UM User Guide

1 - Getting access to the interface

To access the interface, first open your web browser and type in the address um.vif.com
. You will then be prompted for your login and password. The login is 1, followed by your area code and your phone number. Do not put any dashes or spaces. Your password, by default, was automatically generated by our system. You will be able to find it on your quickstart guide (if subscribed after 17-09-2009) or you can call customer service. If you tried to access the bill2.vif.com interface before logging in UM, then your password will be the one you chose for bill2. Once you are successfully logged in, you will be prompted to change it. Once you are done, you will be able to access the interface's main page.

2 - Navigating around the interface

The first screen you will see will be the INBOX screen, where your voice messages are located. There, you will be able to see the message's origin (from), the date the message was received, or the time if the message was left on the current day, and the actual message under the "subject" column. Note that this includes voice messages, but also fax messages. To play back a voice message or view a fax, just click on "voice message" or "fax message". For the voice messages, once you will have clicked on the link, the message will automatically playback; you will have the option to pause or stop it. You can also scroll through it to go to a particular time. One nice feature is that you can also download the audio file to your computer by clicking on the "download" link. The filesize, in Kb, is indicated just on the left of the link. As for fax messages, after clicking on the link, you will be directed to a page with two options: to either open the file with the associated program (more on that later), or to download the file with the download link. Ok, back to the main page: your mailbox has a maximum size of 9765Kb. You will be able to see the usage just on top of the list of messages (i.e.: You are currently using 5265 KB of your 9765 KB). Also, if you have many messages, they might be broken down in more than one page. If so, then just click on the page number you want to view (**Pages**, over and below the message list). You could also click on "view all" to view all messages on the same page.

Now, on the buttons on the white bar: **Get mail** will refresh the inbox, so if any new messages have been received since the page was displayed, this will add them to the list. **Toggle all** simply puts a checkmark on all messages. **Forward** is used to forward voice messages to a specified email address (to be verified). **Read** and **Unread** are used to mark messages as read or unread. **Delete** is self-explanatory.

As for the different icons in the top-left corner, they serve several purposes. Only the 3rd and 4th icons' functions will be explained in-detail, as the other ones are self-explanatory. The "home" icon will return you to the main page, which is in fact the Inbox. The 2nd icon on the right is used to navigate through the different folders (Inbox, Drafts, Sent, Trash). The 3rd icon is used for your UM mailbox (Compose, Addresses, Folders, Search). The 4th icon is what we could describe as the options icon. There you will be able to change the parameters of each and every function related to UM.

3 – Mailbox functionality

3.1 – Compose
This is to be used to compose emails. Yes, the UM interface even allows you to send emails! You can use it as a backup email address if you want, for example. The basic functionality is the same as any other web-based mail system, with a little added option: the ability to record and attach voices messages directly (working and configured microphone required)!

3.2 – Addresses
This is your address book. Click on **add** to add a contact. Once you are done, click on **Save**. You can later edit it or delete it.

3.3 – Folders
This is used to create/edit folders for your mailbox. To create a new folder, type its name in the yellow "Name" field, and click on **Save**.

3.4 – Search
Again, self-explanatory. This is used to search through your messages (text only). "Text" is what you are searching for, and "Look in" is where/in which elements you will be searching in the message.

4 – Options

4.1 – Personal information
Full Name
You should enter your entire name here, for example, "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 email address, i.e. "jdoe@mydomain.org". By default, this is set to the account holder's name automatically.

E-Mail Address
Please leave this field blank.

Reply To
This is the email address that people will write to when replying to your message. If you want this address to be different than the email 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.

Reply Citation

When you click Reply on a received message, the new Compose form contains the original message. A text such as `John Doe wrote:` can be placed before this quoted message. This is called a citation line. The Reply Citation tab allows you to choose how this line looks.

- **No Citation**
  No citation line will be affixed.

- **Author Said**
  A line in the form: `AUTHOR Said:` will be affixed, with AUTHOR replaced by the name of the person who sent the message you're replying to.

- **Quote Who XML**
  This produces the line: `<quote who="John Doe">`.

- **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

If you choose this option, a signature will be attached at the bottom of all messages you send out. First check "Use signature" under the signature tab. Then simply fill in the text you want your signature to contain in the box provided.

Multiple Identities

(action panel) Click this link 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 New button. You will then be offered a choice of these when composing a message. You may also delete identities you have previously created.

4.2 – 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.

4.3 – Display preferences
- General Tab
Language
If English isn't your native tongue, you can easily change the language that most text is displayed in. Choose the language you require from the drop-down list. All text used in PortaUM will now appear in that language. Note that this function does not translate incoming email messages or folder names.

Mailbox Tab
Number of Messages to Index
(Mailbox tab) This defines the number of messages that will be shown in a given folder at one time. 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
(Mailbox tab) 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 pages to show** defines how many page numbers are displayed above and below a message list.

- Message and composition Tab
Wrap incoming text at
(Message and Composition Tab) 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.

Size of editor window
(Message and Composition Tab) How wide do you want your message box to 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
(Message and Composition Tab) 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
(Message and Composition Tab) Reply All sends a reply to all recipients of the original message, including yourself. To leave your own email address out,

uncheck this box.

Include CCs when forwarding messages
(Message and Composition Tab) With this option, if you reply to someone's message by selecting Reply All, your email address will be included in the CC field.

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 Subtle Printer Friendly Link
This allows you to display the View Printable Version link in a message.

Enable Printer Friendly Clean Display
This will clean up the message so the printed version looks nicer.

Enable request/confirm reading
This allows you to enable (or disable) automatic notification that a message has been received or read.

Append signature before reply/forward text
Attaches the signature you defined under the Signature tab in Personal Information.

Use receive date for sort
Self-explanatory.

4.4 – Folder options
Trash Folder
(Special Folder tab) 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".

Sent Folder
(Special Folder tab) 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".

Draft Folder

(Special Folder tab) 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".

Enable Unread Message Notification
(Folder List tab) 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 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 INBOX or No Notification should speed it up.

Unseen message notification type
(Folder List tab) 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.

Memory Search
(Folder List tab) If you search a mailbox, the search can be saved for quick access later. This option defines how many mailbox searches will be saved.

4.5 – UM preferences

Mode tab
You can choose between two basic UM options: voicemail or auto attendant. For auto attendant instructions, please see section 4.7.

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; *Name* for a message giving your name only; and *Personal* for a message of your own choice. Normally, you would want to use ***Personal.***

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 (*98).

Always Ask For Password
When enabled, this will result in the fact that you will be asked for your password every time you access your voice mail. By default, this is disabled. This function might be useful if you want to prevent anybody from accessing messages of a more personal nature, for example.

Prompt levels
This should not be altered; leave it as-is.

Fax Tab

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

External email tab

This is used to send your messages to an external e-mail address. You can use any email address you would like. If the action is at "none", messages will not be received outside of the phone system and UM. If "forward" is selected, you will not receive messages in UM *or on the phone system either*. They will be directly transferred to your email address. "Notify" will send an email to notify you that you have received a message. "Copy" will simply send a copy of the message(s) to your email address. You will still receive messages in the phone system and in UM.
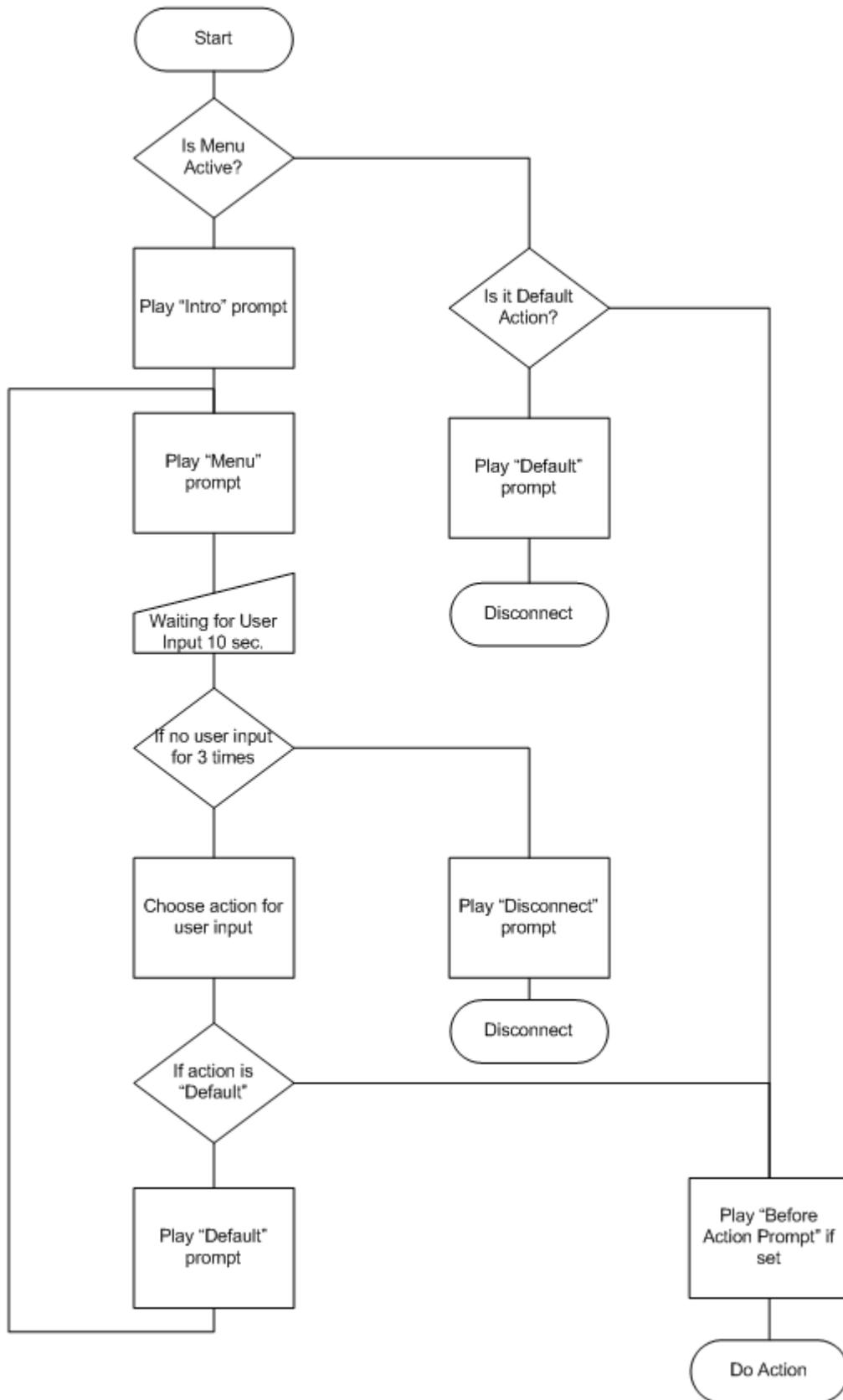
4.6 – Auto attendant

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. It is important to note that VIF internet offers no support for this function to its residential customers. We can of course answer any basic questions related to the auto-attendant, but our customers have to understand that this is designed for corporate/commercial/call center phone systems.

4.6.1 - 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:
    - Default - plays the default prompt from the current menu
    - Transfer - transfers the call to a given telephone number or extension
    - 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:

4.6.2 - 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 new** from the action panel.

4.6.3 - 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.

4.6.4 - Intro, Menu, Default

These three fields work similarly to the Voicemail recording feature.

🔴- **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 greyscale, 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.
.wav	Microsoft .WAV RIFF files.

4.6.5 - Event Table

Column	Description
Event	**Not Active** - if the current menu is not active (see the active period definition above) **0-9, #, *** - user selection on telephone keypad **Timeout** - no selection received from user
Action	**Default** - play the default prompt from the current menu **Directory** – Launches this company's dial-by-name directory. For more info, refer to section 4.7. **Transfer** – Transfers the call to a given telephone number or extension. The phone number should be entered in the same format as the customer would use to dial it from an IP phone in his IP Centrex environment; for example, to transfer a call to extension 123, simply enter 123. **Transfer to E.164 Number** – Transfers the call to a given number. The number should be specified in E.164 format: the country code, followed by the area code, and then the number (e.g. 16045551234 for Canada). **Transfer to Extension** – Transfers the call to an extension number entered by the caller from his phone. To prevent abuse (e.g. someone attempting to enter a long-distance number in this way), you can specify the maximum allowed number of digits in an extension (**Max Size**). **Transfer to Voicemail** – Switches to voicemail mode. This should be designated as an action for the "Fax" event, in order to allow storage of received faxes. **Menu** - start interpreting (executing) the selected menu; the user can choose from any of the available menus

Play before action	Check this box if the corresponding prompt is to be played before the action is performed
File	File name and path

4.7 – Dial Directory

This is used with the auto attendant. This is where the phone directory is configured, for use with the "directory" action. There you have the option to select/record an intro message for the directory menu. Press on "Add" to add an entry; you will then be able to configure the abbreviated number which has to be dialled (extension number), the destination number, and the recipient's last name. You also have the possibility to delete the entry, to edit it later, and to make it active or inactive by checking/unchecking the "active" box. Don't forget to click on "Save" once you are done.

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 dialling 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").

4.8 – Call queues

This feature allows you to provide a "call center" functionality to your VOIP system. 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:

- 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 the VOIP system. On the system 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.

Each call queue contains a pool of incoming calls (users trying to get connected) and a number of connected outgoing calls (calls that have already been connected to agents). When a new incoming call arrives, it is assigned a position in the queue. The caller will hear an announcement about his position in the queue and the estimated waiting time, which is calculated as (average call duration) / (maximum number of connected calls) * (total number of users before him in the queue). After that, the specified "music on hold" is played, and every minute the caller is updated as to his current position in the queue and the estimated waiting time. If there are callers on hold and the number of connected outgoing calls is lower than the specified threshold, PortaUM will attempt to connect the first person in the queue. A call invitation is sent to the destination number in PortaSIP, and PortaUM waits until the call is answered by the other side. If the call is not connected on the first attempt (some representatives may not be available at the moment), PortaUM will make another attempt, then another one, and so on. This will continue until either all of the incoming calls are connected, or the maximum threshold for outgoing calls is reached. In the latter case, PortaUM will simply wait until one of the agents finishes serving his current customer, thereby disconnecting one call and making "room" for a new outgoing call.