

AVAYA

One-X Portal User Guide with Outlook Plug-In & Mobile App

AVAYA

Introducing the Avaya one-X Mobile solution



North American Telecommunications Group
in the end...it all comes down to service

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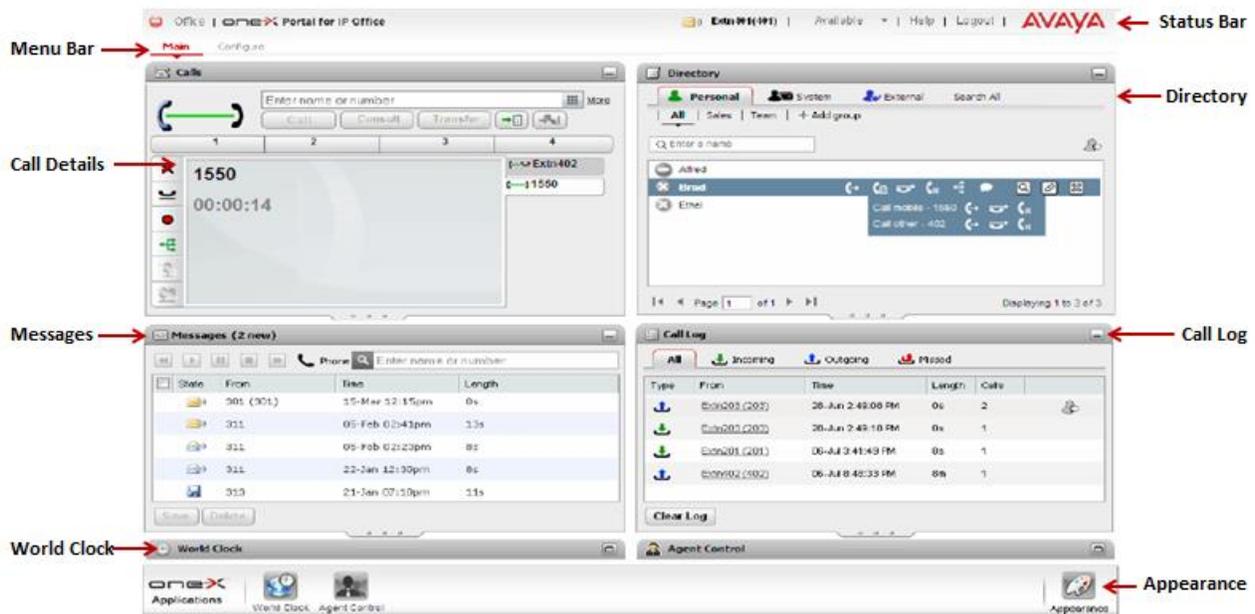
Using Avaya one-X Portal

Logging In to One-X Portal

- Using your Internet Explorer , enter IP Address ____ . ____ . ____ . ____ **Note:** If you do not have your IP address, please contact your IT department or NATG (charges may apply)
 - Press enter, the login menu will appear
 - Enter your full Name (ex. Kristi LePore)
 - Enter password _____
 - Click Remember Me on this computer
 - Click Login



Portal Outline



Button Inquiry

Menu Bar	Gives you access to your main page, configuration to make changes to the appearance and adding more menu tabs
Call Details	Displays caller information such as Name, Phone Number, etc. Also allows you to call handle directly from the information panel
Messages	Message details will appear in this panel such as who the message is from, date and time, message length, and the state of the message
World Clock	The World Clock gadget displays the time in selected time zones that you have added to the gadget.
Appearance	Allows you to make changes to the appearance of your xportal
Call Log	The Call Log displays details of calls you have made, received and missed. You can use the call log to make a call or add the caller's details to your Personal Directory
Directory	Gives you access to system wide and personal directories. Allows you to make calls from the directory panel
Status Bar	The title bar at the top-right of the screen shows you your current status and allows you to access a number of functions.

Making a Call

From your Calls panel...

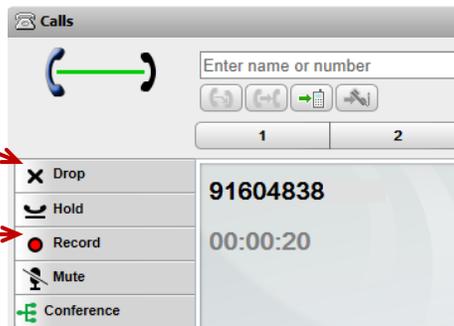
1. Enter the extension number or 9 + the phone number
2. Click  or Enter(on keyboard) to complete call

Note: While on a call, enter another number in the call panel and click call, this will automatically place you current call on hold and complete the second call



Call Handling

- a. On an incoming call,
 - Click  or lift handset
 - Click  to ignore caller and send to voicemail
- b. With an active call,
 - Click  to place caller on hold
 - Click  to retrieve held call
- c. Click  to record call into your voicemail
- d. Click  to Mute call
- e. Click  to coferece held calls together



Parking a Call for an Employee

With an active call...

1. Click on an available Park (1 to 3), call will then move on to park key, key will flash on all phones
2. Call or page employee to pick up designate park

To retrieve parked call: Click desired park key

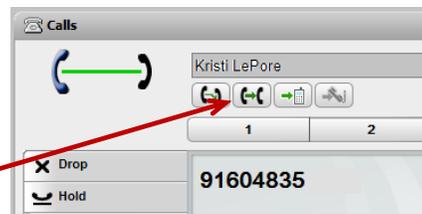
Note: When you place a call on park, the park key on your phone will flash green, on all other phones it will flash red



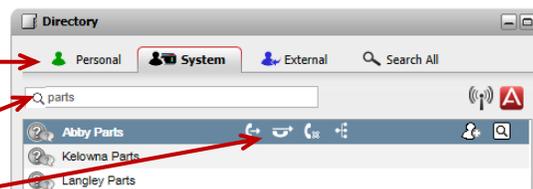
Transferring Calls

There are a couple places you can tranfer a call. With an active call...

- a) From your Calls panel;
 1. Enter the extension number OR
 2. Enter 9 + the phone number OR
 3. Enter the contacts full name (contact must be stored in your directory)
 - Click transfer , then Hang up



- b) From you directory panel;
 1. Choose the directory you'd like to search, Personal, System, External or All directories
 2. Enter name or hunt goup ex. Parts or scroll through all contacts
 3. Hover over the contact you'd like to transfer to
 4. Click transfer , then hang up



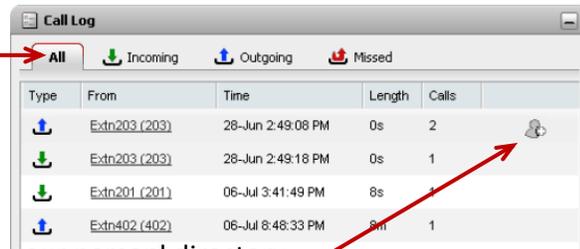
Redial/Caller ID

From your Call Log...

- Click All to view all calls to your extension
- Click  to view incoming calls
- Click  to view outgoing calls
- Click  to view missed calls

To Call: click the call you would like to call

Note: Click  if you would like to add number to your personal directory

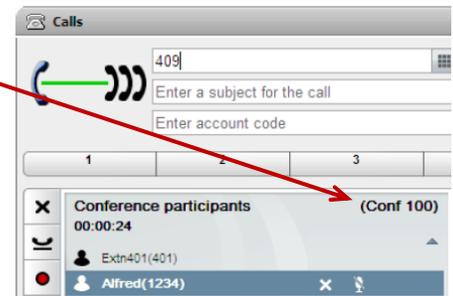


Conference Calling

1. If you have 2 or more calls on hold, press  to join calls into a conference OR
2. Make or Receive first call(internal or external), click  Hold (caller is placed on hold)
3. Make/Receive second call, click 
4. Make/Receive third call (optional), click 
5. When ready to complete conference, click  to connect all parties

Note: You will be assigned a conf # (usually starting at 100). Internal staff can join the conference by dialing that conf number from their phone. An outside caller can also be transferred to the conference number

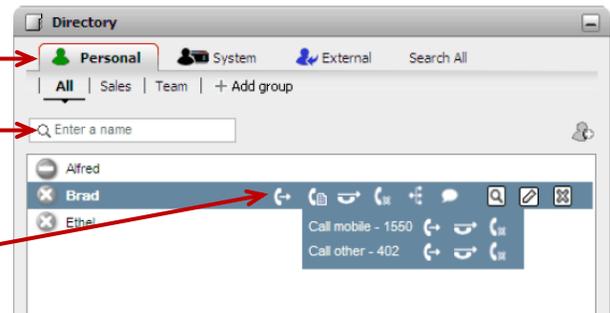
Note: To add another caller to the conference, from you calls panel, make call (your connection to the conference is put on hold and does not affect the conf). Once connected, click  to join caller or click  to cancel, and then click on  to rejoin the conference.



Making a call from your Directory

1. In the directory panel, choose the directory you'd like to search (person, System, External or All)
2. Enter the name of the contact you'd like to call or scroll through all names
3. Highlight the contact you'd like to call, then click  or if there are multiple number associated with that contact, click , then click  to connect

Note: While on an active call, click  to transfer the call to the highlight contact

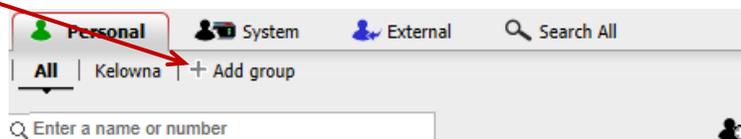


Adding/Changing/Deleting a Contact

From Personal directory panel...

- a. To **ADD**: Click , Fill in desired information, and then Click **Add**
- b. To **EDIT**: Choose the contact you'd like to Edit, click , Make changes, and then Click **Save**
- c. To **DELETE**: Choose the contact you'd like to Delete, and then click 

Note: Click  **Add group**, enter group name, click **Add**. To add members to the group follow the "To Add  instructions above



Avaya Voicemail Configuration

Listening to Messages:

From the Messages panel...

1. Select the message you would like to listen to, and then click
2. While listening:
 - Click to stop the message
 - Click to Pause
 - Click to fast forward (5 seconds)
 - Click to rewind (5 seconds)
3. When done listening, choose if you would like to **Save** or **Delete** the message



Important Note: Read messages will permanently delete themselves after 30 days. Make sure you Save the message if you would like to keep it for longer

Calling Sender:

From the Messages panel...

1. Click on the name or number you'd like to call
2. Call with appear in your Calls screen

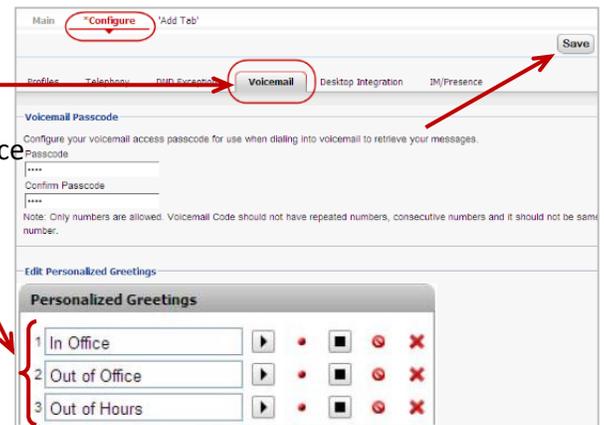


Note: You can add the caller into your directory by clicking icon in the message details

Recording Personalized Greetings

From the **Configure** tab...

1. Click **Voicemail**
2. Under the **Edit Personalized Greetings** field,
3. **Enter a name for the greeting you ex:** Out of the Office
4. When ready, **lift handset** then click
5. When finished, click to stop
 - Click to **Play** greeting
 - Click to **Delete** greeting
 - Click to **Rerecord**
 - Click to **Save**
6. At the top on the screen, **Click Save** to save changes



Activating Profiles:

From the **Configure** tab...

1. Click **Profiles**
2. **Choose the profile you'd like Active:**
 - a. **Office** - profile is set to send calls to the user's desk extension. Voicemail is on
 - b. **Mobile** - profile is set to use mobile twinning to ring at both the user's desk extension and at another number. Voicemail and call pickup are also still on.
 - c. **Home** - profile is set to forward calls to an external number. Voicemail is on but call pickup is off.



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

[Add a new profile definition](#)

Adding or Editing a Profile:

• To Add a New Profile:

1. From your Profile tab, Click **Add a new profile**
2. Enter the **name** of the profile ex. In a Meeting
3. Choose whether you would like to enable call pickup – this allows other users your pick up your extension when this profile is active
4. Select the **Mobility Setting for this profile**
 - Use **Default Deskphone** – your calls simply ring at the IP Office extension which you are using. This mode has no additional mobility settings.
 - Forward – Lets you choose to forward your calls Unconditionally, On No Answer or On Busy to another internal or external number. Also can choose if you would like mobile twinning active (rings both your extension and mobile at the same time)
5. Select the greeting you want to play while this profile is active (**Note:** if you would like a special greeting to play when this profile is selected, first record the greeting using the Recording Personalized Greetings instructions of page 5)
6. Select Voicemail if you would like voicemail to pick up for this profile
7. Select Voicemail Email if you would like voicemails to be sent to your email when this greeting is active

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

Edit/View Profile

Name

Call Pickup
 Enable

Mobility
Mode Use Default Deskphone

Voicemail
Active Greeting System Greeting

Voicemail

Voicemail Ringback

Voicemail Outcalling

Voicemail Email

Listen to messages on Browser Phone

• To Edit an Existing Profile:

1. From your Profile tab, Click **Edit** next to the profile you'd like to Edit
2. Make Changes, and then Click **Ok**

Note: You cannot delete or edit the default profiles, only the profiles you've created yourself.

Name	Description	Active	
Office	At Deskphone, VM ON, Call Pickup ON	<input checked="" type="radio"/>	Edit
Mobile	Mobile Twinned at:123456, VM ON, Call Pickup ON	<input type="radio"/>	Edit

For More User Guides

From your one-X Portal, click Help

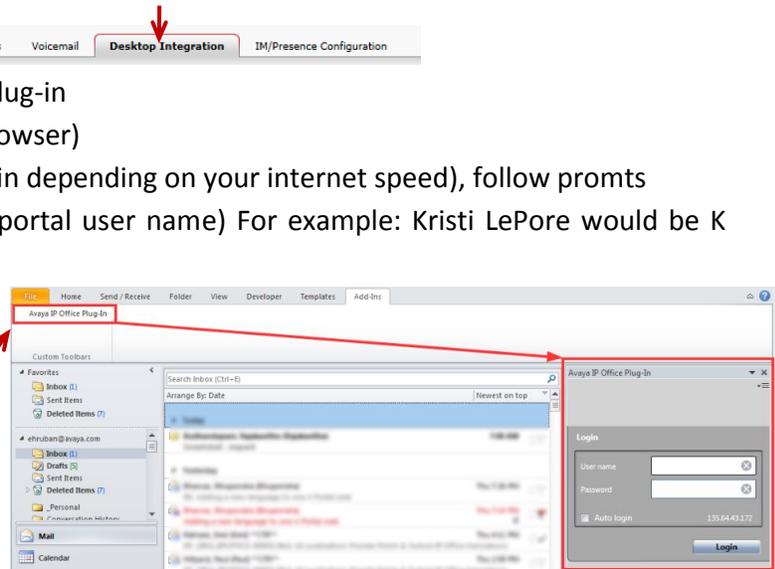
1. Click Help Extn401(401) | Do Not Disturb | Help | Logout | AVAYA
2. Choose the guide you're looking for

Avaya Outlook Plug In (If Applicable)

Installing Outlook Plug In

From the **Configure** tab...

1. Click **Desktop Integration**
2. Click Download Installer for Avaya IP Office Plug-in
3. Click Run or Save (depending on your web browser)
4. Allow Plug-in to install (could take up to 30min depending on your internet speed), follow prompts
5. Enter your User Name(same as your one x portal user name) For example: Kristi LePore would be K LePore
6. Click Next
7. Enter the name of your organization
8. Click Complete, then Follow prompts
9. Once Installed, Open Microsoft Outlook
10. There will be an added tab for Avaya IP Office Plug In
11. Enter your user name & password 33373
12. Click Login



Connecting Plug In to your Network

From Outlook...

1. Click Avaya IP Office Plug-in. The system displays the **Avaya IP Office Plug-in** to the right of your outlook
2. Click **Settings**
3. Click on **Settings**
4. In the navigation pane, select **Connection**
5. In the **Server Information** section:
 - a. Enter the one- X Portal IP address _____
 - b. In the server port field, enter 8080
6. Click **OK**



For User Guides

From your one-X Portal, click Help

1. Click Help
2. Click Avaya IP Office Plug-in for Microsoft
3. Choose the guide you're looking for



Avaya Mobile App (If Applicable)

Installing Avaya Mobile App

1. From your mobile device or ipad, go to your App store
2. Search and download the app: **AVAYA Mobile IPO** 
3. Once the app has finished downloading, open it
4. Enter the following information:
 - a. Service ID: **mobile.pcequip.ca**
 - b. User Name: first initial of your first name (in capital) and your last name. ex: Kristi LePore will be K LePore)
 - c. Password: **33373**
5. Then press **Done**



Note: if you would like to access this app from other devices than your phone, you will have to download the app on to each device.

Making a Call

There are different ways of making a call:

a. Using keypad

1. Press your dial pad 
2. Dial 9 plus the phone number you'd like to call (include a 1 if it's long distance from your office)
3. Click  to complete call
4. Your phone will ring (whichever location you've chosen in your location setup) displaying your office number
5. Answer your phone and remain on the line until connected with caller

Note: the caller ID of your office will be displayed on the recipients display

b. Contacts

1. Click 
2. Choose the contact list you'd like to access



All Contacts

Available Contacts – Displays who else is currently available on one-x app

iPhone/Android Contacts – Displays contacts save in your personal phone

Broadcast Groups – All contacts using one-x app

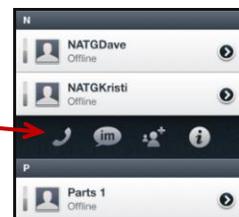
Corporate – Company Contacts

3. Choose the contact you'd like to call, then click 

Note: Your phone will ring (whichever location you've chosen in your location setup) displaying your office number

4. Answer your phone and remain on the line until connected with caller

Note: the caller ID of your office will be displayed on the recipients display



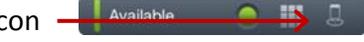
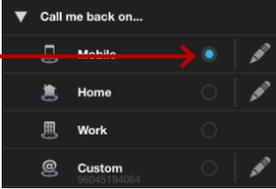
Conference Calling

1. Using your dialpad 
2. Make or Receive first call, once connected,
3. Make Second call then press 



Setting/Changing your Locations

When you make a call out or a call comes in for you, you can choose which device you would like calls to ring to:

1. Click your location icon 
2. Choose which location you would like to activate 
3. Click Ok when finished

Note: Your active location will appear in your status bar



Changing the phone number associated to a location

1. From you location page, press Edit 
2. Press Set phone number
3. Dial 9 plus the phone number you'd like to call (include a 1 if it's long distance from your office)
4. Press Ok when finished

Instant Messaging

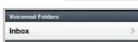
You can instant message by doing one of the following:

1. From your **HOME SCREEN**,
 - a. Press **MESSAGES** 
 - b. **CHOOSE** the **CONTACT** (if available) you would like to message
 - c. **TYPE MESSAGE**, then press **SEND**
2. From your **MENU BAR**,
 - a. Press **IM** 
 - b. **CHOOSE** the **CONTACT** (if available) you would like to message
 - c. **TYPE MESSAGE**, then press **SEND**

3. From your **MENU BAR**,
 - a. Press **CONTACTS** 
 - b. **CHOOSE** the **CONTACT** you would like to Instant Message, then press **IM** 

To DELETE: From your **MESSAGES** page, press **Edit**, press , then press **Delete** OR Press **Clear All** to clear all messages

Listening to Voicemails

1. From your Home screen,
2. Press Voicemail 
3. Press Inbox 
4. Press the message you would like to listen to, message will begin to play, press  to switch from speakerphone to earpiece
 - Press  to call the person back
 - Press  to delete message
 - Press  to forward the voicemail to someone else (by email)

