tab allows users to configure their call service options by expanding the panels as required.

Figure 21: CommPortal Settings Calls tab

The screenshot shows the CommPortal Settings interface for the 'Calls' tab. At the top, there is a phone number '(501) 203 0006' and a 'Call' button. Below this is a navigation bar with tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Apps, Groups, and Settings. Underneath, there are sub-tabs: Account, Calls (selected), Messages, Account Codes, Notifications, Reminders, and Group Mailbox. The main content area is divided into sections: 'General' (expanded), 'Remote Call Forwarding', 'Call Blocking', and 'Call Jump'. The 'General' section includes options for auto-answering, call transfer number (554), allowing numeric pages, withholding caller ID, and displaying caller information. The 'Call Jump' section has a text input field for alternate numbers. At the bottom right, there are 'Apply' and 'Cancel' buttons.

- The **General** panel enables users to configure call settings, including caller ID options.
- The **Remote Call Forwarding** panel allows the user to configure whether they need to enter a PIN to remotely turn on the Immediate Forwarding, Busy Forwarding or No Answer Forwarding options. There is also a button to turn Remote Call Forwarding on or off. This service, allows all incoming calls to be redirected to a different target number.
- The **Call Blocking** panel allows users to bar calls of a particular type, for example they may wish to prevent Premium Rate calls being made from their telephone line.

Call Jump

Call Jump can transfer an established call made or received using their primary phone number to a different telephone number.

The **Call Jump** panel allows the user to configure two telephone numbers that will correspond to two hot key sequences that they can press to transfer these incoming calls when using Single-Target Call Jump.

- The Alternate number will usually be an alternative landline number.
- The Wireless number will be a mobile device.

These telephone numbers need not be associated with the user's CommPortal account.

Call Me Buttons

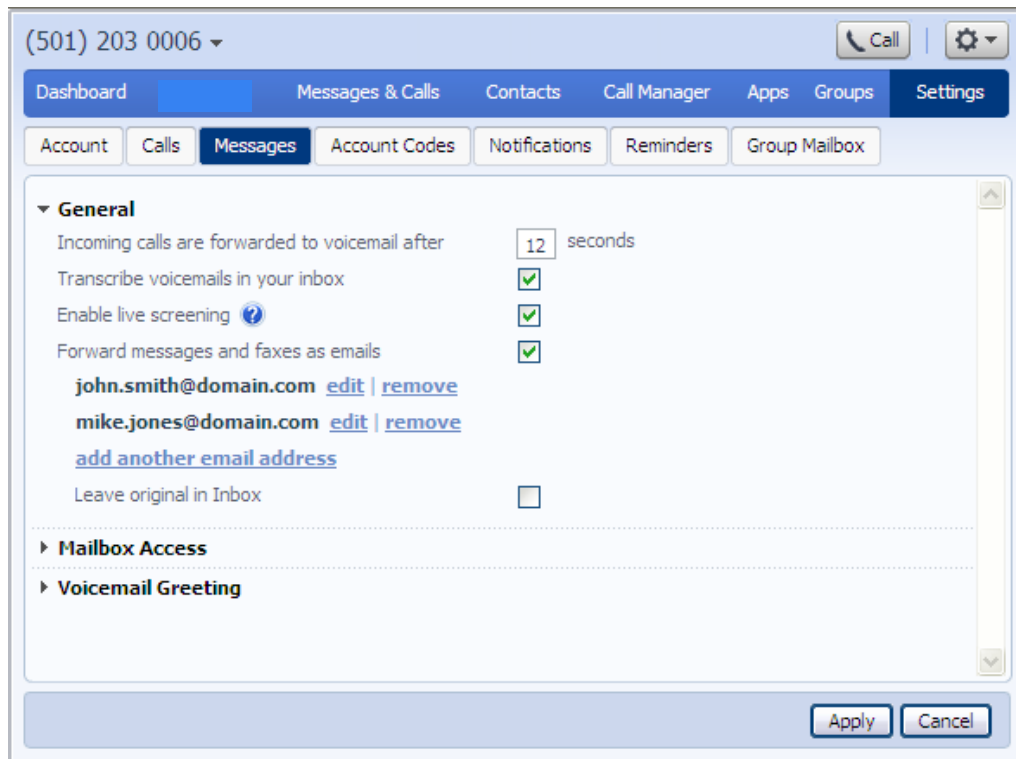
The **Call Me Buttons** panel allows users to enable or disable their Call Me service and to cancel their existing buttons. If a user disables the buttons by un-checking the *Enable Call Me Buttons* checkbox, potential callers who attempt to make a call to the user, for example by using a Call Me button that a user had already included in an email, will see a message stating that the service is not currently available.

Clicking on *Cancel Existing Buttons* allows the user to permanently disable all their existing Call Me buttons, resulting in them no longer being charged for Call Me calls. If they wish to reactivate the Call Me service, they must recreate and redistribute their Call Me buttons.

2.7.3 Messages

Users who use Voicemail can use the **Messages** page to access the settings for these services. The page is divided up into the following different sections.

Figure 22: Messages



The screenshot shows a web interface for managing messages. At the top, there is a phone number '(501) 203 0006' and a 'Call' button. Below this is a navigation bar with tabs for 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Underneath the navigation bar are sub-tabs for 'Account', 'Calls', 'Messages', 'Account Codes', 'Notifications', 'Reminders', and 'Group Mailbox'. The 'Messages' sub-tab is selected. The main content area is titled 'General' and contains several settings:

- 'Incoming calls are forwarded to voicemail after' is set to '12 seconds'.
- 'Transcribe voicemails in your inbox' is checked with a green checkmark.
- 'Enable live screening' is checked with a green checkmark.
- 'Forward messages and faxes as emails' is checked with a green checkmark.
- There are two email addresses listed: 'john.smith@domain.com' and 'mike.jones@domain.com', each with 'edit' and 'remove' links.
- There is a link 'add another email address'.
- 'Leave original in Inbox' is unchecked.

Below the 'General' section are two expandable sections: 'Mailbox Access' and 'Voicemail Greeting'. At the bottom right of the settings area are 'Apply' and 'Cancel' buttons.

Users can use the **General** panel to

- enable and disable Live Message Screening and voicemail transcription (these options will only be visible if the user's Class of Service allows them to use these services).
- turn on the auto-forwarding of voicemail messages by email, and enter destination email addresses by clicking on the *add another email address* link and either entering the address manually or selecting from a dropdown list of email addresses that the user has already added to their Contacts. Existing destination email addresses can be edited or removed by clicking the appropriate link.

Users attempting to add more than their permitted number of email addresses will see an error message.

Faxes are forwarded either in PDF or TIFF format, depending on how the user views faxes.

- choosing whether to leave a copy in their inbox or delete any forwarded messages from their CommPortal account

Users who choose to delete these messages from their CommPortal inbox will not receive any notifications when new messages arrive in their CommPortal account.

- choosing whether to include action links in the outgoing message.

Clicking on action links will allow the user to log in to their account, to mark messages as read (deactivating any message waiting indicators), or even to delete them.

Users can use the **Mailbox Access** panel to configure their mailbox settings by checking and un-checking the appropriate boxes to

- enable or disable fast login and skip PIN options
- set message ordering and playback options.

Users can use the **Voicemail Greeting** panel to:

- select their default greeting
- specify when alternative greetings should be used and the behavior when a greeting expires
- record additional greetings, for example greetings to be used out-of-hours or during an extended absence
- override their default greeting with a temporary greeting for a defined period of time.

2.7.4 Account Codes

The Account codes tab displays the account codes that must be used when placing a particular type of outbound call (e.g. local, national or international) and whether these account codes should be validated or not.

These settings may be configured by the Business Group administrator rather than the user, in which case they will be shown to the user in a read-only view.

2.7.5 Notifications

Users who use Voicemail and Unified Messaging services can use the Notifications tab to set options for how they wish to receive notifications whenever a new message arrives for them.

There are a number of circumstances where the behavior of the notifications options will differ depending on the configuration of your deployment or the user's account.

- Users who have set up CommPortal to auto-forward their voicemails and faxes to an external email account and to delete these messages from their inbox, as described in section 2.7.3, will not receive any notifications when new messages arrive in their CommPortal account.
- If any of the telephone numbers used for email, outdial and pager notifications are affected by an area code split, the user will have to change these manually once the area code split procedure has been completed, otherwise notifications will no longer be delivered.

The MWI notification configuration is changed automatically during the area code split procedure.

MWI notifications are not postponed.

The bar under **Notifications** shows the tabs for the different notification options available to that user, for example **MWI (Message Waiting Indicator)**, **Email**, **Pager**, and **Outdial Notifications**. There is also an **Override** tab, where the user can define the notification behavior and a schedule that, when selected, will override all the other notification settings that they have configured.

As an example, the screenshot below shows the display that the user can use to set up Outdial Notifications. This type of notification allows the user to configure a telephone number that the system should call whenever a new message arrives in his or her account.

Figure 23: Outdial Notifications

The screenshot shows the 'Outdial' notification configuration page. At the top, there is a header with the phone number '(501) 203 0006' and a 'Call' button. Below this is a navigation bar with tabs for 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Underneath, there are sub-tabs for 'Account', 'Calls', 'Messages', 'Account Codes', 'Notifications', 'Reminders', and 'Group Mailbox'. The 'Notifications' tab is active, and within it, the 'Outdial' sub-tab is selected. The main content area contains the following settings:

- Send outdial notification of incoming messages, according to the [schedule](#):**
- Specify the phone number to send outdial notifications to:
- Choose the incoming messages that should be notified to the specified phone number:
 - Urgent Voicemail
 - All Voicemail
 - All Faxes
- Set the delay between receiving the message and receiving the notification for the message:
 - Delay for normal messages:
 - Delay for urgent messages:
- Set a retry limit and delay between retry attempts until the message is marked as read:
 - Number of outdial retry attempts:
 - Stop retries when you answer the call
 - Stop retries only when you access your voicemail
- Delay between retries (minutes):

At the bottom right, there are 'Apply' and 'Cancel' buttons.

The user can:

- enable or disable the notification type by clicking the box on the left-hand side of the screen. When Outdial notifications are disabled, the rest of the screen will be grayed out and the user will not be able to make any changes to the configuration without enabling Outdial notifications first.

- choose which events – Urgent Voicemails, All Voicemails and/or All Faxes – will trigger a notification to a particular target
- enter or modify targets for notification types.

For Outdial notifications, the user can additionally:

- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message still activate the MWI, but the outdial notification is postponed until the next active period in the schedule
- control the delay between receiving a message and sending out a notification
- control how many times, and at what interval, the system re-tries the call if the notification is not acknowledged
- control what the user has to do to acknowledge the notification: simply answer the outdial call, or proceed to access their voicemail. Using the latter setting prevents a notification being lost because the call was picked up by an answering machine or another member of the household.

The Email Notifications and Message Waiting Indicator displays are similar.

- MWI targets are restricted to other telephone numbers owned by the user.

The following screen illustrates further options available to users when configuring notification types that allow more than one target, in this case when configuring MWI notifications.

Figure 24: MWI Notifications

(501) 203 0006

Dashboard | Messages & Calls | Contacts | Call Manager | Apps | Groups | Settings

Account | Calls | Messages | Account Codes | **Notifications** | Reminders | Group Mailbox

MWI | Email | Pager | Outdial | Override

Send phone notification of incoming messages to the following phone numbers

Phone Number	All Faxes	Urgent Voicemail	All Voicemail	
(123) 456 7890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(987) 654 3210	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(648) 952 1658	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(357) 895 1236	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(785) 412 3698	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✕

Clear List | New Entry | Apply | Cancel

As with Outdial notifications described above, all the notification types must be enabled by ticking the checkbox on the left of the screen before the user can make any changes. If this checkbox is not ticked, the rest of the screen will be grayed out.

For these notification types, the user can:

- use the trash can icon to delete a target from the list

- use the checkboxes to change the message types that trigger notifications
- delete the whole list by selecting the **Clear List** option
- add a **New Entry** to the list – selecting this option will create a pop-up box in which to enter the information for the new target. This option will be grayed out if you have already configured the permitted number of targets.

Notification schedule override

Your users can also override the schedules they have configured for their outdial notifications. Once activated, only the override schedule applies and notifications are only delivered to the specified phone, email address or pager until a configured expiry date or until it is manually disabled. Users can only activate the override schedule if they have enabled the outdial notifications service.

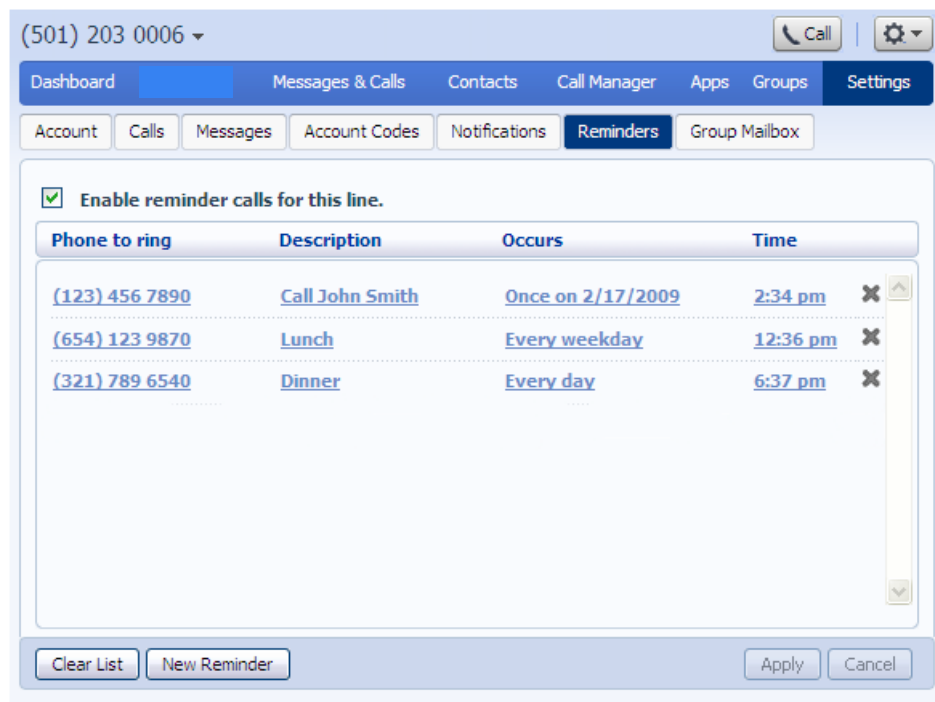
2.7.6 Reminders

Users can use the **Reminders** tab to set up single or recurring reminders calls.

Reminders

The Reminders tab shows a list of the Reminders that have been scheduled. It also allows users to create new Reminders, and edit and delete existing ones.

Figure 25: Reminders



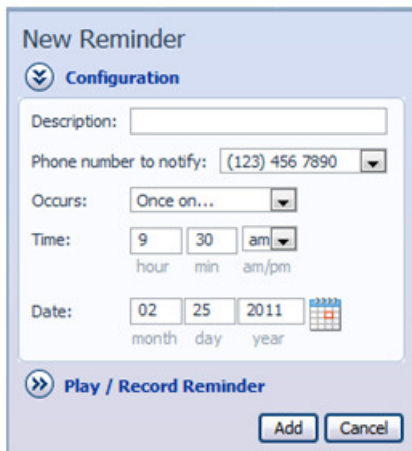
The Reminders tab allows the user to:

- enable or disable the reminders service
- view, modify and delete their existing reminders, and add new ones (the service must be enabled before users can make changes – when the service is disabled, the rest of the screen will be grayed out)
- record and play back the message to be used for each reminder, using the New Reminder or Edit Reminder pop-ups.

Reminder UI


The Reminder UI is used to configure new reminders or edit existing ones.

Figure 26: The Reminder UI for a new reminder



For each reminder, the user can use the New Reminder pop-up illustrated in Figure 26 to configure:

- a description for the reminder, to be shown in CommPortal
- which device (phone) should be used to send the reminder
- whether the reminder is one-off or repeating
 - if the reminder is one-off, the date on which the reminder occurs
 - if the reminder is repeating, whether the reminder occurs on all days or just week days
- the time of day at which the reminder occurs.

The sound control in this UI, exposed by clicking  alongside *Play/Record Reminder*, is used to record and play back the sound used for each reminder.

- If the reminder is already recorded, the sound control displays its duration and the user can play the reminder or re-record it. It is also possible to delete the reminder sound by clicking the *Delete sound* button in the dialog. The *Delete sound* button is enabled only if there is a reminder sound recorded.
- If the reminder sound is not recorded, the message *There is no recording for this item* is displayed and the user can then record one.
- Users can also edit existing reminders by clicking the links on the Reminders screen to launch the Edit Reminder pop-up.

All changes to the reminder sound are submitted to the server with all the other information when the Apply button is pressed on the Reminders screen. The user must click on Apply before navigating away from the Reminders screen, otherwise any changes made will be lost.

Reminders

Reminder users can see a list of all the reminder calls currently set up for their line and modify or delete them, as well as create new ones.

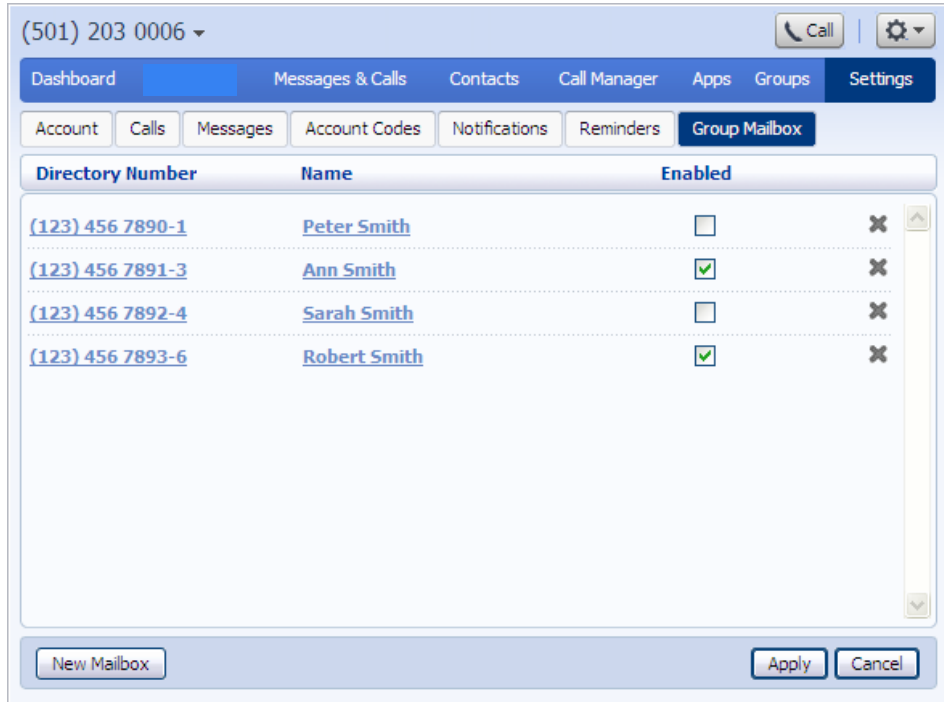
Users can configure both one-off reminder calls and regular reminder calls.

- One-off reminders are made once at a set time, up to 24 hours after the reminder was configured.
- Regular reminders are made at a set time on a number of days, depending on the particular options selected.

2.7.7 Group Mailbox

Users can be provisioned as either individual or group users. Users who are members of group mailboxes can use the **Group Mailbox** tab to configure aspects of this group mailbox. Each group mailbox has one primary and one or more secondary users, who have different editing privileges under this tab.

Figure 27: Group Mailbox



The Group Mailbox tab displays all the members of the group mailbox. Clicking on either the *Directory Number* or *Name* of one of these users launches a pop-up, where primary users can modify the following settings for each secondary user:

- first and last name
- PIN (and Password, if the PIN and password are allowed to be different)
- whether the secondary user is enabled
- whether the secondary user's messages affect the primary's MWI status (if the primary user may use MWI notification and the secondary user has messaging)
- whether information about the secondary user's new messages are exposed to the primary user via the TUI (if the primary and secondary users both have messaging and their class of service allows message count aggregation).

If the group mailbox uses shared access numbers, the primary user can also add and delete secondary users.

2.8 Configuring phones

The CommPortal Phone Configurator is accessed from the **Settings** tab, as described in section 2.7.1. Users will click on *Account* and then the *setkey* link alongside their Desk Phone number that is displayed in the **Devices** panel to launch the UI.

The CommPortal Phone Configurator UI shows a full-screen image of a user's phone(s), either as an overlay in the same window (if you have embedded the CommPortal UI in a surround) or by right-clicking to bring up the browser menu and choosing to open the link in a new window. From here, configuring buttons and features is just a case of clicking on the picture of the phone itself, and navigating pop-up help menus to assign functions.

Figure 28: CommPortal Phone Configurator



- You can use the UI to edit the phone's Line Key configurations.

2.9 Groups Tab

In the **Groups** menu, the user can view membership details of any MADN (Multiple Appearance Directory Number), MLHG (Multi Line Hunt Group) and Call Pickup Groups.

A user can be a member of up to 20 of these groups in total.

Figure 29: Groups tab

The screenshot displays the 'Groups' tab in the CommPortal interface for user Joanna Price. The interface includes a navigation bar with 'Dashboard', 'Messages & Calls', 'Call Manager', 'Apps', 'Groups', 'Settings', and 'Add Services'. Below the navigation bar, a message states: 'The table below lists the MADN, MLHGs and Call Pickup Groups (CPUGs) you are a member of. Click on one of the groups to view detailed information.'

The 'Group Membership' panel on the left lists the following groups:

- CPUG: Jeff's (highlighted)
- CPUG: Toms
- MADN: 2555454
- MLHG: Account's
- MLHG: Sales
- MLHG: Front Desk

The 'CPUG: Jeff's' details panel on the right shows:

- Department: MetaSwitch
- Number of Lines: 4

A table below the details panel lists the members of the CPUG:

Number	Extension	Name
(501) 203 0006	454	Andy Richards
(501) 901 1201	455	Alice
(501) 901 1202	456	Jack
(501) 901 1229	927	Ann

The above screenshot shows the **Groups** tab in CommPortal.

- There may be one or more MADNs shown in the Group Membership panel. The BG Line User can highlight an individual MADN to view its details.
- A User can be a member of one or more MLHGs, and all these will be displayed under the Group Membership panel, including whether the user is currently logged in to that MLHG. There are two types of MLHG membership:

3 Phone Applications

Phone Applications are tools which run on a user's phone, using the phone's own display and keys, offering convenient access to some of CommPortal's most-used features.

3.1 Network Contacts Application

The Network Contacts Application allows users to use their phone to

- view their CommPortal contacts, and the list of extensions and line names in their business group
- search the lists, matching against contacts' names, nicknames, organizations, email addresses and telephone numbers
- sort by first name or last name
- view the detail of a specific contact, including their full name, title, organization, telephone numbers, postal addresses and email addresses
- call a contact, either on their preferred number or a specific number
- modify the name, nickname, organization, number or number preference of a contact
- add a new contact, providing name, nickname, organization, number or number preference of a contact
- paste a number from call lists or voicemail into a contact's number field
- delete a contact.

Any change that is made on the SIP phone is updated immediately in CommPortal and on next poll in CommPortal Assistant.

3.2 Network Call Lists Application

The Network Call Lists application allows users to use their phone to

- view combined or separate lists of missed/dialed/received/rejected calls, including who (was) called and when
- view more details, including the duration of the call
- jump from the identity of the sender to the corresponding contact in the contacts application (or create a new one if no such contact exists)
- return (or retry) a call.

3.3 Network Call Lists – Dialed Calls application

This is functionally the same as the plain Network Call Lists application, but it starts on the Dialed List page of the user's list of calls.

This application is intended for assignation to the phone's redial button so that the user can see a list of recent dialed calls from which to choose to call. The user can still navigate from that point to missed/received/rejected calls as with the Network Call Lists applications.

3.4 Message List Application

The Message List application allows users to use their phone to

- view a list of voicemails, including who sent them, when, whether they are urgent and whether they have been heard
- play voicemails
- read transcripts of their voicemails, if Speech-to-Text is available
- view more details, including the duration
- jump from the identity of the sender to the corresponding contact in the contacts application (or create a new one if no such contact exists)
- return the call
- mark voicemails as heard or unheard
- delete voicemails.

Any change that is made on the SIP phone using this application is updated immediately in CommPortal, and on next poll in CommPortal Assistant as well as in the TUI.

3.5 Services Application

This application provides a menu listing all the applications available to the user on this phone. Users can then start the application by selecting it from the menu.

Note that if the Services application is deployed for a user, the user loses the ability to access on-phone details of the directory, call lists and voicemail services via the services menu. However these features are replaced by the other Phone applications available to users using SIP phones.

3.6 User Login / Logout of Phone Applications

3.6.1 Hot Desking

This feature allows a user to log in to a phone not already associated with a user.

The user is asked to enter their directory number, and CommPortal password or PIN. This associates the phone with their account, which then delivers the application set and features associated with their account.

Once the user has finished using the phone they should log out. The Hot Desking feature consists of both Login and Logout applications.

A CommPortal Assistant

CommPortal Assistant runs on your own PC, offering a convenient and fully-integrated route into your account. Using the toolbar you can carry out a number of tasks, all from your PC:

- enable a pop-up that appears when you receive an incoming call on the telephone number you used to log in to CommPortal – if you do not want to answer the call, you can use the pop-up to either decline the call or redirect it to another telephone number
- see when you receive new messages in your mailbox
- search your contact lists and place calls to those contacts
- make instant changes to your call settings, for example to send calls to voicemail
- synchronize your CommPortal contacts with your Microsoft Outlook 2003, 2007 or 2010 contacts
- place calls with one click from inside Microsoft Outlook.

Integration with Microsoft Outlook 2010 is only available if you are running the 32-bit version of Office 2010 as installed by default, and not if you are using the 64-bit version, for example because you are a power user of Excel.

Before you can make use of the features of CommPortal Assistant, you must first install it on your computer, as described in section A.1.

A.1 Installing CommPortal Assistant

You can download and install CommPortal Assistant from within the web-based CommPortal.

A.1.1 System Requirements

The PC onto which you want to download CommPortal Assistant must have at least 8MB of disk space for installation and be running

- Windows XP (Service Pack 2 or later), Windows Vista or Windows 7
 - Note that CommPortal Assistant is not supported on Windows 2000
- Internet Explorer 6.0 or above, or Firefox 3.0 or above.

CommPortal Assistant also requires .NET 3.5, a component of the Windows operating system. Most PCs already have .NET 3.5. However, if you do not have .NET 3.5 installed on your computer, the installation process will provide you with a link to download it from Microsoft and install it on your PC. This download is free.

You also need administrator privileges to install CommPortal Assistant. You will usually have these privileges if you are installing the software on your own computer, but you may need to contact your network administrators if you are using a company-owned PC or are in a similarly controlled environment.

A.1.2 Downloading CommPortal Assistant

- Log into your account using CommPortal.
 - www.lightpathhostedvoice.com or www.optimumlightpathvoice.com

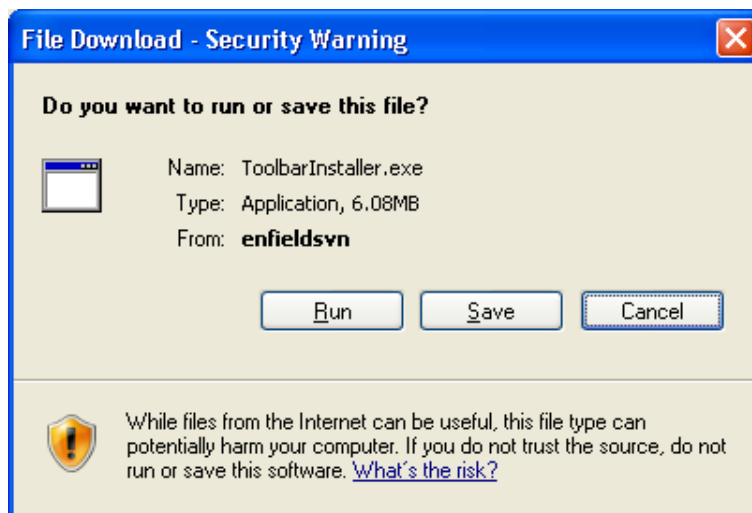
- Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).
- Click *Apps* on the navigation bar.
- If you have the option to choose between apps on different platforms, click on *On your Computer*; otherwise, skip this step.
- You are then taken to the list of apps available for your personal computer. Normally, the CommPortal Assistant page is displayed by default and you can download the application from this page. If the CommPortal Assistant page is not displayed by default, you can select it from under *Computer* on the menu on the left of the screen.

Figure 30: The CommPortal Assistant download page



- Click the *XP/Vista/Windows 7* link to download the installation package *ToolbarInstaller.exe*. You will see a pop-up dialog box similar to that illustrated in Figure 31 below.

Figure 31: Security warning on download of CommPortal Assistant

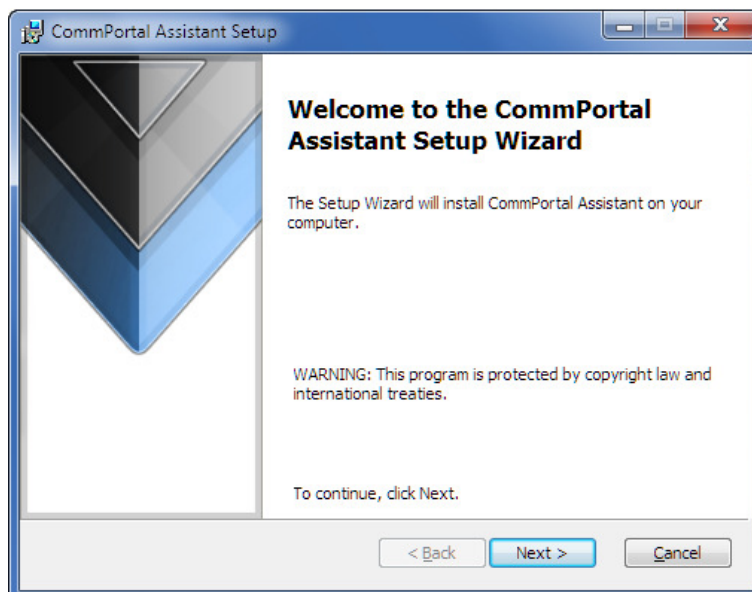


- Click *Run* to install CommPortal Assistant immediately, or *Save* to download it and install it at a later date.

A.1.3 CommPortal Assistant Installation Wizard

Once you have downloaded CommPortal Assistant, you can use the CommPortal Assistant Setup Wizard to install the toolbar on your PC.

Figure 32: The CommPortal Assistant Installation Wizard

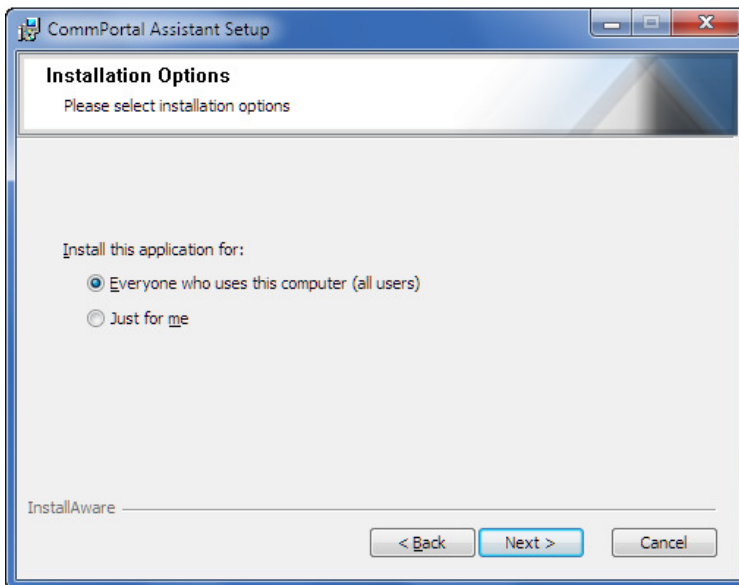


- If you chose *Run* when prompted by the dialog box in Figure 31, the installer will launch automatically. If you chose *Save*, when you are ready to begin installing CommPortal Assistant, open the location you saved it to and double-click the *ToolbarInstaller* icon.
- If you are using Windows Vista, a security dialog may appear, asking you to confirm that you wish to install the new software. Select *Allow* or *Continue* to proceed with the installation.
- The CommPortal Assistant Setup Wizard begins.

- Click *Next*, then read the End User License Agreement. If you accept it, select *I accept the terms in the License Agreement* and click *Next* again.
- If your computer supports multiple users, you must then select whether you want to make the tool available to all users, or only to you. This choice is illustrated in Figure 33.

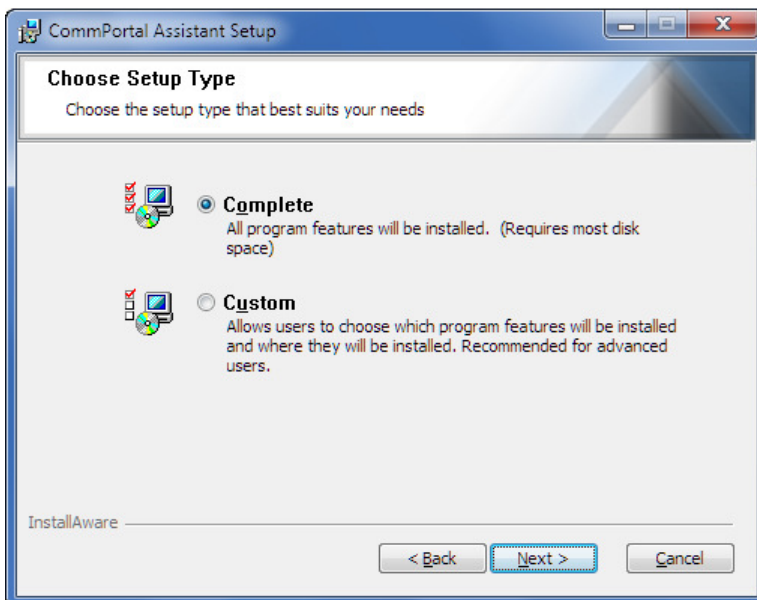
Even if you choose to make the tool available to all users, your account remains secure. Each user must enter their own login details to access their mailbox.

Figure 33: Selecting the users on the PC for whom CommPortal Assistant is available



- You are then asked whether you want to install the complete package or a custom package, as shown in Figure 34.

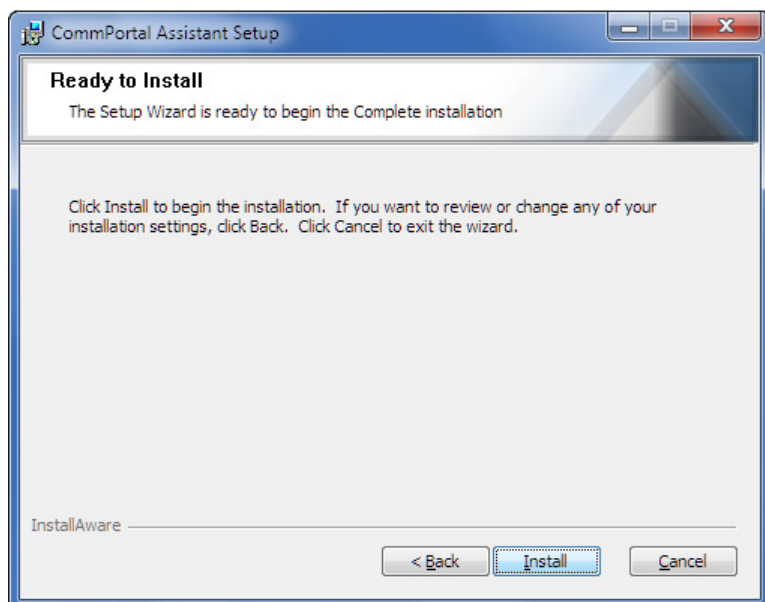
Figure 34: Selecting a complete setup



- If you are an experienced user, you may wish to select custom options. Otherwise, we suggest you install the complete package. Select *Complete* and then click the *Next* button.

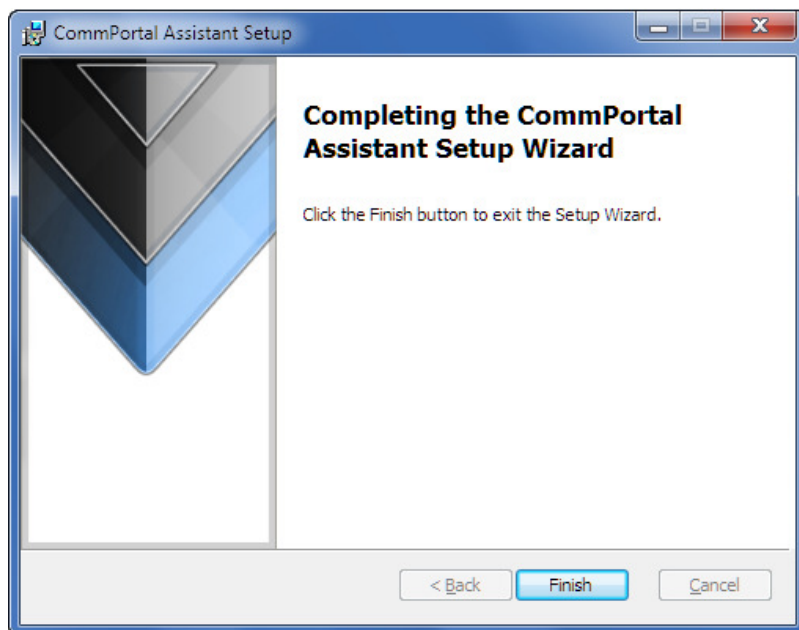
- Finally, you are asked to confirm your settings, as shown in Figure 35. Select *Install* to continue.

Figure 35: Initiating the installation



- CommPortal Assistant is then installed on your PC using the settings you configured.
- Once complete, click *Finish*, as shown in Figure 36, to exit the Setup Wizard and start using the feature immediately.

Figure 36: Installation complete



If you have Outlook 2003, Outlook 2007 or the standard 32-bit version of Outlook 2010 installed on the same PC as CommPortal Assistant, the first time you launch the toolbar you will see a balloon message alerting you to CommPortal Assistant's synchronization feature described in section A.3.5. This feature enables you to automatically synchronize your CommPortal Assistant and Outlook contacts once you have set up the necessary configuration, as described in section A.2.4.

If you have the 64-bit version of Outlook 2010, you will see a message informing you that Outlook integration has been disabled because this feature is not supported. You therefore cannot use contact synchronization, or the click-to-dial feature that allows you to place calls with one click from inside Microsoft Outlook.

- Finally, verify that CommPortal Assistant appears in your Windows Taskbar and Notification area (usually towards the bottom-right of your screen). This is illustrated in Figure 37.

Figure 37: The CommPortal Assistant and Notification area icons on the Taskbar



- If CommPortal Assistant is not visible, right-click on your Windows Taskbar, select *Toolbars*, and then click *CommPortal Assistant*.

This completes the installation process for CommPortal Assistant.

A.1.4 Switching between Microsoft Office 2010 versions

When CommPortal Assistant is launched, it detects which version of Office is running and whether that has changed since it was last started.

If it detects a change in the Office version (including it having been added to, or removed from, the system) then CommPortal Assistant will inform you of any changes in available function. For example, as stated above, CommPortal Assistant's integration with Outlook is not supported in the 64-bit version of Office 2010.

On Windows Vista and Windows 7 platforms, if you switch between these different versions of Microsoft Office, you will be prompted to approve UAC (User Account Control) in order to change the status of the TAPI registration that controls access to the click-to-dial Outlook integration feature. You will require the same permissions as when originally installing CommPortal Assistant.

If you change to a different version of Office 2010, you will therefore see one of the following messages, depending on what version, if any, of Office 2010 you are now running, and whether or not you allowed UAC to change the registration of the TAPI driver. These messages will inform you of the features available on CommPortal Assistant with that version of Office 2010, and any further action that you need to take.

Following upgrade to 64-bit Office

- If you allowed UAC to unregister the TAPI driver
"CommPortal Assistant

CommPortal Assistant is not compatible with 64-bit versions of Microsoft Office. Synchronization between CommPortal and your Outlook contact list, and the Click-to-dial button inside Outlook, have been disabled."
- If you did not allow UAC to unregister the TAPI driver
"CommPortal Assistant

CommPortal Assistant is not compatible with 64-bit versions of Microsoft Office. Synchronization between CommPortal and your Outlook contact list, and the Click-to-dial button inside Outlook, have been disabled."

Although the Click-to-dial button is no longer operational, it will still be displayed inside Outlook. To remove the button, reinstall CommPortal Assistant. You can download the CommPortal Assistant installation package from your CommPortal Settings web page."

Following the removal of 64-bit Office and if no version of Office is now installed

- If you did not allow UAC to unregister the TAPI driver

"CommPortal Assistant

You have uninstalled Microsoft Outlook. If you re-install it in the future, and wish to use CommPortal Assistant's Click-to-dial button inside Outlook, you will also need to reinstall CommPortal Assistant. You can download the CommPortal Assistant installation package from your CommPortal Settings web page."

Following return to 32-bit Office

- If you did not allow UAC to unregister the TAPI driver or, after you had already acknowledged the TAPI popup, no version of Outlook was installed

"CommPortal Assistant

You have reverted to a 32-bit version of Microsoft Office. Synchronization between CommPortal and your Outlook contact list, and the Click-to-dial button inside Outlook, have been re-enabled."

- If you did not allow UAC to unregister the TAPI driver and hadn't previously acknowledged the TAPI popup when no version of Outlook was installed

"CommPortal Assistant

You have reverted to a 32-bit version of Microsoft Office. Synchronization between CommPortal and your Outlook contact list has been re-enabled.

To re-enable the Click-to-dial button inside Outlook, you will need to reinstall CommPortal Assistant. You can download the CommPortal Assistant installation package from your CommPortal Settings web page."

A.2 Configuring CommPortal Assistant Settings

If you want to alter your settings, for example to display a pop-up when a message transcript is ready, you will have to configure your settings manually as follows:

- Right-click on the CommPortal Assistant notification icon.
- Select *Configure* to launch the *Settings* menu.

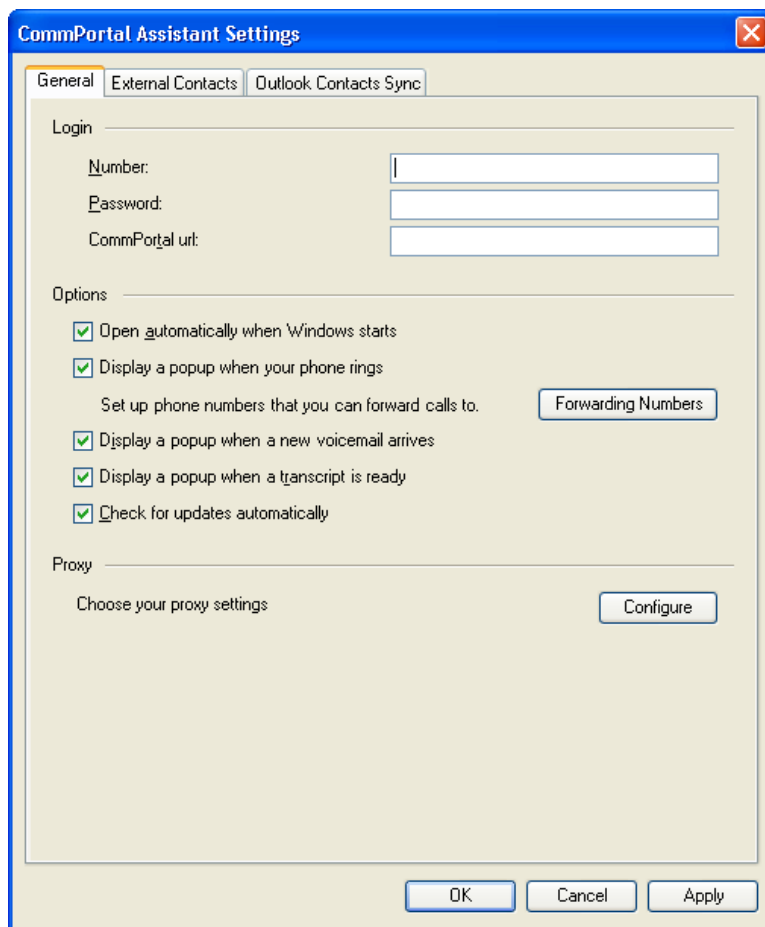
The dialog box shown in A.2 appears.

The *Settings* dialog boxes display the details that CommPortal Assistant uses to access your account. The *General*, *External Contacts* and *Outlook Contacts Sync* tabs are each described below.

A.2.1 General Tab

The General tab allows you to view and make changes to some of your general CommPortal settings.

Figure 38: CommPortal Assistant Settings Menu



This screen is split into a number of sections.

The *Login* section contains the following fields.

- *Number* – this is the phone number you use to access your CommPortal account.
- *Password* – this is the password used to access your CommPortal account. Depending on your service provider, this may be the same as your PIN, or may be a separate password you use only for CommPortal.

The *Options* section allows you to alter the behavior of CommPortal Assistant.

- *Open automatically when Windows starts* – check this if you want the toolbar to open each time you turn on your computer.
- *Display a popup when your phone rings* – check this if you want an on-screen dialog box to popup each time your phone rings. You can also use the *Forwarding Numbers* button to open up a new window that allows you to configure up to 5 phone numbers that you want to forward calls to. This window is described below under Forwarding Numbers.
- *Display a popup when a new voicemail arrives* – check this if you want an on-screen dialog box to pop up each time a new voicemail is delivered to your account. This pop-up will display details of the caller leaving the voicemail message, and the date and time the message was left.
- *Check for updates automatically* – check this if you want CommPortal Assistant to find out and tell you if there are updates available.

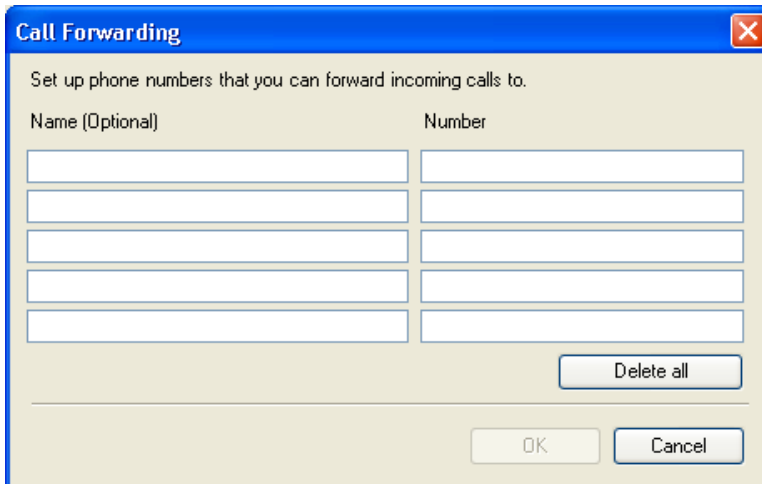
The *Proxy* section contains information used to access your account. Your service provider will tell you if you need to make any changes. You can access and change your proxy settings by pressing the *Configure* button.

Once you have completed all these fields, you should either select one of the other two tabs – for example if you want to enable Outlook Contact Synchronization as described in section A.2.4 – or click *OK* to save your changes and close the Settings tab.

A.2.2 Forwarding Numbers

Clicking on the *Forwarding Numbers* button on the *Settings* page launches the screen shown in Figure 39.

Figure 39: Call Forwarding



Name (Optional)	Number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Buttons: Delete all, OK, Cancel

This screen allows you to configure up to 5 numbers to forward incoming calls to. When you receive an incoming call, the pop-up alerting you to the call will include all the numbers that you enter here and allow you to forward the call with a single click.

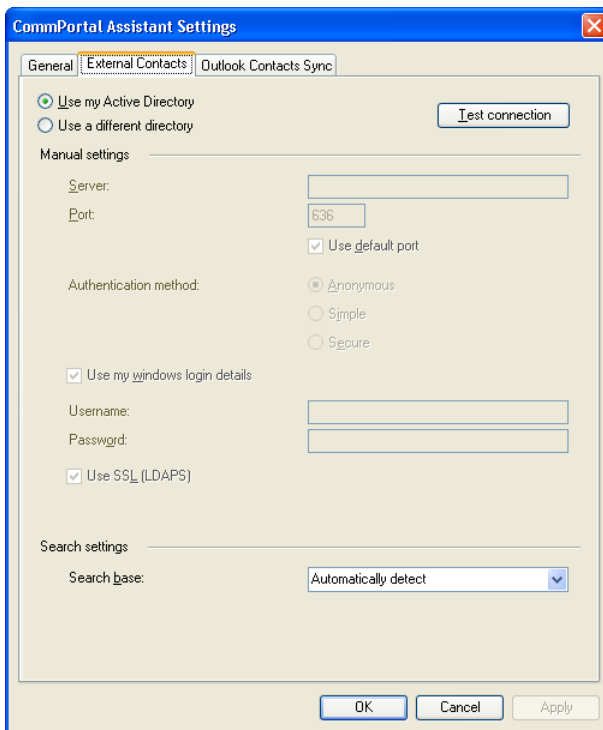
- You may enter up to 32 characters in the *Name* field, or leave the field blank.
- You may enter any common number punctuation in the *Number* field including * and # to allow you to use Business Group short and intercom codes. The numbers can be in any form that would be valid to dial from the telephone, for example national numbers, local numbers, or extension codes.
 - You cannot leave this field blank if you enter a value in the Name field.
- *Delete all* empties all the text fields.

Once you have entered all the information, press *OK* to save it and close the window and return to the *Settings* tab. You will see an error message if you have completed any of the fields incorrectly.

A.2.3 External Contacts tab

The External Contacts tab allows you to change from using your Active Directory to use a different directory for your external contacts.

Figure 40: External Contacts tab



By default, CommPortal Assistant uses your Active Directory.

If you need to change this to use a different directory, select the radio button alongside *Use a different directory*. You will now be able to make any necessary changes to the fields under *Manual Settings*. Contact your Service Provider for more information about the values you should be entering here.

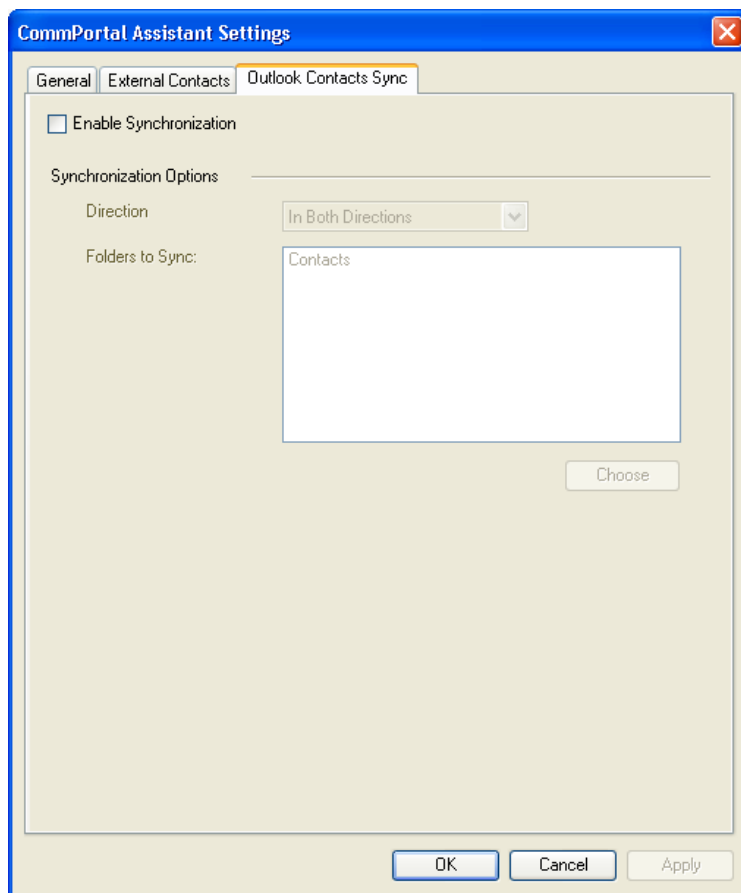
You can use the *Test connection* button to check that CommPortal Assistant can access the directory you have selected.

A.2.4 Outlook Contacts Sync tab

If you are running the 64-bit version of Office 2010, you will still see the Contact synchronization tab but synchronization is disabled because integration with Outlook is not supported in this version.

If you have Outlook 2003, Outlook 2007 or the 32-bit version of Outlook 2010 installed on the same machine as CommPortal Assistant, and have configured at least one profile within Outlook, you will also see the *Outlook Contacts Sync* tab illustrated in Figure 41. This enables you to configure the options for synchronizing any changes made to your Contacts in either Outlook or CommPortal.

Figure 41: Outlook Contacts Sync tab



This tab has the following options:

- *Enable Synchronization* – this will be disabled by default on installation or upgrade of CommPortal Assistant, and all the other settings will be grayed out. You should check this box to enable synchronization and make the other settings on the tab editable.
- *Select Profile* – if you have configured multiple profiles within Outlook and have not set a default profile, the dropdown box will display an alphabetically sorted list of all profiles. You must select a profile before synchronization can occur, and you will see a validation error if you attempt to submit the page without selecting a profile.

If you have only one profile or have configured a default profile, this option will not be shown.

- *Direction* – this allows you to specify the direction in which you want the synchronization to occur. The options are *Both directions*, *From Outlook only*, and *To Outlook only*. The default option is *Both directions*.
- *Folders to Sync* – this indicates which Outlook folders will be included in the synchronization. The default is *Contacts*. Note that you cannot deselect this Contacts folder.

You can use the *Choose* button to display a tree-view list of possible folders within your Outlook mail store, each with an associated checkbox to indicate whether this folder should be included in the synchronization.

If you change your Outlook profile using the Select Profile button described above, the Folder list is reset to include just the default Contacts folder. You cannot use the Choose button if you have not selected a Profile.

Once you have completed the configuration, select *OK* to submit your changes.

- If you have enabled synchronization, you will then be prompted to either synchronize immediately, or disable synchronization.
- If you choose to synchronize immediately, synchronization will start, as described in section A.3.5.

A.3 Using CommPortal Assistant

CommPortal Assistant includes the following components to help you manage your account from your computer desktop.

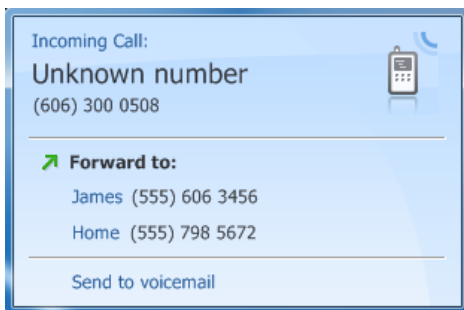
- **Incoming Call Pop-up** – allowing you to see details of incoming calls as they arrive and optionally decline the call or redirect it to another number.
- The **Notification Icon** – found in the notification area (usually at the bottom right of your screen next to the clock).
- The **toolbar** – embedded in the Windows taskbar (usually at the bottom of your screen).
- **Outlook Integration** – allowing you to make calls from within Microsoft Outlook.

These components are described in more detail below.

A.3.1 Incoming Call Pop-up

As described in section A.2.1, you can configure CommPortal Assistant to display a pop-up each time you receive an incoming call on the telephone number you used to log in, as illustrated below.

Figure 42: Incoming Call Pop-up



This pop-up

- displays the number of the caller, or shows Unknown number if this has been withheld by the caller
- displays the name of the caller, instead of the number of the caller, if this can be determined
- allows you to decline the call by pressing

- *Send to Voicemail*, if you have the Voicemail service
 - *Decline call*, if you do not have the Voicemail service, when the caller will then hear a message that you are unable to answer the call
 - allows you to forward the call to one of the pre-configured telephone numbers shown on the pop-up:
 - if you have not yet configured any call forwarding numbers, you will see a link to the page where you can configure these
 - indicates whether this is a Live Message Screening call.
-

If you use Live Message Screening, you will see a pop-up for both stages of the LMS call – first for the original incoming call, and then for the subsequent LMS service call. You cannot use Call Forwarding on LMS calls.

A.3.2 The Notification Icon

The Notification Icon indicates

- whether you have unheard messages
- that you have unresolved conflicts between your Contacts Lists in CommPortal and Outlook
- whether or not you are connected to your account.

You can access CommPortal directly from the Notification Icon, without needing to visit a login screen.





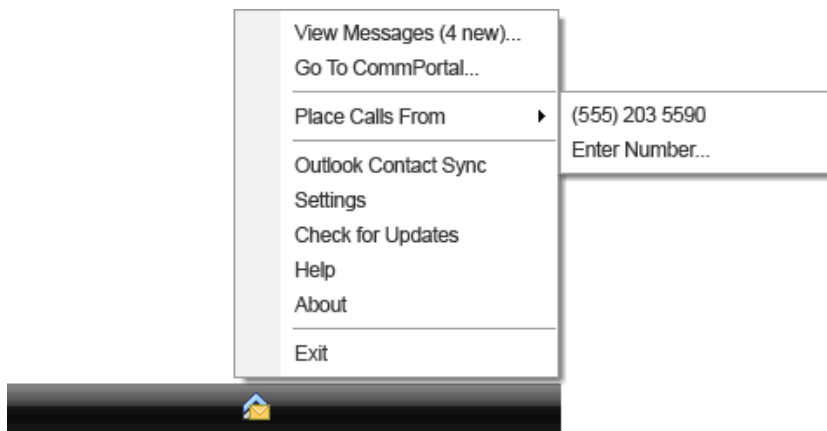
- The Notification Icon shows the following possible conditions.
 -  – when you have unheard voicemails
 -  – when you are connected to your account, but you have no unheard voicemails
 -  – when there is an error connecting to your account
 -  – when there are unresolved conflicts between your CommPortal Contact Lists and your Outlook contacts following synchronization.
- Double-clicking the Notification Icon opens CommPortal on the Dashboard display.
- Right-clicking the Notification Icon brings up the following menu.

Figure 43: Right-click menu of the Notification Icon



You can choose from the following options.

- *View Messages* – opens CommPortal at the Messages display. This option also indicates the number of new messages in your account.
- *Go To CommPortal* – opens CommPortal at the Dashboard display.
- *Place Calls From* – allows you to choose the number to use when making a call. Hovering over this option presents a second dialog where you can either select a pre-configured number or enter a new one.
- *Outlook Contact Sync* – takes you to the *Outlook Contact Sync* tab described in section A.2.4 where you can enable synchronization between your Contact Lists in CommPortal and Outlook.

You will not see this option if you have already enabled synchronization between your CommPortal and Outlook Contact lists.

If you have already synchronized your Contacts and you have unresolved conflicts between entries in your Contact Lists, you will instead see the option *Resolve Contact Synchronization Conflicts*. Section A.3.5 describes how to resolve any conflicts.

- *Configure Settings* – opens the CommPortal Assistant *Settings* page where you can make changes to the behavior of CommPortal Assistant. For a full description, see section A.2.
- *Check for updates* – looks for software updates.
- *Help* – opens the online help in your default web browser.
- *About* – gives details about CommPortal Assistant, and includes buttons to generate diagnostics. For a full description, see the online help.
- *Exit* – closes CommPortal Assistant (which closes both the Notification Icon and the Toolbar).

A.3.3 The CommPortal Assistant toolbar

If the CommPortal Assistant toolbar does not appear despite installing CommPortal Assistant, right-click on your Windows Taskbar, select Toolbars, and then click CommPortal Assistant.

The CommPortal Assistant toolbar allows you to control your status and to initiate outgoing calls.

The icon to the right of the toolbar displays your current phone status. Hover over the icon for more information. To change your status, right-click on the status icon to select from the options presented.

For example, if you have the default set of available settings, the icons, and the corresponding menu options, are as follows.





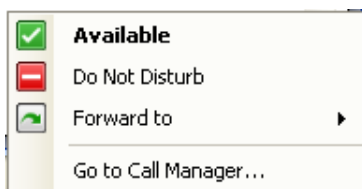
-  – *Ring My Phone*- your phone will ring as normal.
-  – *Do Not Disturb* – all calls will go to your voicemail and your phone will not ring.
-  – *Forward All Calls* – will forward calls either to voicemail or to another number you can select or specify, rather than making your phone ring.
-  – *Sim Ring* – will redirect calls to multiple numbers that you can specify; all the numbers will ring simultaneously and you can answer the call from any of the ringing devices.

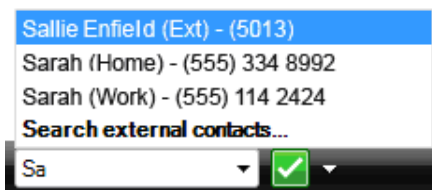
Figure 44: Setting your call services



Making calls from CommPortal Assistant

You can also use the toolbar to make an outgoing call. To start a call, begin typing the name or number of the person you wish to call in the text entry box inside the toolbar. As you type, the toolbar will automatically offer suggestions from your contact list, as shown in Figure 45.

Figure 45: Finding a contact to call



If you are a member of a Business Group, these suggestions will include the names of any Business Group Line contacts as well as your personal contacts.


You can also enter a telephone number in the text entry box, whether that number is in your contact list or not. You should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.


- Click on the name or number of a contact to initiate a call to this contact, or press Return once you have entered a phone number.

- Your own phone will then ring. When you pick it up, the feature server places the call to the chosen contact. You will hear a ringing tone (or other tone) as though you had dialed the number yourself.
- You will see a pop-up that displays the status of the call for the first 15 seconds (unless your Service Provider has configured a longer timeout period), and allows you to end the call at the press of a button. Once the pop-up disappears, you can end the call by hanging up the phone.

A.3.4 Making calls from Outlook

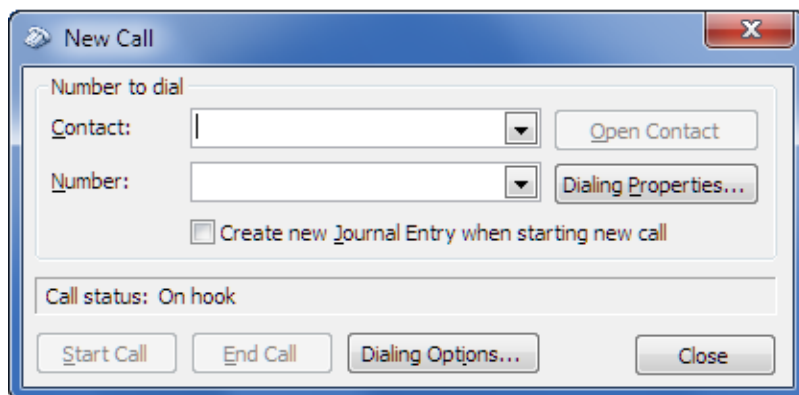
You cannot use the following feature if you are running the 64-bit version of Outlook 2010.

If you use Microsoft Outlook, after you have installed CommPortal Assistant, you will find a new  button on each *Contacts* page in Outlook.

To place a call to the contact, click the  button. The following dialog opens, and you will need to enter relevant details in each field. You can either enter the name of a contact or the number directly. If you enter the number directly, you should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.

To make the call click *Start Call*.

Figure 46: Outlook call contact page



See the CommPortal Assistant online help for full details of this feature.

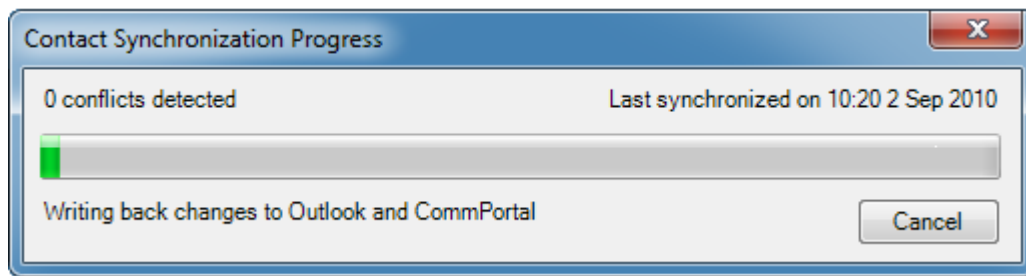
A.3.5 Synchronizing CommPortal and Outlook Contact Lists

You cannot use CommPortal Assistant's Outlook Contact Synchronization feature if you are running the 64-bit version of Outlook 2010.

If you use Outlook 2003, Outlook 2007 or Outlook 2010 on the same PC as CommPortal Assistant, you can configure CommPortal Assistant to synchronize your Contact lists – so that a change made in one application is applied to the other. Refer to section A.2.4 for instructions on how to enable this synchronization.

Once it is enabled, synchronization takes place automatically in the background. When this synchronization is happening, you will see the screen shown in Figure 47 describing the progress of the synchronization operation.

Figure 47: Synchronization Progress Window



- This window shows the progress of the synchronization process, including the number of conflicts detected.
- Selecting *Cancel* will abort the current synchronization. Changes made up to the point at which *Cancel* was clicked will still be applied.
- You can use the minimize button to close the dialog and allow the synchronization to continue in the background.
- Once synchronization is complete, the window will either close automatically or, if there are errors, remain open and indicate what the problem is.
- If there are any synchronization conflicts, the window shown in Figure 48 below will open automatically as soon as synchronization completes.

Resolving synchronization conflicts

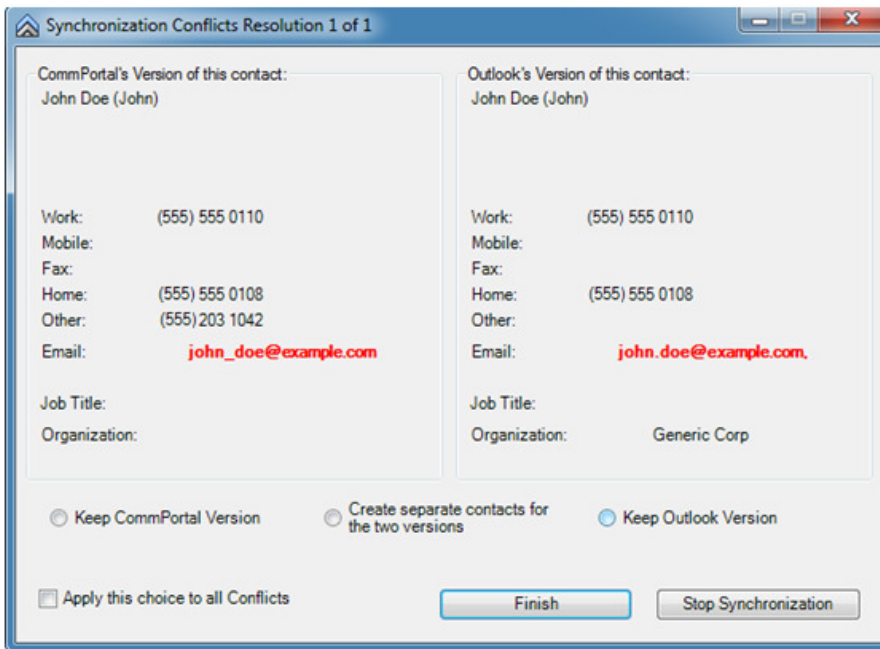
A synchronization conflict occurs if you have made changes to both the CommPortal contact list and your Outlook contacts since the last synchronization that conflict with each other.

If there are conflicts, you will see an exclamation mark next to the notification icon (usually at the bottom-right of your screen next to the clock). You can then select *Resolve Contact Synchronization conflicts* to open the Conflict Resolution Window.

You may also see a balloon appear next to the icon when an automatic synchronization completes. You can click on this balloon to open the Conflict Resolution Window.

The Conflict Resolution Window, shown in Figure 48, displays details of a single conflict. Once you have resolved this conflict, the window automatically changes to display the next conflicting contact until all have been resolved.

Figure 48: Conflict Resolution Window



- The dialog title indicates how many conflicts require resolution.
- The CommPortal and Outlook Contact List entries are displayed side-by-side, with the conflicting fields clearly indicated. In the example above, there is a small difference in the two email addresses.
- You can select one of the following buttons to resolve the conflict. This option will then become the default option for subsequent conflicts, even if the next conflict occurs during a later synchronization.
 - *Keep CommPortal Version* – the Outlook field is updated with the information in the CommPortal field.
 - *Create separate contacts for the two versions* – the conflict is unresolved.
 - *Keep Outlook Version* – the CommPortal field is updated with the information in the Outlook field.
- You can also apply this option to all the conflicts in your lists by checking the radio button alongside *Apply this choice to all conflicts*. This will resolve all outstanding conflicts in the same manner.
- Select *Continue* to apply any changes and move on to the next conflict, or *Stop Synchronization* to leave this and any subsequent conflicts unresolved.

When you run the synchronization process for the first time, you may have multiple potential matches in CommPortal for a contact in Outlook, or vice versa, and these will be indicated as the synchronization proceeds.

If multiple matches are found, you will see a similar screen to that shown in Figure 48.

- The Outlook contact's details are displayed on one side of the screen with all the possible matches within your CommPortal contacts on the other side of the screen.
- Using the radio buttons, you can either select one of your CommPortal contacts as the contact details you want to synchronize, or import the Outlook entry as a new Contact.

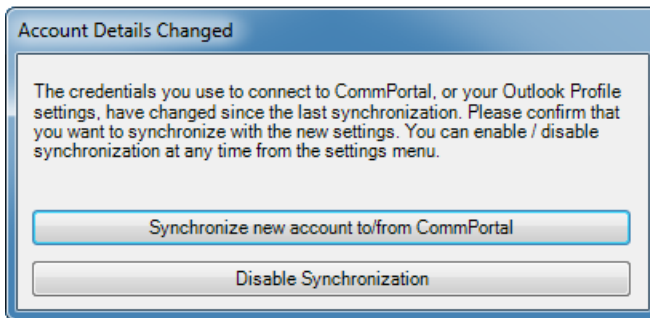
- Once you select a match to use and press *Continue*, CommPortal Assistant will attempt to synchronize the selected CommPortal contact with the Outlook contact.
- You should select *Stop Synchronization* to close the window and leave the conflict unresolved.

Outlook/CommPortal Account Changes

If you have enabled synchronization and subsequently make any changes to your Outlook or CommPortal account – for example to change your default Outlook profile or your CommPortal account username – you will be prompted to confirm whether synchronization is still required with the new account.

If you do not wish to synchronize with the new account, select *Disable Synchronization*. You can later re-enable synchronization, or change your settings, using the *Settings* dialog described in section A.2.4.

Figure 49: Account Details Changed



B Using CommPortal Widgets and Accelerators

This chapter describes which CommPortal Widgets and Accelerators are available, how to install or embed them, and gives a quick overview of how they work.

- **CommPortal Voicemail, Call Lists and Dialer Widgets** provide quick access to the main features of CommPortal on your desktop, or on various Google environments such as your iGoogle homepage.
- The **CommPortal Conference Widget** allows you to access your Conferencing server to set up and manage conferences directly from your desktop.
- Accelerators allow you to carry out actions on highlighted text on a web page. For example, **CommPortal QuickDial Accelerator** allows you to call any number shown on a website.
- Please note that Google will shortly discontinue their iGoogle product.

B.1 Available Widgets and Accelerators

The following Widgets are available to embed or install in Microsoft Windows Vista Sidebar, Microsoft Window 7, Gmail (also known as Google Mail), Google Calendar and Mac OS X Dashboard (Leopard or Snow Leopard).

There are various limitations when adding Widgets to Gmail. For example, you must be running the latest version of Gmail and have turned on the experimental labs feature that gives access to Widgets. You cannot install Widgets if you are running Gmail on your mobile phone.

- **Voicemail** – this provides a message list of your recent voicemails and, if you have the fax service, your fax messages.
- **Call list** – this shows a log of recent calls, missed calls, and received calls.
- **Dialer** – this allows you to make a telephone call.
- **Conference** – this allows you to set up and moderate phone conferencing.

The CommPortal Voicemail, Call Lists and Dialer Widgets are described in more detail in section B.3, and the Conference Widget in section B.4.

The following Accelerator is available as an add-on to any browser that supports Accelerators.

- **QuickDial Accelerator** – this allows you to make Click-to-Dial calls to any number shown on a web page.

The QuickDial Accelerator is described in more detail in section B.3.6.

B.2 Installing CommPortal Widgets and Accelerators

You install CommPortal Widgets and Accelerators from within CommPortal itself. Carry out the following instructions to install them.

- Log into your account using CommPortal.

- Your service provider will have given you the URL (web address) for logging into your account.
- Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).
- Click on *Apps* on the navigation bar.
- If you have the option to choose between apps on different platforms, click on *On your Computer*; otherwise, skip this step.
- You will then be able to select Widgets and Accelerators from the menu on the left.

Figure 50: The CommPortal Apps Tab



- Select the Widget or Accelerator that you want to install from the menu of available apps on the left.
- The right-hand panel will then prompt you to choose the environment in which you want to install it by following the appropriate link to one of the following.
 - iGoogle homepage (please note that Google is discontinuing iGoogle)
 - Gmail
 - Google Calendar
 - Windows 7
 - Vista Sidebar
 - Mac Dashboard

You can only download Widgets and Accelerators for environments that are compatible with your computer's operating system and web browser. When you view a Widget or Accelerator that is available for environments that are not compatible with your system, those links to download it are gray and inactive.

- Depending on where you are choosing to install your Widget, you will then need to follow the on-screen instructions including some presented by Google, Apple, or Microsoft as appropriate to complete the installation.

- To install an Accelerator, select it from the list of apps and click the install link.

B.2.1 CommPortal Widgets, Windows 7 and Firefox

If you are using the CommPortal Widgets using Windows 7 with Firefox as your default browser, you will be prompted to install Flash when downloading the Voicemail Widget if you have not already installed it.

- You should follow the link in the Voicemail Widget that will open a page from where you can install the Firefox Flash plug-in.
- If you have not already done so, for example, because you have removed IE from your system, you must also install the IE Flash plug-in by:
 - clicking *Different operating system or browser?* on this page
 - selecting the correct Operating System and Internet Explorer.

To ensure that CommPortal Widgets function correctly when used with Firefox, you should use Firefox version 3.5 or later.

B.2.2 CommPortal Widgets, Gmail and Internet Explorer 6

Gmail does not allow gadgets (Google's term for Widgets) if you are using Internet Explorer 6. For this reason it is not possible to install any CommPortal Widgets in the Gmail environment if you are using IE6.

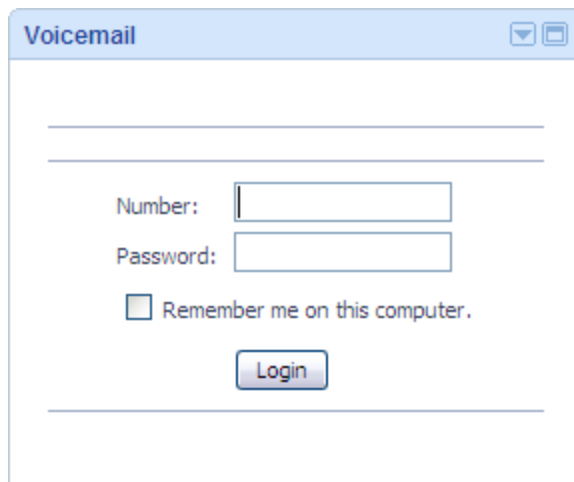
B.2.3 CommPortal Widgets, Mac OS X, and Safari

To use CommPortal Widgets on Mac OS X, you must have Leopard, Snow Leopard or Lion (OS X 10.5, 10.6 or 10.7) with Safari version 4 or later installed, even if you use a different browser to access CommPortal itself.

B.3 Using Widgets and Accelerators

Since most Widgets and Accelerators are directly connecting to your CommPortal account, you have to log in to them using your CommPortal credentials, as shown in Figure 51.

Figure 51: Logging in to a Widget



The image shows a screenshot of a web-based login form for a Voicemail widget. The window has a title bar that says "Voicemail" and standard window control buttons (minimize, maximize, close). Below the title bar, there are two horizontal lines. The first line is followed by the label "Number:" and a text input field. The second line is followed by the label "Password:" and another text input field. Below these fields is a checkbox with the text "Remember me on this computer." and a "Login" button.

- Enter your telephone number and password to activate the Widget or Accelerator. If you want to save these login details fill the *Remember me on this computer* check box. This will save you from having to log in to the Widget or Accelerator each time you use the computer.

You should consider whether other people have access to the computer before you do this. If you are using a computer with public access, you should not store your credentials; if you are using your own computer, or have a personal account on a shared computer, you may choose to do so.

However, if you are using the Conference Widget, you will see a different login screen prompting you to enter your Conferencing credentials, as described in section B.4.

Once you have logged in, the Widget or Accelerator will be ready to use. Basic instructions for using the Widgets and Accelerator are included later in this chapter.

The widgets appear slightly differently in each environment (Windows Vista, Windows 7, Google, Mac Dashboard) and depending on how large you have set the Widget itself within that environment. The following screenshot of the Call Lists widget shows the full level of detail that will be shown. On smaller displays, only the caller number will be shown.

Figure 52: Expanded Call Lists Widget



Accelerators have full-sized and preview-sized versions as shown below.

Figure 53: Full-sized QuickDial Accelerator

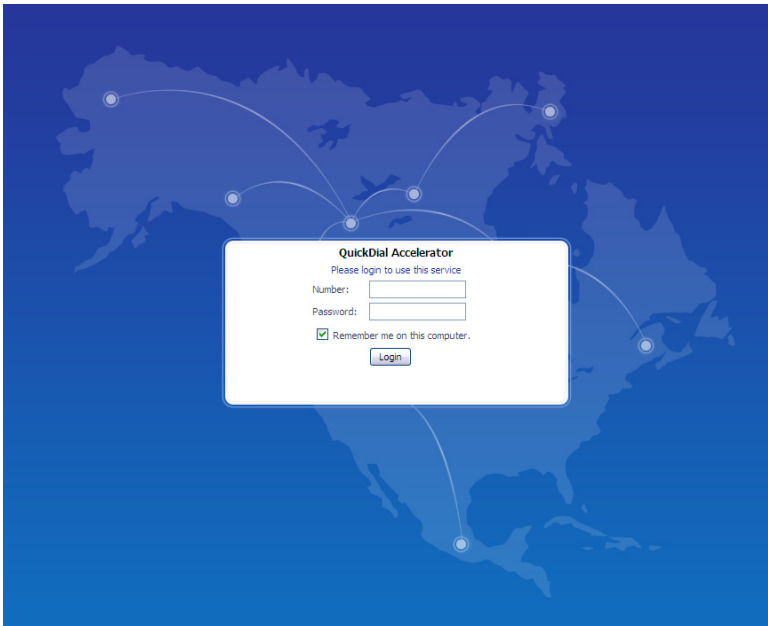
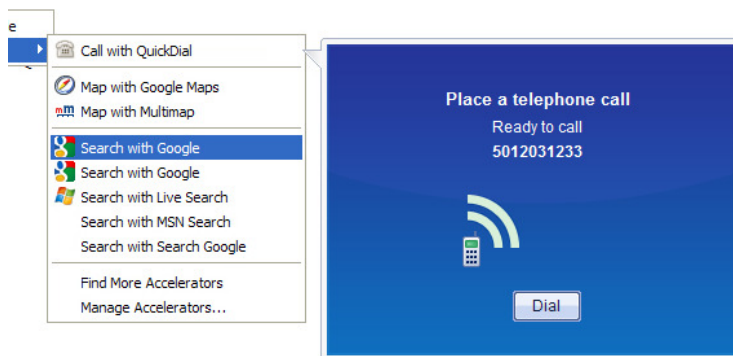


Figure 54: Preview QuickDial Accelerator



B.3.1 Getting help with Widgets


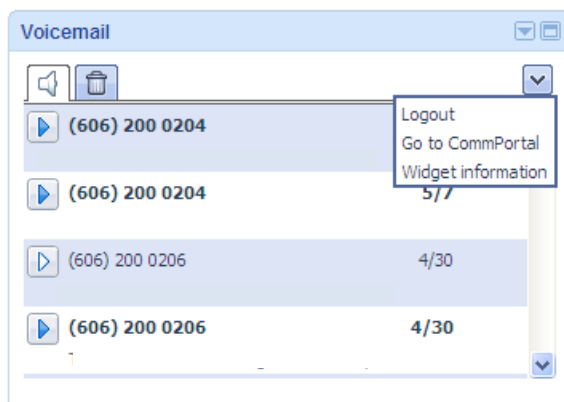

You can get help on your Widgets by clicking on the  button. This brings up the menu shown in Figure 55.

Figure 55: Drop-down menu



Selecting *Widget information* will load a screen containing basic help and information.

B.3.2 Connecting to CommPortal using Widgets

With the exception of the Conference Widget described in section B.4, you can open CommPortal using the Widgets (apart from when used in Mac Dashboard), by pressing the  button and selecting *Go to CommPortal* from the drop-down menu. This will open CommPortal in your default browser.

B.3.3 CommPortal Voicemail Widget





The CommPortal Voicemail Widget shows a list of your voicemails and, if you have a fax service, your faxes. If you have the Voicemail to Text service, you will also see either a transcript of each voicemail, or an error message indicating either that the message was too short to be transcribed or that the transcription attempt failed. This list will be dynamically updated if a new voicemail or transcript is delivered or you change the status of a message while you are viewing the Voicemail Widget.

You may be prompted to install an updated version of this Widget that enables you to view fax messages. You need Safari 4 for this feature to work properly: if you have Safari 3, you will still see fax messages on the Voicemail Widget but will not be able to open the fax to read it.

The Voicemail Widget is shown in Figure 56. The amount of information about the voicemail or fax displayed will vary depending on each environment (Windows Vista, Windows 7, Google, Mac Dashboard) and how large you have set the Widget itself within that environment.

Figure 56: Voicemail Widget



- The Voicemail folder is accessed under the  tab.
- The icons  and  indicate whether an entry is a voicemail or a fax. Where space allows, more information about the entry is included, for example delivery date and time, length of message (in minutes and seconds) or fax (number of pages).
- Clicking on the  button will open the fax message in an external PDF fax viewer, using your browser. The fax button will be emboldened if the fax has not already been viewed. Viewing the fax will mark it as read. You can also click on the caller name/number and mark the fax as either read or unread from the pop menu that appears.


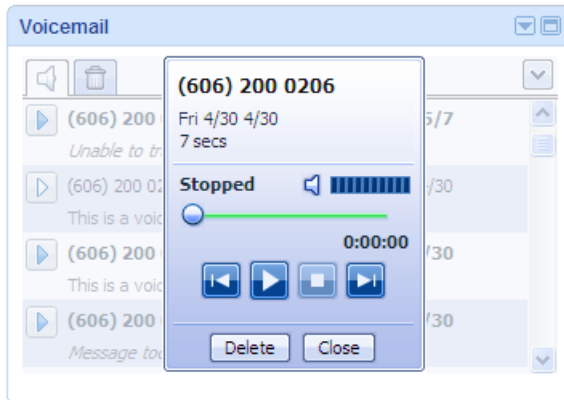
- Clicking on the  button will play your voicemail. The color of the arrow indicates whether or not the message has already been heard. If you have the Voicemail to Text feature, clicking on this button will also expand the transcript of the message.

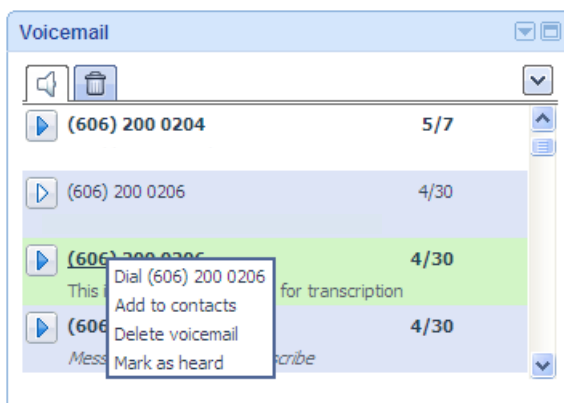
Figure 57: Playing a Voicemail



You can control the play back of the message using the voicemail player, as well as choosing whether you want to delete the voicemail.

- Clicking the name or number allows you to take a number of actions. You can either
 - call the contact or number that left the message (this will start a call in a similar manner to that described in section B.3.5)
 - add the number to your contacts
 - delete the message
 - mark the message as read/unread as appropriate.

Figure 58: Action menu



Deleted messages


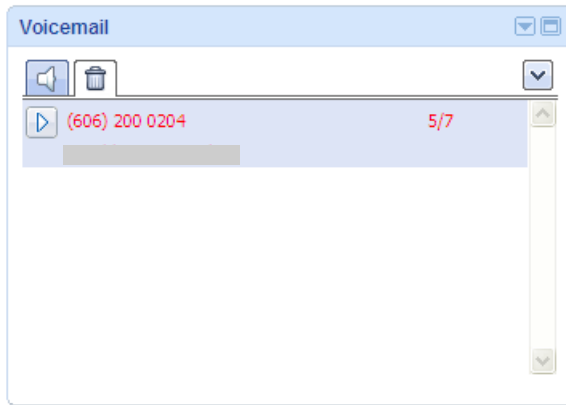


Your version of CommPortal will either have been configured to put the deleted message into the tab for Deleted messages and faxes, as illustrated in Figure 59 and described below, or to permanently delete the voicemail at this point (in which case you will not see the  Deleted folder tab).

Figure 59: Deleted Folder



- The list of deleted voicemails and faxes is shown in red, to distinguish this screen from the list of received messages in the Voicemail folder, but is otherwise identical in terms of the information displayed.
- You can use the  and  buttons to play voicemails and read faxes in the Deleted folder.
- The Voicemail Player will now give you the option to *Restore* the message being played.
- You can either restore a voicemail or fax from this folder to the Voicemail folder, or delete it permanently.
- If you have a large number of deleted items, you may need to wait several seconds when accessing the Deleted folder while the information loads. You will see a loading indicator while the content is being requested.

Mailbox quota warnings


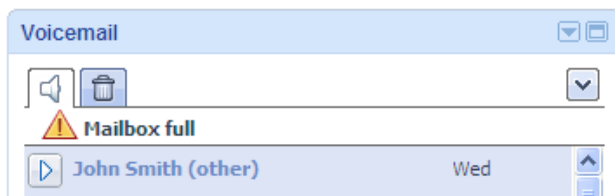
The CommPortal Voicemail Widget will show a warning as you fill the storage space of your mailbox. You will see the  icon with a message alongside it, for example Mailbox full.

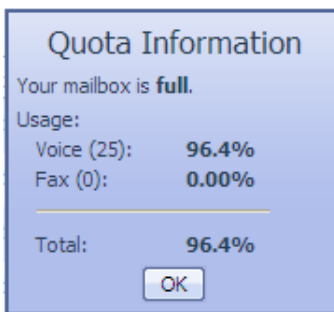
Figure 60: Mailbox quota warnings



The exact text shown depends on how full your mailbox is as well as the environment in which you are using the Widget.

If you click on the warning icon you will see a breakdown of the usage of your mailbox, showing the total number of messages, the space used to store them, and the amount of space you have.

Figure 61: Mailbox usage details, showing a full mailbox



B.3.4 CommPortal Call Lists Widget

The Call Lists Widget shows a log of your missed calls, dialed calls and answered calls. The Widget shows the number (or contact details if you have added them), time and date of the call.

Figure 62: Call Lists Widget



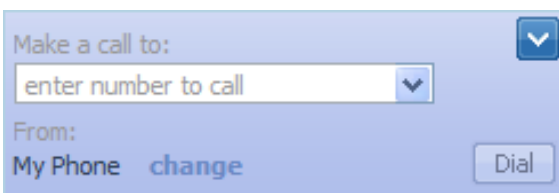
Clicking each tab selects the type of call list. If a contact's name is shown, you will also see whether they called from their home, work, mobile or other number.

B.3.5 CommPortal Dialer Widget

The Dialer Widget allows you to make telephone calls using your computer.

In fact, if you are able to make this type of call, you can initiate calls by clicking on a contact name or number as it appears in any Widget. However, if you want to make calls to other contacts, or to entirely new numbers, you should use the Dialer Widget itself.

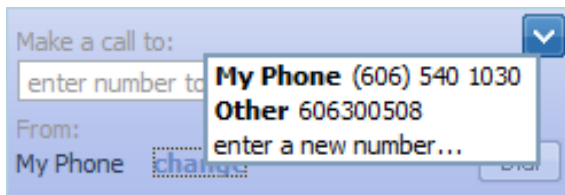
Figure 63: Dialer Widget



You can select any of your CommPortal contacts from the drop-down list, or you can type a number or name. As you enter a name an active search of your contacts will start and any matches will be shown.

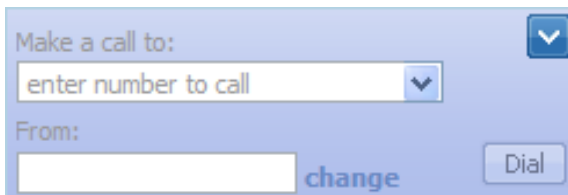
Once you have entered a number or selected a contact, you can choose which phone you want to use to make the call.

Figure 64: Dialer Widget – phone selection



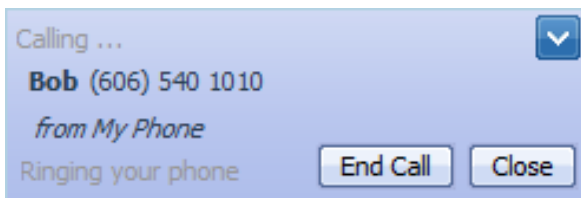
Select the phone you want to use to make the call, or if you want to configure a new number, select *enter a new number...*

Figure 65: Dialer Widget – enter a new number



Once you have selected or entered the phone you want to use, click the *Dial* button to initiate the call.


Figure 66: Dialer Widget – in-call display



The text in the Widget details what is happening. If you want to stop the call, press the *End* button (or hang up your phone if you have already answered it). To dismiss the Dialer Widget, but keep the call going, press the *Close* button.

B.3.6 CommPortal QuickDial Accelerator

QuickDial Accelerator allows you to make Click-to-Dial calls to numbers shown on any web page.

To use QuickDial Accelerator, highlight a phone number as it is shown on any web-site. You will then see the Accelerator icon appear . Click on this button and you will see the Accelerator menu appear. Select *Call with QuickDial* to call that number.

Depending on whether or not you have chosen to store your login details, you may first be asked to log in before the call can proceed. Review the number that appears in QuickDial Accelerator and press *Dial*. Your call will then proceed as with a normal Click-to-Dial call – your phone will ring first, and when you answer, you'll start calling the number you selected.

B.4 CommPortal Conference Widget

The Conference Widget allows you to set up and manage conferences. This feature is available only if your service provider has enabled it.

The CommPortal Conference Widget does not work in the 64-bit version of Internet Explorer; it also does not work as a desktop widget if you have the 64-bit version of Internet Explorer installed.

To use the Conference Widget, you will need your participant code and moderator code for conferences.

B.4.1 Signing In

The Conference Widget initially shows the Sign In window, shown in Figure 67, which asks you for the participant and moderator codes.

Figure 67: Logging in to the Conference Widget



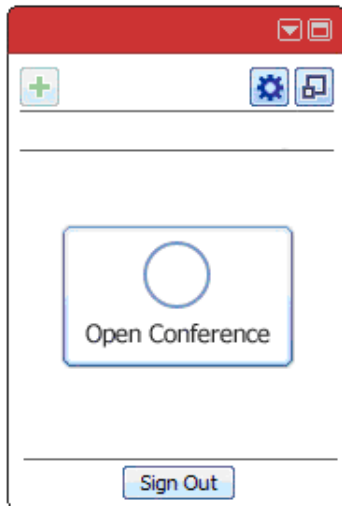
The screenshot shows a 'Sign in' dialog box with a red header. It contains two input fields: 'Participant Code' with the value '123456789' and 'Moderator Code' with masked characters '*****'. There are help icons (question marks) next to both fields. Below the fields is a 'Remember details.' checkbox and a 'Sign In' button.



- Type the two codes in the appropriate edit boxes, then click the *Sign In* button. If you want to save these login details, tick the *Remember details* check box. This will save you from having to enter these each time you access the Conference Widget.


The moderator code is treated as a password, so that the characters you type are replaced on the screen by dots. This is because it gives you privileged access to moderator-only functions and should not be disclosed to any conference participants.

When you have signed in successfully, the Conference Widget appears as shown below.

Figure 68: Conference Widget after signing in



- Three buttons at the top of the display allow you to:
 -  Add a new conference participant, setting up an outdial call to invite this participant into the conference.
 -  Change conference settings, if you are permitted to make such changes, for example whether the conference can start before the moderator has joined and whether the conference ends when the moderator leaves.

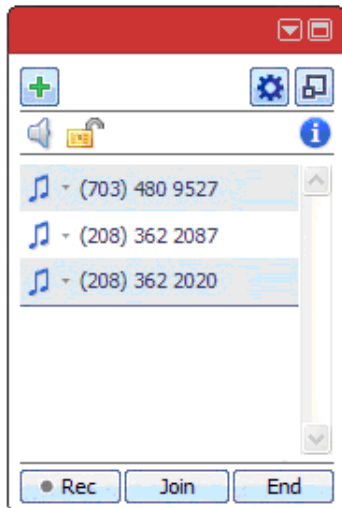
You can also use this button to link the Conference Widget to your CommPortal contacts so that participants who are included in these contacts are displayed or can be added using their name rather than phone number.
 -  View the moderator web interface in a new browser window, so that you can use it as described in the Conferencing User's Guide.
- The Open Conference button, in the middle of the display, allows you to manage and/or join the conference.
- The Sign Out button, at the bottom of the display, allows you to sign out after you have finished using the Conference Widget.




For security reasons, if you are on a public or shared computer, you should always sign out of the Conference Widget when you have finished using it, or close the browser or other environment in which it is running. This ensures that another user cannot gain access to your conferencing facilities from your computer.

B.4.2 Accessing the conference display

When you use the *Open Conference* button, you see the main Conference display as shown below. If there is a conference in progress, you will see details for that conference.

Figure 69: Conference Widget main display



- The three buttons on the second band of the display allow you to:
 -  Mute or unmute all participants in the conference (apart from the moderator) and control whether participants join the conference as muted or not.
 -  Lock the conference so no further participants can join, or unlock it.
 -  View information about the current conference.
- Any participants already in the conference are identified by their calling telephone number, or by the caller name if available. (The caller name is displayed if you are logged in to CommPortal and the caller's number matches one of your CommPortal contacts or if Caller Name information for this caller is available from the network.)
- The three buttons at the bottom of the display allow you to:
 - Record the conference (if your service provider has allowed you to do so).
 - Join the conference as the moderator.
 - End the conference.

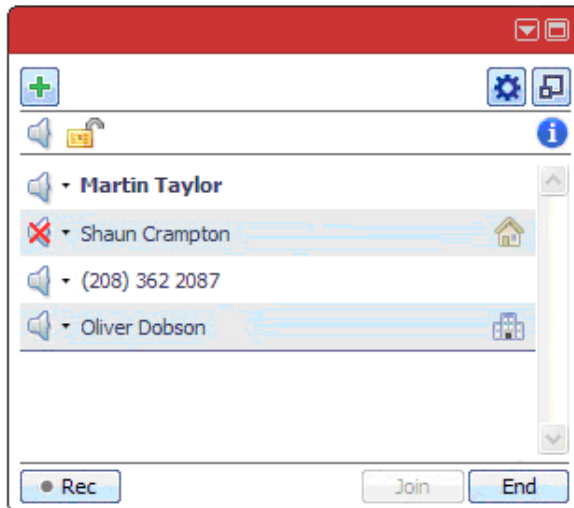
B.4.3 Joining and managing a conference

When you use the *Join Conference* button, you are prompted for the telephone number on which you want to call into the conference.

- If you are logged into CommPortal, your user telephone number is displayed as a default; otherwise, if you have used the Conference Widget before, the last telephone number that you used is shown. You can select from a drop-down list of other numbers that you have previously used, or type in a different telephone number if necessary.
- Click on *Connect* to join the conference with the specified telephone number.

The display then allows you to manage the conference, as shown below.


Figure 70: Conference Widget in-conference display



The width of the Conference Widget display depends on the environment in which you are running it, and you may not be able to change it. The icons for volume control and telephone number type appear only if the display area is wide enough to include them.

- The first entry in the list of participants identifies you as the conference moderator, and the remaining entries identify other participants in the conference.
 - Participants are displayed using their telephone number, unless you have chosen to link the Conference Widget to your CommPortal contacts, in which case any participant who appears in your Contacts is shown by name.
 - At the right-hand end of each entry, an icon indicates whether the caller is using a home or business telephone (if this information is available).
- For each participant in the conference, you can do the following, by clicking on the appropriate icon in the display:
 - Mute or unmute the participant.
 - Change the volume at which audio from this participant is played into the conference.
- You can left-click on the participant's name or telephone number to access additional options:
 - Add this participant to your CommPortal contacts (if you are logged in to CommPortal)
 - Drop this participant from the conference.

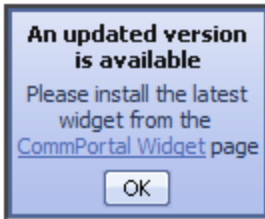
B.4.4 Getting help

To get help with the Conference Widget, click the  button. This brings up a page detailing information about the current conference, which also includes a Support number.

B.5 Updating Widgets

If you are using Widgets in Microsoft Vista or Windows 7, from time to time you may need to update them. This is an automatic process and you will see the following message when you open the Widget.

Figure 71: Widget update notification



Click the link or press the OK button and you'll be taken to the CommPortal Widget installation page, as shown in Appendix B.2.


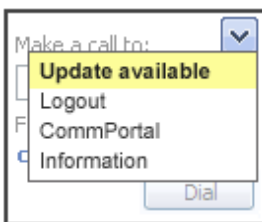
If you do not update the Widget at this time you can choose to update it at a later date. Press the  button on the Widget and you will see an *Update available* notice.

Figure 72: Widget update available notice



Selecting Update available will take you to the CommPortal Widget installation page from which you can download and install the latest version of the Widget.

C Using Call Me

The Call Me feature allows you to create buttons and links that you can embed in a website or email that invites people to initiate a call with you. When someone clicks on the button or the link, they are taken to a website where they are prompted to enter their phone number. Once they have entered a number their phone will ring; when they answer, your phone starts ringing.

This offers essentially the same service to your contacts as a toll-free number (although some users may be charged as for an incoming call), but allows you to control and manage the service from CommPortal.

CommPortal includes full instructions on how to create the buttons, but here is a quick overview for creating a Call Me button.

- Log into your account using CommPortal.
 - www.lightpathhostedvoice.com
 - Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).
- Click on *Apps* on the navigation bar.
- If you have the option to choose between apps on different platforms, click on *On your Computer*, otherwise, skip this step.
- Click on *Call Me* under *Computer* on the menu on the left.
- You will then see the following page.

Figure 73: Apps Tab Call Me Page



- Click on *Webpages or Emails* to create a button that you can use on webpages and emails, following the instructions in Appendix C.1.

C.1 Creating a Call Me button

Clicking on *Webpages or Emails* will launch the Wizard within CommPortal that will lead you through the process of configuring a Call Me button that you can then embed in webpages and emails.

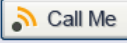
Figure 74: Call Me button creation wizard

Call Me Button: Specify Options

To create a Call Me Button, please provide the following information.

Step 1
Enter the telephone number you would like to be called on when a user clicks your Call Me Button.

Step 2
Do you want to create a Call Me Button or a Call Me link?

 **Call Me** Can be used in web pages and HTML e-mails

[Call Me](#) Can also be used in non-HTML e-mails

< Back Next > Close

- Enter the number of the phone you want to be called on when people click your Call Me button.
- You should then choose whether you want to create a graphical button to embed in a website or HTML email, or a text-based link for use in non-HTML emails.
- If you are creating a graphical button, you can then select which style of button you want to use.

Figure 75: Call Me button selector

Call Me Button: Choose Button Style

Step 3
Please choose your preferred button style

 **Call Me** 

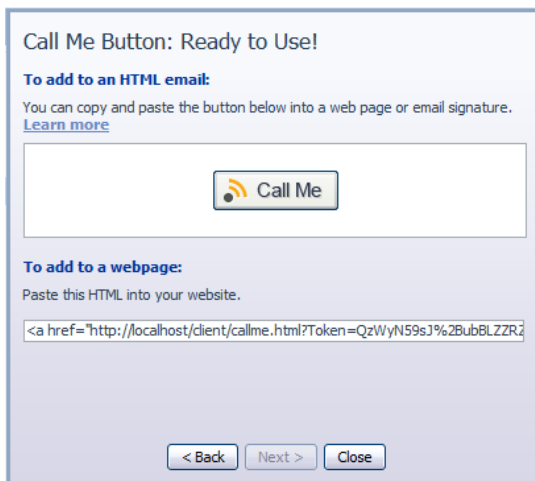
 **Click here to call us now** **CALL ME**



< Back Next > Close

- Once you have selected the button, you are then presented with the detail you need to copy in to your email or website as appropriate.

Figure 76: Call Me Button presentation page



- Copy and paste the image or HTML text as necessary.

C.2 Managing your Call Me buttons

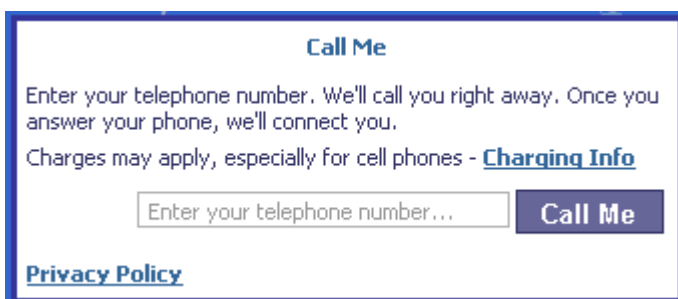
Once you have created them, you can manage your Call Me buttons using the options available under the *Calls* section of the *Settings* tab in your CommPortal account.

- You can control whether or not the Call Me service is active.
 - When inactive, your existing Call Me buttons will not connect to your chosen phone. Instead when your potential callers click your Call Me button they are presented with a message stating that they should try again later.
 - You can reinstate the service at any time using the same selection button.
- You can also completely revoke all your existing Call Me buttons. This will permanently deactivate any existing Call Me buttons even if your service is currently active. If you subsequently want to start using the Call Me feature again, you must create new buttons.

C.3 Call Me experience

When a potential caller clicks your Call Me button the following page opens in their default browser. The caller can click on the *Charging Info* link to see whether they might be charged for this call.

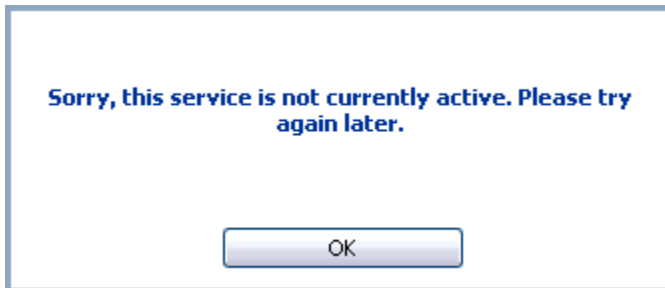
Figure 77: Call Me link – active



The page itself includes clear instructions on how to use the button. The potential caller simply enters their contact number in the field (they are prevented from entering a premium-rate number) and presses the Call Me button. Their phone then rings; when they pick up, your chosen number will then ring.

If you have temporarily suspended your Call Me service, the potential caller will see the following page instead.

Figure 78: Call Me link – inactive



D Using mobile phone applications

The following applications are available for your mobile phone.

- **CommPortal Mobile for iPhone**, described in section D.1, which allows you to access your voicemails and faxes, manage your contacts, switch between your Easy Call Manager call handling profiles, and make Click-to-Dial calls to any of your CommPortal or phone contacts, all using your iPhone.
- **CommPortal Voicemail for BlackBerry**, described in section D.2, which shows a list of your messages and allows you to listen to them, manage them, or call the person who left the message, all using your BlackBerry.
- **CommPortal Mobile for Android**, described in section D.3, which allows you to access your voicemails and faxes, manage your contacts, switch between your Easy Call Manager call handling profiles, and make Click-to-Dial calls to any of your CommPortal or phone contacts, all using your Android OS phone.
- **CommPortal Conference for iPhone**, described in section D.4, which allows you to set up and moderate audio conferences, inviting attendees, adjusting attendee volume, and recording, all using your iPhone.
- **CommPortal Conference for Android**, described in section D.5, which allows you to set up and moderate audio conferences, inviting attendees, adjusting attendee volume, and recording, all using your Android OS phone.

D.1 CommPortal Mobile for iPhone

CommPortal Mobile for iPhone is an application that lets you access many of your services directly from your iPhone. The following features are available.

- Voicemail – Lets you listen to, and manage, your voicemails.

You can see when you have a new message, see a list of all your voicemails and faxes, listen to your voicemails, view your faxes and even call the person that left the message, all using your iPhone.

- Click-To-Dial – Allows you to start a call from another phone using your iPhone.

When you are near another phone such as a landline (for example you are at home or in the office), you can use the Click-To-Dial feature to initiate a call to a contact. Your chosen phone will ring, and when you answer it Click-To-Dial will connect you to the contact you called. This call will appear to your contact as if it was coming directly from your CommPortal account number.

You still use your iPhone to store all your contacts, but you can save your contract minutes or benefit from cheaper call rates by using a landline.

D.1.1 Downloading CommPortal Mobile for iPhone

CommPortal Mobile is an iPhone Application. This means you can download it through the App Store, either directly from your iPhone, or using iTunes on your computer.

This application is published by Metaswitch under the name 'CommPortal Mobile'

D.1.2 Configuring CommPortal Mobile for iPhone

When you start CommPortal Mobile for the first time, you may be asked to choose your service provider from a list (Lightpath) and/or agree to the terms of an End User License Agreement. Once you have done this, you will see the welcome screen:

Figure 79: Welcome screen

Forgotten Details?'. At the bottom is a 'Create Account' button." data-bbox="174 160 467 487"/>

Enter your information:

- *Phone number* – this is the phone number you use to access your CommPortal account. Touch the existing *Enter number* placeholder text and enter your number on the numeric keypad that appears.
- *Password* – this is the password used to access your CommPortal account. Depending on your service provider, this may be the same as your PIN, or may be a separate password you use only for CommPortal. Touch the *Enter password* placeholder text and enter your password on the keypad. This page will only show the text you enter for a few moments before hiding it for security.

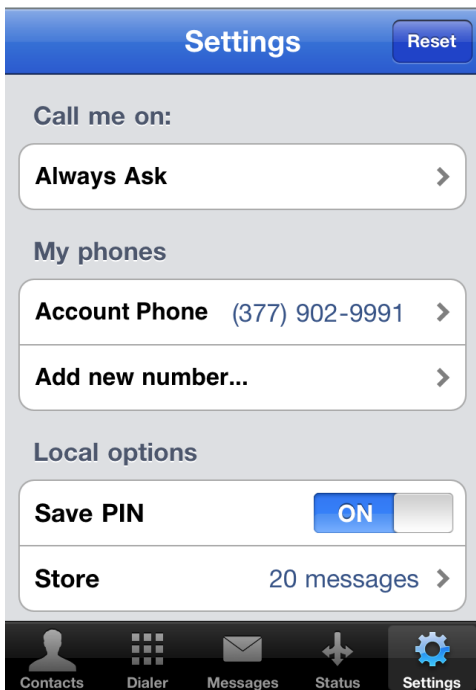
Press *Log in* to verify that your *Account details* work..

If you have forgotten your log in details, you can retrieve them by clicking on the *Forgotten Details?* link.

Before you start making calls using CommPortal Mobile, you should make sure that you have set your preference for Click-To-Dial.

CommPortal Mobile automatically adds the CommPortal phone number you entered on the welcome screen to your list of phones to be used for Click-To-Dial. You can view and add to your list of phone numbers on the *Settings* tab.

Figure 80: Settings tab



Beneath *My Phones*, touching *Add new number...* takes you to the following screen where you can enter a friendly name for the number, as well as the number itself.

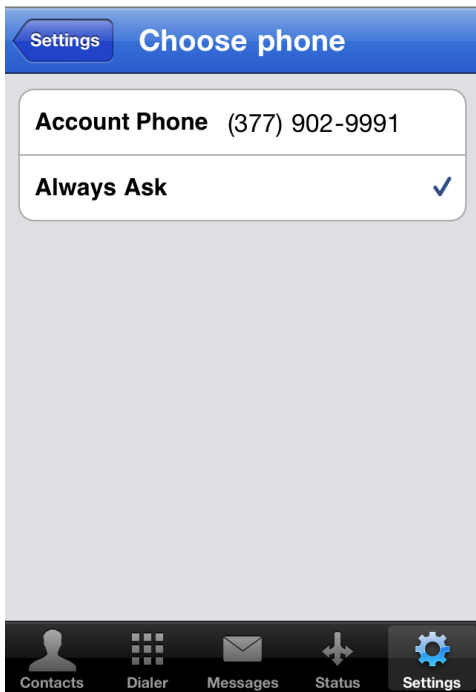
Figure 81: Add new number screen



Note that these numbers are not the numbers you can call – these are the numbers that CommPortal Mobile can call you on before connecting you to the contact you actually want to dial.

CommPortal Mobile can either prompt you to choose a number to call you on every time you initiate a Click-To-Dial call, or it can automatically use a specified default number. You can configure this by touching the bar underneath *Call me on:* on the *Settings* tab. This will take you to the *Choose phone* screen.

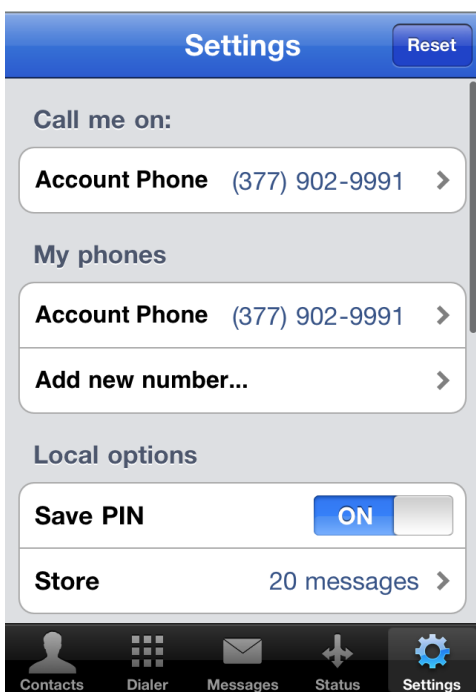
Figure 82: Choose phone screen



Touch the number you want to use by default when making Click-To-Dial calls, or touch *Always Ask* to configure CommPortal Mobile to give you a list of possible numbers each time you make a call.

Returning to the *Settings* tab will show the new phone number that Click-To-Dial will call you on:

Figure 83: Updated Settings tab

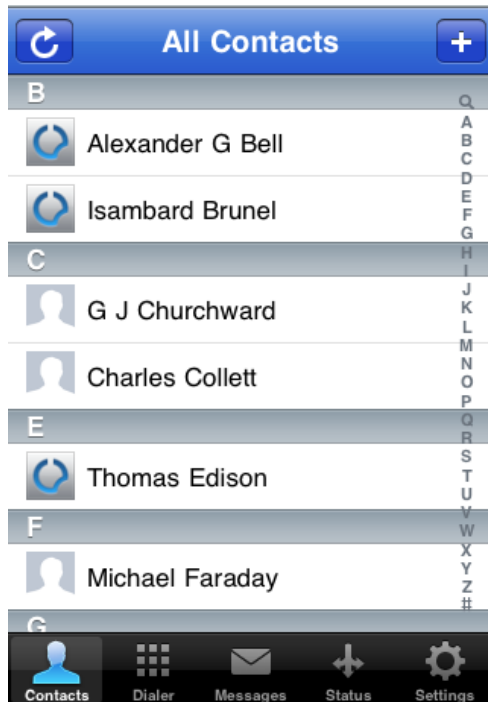


D.1.3 Using CommPortal Mobile for iPhone

Managing your contacts

You can manage both your CommPortal and phone contacts through the *Contacts* tab.

Figure 84: The Contacts tab

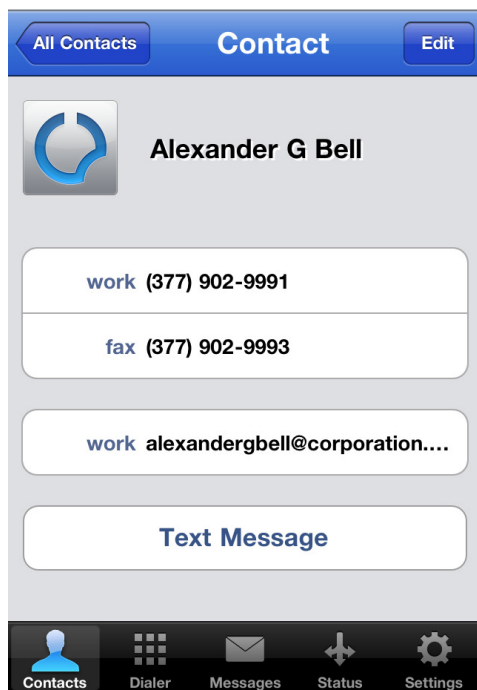


The Contacts screen behaves in a similar way to the standard iPhone contacts screen.

To add a new CommPortal contact, press the Add button, **+**, in the top right hand corner of the Contacts Screen. The resulting screen allows you to give your contact a name and assign it with up to five contact numbers and two email addresses.

You can view a contact by pressing their name. This will show you all of your currently held phone numbers and email addresses for this contact. Pressing one of these phone numbers will initiate a Click-To-Dial call. For more information on this, see **Making Click-To-Dial calls** below. Pressing an email address will open a draft email, which will be sent from the default address that you normally use to send emails from your iPhone.

Figure 85: Individual Contact Screen




You can also send a text message from your phone by pressing the *Text Message* button. If you have more than one phone number for the contact, you will be prompted to choose which number you want to send the text message to.

You can edit any contact by pressing the *Edit* button in the top right hand corner of an Individual Contact screen. Again, the Edit Contact screen works in a similar way to the iPhone's own Edit Contact screen.

The options you have available to you when editing a contact will depend on whether it is a phone contact or a CommPortal contact.

If the contact you are editing is a phone contact, you will be able to edit all of the settings that you can through the iPhone's own Contacts menu, including personalized ringtones and street addresses. However, you cannot delete a phone contact directly from CommPortal Mobile.

If you are editing a CommPortal contact, you will only be able to change your contact's name and add, edit and remove phone numbers and email addresses. However, you can delete a CommPortal contact directly from the application. To delete a CommPortal contact, press the *Delete Contact* button on the Edit Contact screen.

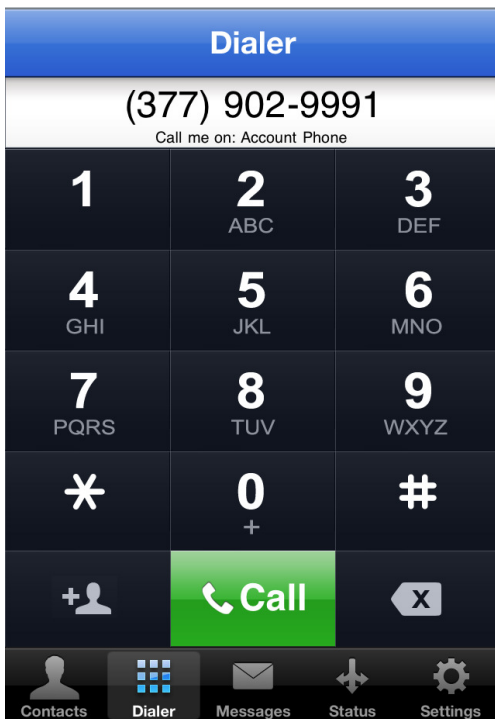
If you make changes to your phone or CommPortal contacts outside of CommPortal Mobile, you may find that your CommPortal Mobile contact list does not update immediately. To make sure any changes are applied to your CommPortal Mobile contacts list, press the Refresh button, , situated in the top left hand corner of the Contacts screen.

Making Click-To-Dial calls

Using the Click-To-Dial feature of CommPortal Mobile is very similar to using the iPhone to make calls.

You can initiate Click-To-Dial calls from the *Contacts* tab, as shown in Figure 84, or the *Dialer* tab.

Figure 86: The Dialer tab

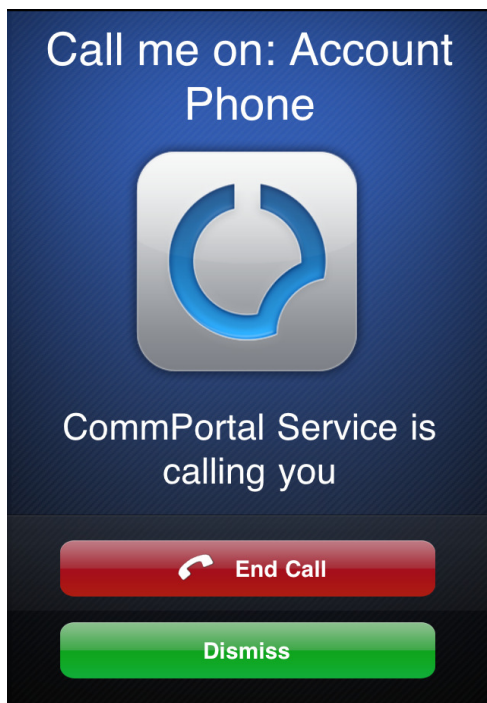


Like the *Contacts* screen, the *Dialer* screen behaves in a similar manner to the Keypad screen used when making standard calls from your iPhone.

To start a Click-To-Dial call from the *Contacts* tab, choose the contact and number you want to call. Depending on your settings, pressing your chosen number will cause CommPortal Mobile to either immediately send the call to your default phone or show a list of possible numbers that you can choose from. Once you answer your chosen phone, CommPortal Mobile will call the number you chose on the *Contacts* tab.

To start a Click-To-Dial call from the *Dialer* tab, simply enter the number you want to call as usual. Depending on your settings, pressing *Call* will cause CommPortal Mobile to either immediately send the call to your default phone or show a list of possible numbers that you can choose from. Once you answer your chosen phone, CommPortal Mobile will call the number you dialed on the *Dialer* tab.

Figure 87: Click-To-Dial call initiation screen



You should see the following progress messages.

- *CommPortal service is calling you* – your default or chosen number should now be ringing. You should pick up the phone.
- *Calling* – you have answered your phone. Your default phone is now calling your contact. You should hear your contact's phone ringing.
- *Call connected* – once your contact answers the phone (or is diverted to voicemail)

The CommPortal Mobile screen will give you various call handling options during the progress of the call.

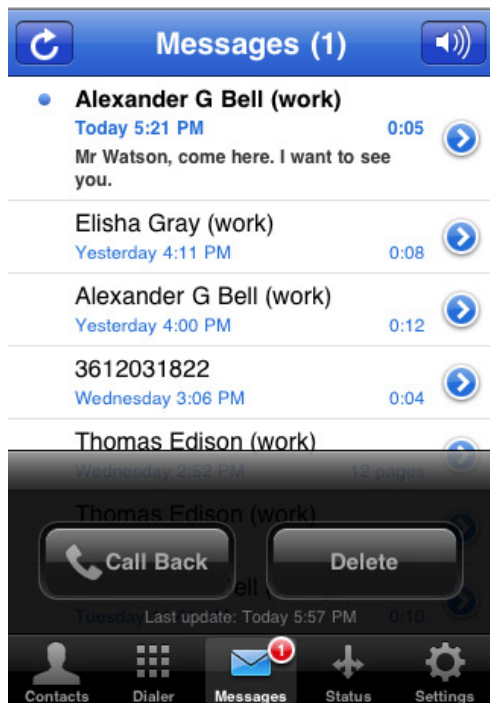
- Up until the point you answer your phone, you can click
 - *End call* – to cancel the call
 - *Dismiss* – continues with the CommPortal Mobile call attempt, but returns you to the main application. You can use your iPhone as normal from this point.
- For a short period of time after you have answered your phone, you can use CommPortal Mobile to end the call. After this time, you can only terminate the call by hanging up the phone you are using.




You can dismiss CommPortal Mobile during a Click-to-Dial call without interrupting it by pressing your iPhone's home button.

Managing your messages

You can access your voicemail and faxes through the *Messages* tab.

Figure 88: Messages tab

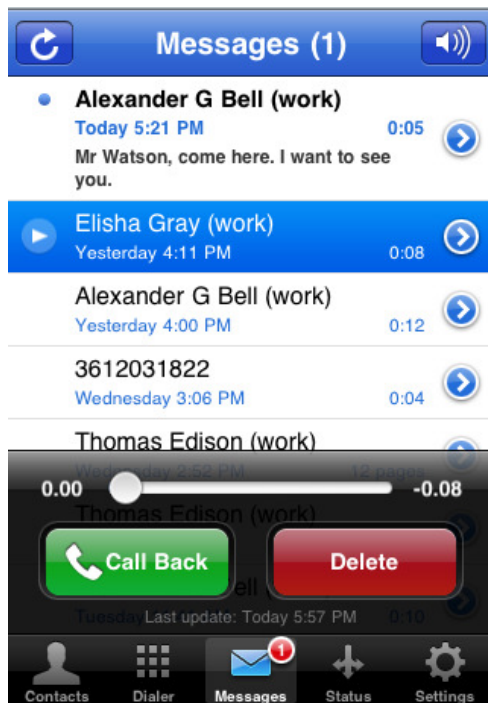






- The title at the top of the page indicates the number of unread messages.
- The speaker icon  allows you to switch speakerphone mode on and off.
- The refresh button  refreshes your inbox.
- For each message there are the following lines.
 - The first line indicates the name or number of the sender and indicates if the message is urgent, private, or both.
 - The second line indicates when the message was left, along with the message duration.
- Unheard messages are indicated through the use of a bold font.
- The detail disclosure button, , on the right of each message shows you the transcript of a message, if you have the Speech-to-Text Transcription service enabled, and also allows you to see contact details for the sender of the message.
- The *Deleted messages* row is a link to the Deleted messages folder for this account. This row only appears if your account allows the Deleted messages folder.
- The status line just above the toolbar at the bottom of the screen shows when you last updated your view of the inbox.

Listening to messages

Touch a message in the list to select it. It will then be highlighted in blue and its details will show on the player. The *Call Back* and *Delete* buttons will also become active. If you have the Speech-to-Text service and the message has a transcript, touching the center zone of the message will take you to the transcript viewing page, as described in Error! Reference source not found. below.

Figure 89: Message selected



To play the message, touch it again. If you have the Speech-to-Text service, ensure you touch only the play icon, . At this point the play icon, , turns into a Pause icon, . You can pause the playback by pressing the Pause icon, which will change to the Play icon, .


- The progress bar shows the playback position and buffer. You can rewind and fast-forward using the slider.
- To call the contact, even during playback, press the *Call Back* button.
- To delete the message, even during playback, press the *Delete* button. This will move the message to your Deleted messages folder.
 - If you do not have a Deleted messages folder, you will be asked whether or not you want to delete the message.

Figure 90: Delete message confirmation popup




- Press *Delete* to permanently delete the message, or *Cancel* if you do not want to delete the message.

Viewing caller details

To view details about the contact, even during playback, press the detail disclosure button, , on the right of the message listing. On the next screen, press the button in the *From* field in the top left hand corner. This button will have the contact's name on it.

This will take you to the caller's individual contact screen, as shown in Figure 85. If the message is not from one of your contacts, you can save the caller as a contact from this screen.

Viewing a fax

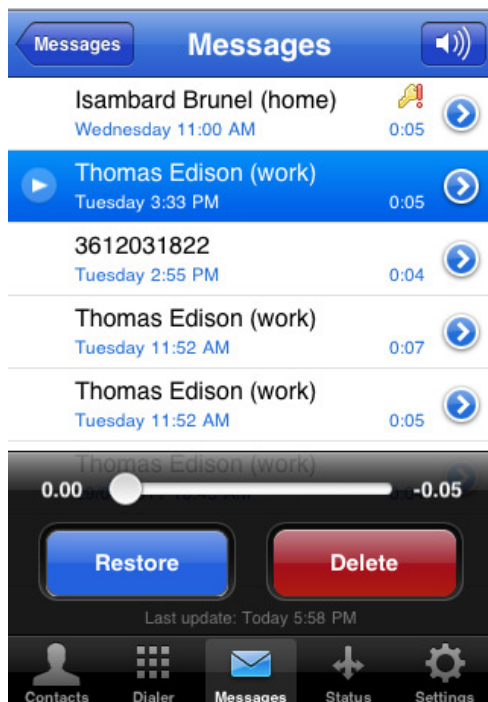
A fax icon, , indicates that the message you received was a fax. To view a fax, select it from the message list, and then touch the message again.

Deleted messages

Pressing the Deleted messages row will take you to the Deleted messages page. This shows the messages that you have deleted from your Inbox. If you have the Voicemail as text service and it is turned on, you will also see the transcripts of these messages.

This folder is only available if your account allows you to keep deleted messages. Otherwise, your messages are permanently deleted when you click the Delete button.

Figure 91: The Deleted messages page



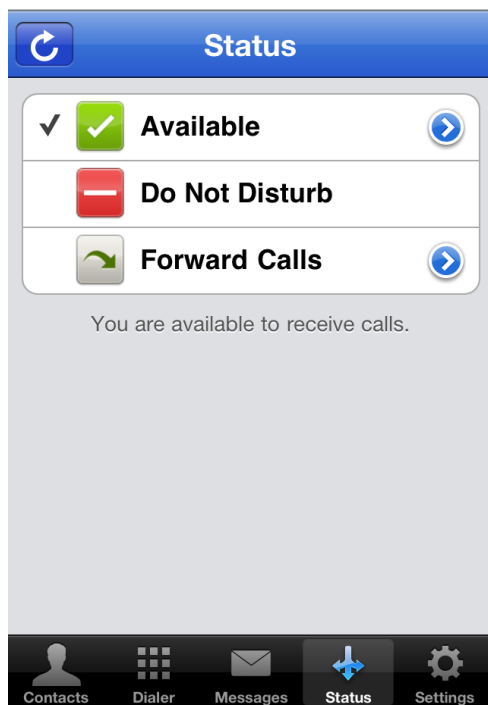
This page behaves in a similar manner to the Inbox page, although if you highlight a message, you are presented with the following alternative options.

- *Restore* – this will return the message to your Inbox.
- *Delete* – this will permanently remove the message from your account.




Changing your Call Manager settings

You can change your Call Manager call handling profile directly from CommPortal Mobile using the *Status* tab.

Figure 92: The Status tab



The following call handling profiles are available.

-  – *Available* – your phone will ring as normal.
-  – *Do Not Disturb* – all calls will go to your voicemail and your phone will not ring.
-  – *Forward Calls* – will forward calls either to voicemail or to another number you can select or specify, rather than making your phone ring.

You can switch between call handling profiles by pressing the name of the profile that you want. When you choose a profile, a tick will appear next to its name and a short description of how your calls will be handled will be shown.


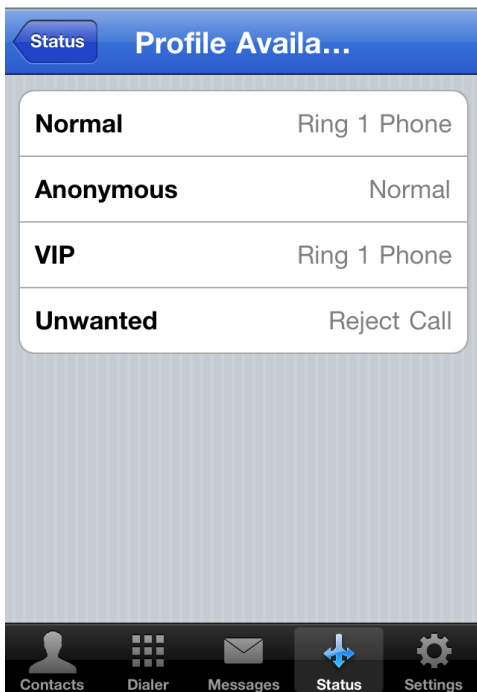
You can view the current settings for your *Available* call handling profile by clicking on the button, , to its right.

Figure 93: Available profile settings screen



This details how calls from different types of contact will be handled. To edit these, you must use CommPortal Web. You cannot change these settings within CommPortal Mobile.


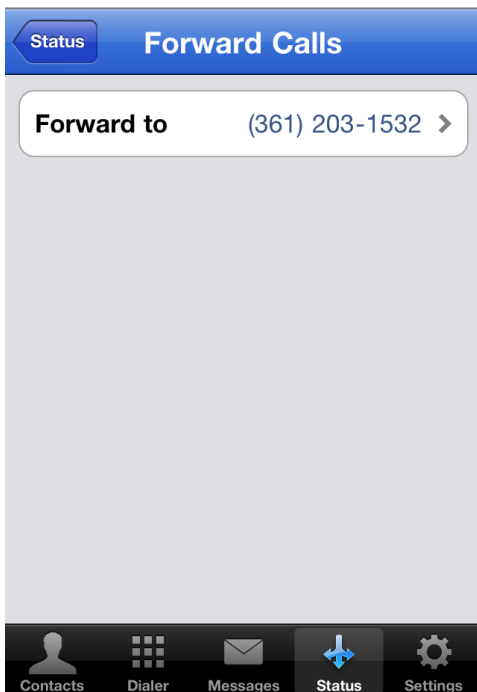
You can also view and edit the number that your *Forward Calls* call handling profile is directing calls to. Again, you should press the  button next to the profile's name.

Figure 94: Forward Calls profile settings screen

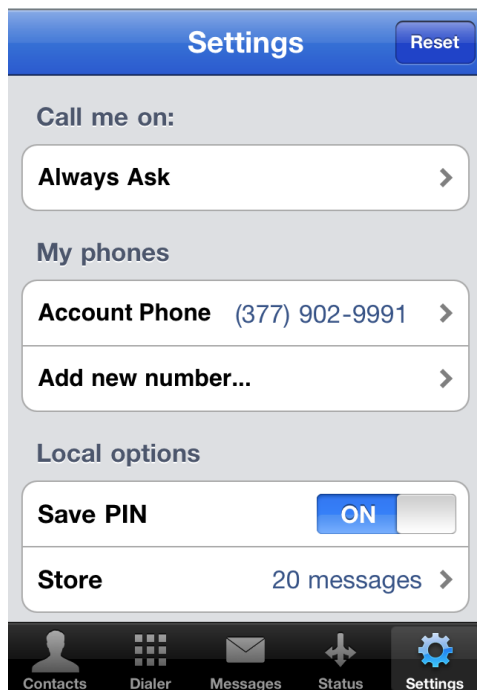


This screen shows you the number that all calls are currently being forwarded to. If you want to change this number, simply press it. You will then be asked to either enter a new number, or choose one from your contact list.

D.1.4 Settings

Pressing the *Settings* tab will take you to the Settings screen.

Figure 95: Settings screen



From this screen you can update the following settings.

- *Call me on* – You can choose a default number that CommPortal always uses to call you when making Click-To-Dial calls, or you can configure it to display a list of possible numbers each time you make a call.
- *My phones* – You can add, edit and delete the phone numbers you use for the Click-To-Dial feature. Note that you cannot delete your account phone.
- *Password storage* – You can choose whether or not you want the application to store your password or PIN.
- *Store* – This takes you to a screen which allows you to decide the number of messages to store in your phone. To improve performance, only inbox messages are pre-loaded.

If you set this to 0 (or if the *Store* setting is not present in your version of CommPortal Mobile), your message list will be discarded each time you lock your iPhone or leave the application (either by closing it, moving to another application or being interrupted by an event such as a phone call). CommPortal Mobile will then re-download the list when you open the application again.

- *About* – This takes you to the *About* screen which contains information on how to contact customer support and how to get online help or FAQs.
- *Version* – This takes you to the *Version* screen which contains specific information about the application. If you ever need to contact customer support, they may well need the information shown on this screen.
- *License info* – This takes you to a screen which details license information for the application.

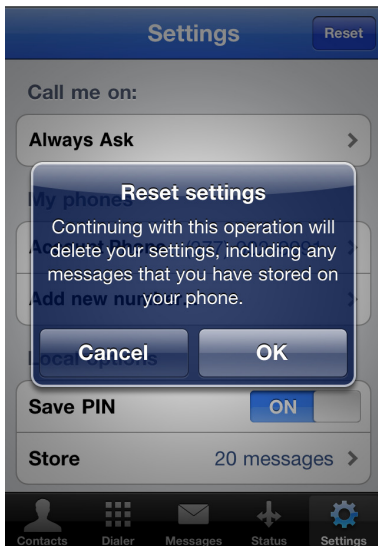
Figure 96: Version Screen



- You can use the *Reset* button in the top right hand corner of the *Settings* screen to reset the application to the state it was in when you first installed it. This will delete any messages that you have stored on your phone.

You will need to reset the application if you want to login with another account.

Figure 97: Reset Warning



D.2 CommPortal Voicemail for BlackBerry

CommPortal Voicemail allows you to manage your voicemails on your BlackBerry.

You can see when you have a new message, see a list of all your voicemails, listen to them or even call the person that left the message, all using your BlackBerry.

You can also view faxes using CommPortal Voicemail for BlackBerry, if you have installed a compatible PDF viewer. More details are in the section titled Viewing a fax.

D.2.1 Downloading CommPortal Voicemail for BlackBerry

CommPortal Voicemail is a BlackBerry Application. This means you can download it through App tab of CommPortal.

D.2.2 Setting application control permissions

Once you have installed the application, you may see a message indicating that it "is requesting changes to its application control permissions". If you do not see this message, there is no cause for concern – proceed to the following section.

If you *do* see this message:

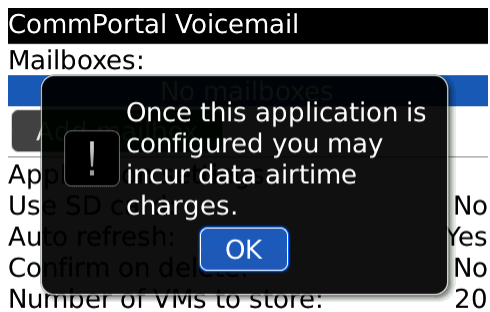
- Select the *View* option (the only option available).
- You will see a list of the permissions the application is requesting. Ensure that you are willing to grant these permissions – note that the application will not function without them – and then press the Back button on your BlackBerry to exit this screen.
- Your BlackBerry will offer you the choice of *Save*, *Discard* or *Cancel*. Select *Save*.
- Now, start CommPortal Voicemail. You will see the message "Permissions updated. This application will now exit. Please restart it." Select the *OK* button (the only option available).

You will be returned to the home screen. You can now proceed to the following section.

D.2.3 Configuring CommPortal Voicemail for BlackBerry

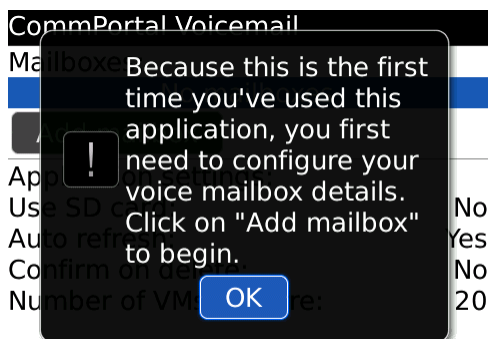
When you start CommPortal Voicemail for the first time (after setting application control permissions if required), and after you have accepted any End User License Agreement, you will see the following message screen. The screen states that you should be aware that this application uses data airtime and that you may be charged when using it.

Figure 98: First time message screen



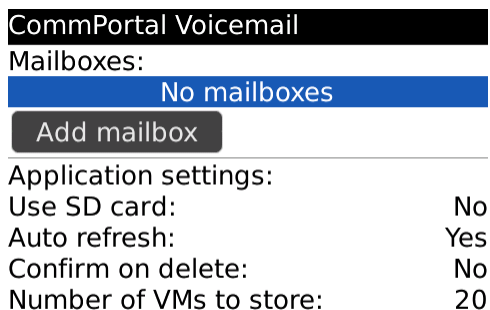
After pressing the *OK* button, you will then see the following message inviting you to configure your new application.

Figure 99: First time configuration screen



Press *OK* and you will see the following screen.

Figure 100: Add Mailbox screen



Click *Add mailbox* and then enter the following information.

- *Mailbox name* – this is used to identify the mailbox as it appears on your phone (it is a name you choose, not something specific to your account).
- *Mailbox number* – this is the phone number you use to access your CommPortal account.

You are then asked whether or not you want to save your new mailbox details.

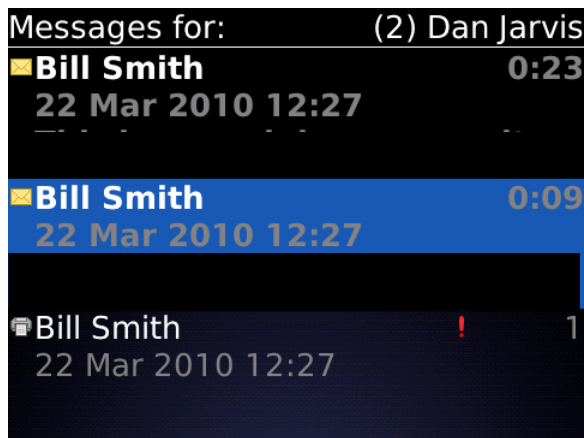
Once you have configured your mailbox the application then attempts to connect to it. You are then prompted for the following information.


- *Password* – this is the password used to access your CommPortal account. Depending on your service provider, this may be the same as your PIN, or may be a separate password you use only for CommPortal.
 - If you have a BlackBerry Pearl and your CommPortal password uses the "{" or "}" characters, you will have to change your password using CommPortal. This is because the BlackBerry Pearl cannot enter those characters (so you would not have been able to correctly enter your password).
- You may also have the option to store your password on your BlackBerry. Check the box by *Keep logged in* if you do not want to have to enter your password each time you use this app.
- Press *OK* when finished.

D.2.4 Using CommPortal Voicemail for BlackBerry

The main screen for CommPortal Voicemail is the *Message List* screen.

Figure 101: Message List screen

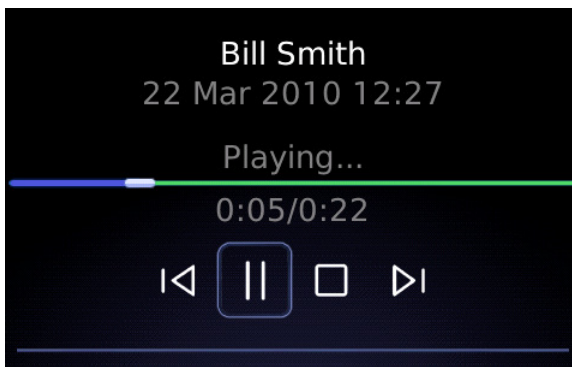


- The title at the top of the page indicates the number of unread messages and allows you to select any other mailbox you may have configured.
- For each message there are up to two lines.
 - The first line indicates the name or number of the sender along with the message duration. It also indicates whether the message is urgent, private, or both.
 - The second line indicates when the message was left.
- Unheard messages are indicated through the use of a bold font and a closed envelope icon, , on the left of the row.

Listening to messages

Select a message in the list to play it. You will then see the message play back screen.

Figure 102: Message play back

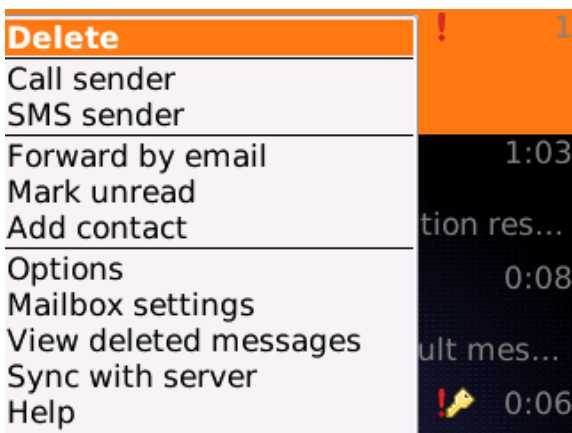


- The progress bar shows the playback position and buffer. You can rewind and fast-forward using the slider and can pause, stop and skip messages using the on-screen controls.

Message menu

Pressing the *Menu* button on your phone brings up the following menu. Depending on the other features available on your phone, and the type of information you have on a given contact you may be able to carry out more actions than those shown below (such as to send an email in response).

Figure 103: Message Menu




This menu allows you to carry out a number of actions.

- Delete the message. Depending on your personal settings, you may have to confirm you want to delete the message. You can change this setting from the options menu described in Appendix D.2.5.
- Call the sender.
- Send the sender an SMS or instant message.
- Forward the message as an attachment in an email to another recipient. *If you have enabled the Speech-to-Text Transcription Service, both the original voicemail and the transcript will be included in the draft email.*
- Mark the message as unheard or heard, depending on its current state.
- Create a contact.
- Bring up the application options screen, described in Appendix D.2.5.

- Switch to the Deleted messages folder. This folder is only available if your account allows you to keep deleted messages. Otherwise, your messages are permanently deleted when you click the *Delete* button.
- Synchronize with the server to force a manual update of the message list on your phone.
- Bring up the help screen.
- Bring up information about the application.
- Close the menu.

Viewing a fax

A fax icon, , indicates that the message you received was a fax. You can view the fax if you have installed a compatible PDF viewer on your phone. The following PDF viewers are suitable; others may not be.

- Cerience RepliGo Reader.
- DataViz PDF To Go.

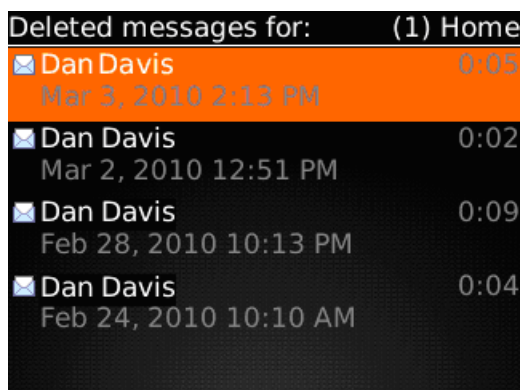
If you do not have a suitable reader, you can phone in to your account and forward the fax to a printer, or alternatively view the fax using CommPortal as normal.

Deleted messages folder

This folder is only available if your account allows you to keep deleted messages. Otherwise, your messages are permanently deleted when you delete them.

This folder shows the messages you have deleted from your inbox..

Figure 104: The Deleted messages folder



The page behaves in a similar manner to the inbox message list shown in Figure 101, in that you can play back any voicemails or view faxes, although there are some slight differences on the Deleted messages menu.

When playing back or viewing a deleted message or fax, the player or viewer is the same as with your inbox, but the options available to you on the playback menu are slightly different again.

These two menus are shown in Figure 105 and Figure 106.

Figure 105: The Deleted messages options menu

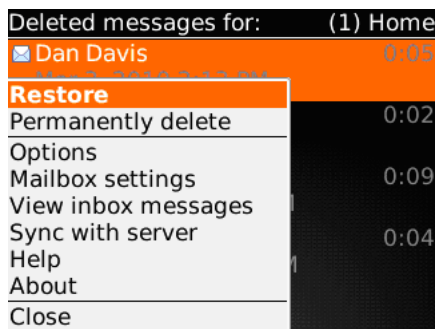
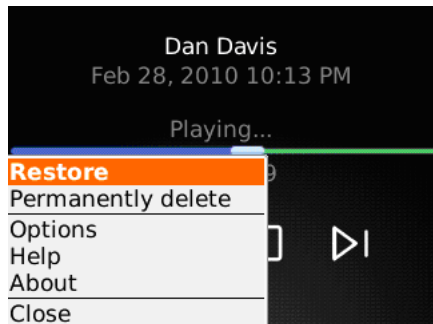


Figure 106: The playback menu shown when playing back a deleted message



From these menus you can choose to take the following actions on your deleted messages.

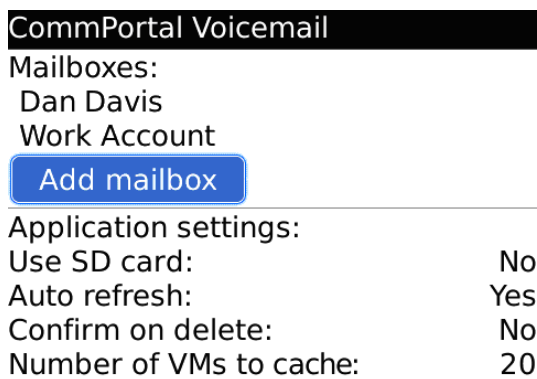
- *Restore* – this will move the message back into your inbox.
- *Permanently delete* – this will permanently remove the message from your account. Before the message is deleted, you will be asked to confirm that you want to permanently delete the message.

You may find that the messages in your Deleted messages folder take slightly longer to start playback than those in your inbox. To improve performance, only inbox messages are pre-loaded.

D.2.5 Options

Selecting Options will take you to the following screen.

Figure 107: Options screen



As well as adding a new mailbox, as described earlier in D.2.3, you can also update the following settings.

- *Use SD card.* This determines whether messages are stored using your phone's in-built memory, or the removable SD card.
- *Auto refresh.* This determines whether the phone will automatically update the message list when a new message is received. You can set this to No, Yes, or Not when roaming.
- *Confirm on delete.* This determines whether you see a warning screen each time you choose to delete a message.
- *Number of VMs to cache.* The number of messages to store in your phone. To improve performance, only inbox messages are pre-loaded.

If you set this to 0 (or if the *Number of VMs to cache* setting is not present), your message list will be discarded each time you lock your BlackBerry handset or leave the application (either by closing it, moving to another application or being interrupted by an event such as a phone call). CommPortal Voicemail for BlackBerry will then re-download the list when you open the application again.

D.3 CommPortal Mobile for Android

CommPortal Mobile for Android is an application that lets you access many of your services directly from your Android phone. The following features are available.

- Voicemail – Lets you listen to, and manage, your voicemails.

You can see when you have a new message, see a list of all your voicemails and faxes, listen to your voicemails, view your faxes and even call the person that left the message, all using your Android phone.

- Click-To-Dial – Allows you to start calls on another phone from your Android phone.

When you are near another phone such as a landline (for example you are at home or in the office), you can use the Click-To-Dial feature to initiate a call to a contact. Your chosen phone will ring and when you answer it, Click-To-Dial will connect you to the contact you called. This call will appear to your contact as if it was coming directly from your CommPortal account number.

You still use your Android phone to store all your contacts, but you can save your contract minutes or benefit from cheaper call rates by using a landline.

- Call Manager – Gives you access to your CM settings, letting you easily forward your landline calls to your voicemail or another number.
- CommPortal Contact Integration – Enables you to both view and edit your CommPortal contacts and to make use of contacts already on your phone.

D.3.1 Downloading CommPortal Mobile for Android

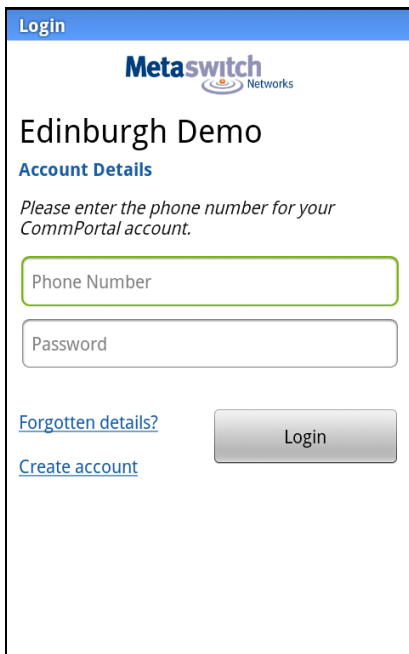
CommPortal Mobile is an Android Application. This means you can download it through Android Market directly to your phone.

This application is published on Android Market by Lightpath Hosted Voice

D.3.2 Configuring CommPortal Mobile for Android

When you start CommPortal Mobile for the first time, you may be asked to choose your service provider from a list and/or agree to the terms of an End User License Agreement. Once you have done this, you will see the welcome screen:

Figure 108: First time login screen

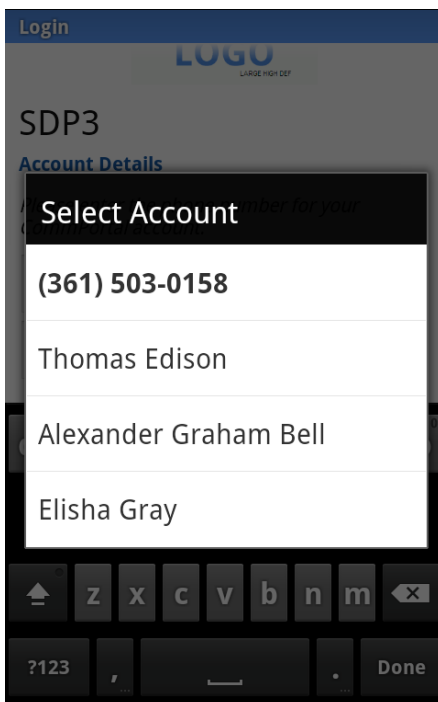


The screenshot shows a mobile application interface for a login screen. At the top, there is a blue header with the word "Login". Below the header is the Metaswitch Networks logo. The main title is "Edinburgh Demo". Underneath, it says "Account Details" and "Please enter the phone number for your CommPortal account." There are two input fields: "Phone Number" and "Password". Below the "Phone Number" field, there are two links: "Forgotten details?" and "Create account". To the right of these links is a "Login" button.

Enter the phone number associated with your CommPortal account along with your password and then press the *Login* button.

If you enter the primary phone number for an account that has secondary mailboxes, you will then be asked to select which mailbox you want to log in to.

Figure 109: Mailbox selection screen



The screenshot shows a mobile application interface for a mailbox selection screen. At the top, there is a blue header with the word "Login". Below the header is the LOGO logo. The main title is "SDP3". Underneath, it says "Account Details". A "Select Account" dialog box is open, showing a list of mailboxes: "(361) 503-0158", "Thomas Edison", "Alexander Graham Bell", and "Elisha Gray". At the bottom of the screen, there is a keyboard with a "Done" button.

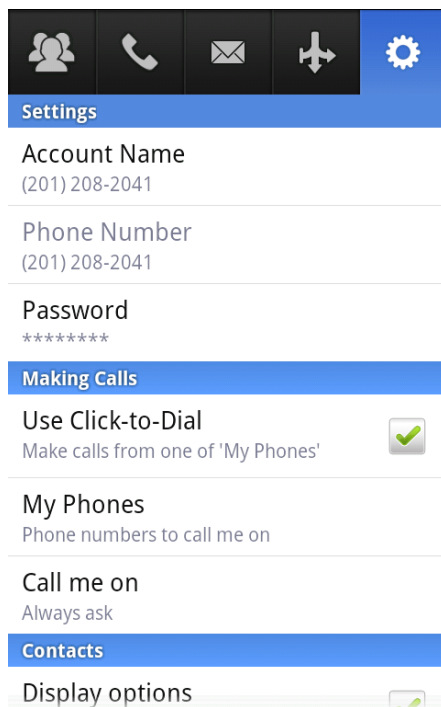
Once you have selected the mailbox you want to log in to, you will be prompted to enter the password for that account. Once you have logged in, you may be taken through a tutorial which will give you an introduction to CommPortal Mobile for Android.

Before you start making calls using CommPortal Mobile, you should make sure that you have set your preference for Click-To-Dial.

If you would rather make calls directly from your Android phone rather than using Click-to-Dial, you can turn the Click-to-Dial feature off from the Settings tab (shown in Figure 110) by touching the checkbox next to Use Click-to-Dial until it is no longer ticked.

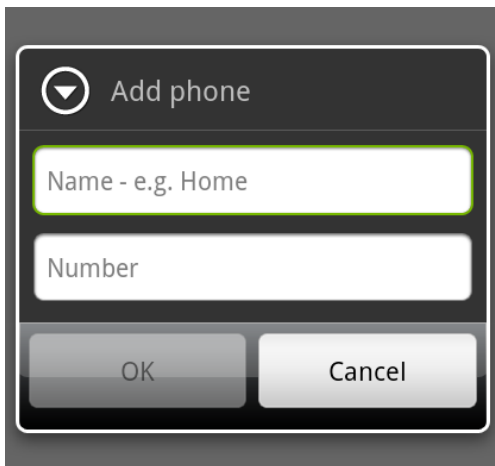
CommPortal Mobile automatically adds the CommPortal phone number you entered on the welcome screen to your list of phones to be used for Click-To-Dial. You can view and add to your list of phone numbers by touching *My Phones* on the *Settings* tab.

Figure 110: The Settings Tab



This will bring up your list of phones to be used for Click-To-Dial. To add a new number, press your phone's menu button and then touch *Add phone*. This will bring up the following menu which you can use to enter a friendly name for the number, as well as the number itself.

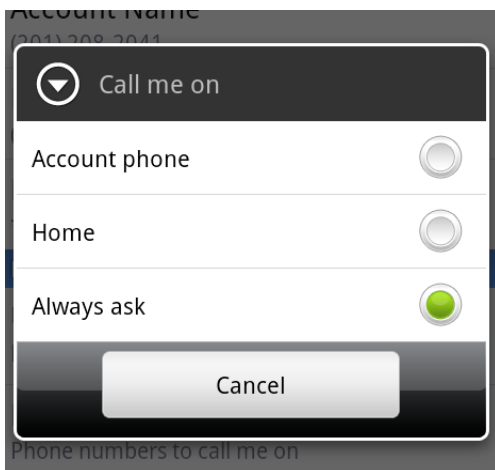
Figure 111: Add phone menu



Note that these numbers are not the numbers you can call – these are the numbers that CommPortal Mobile can call you on before connecting you to the contact you actually want to dial.

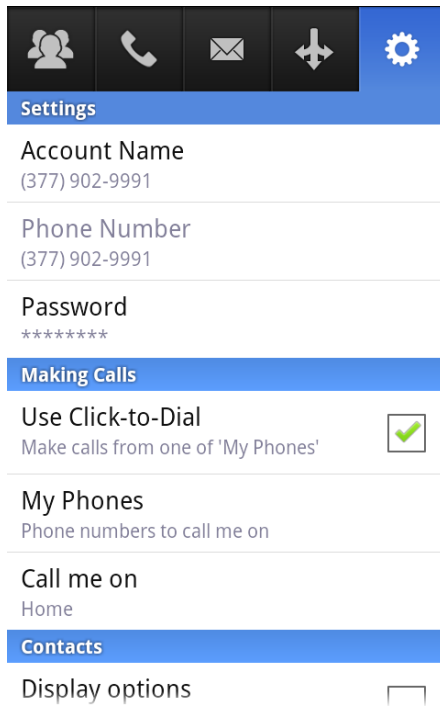
CommPortal Mobile can either prompt you to choose a number to call you on every time you initiate a Click-To-Dial call, or it can automatically use a specified default number. You can configure this by touching *Call me on* on the *Settings* tab. This will bring up the *Call me on* menu.

Figure 112: Call me on menu



Touch the number you want to use by default when making Click-To-Dial calls, or touch *Always Ask* to configure CommPortal Mobile to give you a list of possible numbers each time you make a call.

Returning to the *Settings* tab will show the new phone number that Click-To-Dial will call you on.

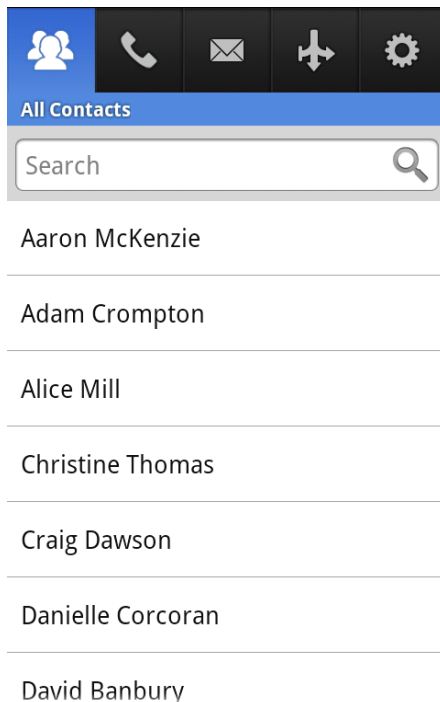


D.3.3 Using CommPortal Mobile for Android

Managing your contacts

You can manage your contacts from the *Contacts* tab.

Figure 113: The Contacts Tab



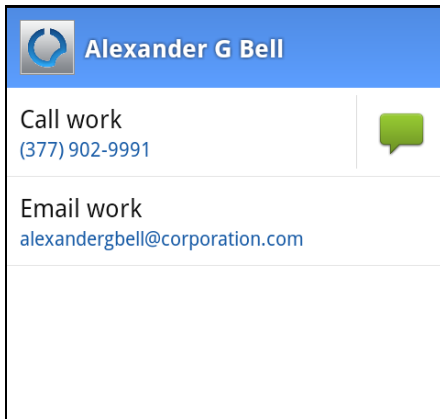
When you first access this tab, you will be shown a list of your phone and CommPortal contacts. You can either scroll through this list or search within it using the Search bar at the top of the screen.

You can add a CommPortal contact to this list by pressing your phone's menu button and then pressing *Add Contact*.

If you find that recently added phone or CommPortal contacts do not appear on this list, you can also reload your contact list by pressing your phone's menu button and then pressing *Refresh*.

To view a contact's details, simply press their name. You will be taken to a Contact Details screen displaying all of the phone/fax numbers and e-mail addresses that you currently have stored for that contact.

Figure 114: Contact Details screen



From this screen, you can do the following.

- Start a Click-To-Dial call – If your chosen contact has a phone number assigned to them, you can call them using the Click-To-Dial feature. To initiate a call, simply press your chosen contact number. For more information on Click-To-Dial calls, see **Making Click-To-Dial calls** below.
- Send an email – If your chosen contact has an email address assigned to them, you can send them an email by simply pressing your chosen address. Choose the method you want to use to write your email from the list that appears, and then compose your mail.

If your chosen contact is a CommPortal contact, you can edit or delete your contact from the Contact Details screen by pressing your phone's menu button and pressing either *Edit contact* or *Delete contact*. You can also set any of a CommPortal contact's numbers or e-mail addresses as the default. To do this, press and hold your chosen number or e-mail address and then select *Make default* from the resulting menu.

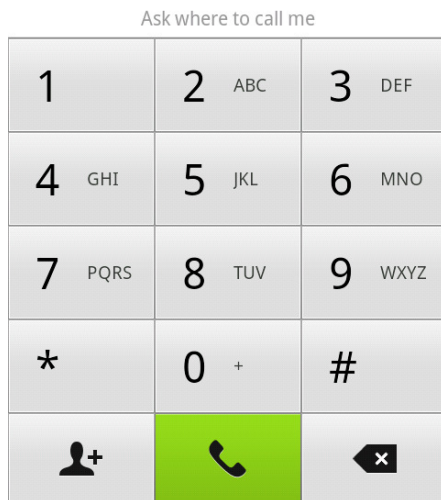
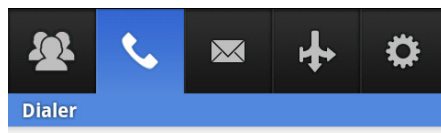
You cannot edit or delete a phone contact directly from CommPortal Mobile. However, you can easily skip straight from viewing a phone contact in CommPortal Mobile to your phone's own contact details page. To do this, press your phone's menu button when viewing a phone contact in CommPortal Mobile, and then press *More details*. You can then edit or delete your phone contact as you would normally. You can also do this for CommPortal contacts, using the same method.

Making Click-To-Dial calls

Using the Click-To-Dial feature of CommPortal Mobile is very similar to using your Android phone to make calls. However, you should first launch the CommPortal Mobile application by touching it on the applications menu of your Android phone.

You can initiate Click-To-Dial calls from the *Contacts* tab, shown in Figure 113, or the *Dialer* tab.

Figure 115: The Dialer Tab

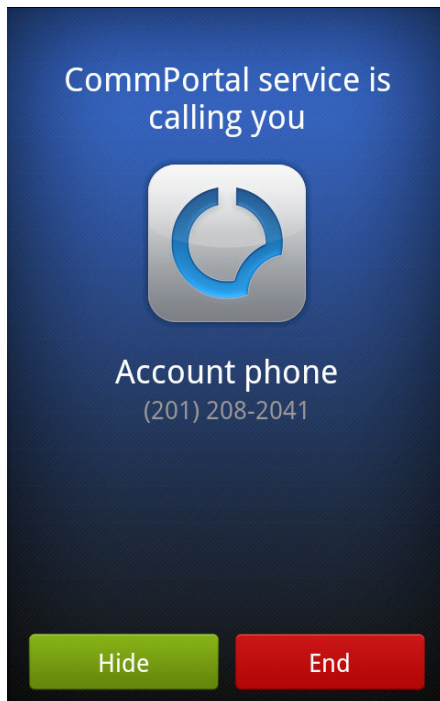


These screens behave in a similar manner to the standard Contact List and Phone screens used when making standard calls from your Android phone.

To start a Click-To-Dial call from the *Contacts* tab, press the contact and then the number you want to call. Depending on your settings, pressing your chosen number will cause CommPortal Mobile to either immediately send the call to your default phone or show a list of possible numbers that you can choose from. Once you answer your chosen phone, CommPortal Mobile will call the number you chose on the *Contacts* tab.

To start a Click-To-Dial call from the *Dialer* tab, simply enter the number you want to call as usual. Depending on your settings, pressing the *Call* symbol will cause CommPortal Mobile to either immediately send the call to your default phone or show a list of possible numbers that you can choose from. You can use the prompt above the keypad to remind you of your current settings. Once you answer your chosen phone, CommPortal Mobile will call the number you dialed on the *Dialer* tab.

Figure 116: Click-To-Dial call initiation screen



You should see the following progress messages.

- *CommPortal service is calling you* – your default or chosen number should now be ringing. You should pick up the phone.
- *Calling* – you have answered your phone. Your default phone is now calling your contact. You should hear your contact's phone ringing.
- *Call connected* – once your contact answers the phone (or is diverted to voicemail)

The CommPortal Mobile screen will give you various call handling options during the progress of the call.

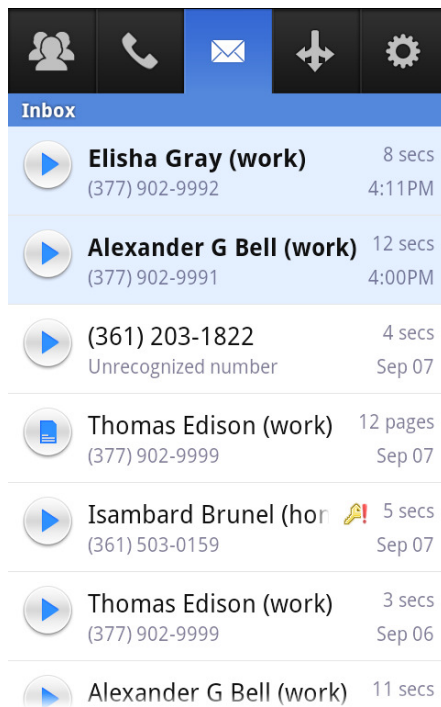
- Up until the point you answer your phone, you can click
 - *End* – to cancel the call
 - *Hide* – continues with the CommPortal Mobile call attempt, but returns you to the main application. You can use your Android phone as normal from this point.
- For a short period of time after you have answered your phone, you can use CommPortal Mobile to end the call. After this time, you can only terminate the call by hanging up the phone you are using.

You can dismiss CommPortal Mobile during a Click-to-Dial call without interrupting the call by pressing your Android phone's home button.

Managing your messages

You can access your voicemail and faxes through the *Inbox* tab.

Figure 117: The Inbox Tab



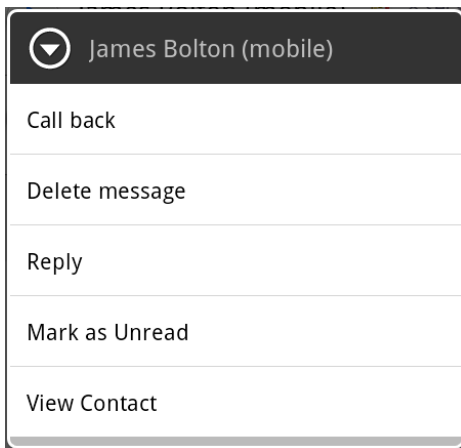
- For each message there are up to two lines.
 - If the message is from one of your contacts, the first line will include the contact name of the sender, along with details of the phone that the contact used (work, mobile, and so on). If it is from an unrecognized number, this line will give the phone number in full.

The first line may also include the message duration (or number of pages if the message is a fax) and an icon indicating whether the message is private and/or urgent.
 - If the message is from one of your contacts, the second line will give the full phone number used to leave the message. If the message is not from one of your contacts, this line will indicate that the message is from an unrecognized number. This line will also include the time (if the message was received that day) or date that the message was received.
- Unheard messages are indicated by a blue background, as for the first two entries in Figure 117.

Context Menu

Pressing and holding on to a message entry will bring up the context menu.

Figure 118: CommPortal Voicemail for Android Context Menu



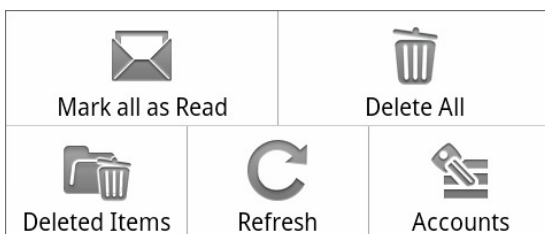
From this screen you can

- call the contact who left the message
- reply to the message
- delete the message
- mark the message as read or unread as appropriate
- view the contact who left the message, or create a contact if the number does not match an existing contact.

Inbox Menu

Pressing the phone's *Menu* button when on the *Inbox* screen brings up the following menu.

Figure 119: Menu Options on the Inbox screen



From this menu you can select the following.

- *Mark all as Read.* Mark all messages as read or unread as applicable
- *Delete All.* Delete all messages
- *Deleted Items.* Go to your Deleted Items folder
- *Refresh.* Refresh the screen to check for new messages
- *Accounts.* Select other accounts

Listening to messages


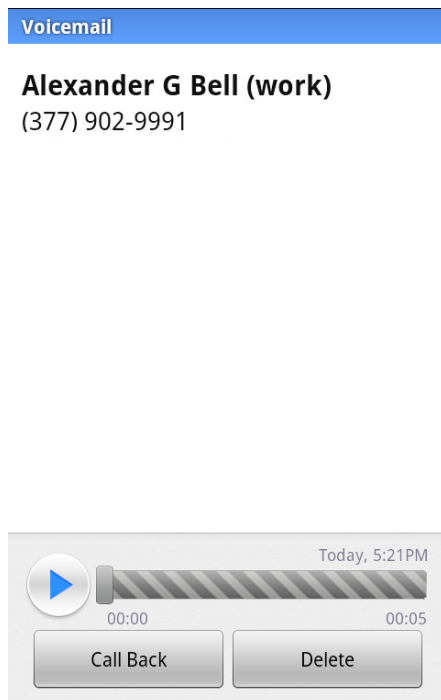
You can play messages either by pressing the Play button, , either directly from the Inbox screen, or by selecting the message and pressing the Play button on the Voicemail screen shown in Figure 120.

Figure 120: Voicemail screen



- If the message has not yet downloaded to your phone, you will be unable to play back the message and will see the text *Awaiting message....*
- The progress bar shows the playback position and buffer. You can rewind and fast-forward using the slider and can pause, stop and skip messages using the on-screen controls.
- If you have enabled the Speech-to-Text Transcription Service, you will also see the transcript of the message below the caller details. Depending on your model of phone and its screen size, and the length of the transcript, you may need to scroll down to read the whole message.
- You can call the caller back or delete the message using the on-screen buttons.

If you have configured CommPortal Mobile to always ask you which phone to call you on when using the Click-To-Dial feature, you will be prompted to choose a phone.

Message menu

Pressing the *Menu* button on your phone when looking at a message brings up the following menu.

Figure 121: Message Menu

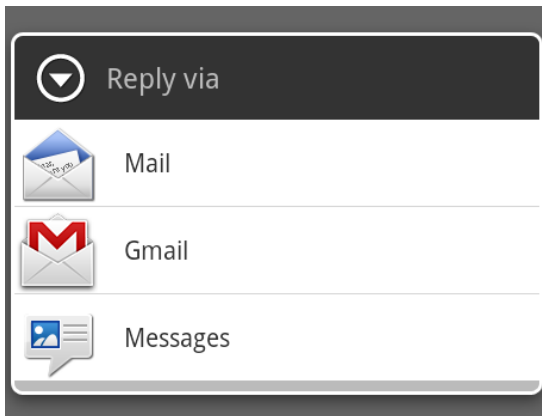


This menu allows you to carry out a number of actions.

- Reply to or forward the message.

You are then prompted to select the method by which you would like to reply to or forward the message.

Figure 122: Reply to message action menu



- Mark the message as Unread or Read, depending on its current state.
- Return to your inbox.
- View contact details for the sender (if the sender is not already in your contact list, you will be given the option to save the number as a contact).

Viewing a fax


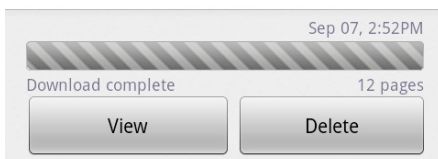
A fax icon, , indicates that the message you received was a fax. Pressing on the fax message takes you to the *Fax Message* screen.

Figure 123: Fax Message screen



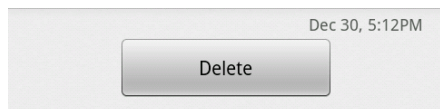
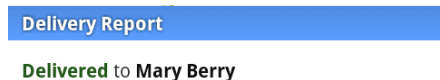
The fax message screen shows details of the contact or number that sent the message. Before you can see the fax you must wait for the message to download. Once it has downloaded you can view or delete it using the on-screen buttons.

Clicking the *View* button brings up an action menu from which you can select the program you want to use to view the fax. If faxes are delivered in PDF format, you must have a PDF viewer installed on your phone in order to view them.

Delivery Reports

Selecting a delivery report takes you to a Delivery Report page, which shows more details about that report.

Figure 124: Delivery report



The report can be deleted by pressing the *Delete* button at the bottom of the page.

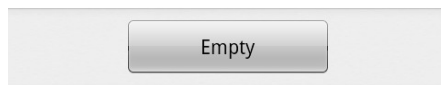
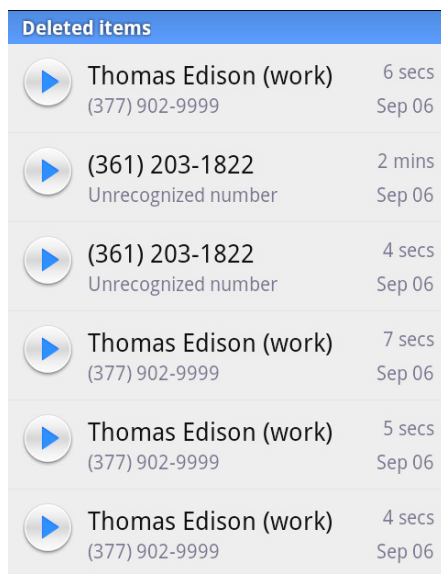
The context menu, shown by pressing the on-phone menu button allows you to mark the report as read or unread as appropriate, and allows you to return to the inbox.

Deleted messages folder

This folder is only available if your account allows you to keep deleted messages. Otherwise, your messages are permanently deleted when you delete them.

This folder shows the messages you have deleted from your inbox. If you have the Voicemail as text service and it is turned on, you will also see the transcripts of these messages.

Figure 125: The Deleted messages folder



Pressing the *Empty* button will permanently delete all messages in your Deleted Items folder.

The page behaves in a similar manner to the inbox message list shown in Figure 117, in that you can play back any voicemails or view faxes.

When playing back or viewing a deleted message or fax, the context menu (available by pressing your on-phone *Menu* button) shows the following options.

Figure 126: The Deleted messages options menu



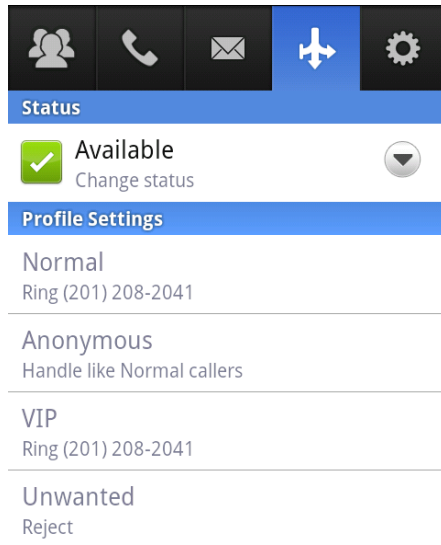
- *Reply*– this behaves in the same way as the reply option shown in Figure 121.
- *Deleted Items* – this will return you to the Deleted Items folder.
- *Delete* – this will permanently delete the message. Before the message is deleted, you will be asked to confirm that you want to permanently delete the message.
- *View Contact* – this will show you your stored contact details for the sender (if the sender is not already in your contact list, you will be given the option to save the number as a contact).

You may find that the messages in your Deleted messages folder take slightly longer to start playback than those in your inbox. To improve performance, CommPortal Mobile only allows inbox messages to be pre-loaded.

Changing your Call Manager settings




You can change your Call Manager call handling profile directly from CommPortal Mobile using the *Status* tab.

Figure 127: The Status Tab



The *Status* tab will show which of your call handling profiles is currently active and will give a summary of how calls are being handled.

The following call handling profiles are available.

-  – *Available* – your phone will ring as normal.
-  – *Do Not Disturb* – all calls will go to your voicemail and your phone will not ring.
-  – *Forward All Calls* – will forward calls either to voicemail or to another number you can select or specify, rather than making your phone ring.

To switch between call handling profiles, simply press the name of the currently active profile and then choose the profile you want from the menu that appears.

Your new profile will then be shown with a brief summary of how it will handle your incoming calls.

You can also change the number used for the *Forward All Calls* profile. To do this, take the following steps.

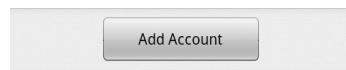
- Set *Forward All Calls* as your active profile.
- On the *Status* tab, press *Forwarding Number*.
- A *Forward to* dialog box and a numeric keypad will appear on your screen. You can choose to either enter a number or choose from your existing contacts.

- To enter a number, simply type it in to the field using the keypad and then press *OK*.
- To choose a number from an existing contact, press the *Contacts* button to the right of the number field in the dialog box. This will bring up your contact list, which you can use to choose your contact and number. Note that only contacts with phone numbers will be shown.

Switching between accounts

You can access the accounts screen by pressing the menu button on your phone while on any of the five main tab screens and choosing *Accounts* from the context menu that appears.

Figure 128: Accounts



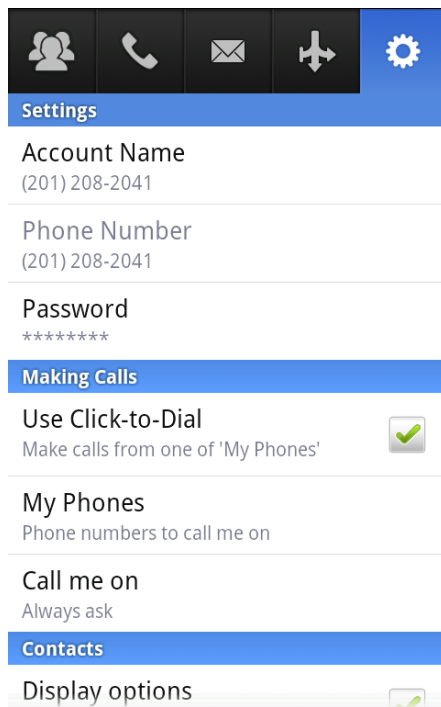
From this screen you can select other accounts you have configured, or press *Add Account* to create a new account. Pressing *Add Account* will take you to the same page as seen when first starting the application, as shown in Figure 108.

To remove an account, press and hold your chosen account number and then choose *Remove account* from the menu that appears.

D.3.4 Settings

Navigating to the *Settings* tab will take you to the following screen.

Figure 129: The Settings Tab



The Settings page shows the telephone number of the account to which the settings apply. You can control the following details.

- *Account Name* – You can give your CommPortal account a recognizable name using this option.
- *Password* – This option allows you to change your current CommPortal password.
- *Use Click-to-Dial* – This allows you to turn the Click-to-Dial feature on and off. If this feature is turned off, any call you initiate in CommPortal Mobile will be made directly from your Android phone.
- *My Phones* – This allows you to view and edit the list of phones that you currently have available to use the Click-To-Dial feature. You can add to this list by pressing your phone's menu button while looking at the list and choosing *Add phone*.

To edit or delete a phone number on your list, press and hold it and then choose the appropriate option from the menu that appears.

- *Call me on* – This sets the default phone used for the Click-To-Dial feature. You can set any of the phones that you have configured under *My Phones* as your default phone or you can choose to have CommPortal Mobile ask you which phone to use each time you initiate a call.
- *Display options* – This allows you to choose whether or not contacts without numbers are shown in the application's Contact list.
- *Store* – The number of messages to store in your phone. To improve performance, only inbox messages are pre-loaded. Pressing this option brings up a context menu from which you can select the total number of messages to pre-load on your phone.

If you set this to 0 (or if the *Store* setting is not present in your version of CommPortal Mobile), your message list will be discarded each time you lock your Android handset or leave the application (either by closing it, moving to another application or being interrupted by an event such as a phone call). CommPortal Mobile will then re-download the list when you open the application again.

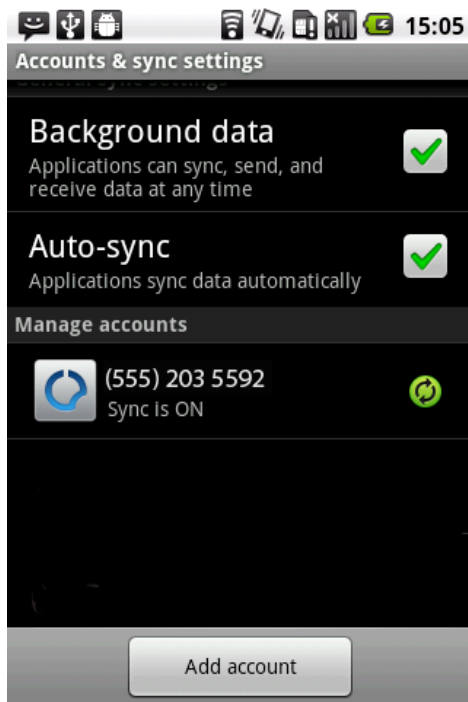
- *Notify me when.* This determines when you receive notification of your messages' arrival. You can select from the following options.
 - *Never* – you do not receive notifications of new messages.
 - *Message arrives* – you receive a new message notification when the initial voicemail arrives.
- *Vibrate* – This determines whether or not your phone vibrates when it receives a new message notification.
- *Select Ringtone* – This brings up a context menu from which you can select the ringtone for your new message notification.
- *Tutorial* – This gives a brief tutorial on how to use CommPortal Mobile for Android.
- *About* – This brings up the About page which shows information about the app.

D.3.5 Application settings

There are a number of settings for the CommPortal Mobile for Android application that are accessed from within the Settings application on the phone itself.

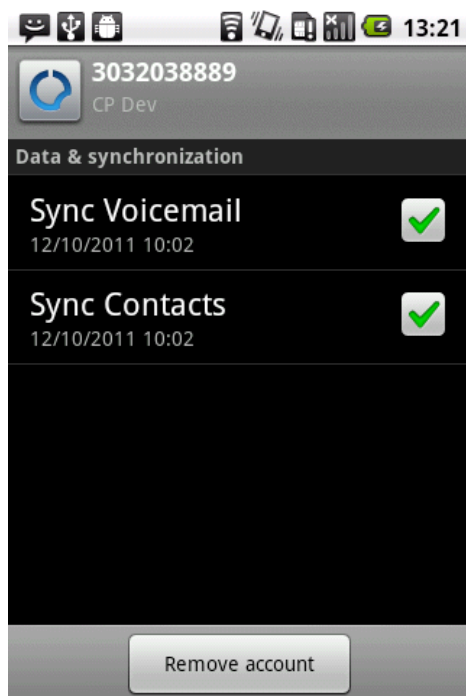
From your phone's own Settings application, select *Accounts & sync settings*. You will then see the following page.

Figure 130: The native Accounts & sync page



This page will show you all of the CommPortal accounts that you have configured in CommPortal Mobile and inform you whether the application is automatically keeping in sync with any of them. Selecting an account takes you to the following page.

Figure 131: Synchronization options



From this page, you can choose whether or not you want CommPortal Mobile to automatically check for any updates to your message list, CommPortal contacts or Call Manager settings that have been made outside of the application (for example, through CommPortal Web).

If *Sync Voicemail* and *Sync Contacts* are both ticked, then the application will regularly check for changes to your CommPortal contacts and update them if necessary.

If either of these options is not ticked, then the application will check for updates to your CommPortal contacts once a day at most. You can still manually update your contact list by pressing your phone's menu button while on the *Contacts* tab and then pressing *Refresh*.

If *Sync Voicemail* is ticked, then the application will regularly check your message list and Call Manager settings and update them if necessary.

If *Sync Voicemail* is not ticked, then you will not receive any new messages unless you manually update your message list. You can do this by pressing the phone's *Menu* button while on the *Inbox* tab and then pressing *Refresh*. Your Call Manager settings will be updated each time you open the *Status* tab.

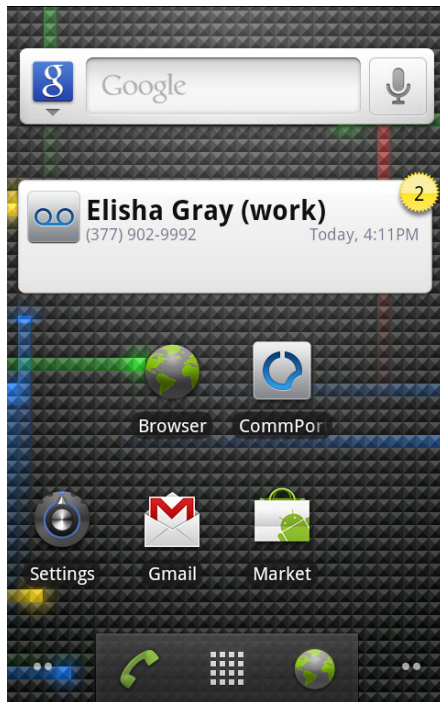
You can also choose to remove this account from your phone by pressing the *Remove account* button.

D.3.6 CommPortal Mobile for Android Widget

The CommPortal Mobile for Android application also has a Widget. An Android Widget is an active icon you can place on your phone desktop screens. For CommPortal Mobile for Android, this widget shows information about your latest voicemail or fax, and gives an indication of the number of unread messages in your account. It also notifies you about any missed reminders.

To install the widget, touch and hold a clear area of one of your desktop screens. From the menu that appears, choose *Widgets*, and then scroll through your list of widgets until you find the CommPortal Voicemail widget. When you touch it, the widget will be installed on your chosen desktop screen.

Figure 132: CommPortal Mobile for Android Widget



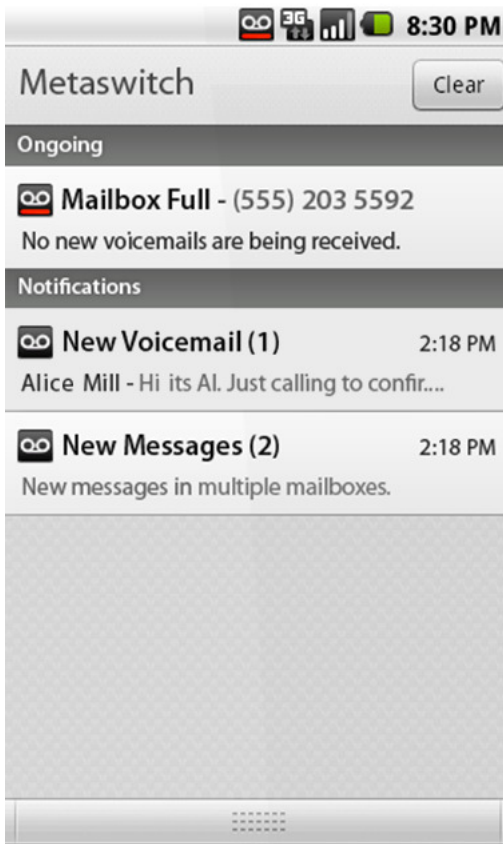
This image shows examples of the Widget and the application icon itself. Pressing the widget will open the application to show the *Inbox* tab as shown in Figure 117.

Note that if you change the *Store* setting in the *Settings* tab to 0 (or if the *Store* setting is not present in your version of CommPortal Mobile), the widget will not display details of the newest message or give a message count, as shown in Figure 132. Instead, it will simply inform you that there are new messages available.

The notification menu

You can reach the notification menu by pressing and holding the notification bar and then sweeping it downwards. Assuming the CommPortal Mobile for Android application is running on your phone, you will see a list of your current notifications from this application, alongside any notifications from other applications you may have running on your phone.

Figure 133: The notification menu



Pressing any notification from CommPortal Mobile for Android will open the application.

Note that if you change the *Store* setting in the *Settings* tab to 0 (or if the *Store* setting is not present in your version of CommPortal Mobile), the notification menu will not display information about the message sender, transcription text or a message count, as shown in Figure 133. Instead, it will simply inform you that there are new messages available.

D.4 CommPortal Conference for iPhone

CommPortal Conference allows you to moderate conferences on your iPhone.

You can set up a conference, either by selecting participants in your phone contacts, or by dialing their number directly. You can see a list of all participants and can control their volume, mute them and even control the recording of your conference (if your service provider allows it), all using your iPhone.

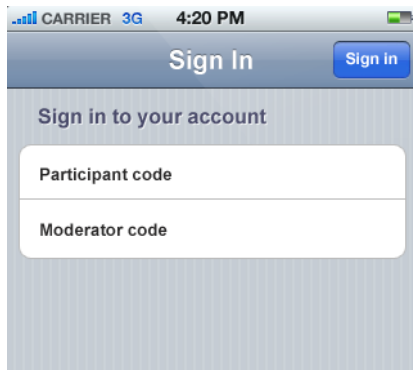
D.4.1 Downloading CommPortal Conference for iPhone

CommPortal Conference is an iPhone Application. This means you can download it through the App Store, either directly from your iPhone or using your computer.

D.4.2 Configuring CommPortal Conference for iPhone

The first time you load CommPortal Conference you will be presented with a sign in screen, shown in Figure 134, which asks you for the participant and moderator codes. These are the codes used to dial into your conference account and your service provider should have given them to you.

Figure 134: Sign in screen for CommPortal Conference



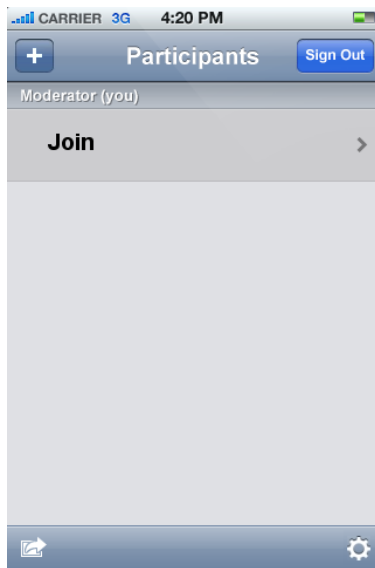
- Type the two codes in the appropriate edit boxes, then click the *Sign In* button.

You only have to enter these details once as they are stored by the app. The next time you open the app, you will be taken straight to the participants screen shown in Figure 135. If you want to enter a new code at any point, you should sign out of the application.






D.4.3 Using CommPortal Conference for iPhone

When you have signed in successfully, the Conference Widget appears as shown in Figure 135.

Figure 135: CommPortal Conference start screen



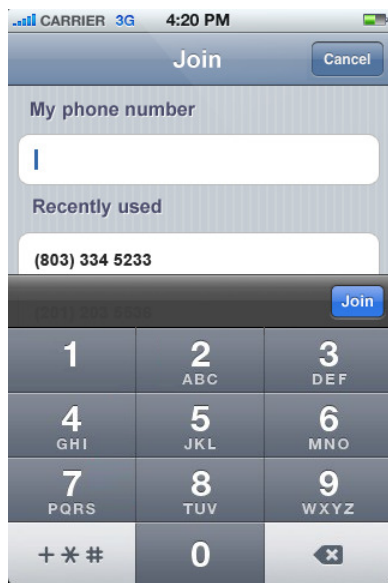
You can now start using the CommPortal Conference app to control your conferences.


- The buttons on this screen allow you to:
 -  Add a new conference participant, setting up an outdial call to invite this participant into the conference.
 -  Sign out from the app. This will return you to the initial sign in screen.
 -  Open the Action sheet. This opens a new menu on the existing screen that allows you to control aspects of a conference, such as to mute all participants, prevent any new participants joining the conference, and to start recording.
 -  Open the Settings sheet. The opens a new screen from which you can set whether the conference starts and ends when you join and leave a conference and also shows the current conference number, your participant code and moderator code.
 -  Join a conference.

D.4.4 Joining and managing a conference

When you tap *Join*, you are prompted for the telephone number on which you want to call into the conference. Alternatively you can choose a number you have used previously.

Figure 136: Joining a conference – enter new number

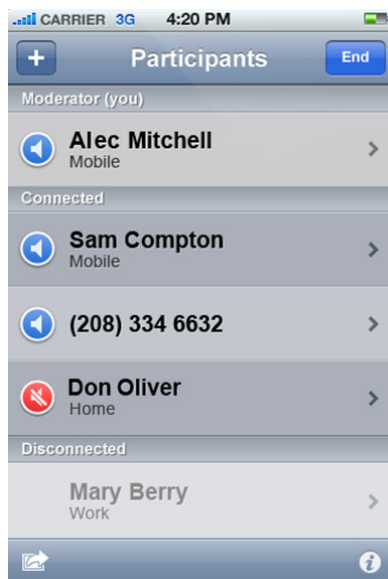



- Click on  to join the conference with the specified telephone number.




Moderating a conference

Once you have joined a conference, you are taken to the Participants screen, shown in Figure 137 which shows a list of currently connected, connecting and disconnected participants.

Figure 137: CommPortal Conference Participants display



- The first entry in the list of participants identifies you as the conference moderator, and the remaining entries identify other participants in the conference.
- Participants are displayed using their telephone number, unless you have details of that participant in your phone's contacts, in which case they are shown by name. Details of the type of number (Home, Mobile, Work and so on) are also shown below the participant name, if available.
- If you or any participants are using HD audio, an "HD" symbol, , appears next to your name or the participant's name.

- Pressing the speaker icon,  , will mute the participant and change the icon to the muted icon,  . Pressing the muted icon will unmute the participant again.
- While a participant is speaking the speaker icon changes to the speaking icon,  .

Adding participants to a conference


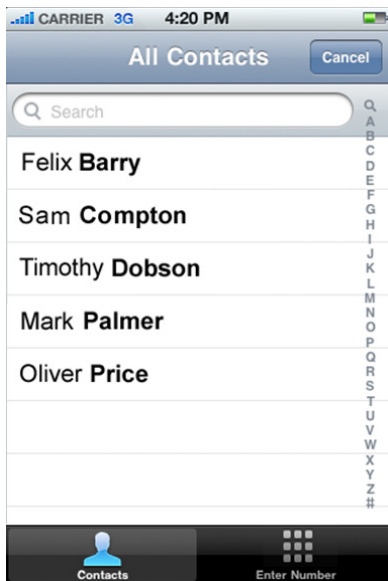
Select  to add a new conference participant. This will open your phone's contact list.

Figure 138: Adding a participant

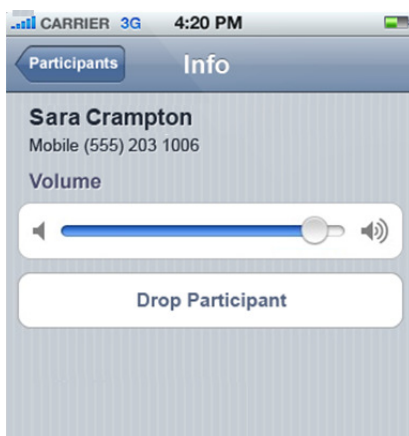


You can choose to invite one of your contacts, or enter a number, in the same way you might make a call with your phone.

Participant info

By selecting a participant from Participant list you are taken to a screen shown in Figure 139.

Figure 139: Participant info screen



From this screen you can

- see the full details of the participant including name, number and type of number as available

- adjust the microphone volume of the participant
- Drop this participant from the conference.

Global options


Pressing the Action sheet button, , brings up a menu that allows you to make changes to the conference.

Figure 140: The action sheet menu for the conference



This allows you to

- mute all participants – this shuts off the microphone for all participants, apart from the moderator
- lock the conference – this prevents any further participants from joining the conference
- start recording the conference.

Once pressed these buttons change to offer the opposite action. That is, the *Mute All* button changes to *Unmute All* and so on.

D.4.5 Settings


Selecting  will take you to the following screen.

Figure 141: Options screen



From this screen you can see the following details of the conference.

- *Conference Number* – the number conference participants must call to enter the conference
 - *Participant code* – your user code for the current conference
 - *Moderator code* – the code used to gain moderator privileges for the conference.
- From this screen you can also make the following changes.

- Configure whether or not the conference can start without a moderator.
- Determine whether or not the conference ends automatically when the moderator leaves.

D.4.6 Leaving and ending a conference

How a conference ends depends on your chosen settings. You can configure the app to automatically end a conference when you leave it, alternatively you can end the conference manually.

- Press **End**. This will either automatically end the conference, or will show the following screen.

Figure 142: The Leave Conference popup



From this popup, you can choose to leave the conference, or to end it, or cancel to return to the conference.

D.5 CommPortal Conference for Android

CommPortal Conference allows you to moderate conferences on your Android phone, such as the Motorola Droid and the Nexus One.

You can set up a conference, either by selecting participants in your phone contacts, or by dialing their number directly. You can see a list of all participants and can control their volume, mute them and even control the recording of your conference (if your service provider allows it), all using your phone.

D.5.1 Downloading CommPortal Conference for Android

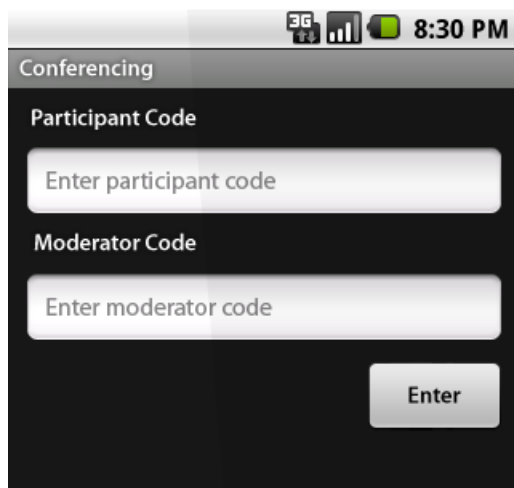
CommPortal Conference is an Android Application. This means you can download it through the Android Market directly to your phone.

CommPortal Conference for Android is published by Lightpath Hosted Voic.

D.5.2 Configuring CommPortal Conference for Android

The first time you load CommPortal Conference you will be presented with a sign in screen, shown in Figure 143, which asks you for the participant and moderator codes. These are the codes used to dial into your conference account and your service provider should have given them to you.

Figure 143: Sign in screen for CommPortal Conference



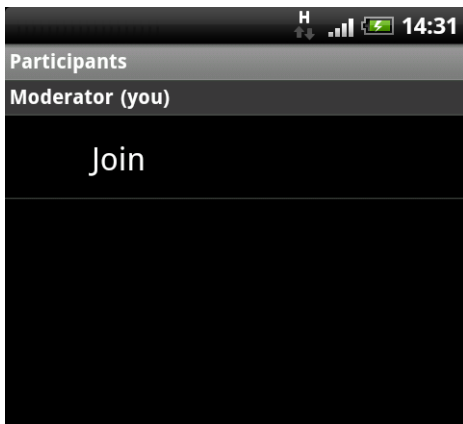
- Type the two codes in the appropriate edit boxes (selecting a field will bring up the on-screen keyboard if you do not have a keyboard attached), then click the *Enter* button.

You only have to enter these details once as they are stored by the app. The next time you open the app you will instead be taken straight to the start screen, shown in Figure 144. If you want to enter a new code at any point, you should access the Settings screen.

D.5.3 Using CommPortal Conference for Android

When you have signed in successfully, the Conference Widget appears as shown in Figure 144 below.

Figure 144: CommPortal Conference start screen

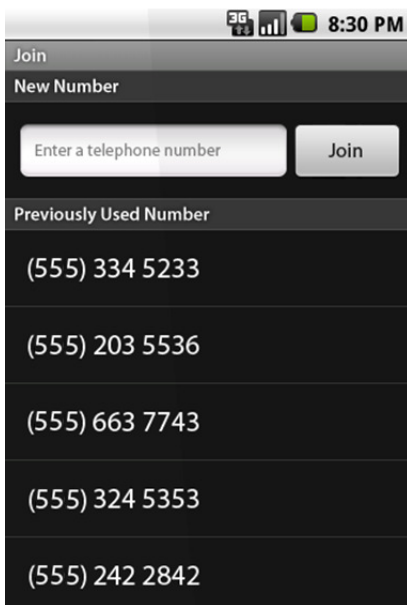


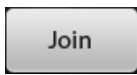
To join a conference, select *Join*.

D.5.4 Joining and managing a conference

When you tap *Join*, you are prompted for the telephone number on which you want to call into the conference. Alternatively you can choose a number you have used previously.

Figure 145: Joining a conference – enter new number

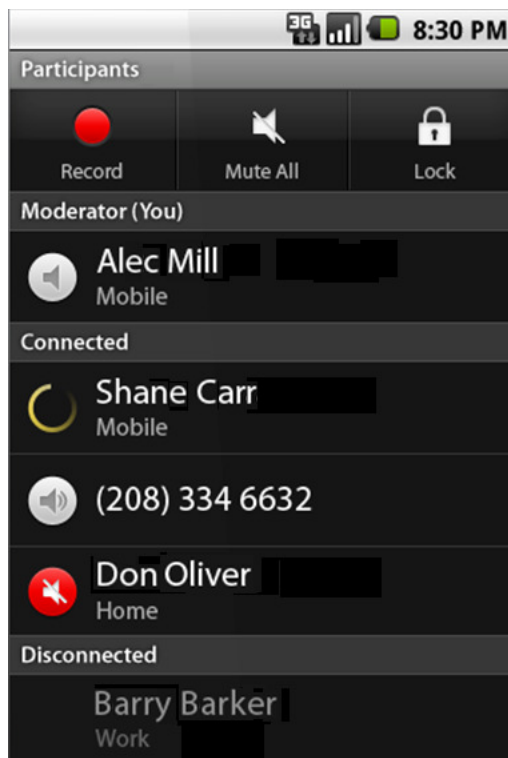








- Click on  to join the conference with the specified telephone number.

Moderating a conference

Once you have joined a conference, you are taken to the Participants screen, shown in Figure 146 which shows a list of currently connected, connecting and disconnected participants.

Figure 146: CommPortal Conference Participants display

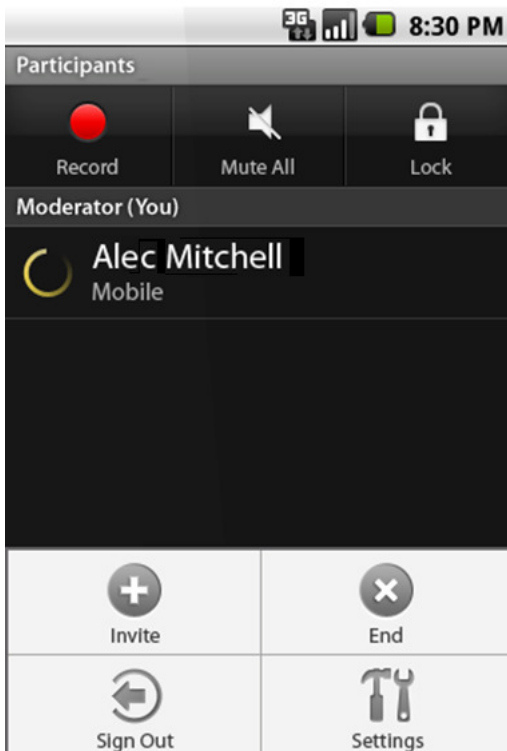


- The buttons at the top of this screen allow you to:
 -  – record the conference
 -  – mute all participants
 -  – lock the conference, preventing any more participants from joining.
- The first entry in the list of participants identifies you as the conference moderator, and the remaining entries identify other participants in the conference.
- Participants are displayed using their telephone number, unless you have details of that participant in your phone's contacts, in which case they are shown by name. Details of the type of number (Home, Mobile, Work and so on) are also shown below the participant name, if available.
- If you or any participants are using HD audio, an "HD" symbol, , appears next to your name or the participant's name.
- Pressing the  will mute the participant and change the icon to . Pressing this icon will unmute the participant again.





In-conference controls

Pressing the phone's menu button brings up the in-conference control menu.

Figure 147: In-conference control menu



From here you can select the following buttons.

-  – to invite new participants to the conference.
-  – to end the conference.
-  - to sign out from the conference.
-  – to navigate to the Settings screen.

Inviting participants to a conference


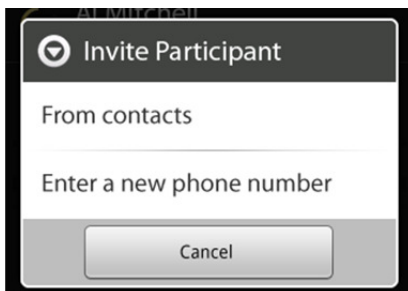
Selecting  from the in-conference settings menu shows the *Invite Participant* popup, shown in Figure 148.

Figure 148: Invite Participant popup



From this popup you can select to invite a participant

- from your contacts on your phone

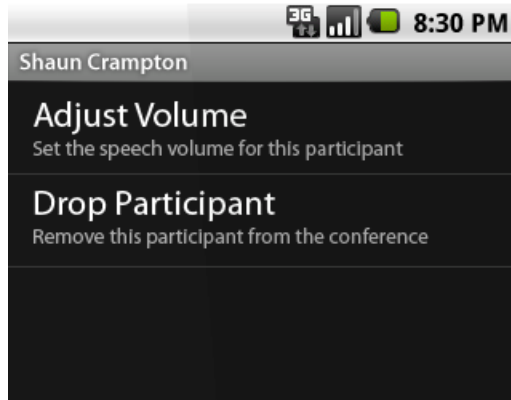
- by dialing their number.

Once you have invited a participant, you will return to the *Participants* screen.

Participant info

By selecting a participant from the participants list you are taken to the *Info* screen as shown in Figure 149.

Figure 149: Participant info screen



From this screen you can

- see the participant's name or number as available
- adjust the microphone volume of the participant
- Drop this participant from the conference.

D.5.5 Settings


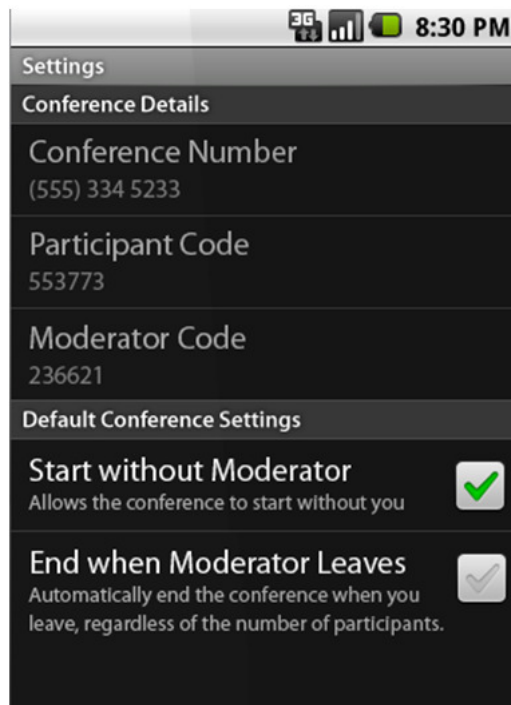
Pressing the *Settings* button, , will take you to the following screen.

Figure 150: Options screen



From this screen you can see the following details of the conference.

- *Conference Number* – the number conference participants must call to enter the conference
- *Participant code* – your user code for the current conference
- *Moderator code* – the code used to gain moderator privileges for the conference.



From this screen you can also make the following changes.

- Configure whether or not the conference can start without a moderator.
- Determine whether or not the conference ends automatically when the moderator leaves.

D.5.6 Leaving and ending a conference

How a conference ends depends on your chosen settings. You can configure the app to automatically end a conference if you sign out, alternatively you can end the conference manually.

- Bring up the in-conference control menu by pressing the *Menu* button on your phone.
- Select either

-  – to end the conference
-  - to sign out from the conference.

Depending on your chosen settings this will

- also end the conference automatically
- bring up the *Leave Conference* popup, which will ask if you just want to leave the conference, or would like to end it as well.

Figure 151: The Leave Conference popup

