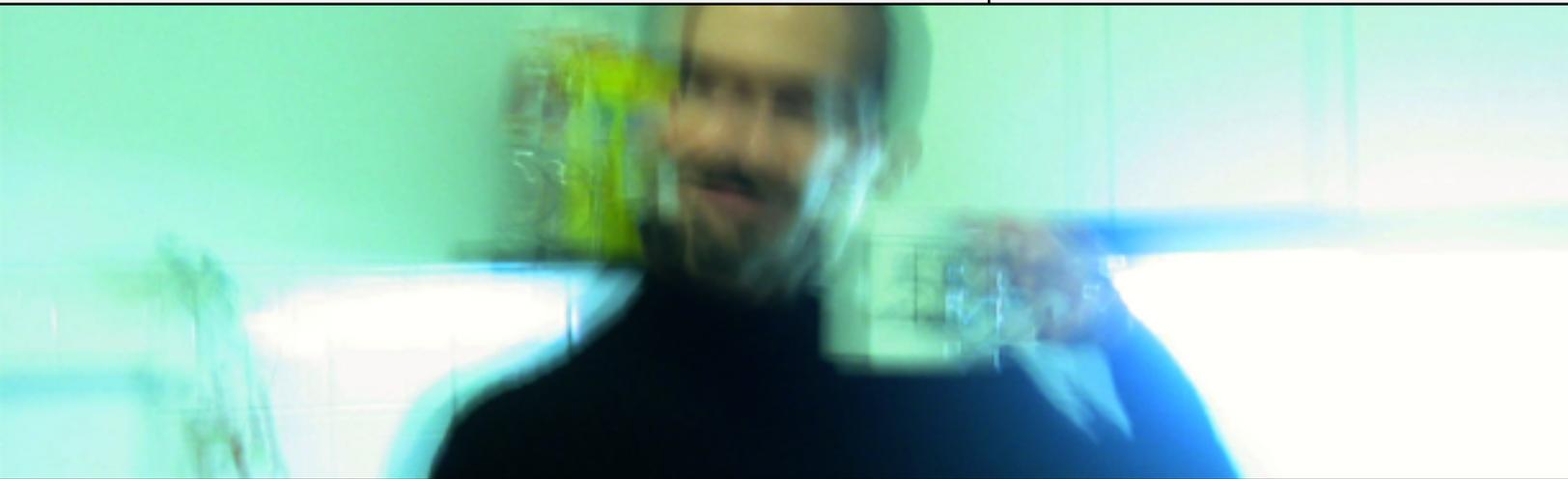


**PortaUM**  
Unified Messaging



**End-User Manual**

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**PortaUM® End-User Manual, March 2011**

Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam BC V3B 2P7 Canada.

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## Preface

This document provides a general overview of the PortaUM® Account (Debit card user) self-care interface.

### Where to get the latest version of this guide

The hard copy of this guide is updated at major releases only, and does not always contain the latest material on enhancements occurring between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at: [www.portaone.com/support/documentation/](http://www.portaone.com/support/documentation/)

## Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**
- Terminal sessions, console screens, or system file names are displayed in fixed width font



**Exclamation mark** draws your attention to important information or action.

**NOTE:** Notes contain helpful suggestions about or references to materials not contained in this manual.



**Timesaver** means that you can save time by taking the action described in the paragraph.



**Tips** provide information that might help you solve a problem.

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## Client System Requirements

- OS: Windows, UNIX or Mac OS
- Java Virtual Machine Support (JRE 1.4.2\_01 or later)
- Web Browser: Internet Explorer 6.0 (and higher), Firefox 2.0 (and higher) with JavaScript enabled
- Display Settings:
  - Min Screen Resolution: 1024 x 768
  - Color Palette: 16 bit color (minimum)

# 1. Overview

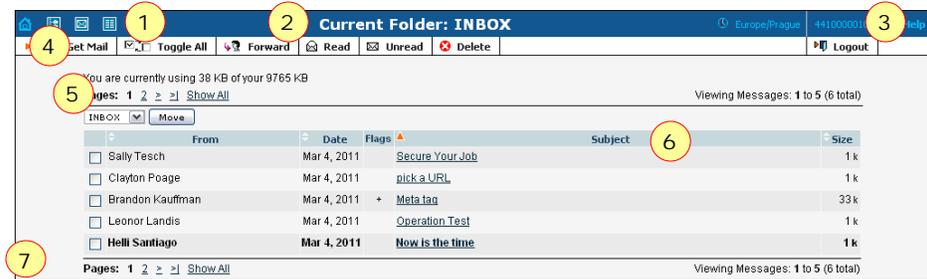
PortaUM® is developed specifically to meet all the communications needs of the small to medium sized business or branch office. PortaUM® is a part of PortaSwitch®, fully featured VoIP Billing and Communication Services Platform.

PortaUM® allows Internet Telephony Service Providers to offer their subscribers the ability to process emails, manage voicemails, all from within a web browser, or a favorite email client.

PortaUM® provides a non-intrusive, single interface for all telephony and messaging functions, and it cleverly increases staff proficiency and productivity because it is easy to use and manage.

# 2. Web Interface

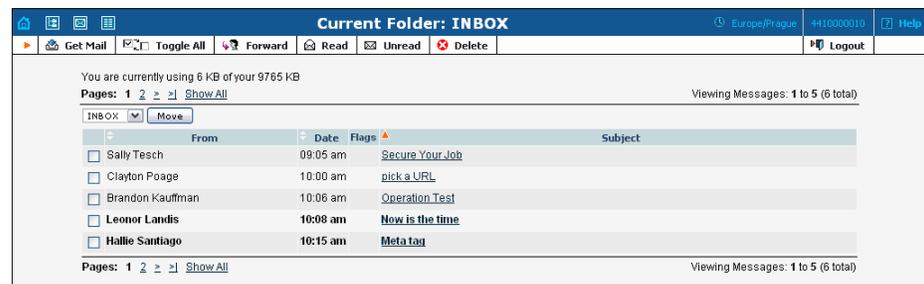
## Feature Overview



1. Intuitive and consistent Navigation Panel on every page.
2. Page title on every page.
3. User Time Zone, Help, and Logout on every page.
4. Content-related Action Bar on every page.
5. Customized Paging.
6. Sortable and serializable columns.
7. Generic Interface – easy branding.
8. Sub-Tabs where appropriate.



## Basics



The PortaUM® message view is laid out in two main sections. At the top of the page is a shortcut bar and an action panel. Below this is where most of your business takes place. Here you can read, move or delete messages in any one of your folders. When you log in, your inbox is shown by

default. Logout safely signs you out of the program when you are finished.

The shortcut bar is found in the upper left-hand corner on every page.

Icon	Description
	Clicking the Home button opens your Inbox folder.
	Move the mouse over the Folders button for shortcuts to your currently subscribed folders.
	The Envelope button allows you to compose messages, check your address book, access folders or perform searches.
	With the Options button you can change many of your mailbox's settings.



The action panel is content-related, and different for each page. Consult the following sections of this document.

## Folder View

The folder menu lists the email messages found in a particular folder, and gives you a number of options for working with them.

Below the shortcut bar (found on every page - see Basics) is the action panel. Use the  **Get Mail** button to check whether you have any new messages. Use the  **Toggle All** button to check all select boxes at once or to invert a selection. The  **Forward** button allows you to send a message on to another person. With the  **Read** and  **Unread** buttons you can change the status of selected messages. Click the  **Delete** button to erase a selected message or messages.

### The folder view

The message list is located under the action panel. This gives you an overview of messages received and allows you to read, move or sort them. The line at the top and bottom of the list tells you which messages you are viewing numerically and how many messages you have in total. Next, on the left-hand side, is a drop-down list with your currently subscribed folders. Any selected message may be moved to the folder you select by clicking the **Move** button. Note that more than one message may be moved at once.

The message list is headed by a bar with three headings (From, Date, Flags and Subject). **From** tells you who sent the message, or at least which email address it came from. **Subject** displays what the sender entered in

the message's subject line. **Date** shows the date on which the message was sent. By clicking the grey arrows next to any one of these headings, you can resort messages according to sender, subject or date. The **Flags** column may contain flags such as "+," "!" or "A." If you see "+," it means the message has attachments; "A" indicates that you have answered the message and "!" tells you that the message was marked urgent by its sender.

On the far left is a checkbox which, when selected, allows the corresponding message to be handled in the ways described above (moved, marked as (un)read, deleted). You can change the order of any or all of these headings by going to **Index Order** under Options on the shortcut bar.

What remains is the actual message table. To read a message, simply click on its subject. (For more details, see the Read Mail chapter.) You will notice that unread messages are shown in bold, while messages you have already read are in normal text.

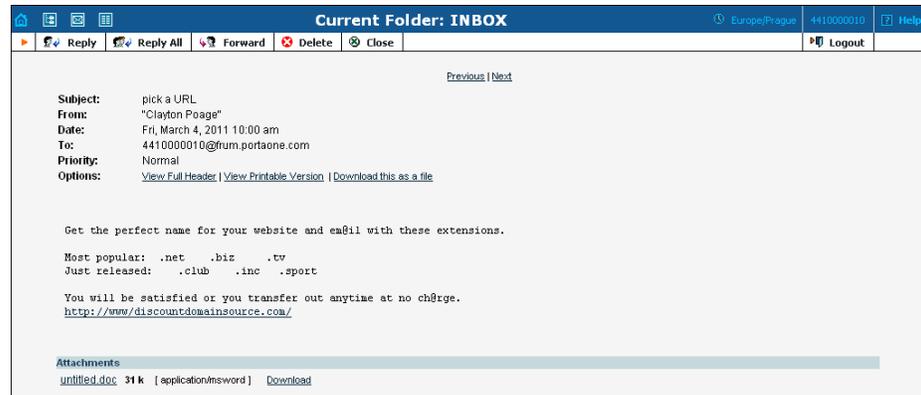
If your mailbox contains many messages, the message list will be split into multiple pages, with the first page displayed by default. To view other pages, use the **Previous** and **Next** links at the top and bottom of the message list. You can also jump to a specific page directly by clicking on one of the page numbers. By clicking **Show All**, you can disable this kind of pagination and display all the messages on one big page.

## Messages

### Reading an E-mail Message

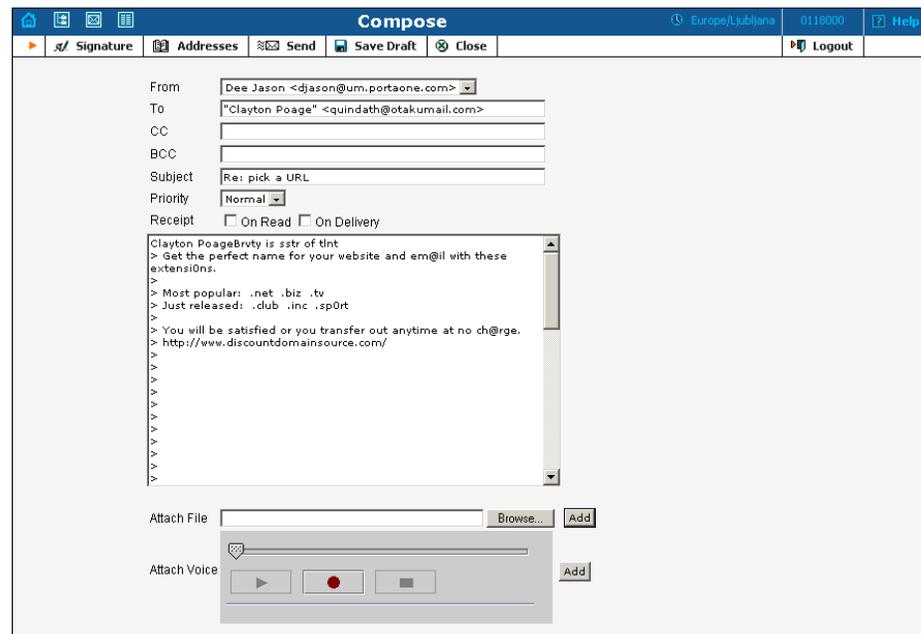
The ability to read an e-mail message is one of the most basic features of any e-mail client. However, PortaUM® has quite a few special features for use in reading messages. This section explains what all of them do.

In the message list, click on the subject of a particular message to display it. One thing you will notice is that all e-mail and web addresses are live links, so that you can click on them to send an e-mail or open a web page.



### Reply / Reply All

Click this  icon to send a new message to the originator of a previously viewed message. “**Re:**” is prepended to the original subject line in the subject field. The text of the original message is quoted in the text box, with a “>” symbol in front of each line of the original text. You may notice that some of the original text does not have this “>” symbol. This is due to line wrapping. To correct this, try setting the value of **Wrap Incoming Text At** on the **Display Preferences** page to a larger number. Comments may be made anywhere in the text box, along with the quoted message. You may also use the attachment feature. A sound message can be recorded using the Java applet recorder below.



The same goes here as when using Reply, with the exception that all the addresses listed in the header will receive the reply message.

## Forward

The **Forward** button opens a Compose page with the previously viewed e-mail attached below. Place the cursor in the text box to add your comments to the attached text.

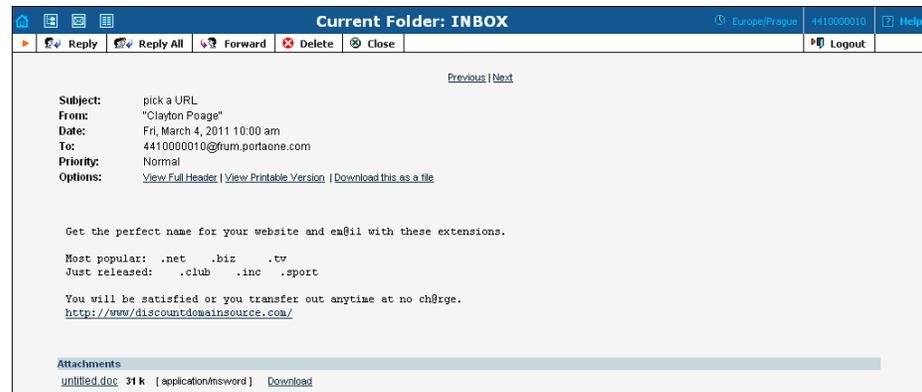
## Delete

Click this button to delete the message currently being viewed. All attachments will be deleted as well. You can prevent the loss of attachments by downloading them first (as explained below).

In this case, deleting means that the message will be moved to the folder called **Trash**. If you wish to keep the message after all, go to the **Trash** folder and move the message out.

## Navigation

Navigation buttons are located in the middle of the screen, above the message. **Previous** is an active link if it can be utilized; otherwise it appears as normal text. Clicking this link will display the previous message without your needing to go back to the summary list of messages. The same goes for the **Next** link, which will advance you to the message immediately following the one you are currently viewing.



## View Full Header

This link displays the entire header for an e-mail message, including the route the message took to get to you and other more detailed information about the message itself.

## View Printable Version

If you want to print a message, you may wish to click this link. It presents you with a new window containing the message ready to print, but with all unnecessary information and menus removed. Clicking the Print button in the window will print the message. Press Close to return to your message.

## Download this as a file

Below the message itself you will find this link, which allows you to save an e-mail to your local hard drive as a plain text message. A simple header will be attached to the top of the message as well.

## Attachments

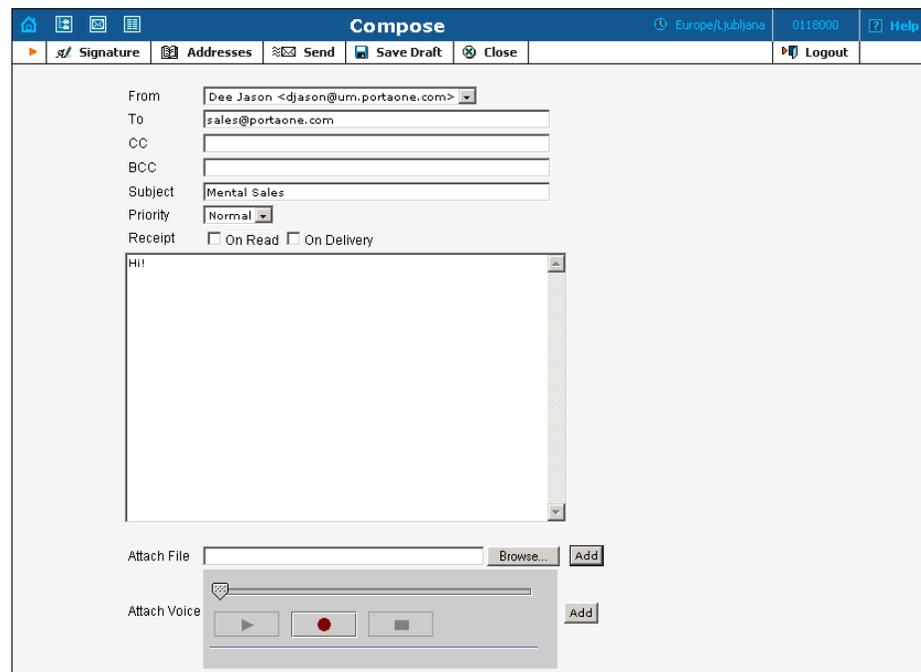
Any attachments sent with a received message will be displayed at the bottom inside a colored box. The file is presented as a link, with a description of the file type to the right. Clicking on the file name will either display the attachment or open a download dialogue, depending on the file type. If you wish to download the file (rather than view it), click “download” link on the right.

If your web browser supports viewing the attachment's file type, the View link will allow you to display the file in your browser.

## Compose

With this feature, you can write and send messages to various recipients via PortaUM®.

Choose Compose from the Envelope pop-up menu. This will take you to a new Compose page. Here you will find several fields and buttons. Depending on how you got to the Compose page, some of these fields may already be filled in for you.



The screenshot displays the 'Compose' email interface. At the top, there is a navigation bar with icons for home, mail, and compose, and the title 'Compose'. Below this is a toolbar with buttons for 'Signature', 'Addresses', 'Send', 'Save Draft', and 'Close'. The main form contains the following fields:

- From:** Dee Jason <djason@um.portaone.com>
- To:** sales@portaone.com
- CC:** (empty)
- BCC:** (empty)
- Subject:** Mental Sales
- Priority:** Normal
- Receipt:**  On Read  On Delivery

The main body of the email contains the text 'Hi!'. At the bottom, there are two sections for attachments:

- Attach File:** A text input field followed by a 'Browse...' button and an 'Add' button.
- Attach Voice:** A section with a play button, a red record button, and a stop button, followed by an 'Add' button.

The **From:** field will only be displayed if you have enabled multiple identities (through the Options menu). If so, you can choose which identity to use here, i.e. which name and email address will appear in the From line of your message.

The **To:** field contains the email address of the person or persons you are sending the message to. You may enter as many addresses as you like, simply separating them by a comma. Or click the “Addresses” button to fill in this field. Do not worry if the entire address is not displayed. This is because the field has a fixed length. All of the addresses you enter will be used, even though the field might scroll to the right or left.

Next comes the **CC:** field. CC is an abbreviation for carbon copy, and this function allows you to send another addressee a copy of a message. Think of this like drafting a memo. You can have as many people as you like in the To:, CC:, and BCC: fields. Only people who the message directly concerns would be in the To: field, while recipients for whom it may be useful as information would be entered in the CC: and BCC: fields. BCC is an abbreviation for “blind carbon copy”. Use this to send someone a copy of a message without other recipients in the To: and/or CC: fields knowing about it.

### Subject

Type in a relevant heading here. A clear and attractive subject line will help your message get read.

The **Priority** drop-down list allows you to designate a message's level of importance. A high-priority message may be handled in a different way by the recipient's mail program. Note that excessive use of this function devalues its effect.

### Receipt

Here you can specify what kind of notification you want to receive from the recipient. Check “On Read” to request notification when the message has been read. Or check “On Delivery” to request notification immediately after the message is received.

### Message Body

The large empty box you see in the middle of the page is where you will type the text of your message. If a signature file has been saved, it will appear here as well.

### Attach

This feature allows you to include a file with your message. The file must be located on your local computer or network in order to be attached.

The Browse button allows you to search through your directory and click on the file you want to include. Alternatively, you may type directly in the

Attach field, provided you know the full path and the exact file name. Simply press the Add button to attach the selected file as an attachment and display it below.

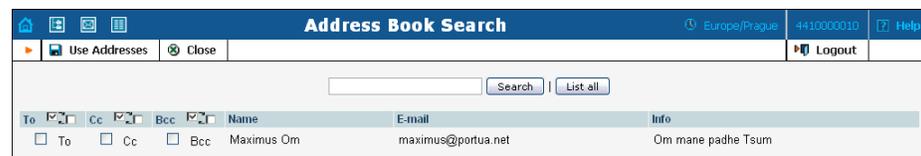
Once at least one file has been attached, the Delete selected attachments button appears. Deletion of one or more attached files is accomplished by selecting the file(s) and clicking Delete selected attachments.

### Attach Voice

This feature allows you to record a voice message and include it with your e-mail. To record a voice message using the Java applet recorder on the Compose page, simply click the red record button and speak into the microphone associated with your computer. Now simply click the Add button to attach the voice message as an attachment and display it below. Or, if you wish, first click play on the Java applet recorder to listen to the voice message, and then click Add.

### Addresses button

This  button will open the address book and offer a search box.



Enter a name or other information in the search box to retrieve a result. If all the addresses in the address book are required, click the **List All** button. More detailed information may be found in the “Addresses” chapter.

### Save Draft button

If you are composing a message but are not ready to send it yet, use this button to save the message in the Drafts folder. Later you may finish the message and send it out. Simply go to the Drafts folder and open the message to return to the Compose page.

## Address book

Address books can save a lot of time and typing. You can store addresses for the people you write to most often and reuse these over and over. Address books are a great time-saving feature. Frequently-used addresses can be stored here.

### Nickname

Here you can type in a short or familiar form of a person's name. Something that will jog your memory and give you a clear idea whom this e-mail address belongs to.

### Name

Here you should type the addressee's first and last name in full.

### E-mail address

This column must contain the addressee's full and complete e-mail address. Just to remind you, there are three parts to an email address. First is a group of characters that identifies the addressee, such as "johnq". After the @ sign comes the domain name, e.g. "tayloru". Last of all, after the dot, comes the top level domain, which could be com, org, net, edu, and so on. When we put all these together it looks like this: johnq@tayloru.edu. If this address is incorrect in any detail, your message will come back to you in the form of a bounced message.

### Note

This is another field where you can enter something that reminds you about who the addressee is. This can contain considerably more information than the Nickname. For instance, if you met the addressee at a business meeting, you could enter "Met at Business Symposium".

### Delete

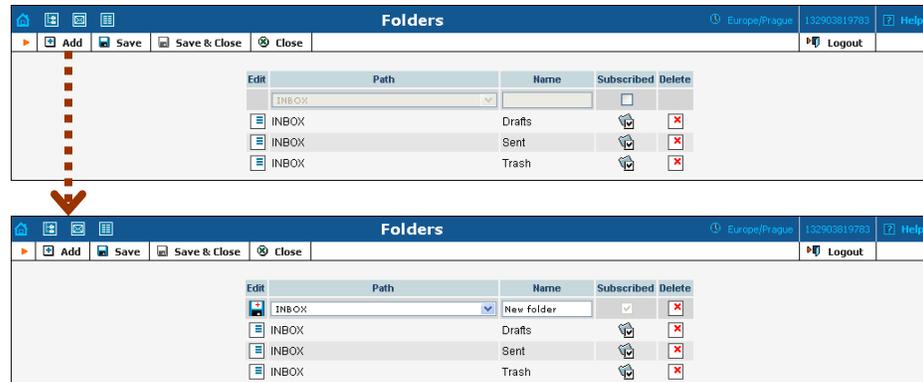
This button allows you to delete a single address entirely. Simply click on the button to delete the address.

### Add new address

Click the  **Add** button in the action panel. Now enter the appropriate information in the fields provided (Nickname, e-mail address, First name, Last name). You may also add a Note. Click the  **Save&Close** button to save the new address and exit,  **Save** to save the new address without exiting, or Close to exit without saving.

## Folders

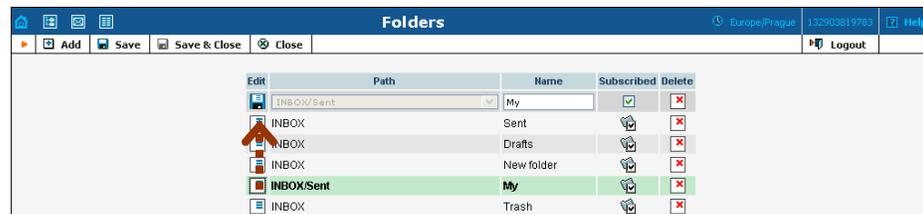
You can store your messages in different folders. This is especially useful if you have a lot of email and want to keep it organized. The Folders option (shortcut bar) allows you to manipulate your folders.



### Add new folder

New folders may be created by simply typing a name into the **Name** field and clicking  **Save** or  **Save & Close**. If you want this new folder to be a subfolder of another one, choose the parent folder from the drop-down list of folders provided.

### Edit



To rename a folder, click the **Edit** button to its left. Then enter a new name in the text box and click the **Save** button. For obvious reasons, you cannot rename the sent, trash, or inbox folders.

### Delete

You may delete any folder displayed by clicking the  **Delete** button to its right. Special folders such as your sent items or your trash folder cannot be deleted; nor, of course, can your inbox.

### Subscribing and unsubscribing

#### Definitions:

- **Subscribe:** Registers a folder with the PortaUM® mail server, allowing you to view it in the folder listings.
- **Unsubscribe:** The opposite of subscribing. This unregisters a folder with the PortaUM® mail server.

After clicking the **Edit** button, click the Subscribe checkbox to subscribe a folder, or to unsubscribe one previously subscribed. The subscribe icon  to the right of the folder will appear or disappear according to the

action you have just performed. You can also unsubscribe or re-subscribe folders later, as you wish.

## Options

You can customize the way PortaUM® looks and responds to you by choosing different options from the Options pop-up menu (shortcut bar).

One of the great things about PortaUM® is the degree to which it may be customized. Depending on your configuration, you may choose languages, folders, and other preferences. All of these may be changed without affecting other users on the system. The Options menu has nine sections: Personal Information, Message Highlighting, Index Order, Display Preferences, Folder Preferences, UM Preferences, Auto Attendant, Dial Directory and Call Queues.

## Personal Information



### Full Name

You should enter your entire name here, i.e. “John Doe”. This is what is seen by people to whom you send a message, i.e. they will see that it comes from “John Doe”. If you don’t fill this in, recipients will see only your e-mail address, i.e. “jdoe@mydomain.org”.

### E-Mail Address

If your e-mail address is different from the one automatically assigned, you can enter it here.

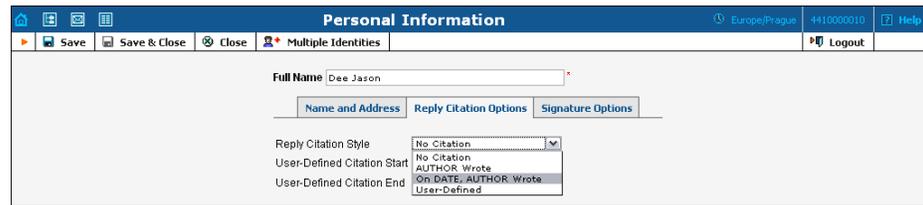
### Reply To

This is the e-mail address that people will write to when replying to your message. If you want this address to be different than the e-mail address you send messages from, enter the reply address here. This is useful if, for instance, you want people to reply to your private Yahoo account rather than to your office address.

### Signature

Fill in the text you want your signature to contain in the box provided.

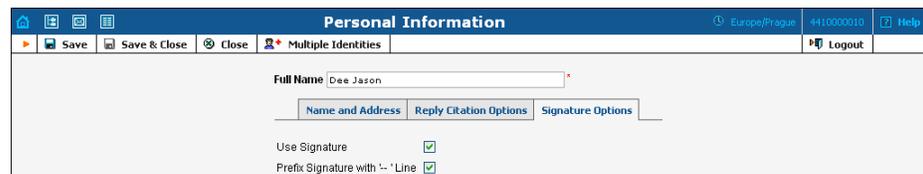
### Reply Citation Options tab



**Reply Citation Style** – Choose the citation style from the drop-down list. The following options are available:

- **No Citation** – No citation line will be affixed.
- **AUTHOR Wrote** – A line in the form: `AUTHOR Wrote:` will be affixed, with `AUTHOR` replaced by the name of the person who sent the message you're replying to.
- **On DATE, AUTHOR Wrote** – A line in the form: `On DATE, AUTHOR Wrote:` will be affixed, with `AUTHOR` replaced by the name of the person who sent the message you're replying to and `DATE` with the date when you received this message.
- **User-Defined** – This option enables you to define your own citation line. In the two text boxes below, type in a start and end for your citation line. The author's name will be inserted in between these.

### Signature Options tab



Field	Description
<b>Use Signature</b>	If this is checked, a signature will be attached at the bottom of all messages you send out.
<b>Prefix Signature with "--" Line</b>	If this is checked, the line with "--" will be added to the signature.

### Multiple Identities

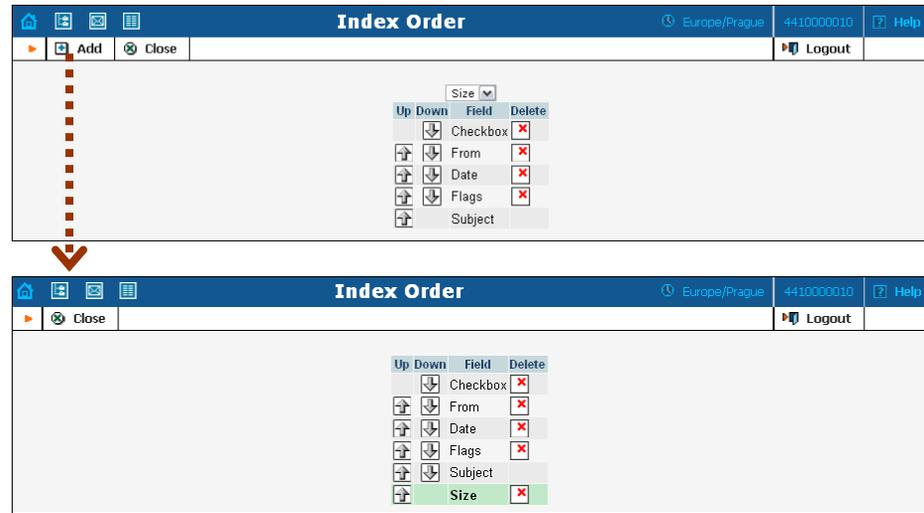
Click the  icon to edit multiple identities. This is useful if you want to choose between different "From" lines for different messages (for example, ones containing your work or your home email address). On the view displayed, add as many identities as you like using the  **Add** button. You will then be offered a choice of these when composing a message. You may also delete identities you have previously created.



choose which header field to match with (to, from, subject). In the text box, enter the matching phrase (e.g. [mom@yahoo.com](mailto:mom@yahoo.com)).

## Index Order

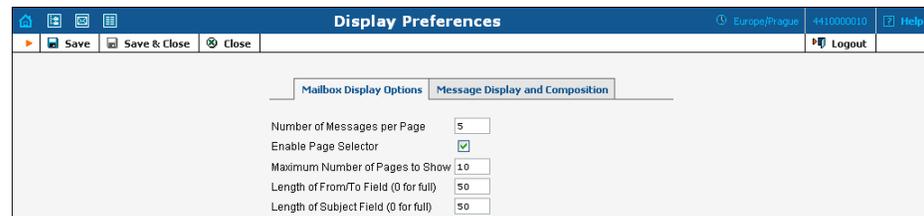
This section gives you control over the message list. You can choose how much information you want the message list to contain and what order it is displayed in.



Use the  Up and  Down buttons to move column headings around,  **Delete** to remove a column from the display, and  **Add** to add a new one.

## Display Preferences

### Mailbox Display Options tab



### Number of Messages per Page

This defines the number of messages that will be shown in a given folder on a single page. If the folder contains more than this number, you will see “Previous” and “Next” links above and below the list, taking you directly to the previous or next message.

### Enable Page Selector

When you check this box, page numbers will be shown above and below the message list, allowing you to quickly jump to a specific message page. The number given in **Maximum Number of Pages to Show** defines how many page numbers are displayed above and below a message list.

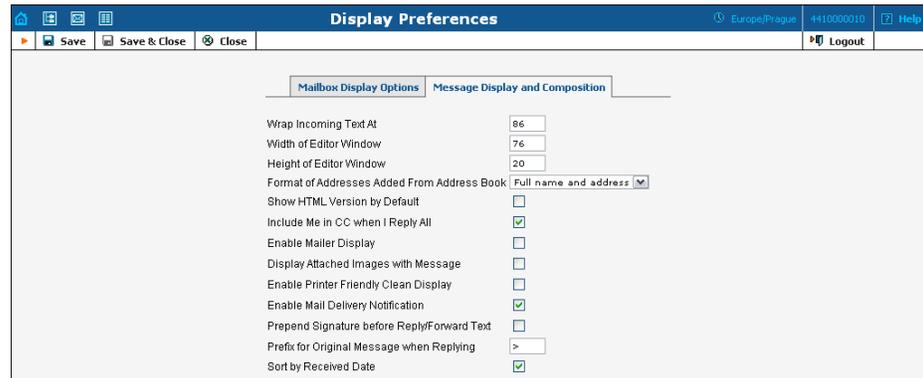
### Length of From / To Field

Specify the number of characters that will be displayed in the From / To field. If you enter 0, then the full name will be visible.

### Length of Subject Field

Specify the number of characters that will be displayed in the subject field. If you input 0, then the full subject will be visible.

## Message Display and Composition tab



The screenshot shows the 'Display Preferences' dialog box with the 'Message Display and Composition' tab selected. The dialog has a title bar with 'Display Preferences', a user profile 'Europe/Prague', a user ID '111000010', and a 'Help' icon. Below the title bar are buttons for 'Save', 'Save & Close', and 'Close'. The main content area contains the following settings:

Setting	Value
Wrap Incoming Text At	86
Width of Editor Window	76
Height of Editor Window	20
Format of Addresses Added From Address Book	Full name and address
Show HTML Version by Default	<input type="checkbox"/>
Include Me in CC when I Reply All	<input checked="" type="checkbox"/>
Enable Mailer Display	<input type="checkbox"/>
Display Attached Images with Message	<input type="checkbox"/>
Enable Printer Friendly Clean Display	<input type="checkbox"/>
Enable Mail Delivery Notification	<input checked="" type="checkbox"/>
Prepend Signature before Reply/Forward Text	<input type="checkbox"/>
Prefix for Original Message when Replying	>
Sort by Received Date	<input checked="" type="checkbox"/>

### Wrap Incoming Text At

Defines how many characters to allow before wrapping text. This prevents messages from scrolling far off the screen. 86 is usually a good number to enter here, but you may change this as you desire.

### Width and Height of Editor Window

Defines how wide and high your message box will be. This indicates the number of characters per line you will be able to type before wrapping occurs in Compose.

### Show HTML Version by Default

If a message you receive is in both text and HTML format, you can choose to see the HTML version (Yes) or the text version (No) by default.

### Include Me in CC when I Reply All

Reply All sends a reply to all recipients of the original message, including yourself. To leave your own email address out, uncheck this box.

**Enable Mailer Display**

When viewing a message, this displays which email service or client the sender used.

**Display Attached Images with Message**

When you check this box, the images attached to a message will be displayed right as you view the message.

**Enable Printer Friendly Clean Display**

This will clean up the message so the printed version looks nicer.

**Enable Mail Delivery Notification**

This allows you to enable (or disable) automatic notification that a message has been delivered.

**Prepend Signature before Reply / Forward Text**

Attaches the signature you defined under the Signature tab in Personal Information.

**Sort by Received Date**

If this is checked, all the messages will be sorted by the order in which they were received.

**Other Options**

Depending on the configuration of your PortaUM® installation, some other options might be displayed here. Hopefully they will be self-explanatory.

## Folder Preferences

### Special Folder Options tab



The screenshot shows a web-based interface for "Folder Preferences". At the top, there are navigation icons and a title bar with "Folder Preferences", "Europe/Prague", "132903819789", and "Help". Below the title bar are buttons for "Save", "Save & Close", and "Close". On the right side, there is a "Logout" button. The main content area has two tabs: "Special Folder Options" (selected) and "Folder List Options". Under the "Special Folder Options" tab, there are three dropdown menus: "Trash Folder" set to "Trash", "Draft Folder" set to "Drafts", and "Sent Folder" set to "Sent".

**Trash Folder**

You can choose which folder messages will go to when you delete them. If you don't want deleted messages to go to a trash folder, set this to "Do not use Trash".

**Draft Folder**

You can choose which folder messages you save as drafts will go to. If you don't want this to happen, just set this option to "Do not use Drafts".

## Sent Folder

You can choose which folder your sent messages will go to. If you don't want this to be done, just set this option to “Do not use Sent”.

## Folder List Options tab



The screenshot shows the 'Folder Preferences' web interface. At the top, there are navigation buttons: 'Save', 'Save & Close', and 'Close'. On the right, there is a 'Logout' button and a 'Help' icon. The main content area has two tabs: 'Special Folder Options' and 'Folder List Options', with the latter being selected. Under the 'Folder List Options' tab, there are four settings:

Enable Unread Message Notification	Only INBOX
Unread Message Notification Type	Only Unseen
Enable Cumulative Unread Message Notification	<input checked="" type="checkbox"/>
Memory Search	Disabled

### Enable Unread Message Notification

This option specifies how to display unseen (unread) messages in the folder list in your browser window. If you set this to **No Notification**, you will not be notified of unseen messages. If you set it to **Only INBOX**, the inbox heading will become bold when you have new messages, and a number will appear to the right of it indicating how many new messages are in it. If you set this to **All Folders**, the same will happen in all folders. If you notice that the folder list is loading very slowly, setting this to **Only INBOX** or **No Notification** should speed it up.

### Unread Message Notification Type

When new messages are in a folder, this option indicates whether to display the number of new messages only, or the total number of messages in that folder as well.

### Enable Cumulative Unread Message Notification

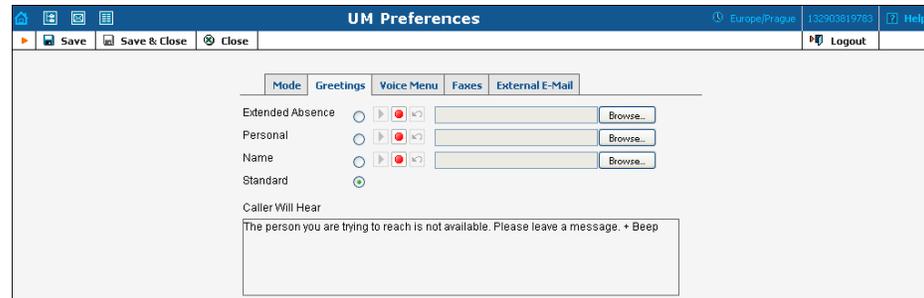
This controls the behavior of the message counter that is displayed next to each folder in the folder list. If the box is checked and the folder contains sub-folders, then once it is collapsed, the message count will include all of the messages within all of the sub-folders of that folder.

### Memory Search

If you search a mailbox, the search can be saved for quick access later. This option defines how many mailbox searches will be saved.

## UM Preferences

PortaUM® also offers you a number of special options for accessing your email via phone.



## Mode tab

You can choose between two basic UM options: voicemail or auto attendant.

## Greetings tab

Using the **Greetings** tab, you can record, play back and change the type of greeting message callers will hear when you are not available.

First, choose between Extended Absence for a message providing your full name and number; Standard for a message giving your name only; and Personal for a message of your own choice.

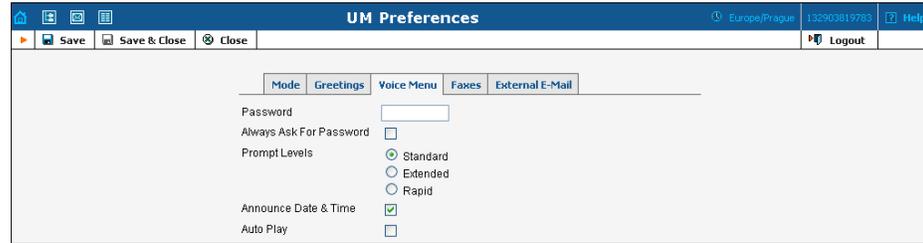
You can either upload an existing sound file using the Browse buttons on the right, or record a new one with a microphone attached to your computer. A green play button next to the message type indicates that a sound file already exists, while a red play button means that none is currently available.

To record a message, click the red record button. When you click record, all other buttons are disabled. Alternatively, you can use the radio buttons to choose and then record a given message type.

A blinking play button indicates that a message has been successfully recorded. To save the recorded message, click Save in the action panel above. To re-record a message, click the undo button next to the record button.

Two buttons are active when playing back messages: play and pause.

## Voice Menu tab



### Password

You can change the password you use to access your mailbox via phone.

### Always Ask for Password

In some cases, the system may recognize you when you call from your home number, and will not request your password (ask your system administrator if this feature is supported). If you want to be asked for your password anyway, check this box.

### Prompt Levels

PortaUM® offers three voice prompt settings in each supported language: Standard, Extended, and Rapid. When entering an account number, the voice prompt for each setting is as follows:

- Standard:** “Please enter your account”
- Extended:** “Please enter your account number and press pound”
- Rapid:** “Account”

### Announce Date & Time

You can switch this function on or off.

### Auto Play

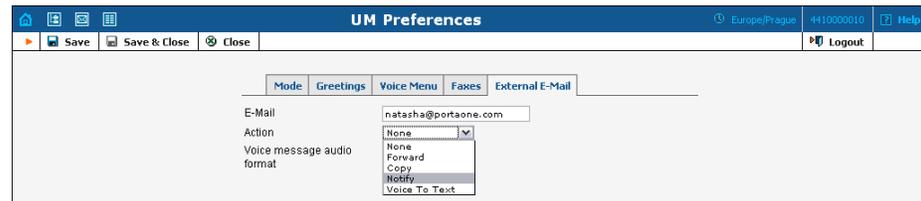
You can have new messages played automatically by checking this box.

## Faxes tab



The Fax tab allows you to choose in what form you will receive faxes: as a single PNG, PDF or TIFF file, or with one PNG file per page.

## External E-Mail tab



This tab enables to configure the forwarding, sending the copy or notification about the received e-mails to another mailbox.

### E-mail

Specify your external e-mail address here.

### Action

The following actions are possible:

**Forward:** All the e-mails you receive will be forwarded to the specified e-mail address.

**Copy:** You will get the copy of the received e-mails.

**Notify:** The notification about the received e-mail will be sent to the specified e-mail address.

**Voice To Text:** If this option is selected and someone leaves you a voicemail, then the recorded file will be transcribed and sent as a text message to your external email address.

### Voice message audio format

Choose the audio format for voice messages. It can be MP3, AU or WAV.

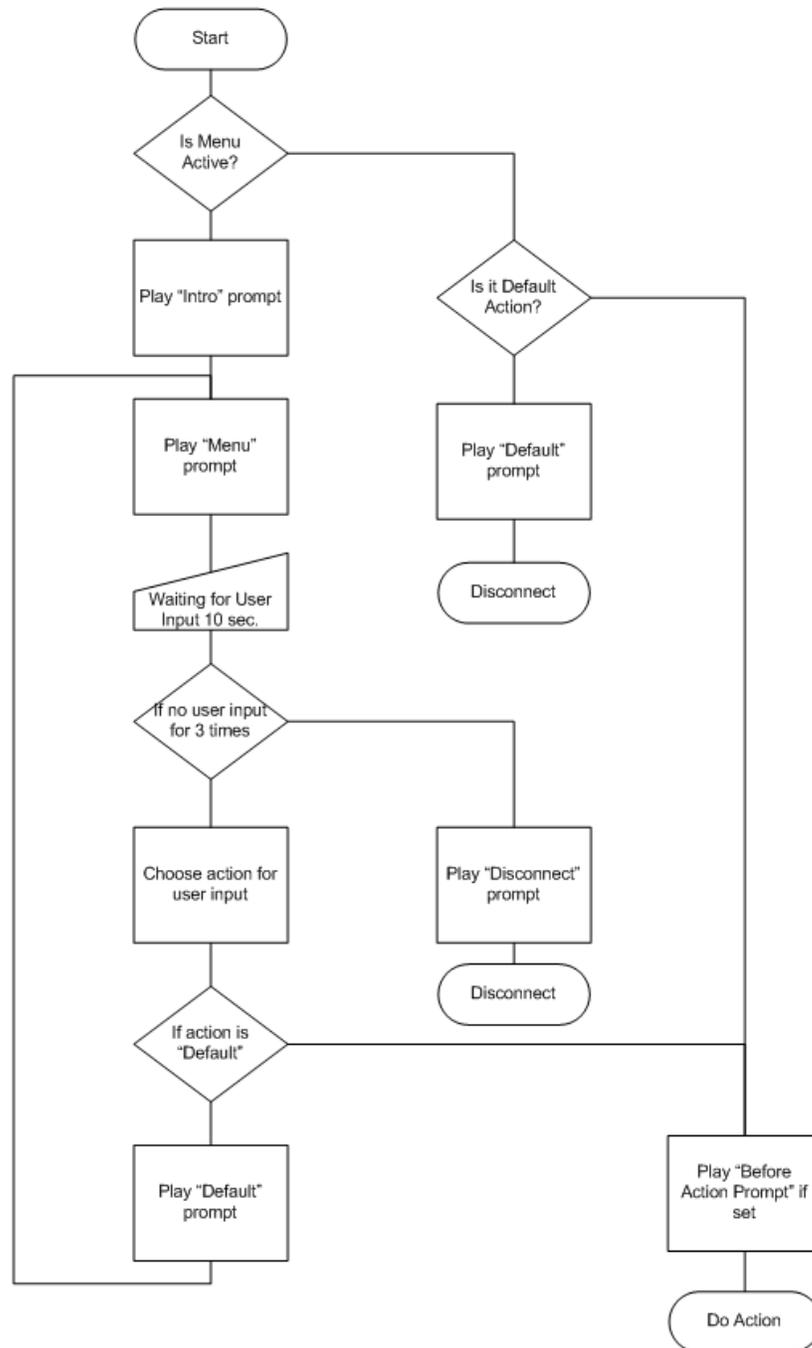
## Auto Attendant

PortaUM® Auto Attendant is a flexible utility designed to greet callers and transfer them either to an existing PortaSwitch® accounts, or to your current phone system.

### Basic Concept

- PortaUM Auto Attendant (AA) is composed of a set of menus.
- All the menus are the same in every respect, except for the ROOT menu, which is always present and cannot be deleted, and whose name cannot be changed.
- When a caller dials the system, AA will answer the call with the Intro prompt from the ROOT menu.

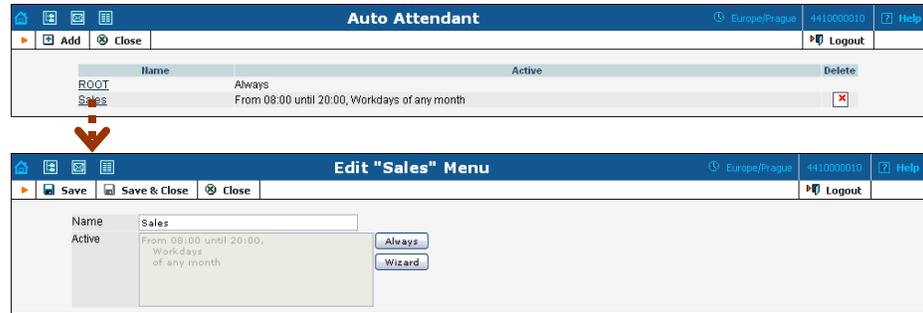
- After this, the Menu prompt will be played, and AA will listen to the user input.
- The user input will trigger execution of the following available actions:
  - o **Default** – plays the default prompt from the current menu
  - o **Transfer** – transfers the call to a given telephone number or extension
  - o **Menu** – starts interpreting (executing) the selected menu; the user can choose from any of the available menus
- The user may select whether the corresponding prompt is to be played prior to the action.
- A menu call flow chart is displayed in the diagram below:



## Menu List Mode

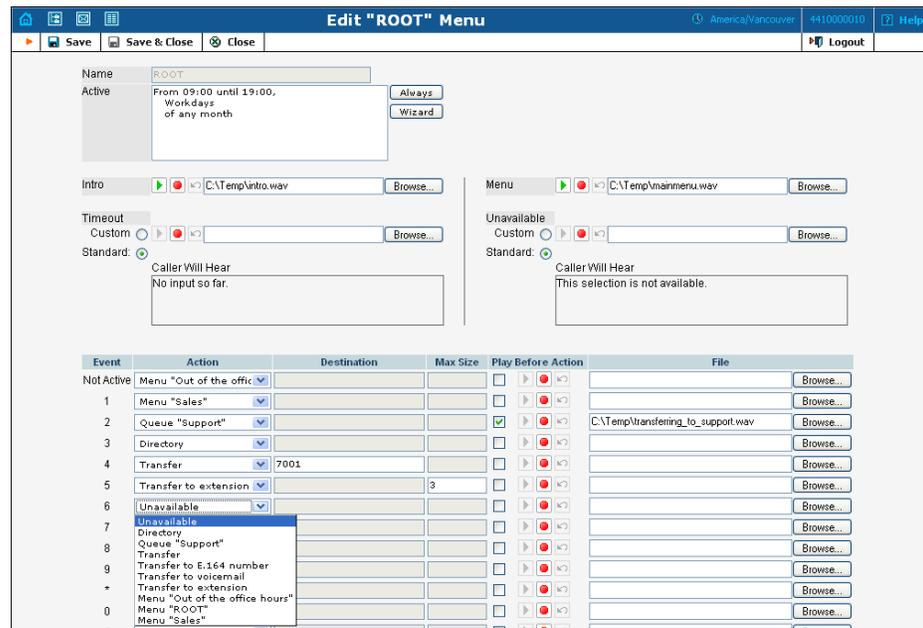
Auto Attendant can be selected from the Options menu. The main screen lists all the menus available in the system.

To modify one of the existing menus, select its name from the list. To add a new menu, select  **Add** from the action panel.



## Menu Edit Mode

After selecting one of the existing menus, please allow all the prompts to load in your browser; this may be viewed on the status indicator in the action pane.



The fields of the Menu Edit screen are explained below:

### Name

A logical name for the menu, i.e. Sales for a sales department

### Active

Time definition when the current menu is active. To set the menu as always active, select the Always button on the right. PortaUM® also provides users with a Period Wizard, a flexible tool for defining a time period of any complexity.

## Period definition wizard

Via a sequence of screens, the user may select the time interval, day of the week, day of the month, and month; multiple selection is allowed.

The following example shows the process of creating a period starting at 6pm every day and lasting until 6am the next morning. Another interval is used during weekends. We will also include some holidays, e.g. January 1 and December 24-26.

In the first screen, select 6pm in the **From** column and 6 am in the **Until** column. Now select the **Next** button. The two text areas on the right side of the screen provide the user with a display of the current period definition. The top text area displays a verbal definition of the period: From 6:00pm until 6:00am, while the bottom one contains the same information in a format which can be parsed by PortaBilling®: `hr{6pm-5am}`. This sets up the first period; in order to continue, skip the following screens by pressing the **Skip** or **Next** button until the **Period definition completed** message is displayed. Click **Add** to create another period definition; the wizard returns to the first screen.

Now for weekends: by pressing the **Skip** or **Next** button, go to the second screen and select *Weekend*, or hold the <Ctrl> key and select *Saturday* and *Sunday* from the list. Now use the **Next** button, skipping forward until the **Period definition completed** message is displayed. Click **Add** to create another period definition.

To include January 1st in the period definition, skip to the Day of Month screen and select *1*. Now click the **Next** button. Select *January* and click **Next**, skipping forward until the **Period definition completed** message is displayed. Use the same approach to select the December 24-26 interval. Hold the <Ctrl> key to select multiple entries.

To review your work, look in the top text area. The following should be displayed:

```
From 6:00pm until 6:00am
  any day of any month
OR Sunday and Saturday
  of any month
OR 1
  of January
OR 24-26
  of December
```

If the definition is correct, select **Finish**.

**Intro, Menu, Timeout, Unavailable**

You can define four separate prompts (consult the [PortaUM Administrator Guide](#) for an explanation of when each particular type of prompt is played). While you will need to provide content for the **Intro** and **Menu** prompts, you can use the default content for the **Timeout** and **Unavailable** prompts.

 - **Record**. Select to start recording your voice prompt. (You will need to connect a microphone to your computer sound card to use this feature.)

After the existing prompt is recorded over, the  **Undo** icon becomes available, allowing rollback to the previous state. The blinking  **Play** icon indicates that the existing prompt is being overwritten, but changes have not been saved yet.

 - **Stop**. Select this to stop recording or playback of the recorded message.

 - **Play**. Select this to play back the recorded prompt. When selected, this icon will turn into  - **Pause**.

Each of the icons above may appear in grayscale, meaning it cannot be accessed because some other task is active.

To give your Auto Attendant a professional sound, we recommend using a professional speaker and a digital recording studio when recording voice prompts.

To upload a prompt, select the **Browse...** button on the right side. The native audio file format for the system is the following:

**Type:** NeXT/Sun (Java) file .au  
**Format:** G.711 u-Law  
**Attributes:** 8,000 Hz, 8-bit, Mono

PortaUM® uses [SOX - Sound eXchange](#), a universal sound sample translator for prompts uploaded into the native UM format.

Here’s a short list of supported audio file formats:

Type	Description
.aiff	AIFF files used on Apple IIc/Iigs and SGI.
.au	SUN Microsystems AU files.
.gsm	GSM 06.10 Lossy Speech Compression
.mp3	MP3 Compressed Audio
.ogg	Ogg Vorbis Compressed Audio.

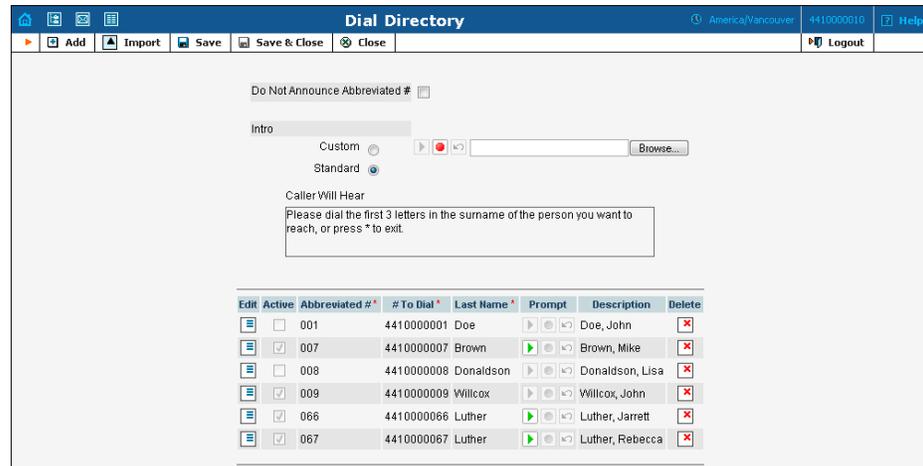
.raw	Raw files (no header).
.wav	Microsoft .WAV RIFF files.

Event table

Column	Description
<b>Event</b>	<b>Not Active</b> – if the current menu is not active (see the active period definition above). <b>0-9, #, *</b> – user selection on telephone keypad. <b>Timeout</b> – no selection received from user.
<b>Action</b>	<ul style="list-style-type: none"> <li>○ <b>Default</b> – play the default prompt from the current menu.</li> <li>○ <b>Transfer</b> – transfer the call to a given telephone number or extension.</li> <li>○ <b>Menu</b> – start interpreting (executing) the selected menu; the user can choose from any of the available menus.</li> </ul>
<b>Play before action</b>	Check this box if the corresponding prompt is to be played before the action is performed.
<b>File</b>	File name and path.

## Dial Directory

Using **Dial Directory** if a caller does not know the extension number of the person he is trying to reach, he may look up the called party using the first three letters of his surname.



Every UM account has its own dial directory; however, an initial list of extensions may be imported from the main list in PortaBilling® to save time and effort. You can upload a voice prompt with the actual person’s name for each extension. You may also exclude certain extensions from being accessible via dial-by-name (e.g. you do not want tele-marketers to

directly reach your CEO or CFO because their names are publicly accessible).

The dial-by-name directory can be assigned as an “action” item to any element in the ROOT menu or sub-menu. When a user reaches the dial-by-name dialog, he will be prompted to enter the three first letters in the called party’s surname. Standard phone mapping is used, i.e. 2 is ABC, 3 is DEF, and so on. If no matching person is found, the user is informed of this, and may then re-enter the name or press \* to exit. If more than one match is found (e.g. there are two persons with the “same” surname in the company, e.g. 276 will match both Brown and Asok), the user will hear a list of matching names and their extensions, and may then enter the correct extension.

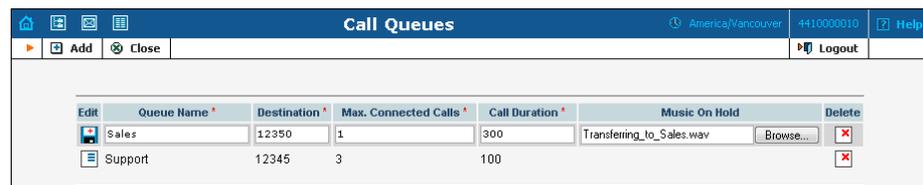
Two modes of selecting the call transfer destination are available:

- The end-user hears the person’s full extension (e.g. “Press 116 to reach John Brown, press 145 to reach Mary Broslavsky”) and then enters it, thus learning the actual extension number for future use.
- If, for some reason, the actual extension numbers are to be hidden from end-users, then another mode is available. In this case, users can choose a person simply by dialing a sequential number from a list (i.e. the announcement in the previous example will now be: “Press 1 to reach John Brown, press 2 to reach Mary Broslavsky”).

## Call Queues

This feature allows you to provide “call center” functionality to your IP Centrex customers. When a large number of incoming calls from customers arrive to the auto attendant, PortaUM® can forward these calls to the actual agents (customer service representatives) in a regulated fashion.

Every call queue contains several configuration parameters:



Edit	Queue Name *	Destination *	Max. Connected Calls *	Call Duration *	Music On Hold	Delete
	Sales	12350	1	300	Transferring_to_Sales.wav <input type="button" value="Browse..."/>	<input type="button" value="X"/>
	Support	12345	3	100		<input type="button" value="X"/>

- **Queue Name** – A short descriptive name for this call queue.
- **Destination** – A phone number where an outgoing call may be forwarded to. The fact that this is a single number does not, of course, mean that you can only have one agent answering calls.

This is simply the number used to forward calls to PortaSIP®. On the PortaSIP® side, you can use the call forwarding feature to direct an incoming call to multiple IP phones. Or, alternatively, you may forward this call to an external IP PBX or a gateway with multiple FXS ports; then “hunting” for an available agent will be done on that side.

- **Max Connected Calls** – This defines the “bottleneck” of your queue, i.e. the maximum number of concurrently connected outgoing calls.
- **Call Duration** – The average expected processing time for each call (used to calculate the estimated waiting time).
- **Music on Hold** – A melody (or announcement) which is played to users waiting to be connected.

Please consult the *Call Queues* chapter in the [PortaUM Administrator Guide](#) for more details.

# 3. Telephony Interface

## Overview

The PortaUM® user can access the mailbox via a telephony interface which allows to listen to voice messages, and configure the UM options for accessing the mailbox via phone.

## IVR Path Diagram

Your PortaUM® mailbox can be accessed via phone by dialing \*98. Below is the IVR Path diagram to help you navigating and configuring the system.

