

# Portal User Guide

Portal Release 3.13

<https://portal.3starsnet.com>

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## **1 Introduction**

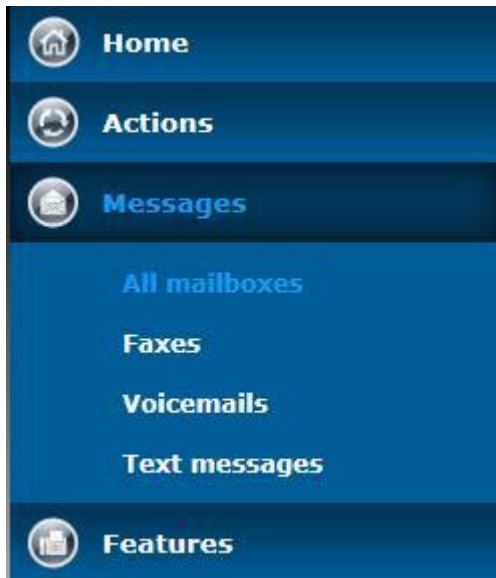
Portal enables users to access and navigate their messages and mailbox options via the web interface or via telephone. Portal features provide users with the flexibility to pause an incoming call and continue from another phone, or to make a call via the web interface. The following sections describe how to access the various Portal features, and provided suggested scenarios applicable to some of these features.

## **2 Accessing Messages on the Web Interface**

This chapter provides instructions for accessing your messages via the web interface. Chapter 3 Accessing Messages via Telephone provides instructions for accessing your messages via telephone.

### **To access your messages from the web interface**

1. Log in to the Portal web interface.
2. Select the **Messages** menu.
3. By default, all messages are shown. If you want to see a specific message type, select one of the following options:
  - All mailboxes
  - Faxes
  - Voicemails
  - Text messages



4. If you have access to more than one mailbox, select the mailbox you want to view. The messages in the selected mailbox appear.

### **2.1 Searching for Messages**

You can search for a specific message or group of messages to display. Your search can be based on a variety of search parameters, including a message's folder location, start and end date, duration, and/or the calling number or name.

### To search for a message

1. Log in to the Portal web interface.
2. Access the type of messages you want to search for (see Accessing Messages on the Web Interface).

#### Show messages matching:

**Folder:**

**Start date:** 2009  25

**End date:** 2013  25

**Minimum duration (seconds):**

**Maximum duration (seconds):**

**Calling number or name contains:**

3. Enter the following search parameters:

**Folder:** Select the folder in which the messages are located.

**Start date:** From the drop-down lists select the start date of the messages you want to locate or click the Calendar icon and select the start date.

**End date:** From the drop-down lists select the end date of the messages you want to locate or click the Calendar icon to select the end date.

**Minimum duration (seconds):** The minimum duration, in seconds, of messages for which you want to search.

**Maximum duration (second):** The maximum duration, in seconds, of messages for which you want to search.

**Calling number or name contains:** Enter all or part of the calling number or name associated with the messages you want to locate.

4. Click **Update**.

### 2.2 Sorting Messages

You can sort the displayed messages based on the messages dates and times, durations, and caller names.

#### To sort messages

1. Log in to the Portal web interface.
2. Access the type of messages you want to display (see Accessing Messages on the Web Interface).

**Sort:**

**Sort by:**

**Direction:**

**Update**

3. From the **Sort by** drop-down list, select how to sort your messages. Options are:

Date and time  
Duration  
Caller

4. From the **Direction** drop-down list, select to sort your messages in **Ascending** or **Descending** order.

5. Click **Update**.

## 2.3 Downloading Messages

You can download a message from the web interface onto your computer. This enables you to access the message even when you are not connected to the internet or logged in to the Portal web interface.

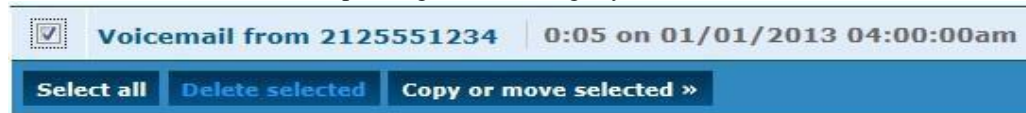
### To download a message:

1. Log in to the Portal web interface.
2. Access the type of messages you want to download (see Accessing Messages on the Web Interface).
3. Click the message you want to download.
4. Select a location in which to save the message.

## 2.4 Deleting Messages

### To delete a messages

1. Log in to the Portal web interface.
2. Access the type of messages you want to delete (see Accessing Messages on the Web Interface).
3. Select the checkboxes corresponding to the messages you want to delete.



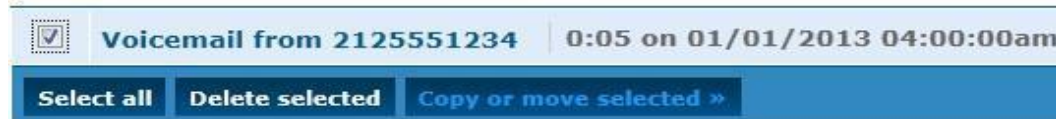
**Note:** Click **Select all** to select all message to delete.

4. Click **Delete selected**. A message appears asking you to confirm that you want to delete the selected message.
5. Click **OK**.

## 2.5 Copying or Moving Messages

### To copy or move a messages

1. Log in to the Portal web interface.
2. Access the type of messages you want to copy or move (see Accessing Messages on the Web Interface).
3. Select the checkboxes corresponding to the messages you want to copy or move.



4. Click **Copy or move selected**.
5. From the drop-down list, select to **Copy** or **Move** the message.
6. To copy or move the message to a specific folder, select the folder from the **To Folder** drop-down list.
7. To copy or move the message to a mailbox or a group of mailboxes, in the **or to mailboxes** section, select the mailboxes from the right column and click **Add Selected**.

**Note:** To remove a mailbox or a group of mailboxes from this option, select the mailboxes in the left column and click **Remove Selected**.

### Copy or move message



The dialog box has a title bar "Copy or move message". It contains a "Copy" dropdown menu, a "To folder:" dropdown menu, and a section labeled "or to mailboxes:" with two columns of mailbox names. The right column contains "1235", "20001", and "331234567". Below the columns are "Remove selected »" and "« Add selected" buttons. A "Save" button is at the bottom.

8. Click **Save**.

## 2.6 Accessing Online Help

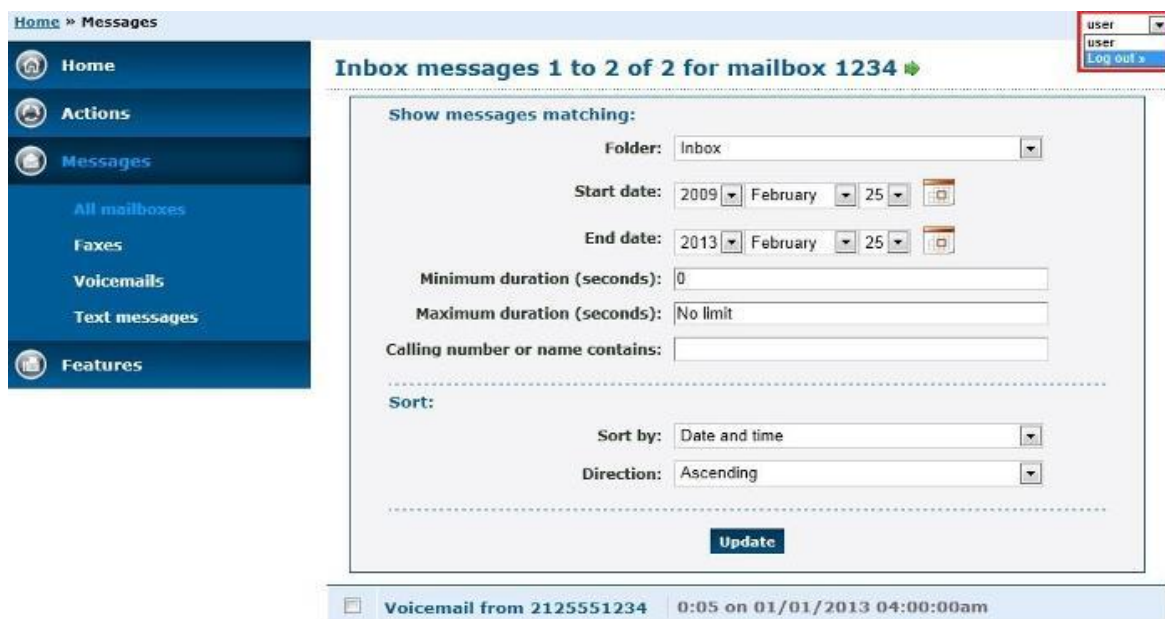
### To access online help

1. Log in to the Portal web interface.
2. Select **Actions » More Information**. A Portal page with links to various Portal guides appears.
3. Select **User**. The user online help appears.

## 2.7 Logout of Portal

### To exit Portal from the web interface

1. Click the down arrow at the top right of the page.
2. Select **Log out**.



## 3 Accessing Messages via Telephone

This chapter provides instructions for accessing your messages via telephone. Chapter 2 Accessing Messages on the Web Interface provides instructions for accessing your messages via the web interface.

### To access your messages via telephone

1. Dial the voicemail access feature code (\*1 by default). If your telephone forwards to a mailbox you are logged in automatically. If not, you are prompted for a mailbox and password. Alternatively, dial the voicemail login feature code, and you are always asked for a mailbox and password.
2. Follow the prompts to navigate the menus. The following prompts are available at this level:

Prompt	Feature Refer to...
1 Listen to voicemail messages	Listening to Voicemail Messages on page 11
3 Advanced Options Accessing	Advanced Options on page 13
0 Mailbox options	Configuring Mailbox Options on page 14
* Help	Accessing Help on page 16

### **3.1 Listening to Voicemail Messages**

You can listen to your voicemail messages.

#### **To listen to your voicemail messages**

1. Access your messages via telephone (see Accessing Messages via Telephone).
2. Press **1** to listen to your voicemail messages in your mailbox.
3. Follow the prompts to navigate the menus. The following prompts are available at this level:

<b>Prompt Feature</b>	<b>Refer to...</b>
2 Change folders	Changing Folders on page 11
4 Move to the previous message	Playing the Previous Message on page 11
5 Repeat the current message	Repeating the Current Message on page 12
6 Move to the next message	Playing the Next Message on page 12
7 Delete the current message	Deleting the Current Message on page 12
8 Forward the current message to another mailbox or mailboxes	Forwarding the Current Message to another Mailbox or Mailboxes on page 12
9 Save a message in a folder	Saving a Message in a Folder on page 12
* Rewind a message	Rewinding a Message on page 13
# Skip to the next message	Skip to the Next Message on page 13

#### ***3.1.1 Changing Folders***

You can access your messages that are located in other folders.

##### **To change folders**

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **2** when you hear the name of the folder you want to access.

#### ***3.1.2 Playing the Previous Message***

You can play the previous message in your mailbox.

##### **To play the previous message**

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **4** to play to the previous message.

#### ***3.1.3 Repeating the Current Message***

You can repeat the current message.

##### **To repeat the current message**

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **5** during the message you want to repeat.

#### ***3.1.4 Playing the Next Message***

You can play the next message in your mailbox.

##### **To play the next message**

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **6** when you reach the message you want to skip over to move to the next message.

#### ***3.1.5 Deleting the Current Message***

You can delete the current message.



### To delete the current message

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **7** when you reach the message you want to delete.

### 3.1.6 Forwarding the Current Message to another Mailbox or Mailboxes

You can forward messages to another mailbox or mailboxes.

### To forward the current message to another mailbox or mailboxes

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **8** when you reach the message you want to forward.
3. Follow the prompts to select the mailbox or mailboxes to which you want to forward the message.

### 3.1.7 Saving a Message in a Folder

You can save messages to specific folders.

### To save a message

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **9** when you reach the message you want to save.
3. Follow the prompts to select the folder to which you want to save the message.

### 3.1.8 Rewinding a Message

You can rewind a message while it is playing.

### To rewind a message

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **\*** while the message is playing.

### 3.1.9 Skip to the Next Message

You can skip the rest of the message you are listening to, and move ahead to the next message.

### To skip to the next message

1. Listen to the voicemail messages in your mailbox (see section Listening to Voicemail Messages).
2. Press **#** while listening to the message you want to skip.

## 3.2 Accessing Advanced Options

The advanced options provide you with the following capabilities:

- Replying to a voicemail
- Playing a message envelope
- Leaving a message
- Returning to the main menu

### To access the advanced options

1. Access your messages via telephone (see Accessing Messages via Telephone).
2. Press **3**.
3. Follow the prompts to navigate the menus. The following prompts are available at this level:

Prompt	Feature Refer to...
1 Reply to a voicemail	Replying to a Voicemail on page 14
3 Play a message envelope	Playing a Message Envelope on page 14
5 Leave a message	Playing a Message Envelope on page 14
* Return to the main menu	Returning to the Main Menu on page 14

### **3.2.1 Replying to a Voicemail**

You can reply to a voicemail in your mailbox.

#### **To reply to a voicemail**

1. Access your mailbox's advanced options (see Accessing Advanced Options).
2. Press **1** and follow the prompts.
3. Press **\*** to return to the main menu.

### **3.2.2 Playing a Message Envelope**

You can play a message envelope.

#### **To play a message envelope**

1. Access your mailbox's advanced options (see Accessing Advanced Options).
2. Press **3** and follow the prompts.
3. Press **\*** to return to the main menu.

### **3.2.3 Leaving Messages**

#### **To leave a message**

1. Access your mailbox's advanced options (see Accessing Advanced Options).
2. Press **5**. And follow the prompts.
3. Press **\*** to return to the main menu.

### **3.2.4 Returning to the Main Menu**

#### **To return to the main menu**

Press **\***.

## **3.3 Configuring Mailbox Options**

#### **To configure your mailbox options**

1. Access your messages via telephone (see Accessing Messages via Telephone).
2. Press **0**.
3. Follow the prompts to navigate the menus. The following prompts are available at this level:

<b>Prompt Feature</b>	<b>Refer to...</b>
1 Record an unavailable greeting	Recording an Unavailable Greeting on page 15
2 Record a busy greeting	Recording a Busy Greeting on page 15
3 Record your name	Recording a Your Name on page 15
4 Record a temporary greeting	Recording a Temporary Greeting on page 15
5 Change password	Changing Your Password on page 16
* Return to main menu	Returning to the Main Menu on page 14

### **3.3.1 Recording an Unavailable Greeting**

You can record a greeting informing callers that you are unavailable.

#### **To record an unavailable greeting**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **1** and follow the prompts.

### **3.3.2 Recording a Busy Greeting**

You can record a greeting informing callers that the line is busy.

### To record a busy greeting

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **2** and follow the prompts.

### 3.3.3 Recording a Your Name

You can record your name to inform callers that they have reached your mailbox.

### To record your name

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **3** and follow the prompts.

### 3.3.4 Recording a Temporary Greeting

You can record a temporary greeting that callers will hear when they reach your mailbox during a specified time.

### To record a temporary greeting

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **4** and follow the prompts.

### 3.3.5 Changing Your Password

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

### To change your password

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **5** and follow the prompts.

## 3.4 Accessing Help

### To access help

Press **\***.

## 3.5 Exiting Portal

### To exit Portal

Press **#**.

## 4 Accessing Messages via Telephone (Experimental Menus)

This chapter describes the new experimental voicemail menus which can be accessed via the telephone. This is only applicable if this option has been enabled on your system. If not, refer to Chapter 3 Telephone for the traditional voicemail menus.

### To access your messages via the telephone experimental menus

1. Dial the voicemail access feature code (\*1 by default). If your telephone forwards calls to a mailbox, you are logged in automatically. If not, you are asked for a mailbox and password. Alternatively, dial the voicemail login feature code, and you are always asked for a mailbox and password.

If you have any urgent messages, the urgent folder opens first. If not, the inbox folder opens.

2. Follow the prompts to navigate the menus. The following prompts are available at this level:

Prompt Feature	Refer to...
1 Move to the first message in this folder	Moving to the First Message in the Current Folder on page 18
2 Change folders	Changing Folders on page 18
3 Play message envelope	Playing a Message Envelope on page 18
4 Move to the previous message	Replaying the Previous Message on page 18

5 Repeat the current message	Repeating the Current Message on page 19
6 Move to the next message	Moving to the Next Message on page 19
7 Delete the current message	Deleting the Current Message on page 19
8 Move or copy the current message to a different folder	Moving or Copying the Current Message to a Different Folder on page 19
9 Forward the current message to another mailbox	Forwarding the Current Message to another Mailbox on page 20
0 Mailbox options	Configuring Mailbox Options on page 20
* Help Accessing	Help on page 16
# Exit	Exiting Portal on page 16

#### **4.1 Moving to the First Message in the Current Folder**

You can access the first message in the current folder.

##### **To move to the first message in the current folder**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **1**.

#### **4.2 Changing Folders**

You can access your messages in other folders.

##### **To change folders**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **1** to listen to your voicemail messages in your mailbox. A menu of the existing folders is played.
3. Press **2** when you hear the name of the folder you want to access.

#### **4.3 Playing a Message Envelope**

You can play a message envelope.

##### **To play a message envelope**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **3**.

#### **4.4 Replaying the Previous Message**

You can replay the previous message

##### **To replay the previous message**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **4** to return to the previous message.

#### **4.5 Repeating the Current Message**

You can go back to the beginning of a message to hear it again.

##### **To repeat the current message**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **5** during the message you want to repeat.

#### **4.6 Moving to the Next Message**

You can skip the rest of the message you are listening to, and move ahead to the next message.

##### **To move to the next message**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **6** to access the next message.

#### **4.7 Deleting the Current Message**

You can delete the current message.

##### **To delete the current message**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **7** when you reach the message you want to delete.

#### **4.8 Moving or Copying the Current Message to a Different Folder**

You can move or copy the current message to another folder.

##### **To move or copy the current message to a different folder**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **8** when you reach the message you want to move or copy, and follow the prompts.

#### **4.9 Forwarding the Current Message to another Mailbox**

You can forward messages to another mailbox

##### **To forward the current message to another mailbox**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **9** when you reach the message you want to forward, and follow the prompts.

#### **4.10 Configuring Mailbox Options**

##### **To configure mailbox options**

1. Access your messages via telephone (see Accessing Messages via Telephone (Experimental Menus)).
2. Press **0** to configure the options in your mailbox.
3. Follow the prompts to navigate the menus. The following prompts are available at this level:

<b>Prompt Feature</b>	<b>Refer to...</b>
1 Record an unavailable greeting	Recording an Unavailable Greeting on page 20
2 Record a busy greeting	Recording a Busy Greeting on page 21
3 Record your name	Recording a Your Name on page 21
4 Record a temporary greeting	Recording a Temporary Greeting on page 21
5 Change password	Changing Your Password on page 21
* Return to main menu	Returning to the Main Menu on page 14

##### **4.10.1 Recording an Unavailable Greeting**

You can record a greeting informing callers that you are unavailable.

##### **To record an unavailable greeting**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **1** and follow the prompts.
  - To record or re-record the greeting, press **1** and follow the prompts.
  - To listen to the existing greeting, press **2**.
  - To delete the existing greeting, press

##### **4.10.2 Recording a Busy Greeting**

You can record a greeting informing callers that the line is busy.

### **To record a busy greeting**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **2** and follow the prompts.
  - To record or re-record the greeting, press **1** and follow the prompts.
  - To listen to the existing greeting, press **2**.
  - To delete the existing greeting, press **3**.

### **4.10.3 Recording a Your Name**

You can record your name to inform callers that they have reached your mailbox.

### **To record your name**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **3** and follow the prompts.
  - To record or re-record the name, press **1** and follow the prompts.
  - To listen to the existing name, press **2**.
  - To delete the existing name, press **3**.

### **4.10.4 Recording a Temporary Greeting**

You can record a temporary greeting that callers will hear when they reach your mailbox during a specified time.

### **To record a temporary greeting**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **4** and follow the prompts.
  - To record or re-record the greeting, press **1** and follow the prompts.
  - To listen to the existing greeting, press **2**.
  - To delete the existing greeting, press **3**.
  - To activate or deactivate the greeting, press **4**.

*Note: Activating or deactivating the greeting applies only to the temporary greeting.*

### **4.10.5 Changing Your Password**

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

### **To change your password**

1. Access your mailbox options (see Configuring Mailbox Options).
2. Press **5** and follow the prompts.

## **5 Call Park**

Call Park enables you to put a call on hold on one telephone set and continue the conversation from another telephone set.

### **To park and pick up a call**

1. Answer an inbound call.
2. After talking to the caller, press **#**. You hear "Transfer".
3. Press the park code. By default, the park code is **\*7**.
4. Wait two seconds. You hear a park number, such as 701.
5. Hang up.
6. Call the park number from another telephone.

**Note:** Only inbound calls can be parked. Outbound calls cannot be parked to allow the **#** button to work with external IVRs.

## 6 Click to Call

Click to Call allows you to make a call via the web interface or JSON API.

The following are possible scenarios:

Speed dials from your web browser's bookmarks.

Integration with desktop applications such as email clients. To do this, invoke the following URL:  
[http://Portal.example.com/actions/call/save/?\\_username=<Portal username>&\\_password=<Portal password>&stype=phone&phone=<telephone line to call from>&cnumber=<number to call>](http://Portal.example.com/actions/call/save/?_username=<Portal username>&_password=<Portal password>&stype=phone&phone=<telephone line to call from>&cnumber=<number to call>)

"Click here to call us" buttons on your website.

To do this, configure a CGI script on your web server to invoke the following URL:  
[http://Portal.example.com/actions/call/save/?\\_username=<Portal username>&\\_password=<Portal password>&number=<customer number to call first>&cnumber=<feature code pointing to queue or hunt group>](http://Portal.example.com/actions/call/save/?_username=<Portal username>&_password=<Portal password>&number=<customer number to call first>&cnumber=<feature code pointing to queue or hunt group>)

**Note:** It is important to use a script rather than a link to avoid revealing your username and password.

### To call via the web interface

1. Log in to the Portal web interface.
2. Select **Actions » Make a call** to display the Make a call form.

#### Make a call



Call settings:

Make first call to: Telephone

Telephone line: 12304 Charles Smith

\*When answered, forward to:

Callerid on first call: Withheld

Request telephone to auto-answer: No

Call

3. Enter the following: (fields marked with are required):

**Make first call to:** Choose the first destination to call. This can be a telephone line or an arbitrary number. If a number, it is routed as though you had dialed it from a telephone.

**Telephone line:** If you select Telephone, select the telephone line.



Call settings:

Make first call to: Number

\*Number:

\*When answered, forward to:

Callerid on first call: Withheld

Callerid on second call: Withheld

Call

- ➔ **Number:** If you select Number, enter the phone number.
- ➔ **When answered, forward to:** Choose a number to transfer to once the first destination has answered. This can be an arbitrary number, such as an external number, number, feature code, or telephone line.
- ➔ **Callerid on first call:** Choose the callerid number to display on the first call. Choose **Withheld** if you do not want the number displayed.
- ➔ **Callerid on second call:** Choose the callerid number to display on the second call. Choose **Withheld** if you do not want the number displayed.

4. Click **Call**. The first destination should ring within a few seconds.
5. You can bookmark the next page to make the same call in future

### **7 Forwarding to an External Extension**

Many features allow you to forward a call to an external number using the "External number" entry box on the destination selector. You can play DTMF to the destination if this is required to specify a particular extension. For example, to dial "2125551234" and play DTMF "123" when answered, enter "2125551234x123" in the external number entry box. Anything after the "x" is taken to be DTMF to play.

You may need to delay the DTMF depending on the menu the far end plays. You can do this by adding a "w" to the string specified. Each "w" creates a delay of 0.5 seconds. You may specify as many of these as you wish. For example, "2125551234xwww1w123" will dial 2125551234, then, when answered, waits two seconds, plays a 1, waits another 0.5 seconds, plays 123, then connects the caller. Some experimentation may be required to find the correct combination of DTMF and waiting.