

ixi-UMS User Portal

User Guide

Onlineversion

Content

1 Introduction	2
2 Login	2
3 Global settings	3
4 Recording mode for the voice-mailbox	3
5 ixi-UMS Web Journal	5
6 ixi-UMS User Settings	7
7 ixi-UMS Voice-Mailbox Configuration	9
7.1 Overview	9
7.2 Profile Management	11
7.2.1 Record individual Announcement	12
7.2.2 Voice-Mailbox personalization	14
7.2.3 Voice-Mailbox settings	
7.2.4 Call forwarding destinations	16
7.3 Notifications	17
7.4 Office Hours	18
7.5 Change PIN	19
7.6 Remote Inquiry	19
7.7 Important note	20
8 Info	21
8.1 About estos	21
8.2 Version	21

1 Introduction

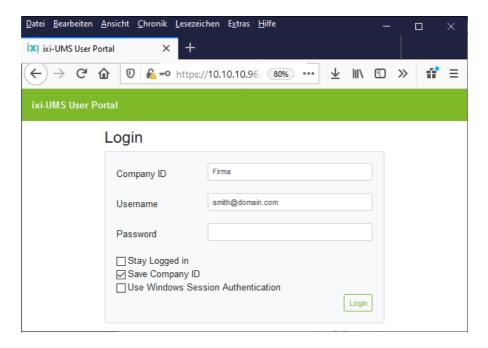
The ixi-UMS User Portal provides you with web applications to display and configure your ixi-UMS Enterprise functions. The options available to you depend on the installed and available ixi-UMS Enterprise components as well as the settings, approvals and authorizations on the ixi-UMS Portal Server.

To view the ixi-UMS User Portal you need one of the following web browsers:

- at least Microsoft Internet Explorer 11
 Note: The recording of announcements for the ixi-UMS Voice-Mailbox via headset is not supported
- Microsoft Edge
 Note: The headset for recording the announcement for the ixi-UMS Voice-Mailbox must be selected anew in each session
- at least Mozilla Firefox 68
- at least Google Chrome 78

2 Login

The link to open the ixi-UMS User Portal and the required login details will be provided to you by your administrator or with the welcome message created by the ixi-UMS Voice-Mailbox.



If you are offered the option "Use Windows Session Authentication", your Windows credentials will automatically be used to log in to the ixi-UMS User Portal when you select this option.

After registration, the defined modules are available to you with the freely available options.

ixi-UMS Web Journal

• View incoming messages and confirmations in the ixi-UMS Web Journal

ixi-UMS User Settings

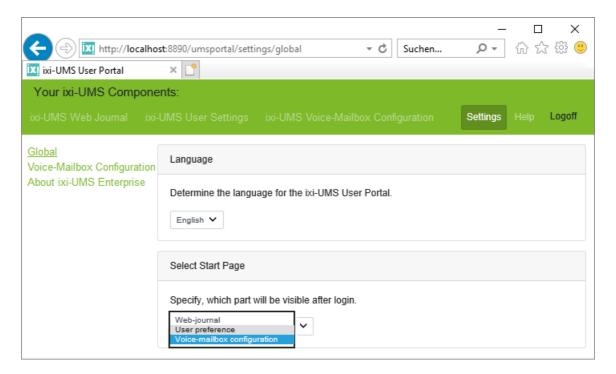
- Information about permissions for Fax, SMS, Voice permissions.
- Change cover page and sender information settings

ixi-UMS Voice-Mailbox Configuration

• The browser-based configuration interface for the ixi-UMS Voice-Mailbox

3 Global settings

After the first login you will be offered the global settings. Here you can specify the display language (German/English) and the future start page.



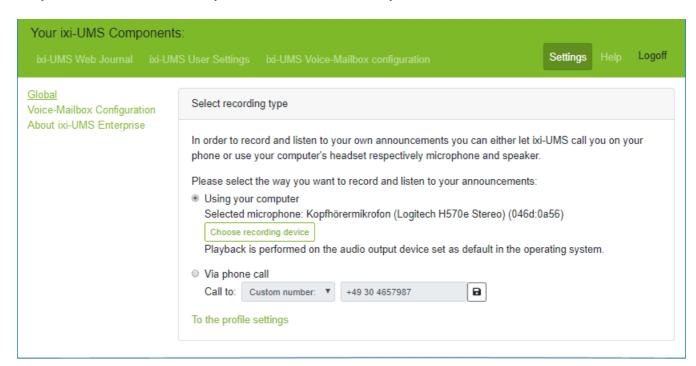
You can change these settings at any time.

Please note: These settings are stored in your browser. If you change your workstation or browser, you will have to set these settings again.

In the upper part the available web pages are offered to you as tab.

4 Recording mode for the voice-mailbox

Here you can define via which device you want to record and listen to your announcements.

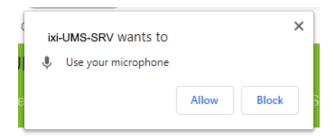


Login 3

Using your computer

If the option "Record via microphone" has been activated on the ixi-UMS Voice-Mail Server and a microphone is connected to your computer, you can record your announcement directly via this headset.

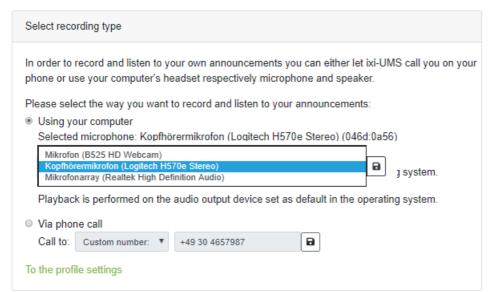
Note: This option is not available in Internet Explorer,



Depending on the browser you are using, clicking on the button

Choose recording device will lead to a message in which you must grant access.

If this message does not appear or if you are informed that you cannot use this function, you may have to enable this function in the browser settings under "Private & Privacy".



Then select the microphone\headset via which you want to record your greeting.

After your selection, save the setting and switch to the <u>profile</u> <u>management</u> to record or listen to your greeting.

Hint:

Some browsers only save this setting for the current session. In this case, you have to select the headset again after logging in again.

Via phone call

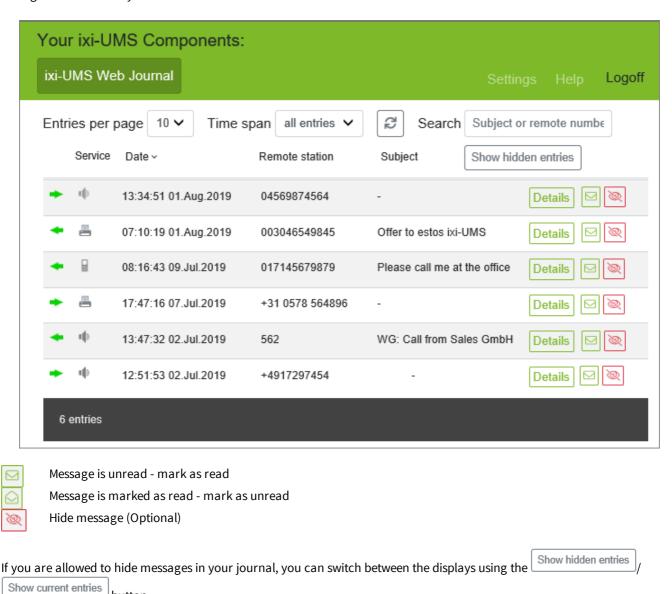
To record announcements over a phone the ixi-UMS Voice-Mail Server must call you. By default ixi-UMS will call you on your office number. If you have been granted authorization, you can enter your own phone number. After entering the phone number, it must be saved .

On the phone number selected here the ixi-UMS Voice-Mail Server will call you if you want to record or listen to your announcement.

After defining the recording mode you can record your greetings for the ixi-UMS Voice-Mailbox.

5 ixi-UMS Web Journal

In the "ixi-UMS Web Journal" you can check all incoming and outgoing ixi-UMS messages. You can mark the messages as read and hide and open them if necessary. Whether you can hide, open, view or save your ixi-UMS messages depends on the settings of the ixi-UMS system.



If the option "Archive all files" is activated in ixi-UMS Enterprise, you can print or save incoming and outgoing faxes and SMS including the report and listen to voice messages left by callers.

button.

56
50
3046549845
10:19 01.Aug.2019
er to estos ixi-UMS
9 8142 4799340
x message sent

For sent fax, voice and SMS messages you will always receive the detailed information shown opposite.

This report/report contains information on the sender, recipient, subject, page number and transmission result.

In addition, a report can be **opened as a PDF** for fax messages. In this case you will receive a one-page PDF with the fax report at the beginning and then a section of the first fax page.

Details for received	fax message ×	
Sender:	+31 0578 564896	
Recipient:	+49 8142 48384562	
Transmission time:	17:47:16 07.Jul.2019	
Subject:	-	
Remote station ID:	+0 00 00000	
Number of pages:	1	
Result:	Fax successfully received	
Open report as PDF	Open fax as PDF Print details	

Also for received fax and SMS messages you always receive the detailed information shown opposite.

This report/report contains information on the sender, recipient, subject, page number and transmission result.

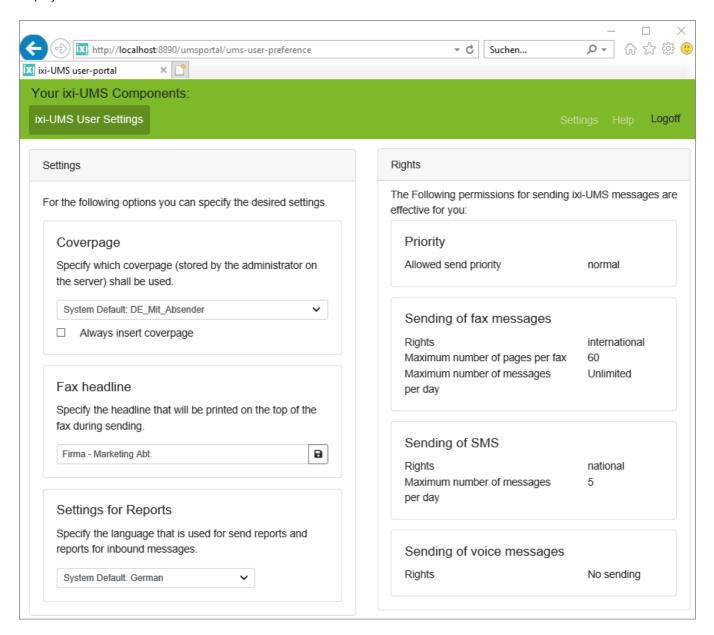
You can save the **report as a PDF** and, if necessary, open the received fax as a PDF.

Details for received callSender:+4917297454Recipient:+49 8142 48384562Transmission time:12:51:53 02.Jul.2019Subject:-Result:-Save voice messagePlay voice messagePrint details

For voice messages you may be offered to play and save the message

6 ixi-UMS User Settings

In the ixi-UMS User Settings you can see the permissions for the Fax, SMS and Voice functions defined by the administrator in the ixi-UMS System. In addition, some setting options can be offered to you. Note: Options that have not been released are not displayed.



Coverpage

The fax cover sheets are stored by the administrator in the ixi-UMS System. By default, fax cover sheets are only created if you also enter a text in the e-mail for sending the fax. On this cover page, the company logo, your sender information and the e-mail text are inserted, depending on the institution.

All fax cover pages stored in the ixi-UMS system are displayed for you to choose from.

Optionally, you can specify that a cover page is always displayed, even if you send the e-mail for sending by fax only with an attachment.

ixi-UMS Web Journal 7

Fax headline

The Fax-Headline = Sender ID is stored in the ixi-UMS system and is valid for all outgoing fax messages. If this option is activated for you, you can overwrite this headline.

Enter the desired information and save your entry.

Please note: the entry should not exceed 15 characters, otherwise it may not be printed completely on the fax.

If you delete the entry in this field, the fax headline stored in ixi-UMS system becomes valid again.

Settings for Reports

Choose in which language you want to receive the ixi-UMS reports and feedback.

Note: All languages available on the ixi-UMS System are always displayed. Your administrator will tell you which of the languages have been activated on the ixi-UMS system.

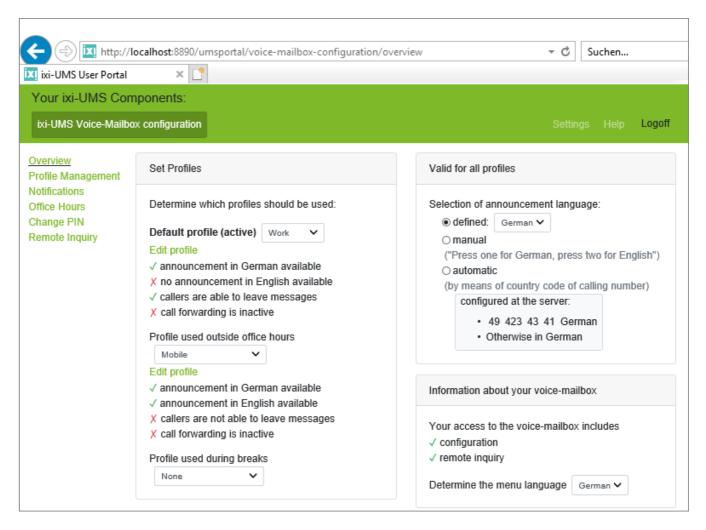
7 ixi-UMS Voice-Mailbox Configuration

If a ixi-UMS Voice-Mailbox has been enabled for you, you can configure the settings on the phone or via the ixi-UMS Voice-Mailbox Configuration in the ixi-UMS User Portal.

The number of available profiles and the configuration options offered in the ixi-UMS Voice-Mailbox configuration depend on the settings in the ixi-UMS Voice-Mail Server and the rights assigned to you.

7.1 Overview

After the login you reach the overview via the tab "ixi-UMS Voice-Mailbox Configuration". Here you get an overview which profile is activated and which settings you have stored for this profile. This allows you to see at a glance which options are available to the caller.



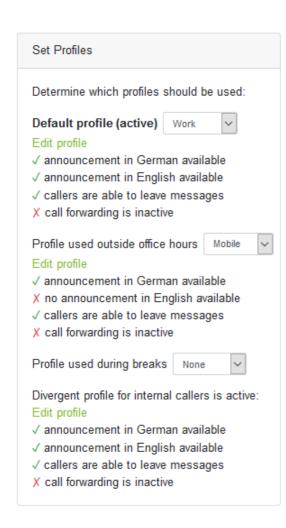
Via the menu on the left side you can switch between the individual configuration interfaces. The available menu items are administrator-defined.

e.g.

- Profile Management
- Notifications
- Office Hours
- Change PIN
- Remote Inquiry

At the top right you can Logoff and switch to the ixi-UMS User Portal Settings.

ixi-UMS User Settings



Set Profiles

The Default profile is active during the defined office hours. If no office hours are set, the profile is always active. Behind it, you will see in (...) whether this profile is currently active or not, because you are out of office hours.

Via the link "Edit profile" you can change directly to the selected profile to change the settings.

Underneath the existing options and settings of this profile are shown.

Profile used during non-office hours/during breaks

If "office hours" are used to control the ixi-UMS Voice-Mailbox, you can set the after-work and break profile.

The current settings are also displayed.

The information for the "Profile for internal callers" is only displayed if a greeting is stored in the profile.

Please note:

If a greeting for internal callers is stored, it is valid for every call from an internal telephone. The office hours are ignored.

Valid for all profiles

You must define which announcement language is predefined or offered for selection to the caller. Note that you must store a greeting text for the corresponding language.



Defined

Please define whether the caller shall hear your German or your English announcement.

Manual:

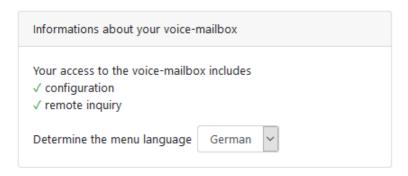
All languages available are offered to the caller. By pressing the respective key he then can decide, which of the laguages offered he prefers.

By means of country code:

The language of the announcement is determined on the basis of the sender number of the caller. When the incoming call number e.g. is +49 8142 4799xxx, the language is German (default). Please ask your administrator about the available settings/options.

Informations about your voice-mailbox

Here you can see what options are available to you when dialing by telephone to the voice mailbox.



If you have access by phone, you can specify whether the menu is available on the phone in German or English.

7.2 Profile Management

The number of available profiles and the configuration options offered in the profile administration depend on the settings in ixi-UMS Voice-Mail Server and the rights assigned to you.

On ixi-UMS Voice-Mail Server it has been determined whether you may use "Personalized" or "Individual" as greeting type. If you have the right to log on to your ixi-UMS Voice-Mailbox via telephone, you may optionally be offered to select the greeting type in the telephone menu.

- With announcement type Personalized, you can only save your user name. This is then valid for all profiles.
- With the announcement type Individual, you can define an individual announcement per profile and language.

Regardless of whether you have a "personalized announcement" or one "individual welcome message" per profile, you must define the device for recording and listening to the greeting in the settings.

Possible profiles

Up to 7 profiles can be made available to you:

Work, Mobile, Home, Custom 1 und 2	Announcement for external callers. The set office and break times are valid
Varcantion	Announcement for external callers. The profile is always valid. Office and break times are not considered.
internal	Announcement for internal callers. Valid for every call from an internal subscriber. Office hours and vacation profile are ignored. If no greeting is stored, the greeting from the active profile is played.

7.2.1 Record individual Announcement

If you are allowed to record an individual welcome message, you can enter your own announcement for each of the 6 profiles.

You can record ● and play back ▶ the greetings via your <u>telephone or headset with microphone</u>, upload **a** a Wav file with your greeting to ixi-UMS Voice-Mail Server or save it **a** on your PC, delete the greeting file or convert the entered text into a greeting using "Text-to-Speech".

Please note:

If you <u>configure "call forwarding"</u>, this option must be offered to the caller. Either you must offer <u>this selection</u> in your greeting or it will be played by the ixi-UMS Voice-Mail Server. In this case you must <u>record a description text</u> for the destination.

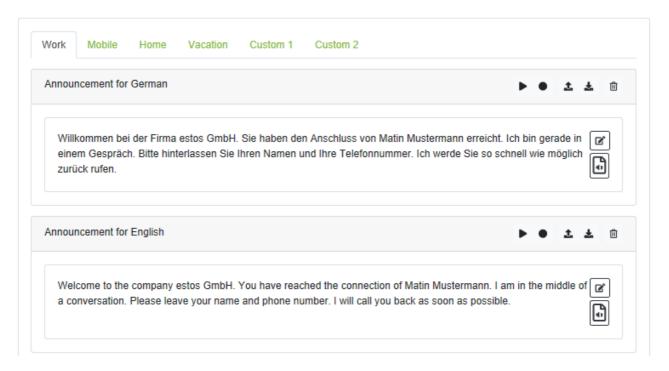
By clicking on the button in the text field you can enter your announcement text. That way you can always see, which announcement you recorded for which profile.

Select the profile you want to edit and store the greeting in one of the ways shown below. After that you can<u>set the functions/options of the voice mailbox.</u>

Creating a greeting via TTS

Enter the text of your greeting in the text field. After saving the entry the button for creating the greeting via TTS becomes active.

Click on the button to have the greeting created. Depending on the length of the greeting this process may take a few seconds. After the creation you can listen to the greeting via the button.



Note:

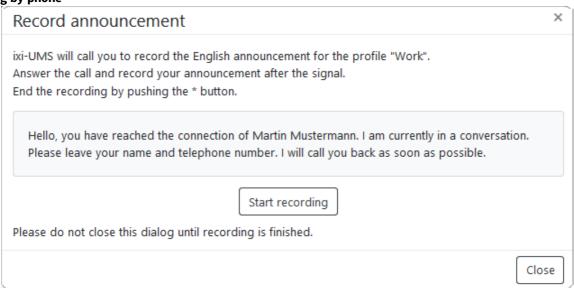
A possibly required description text for call forwarding cannot be created via TTS.

Record announcement

To record the greeting via the <u>specified recording device</u> click on the button . This opens a dialog with all required information. If you have entered your announcement as text, it will be displayed to you.

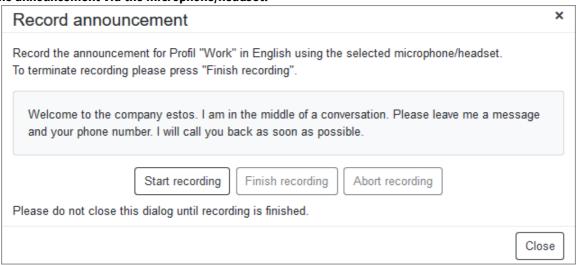
If the **-**button for recording an announcement is not highlighted in color, no <u>recording device</u> is stored under Settings.

Recording by phone



If you click on "**Start recording**", ixi-UMS Voice-Mail Server will call you after a short time and you can speak your announcement. Stop recording by pressing the * key on the phone.

Record the announcement via the microphone/headset:



Click on "Start recording" and record your greeting. Finally, click on "Finish recording". The greeting is immediately valid.

Please note:

If you set up a "call forwarding" this must be offered to the caller. Either you have to offer this selection in your announcement or it will be imported from the ixi-UMS Voice-Mail Server. In that case, you must provide a description text.

Use existing announcement

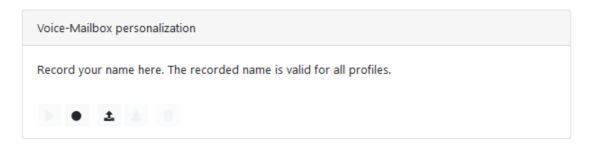
With the button 4 you can load an existing announcement as a wav file into your ixi-UMS Voice-Mailbox. Please read the notes under Important Notes

7.2.2 Voice-Mailbox personalization

If your ixi-UMS Voice-Mailbox is set up for a personalized announcement, you can leave your name. This is valid for all profiles.

You can record and play back your name on your <u>telephone or headset with microphone</u>, upload a Wav file with your name to the ixi-UMS Voice-Mail Server or save it on your PC or delete the announcement file

After recording your name, you can specify functions/options of the voice-mailbox per profile.

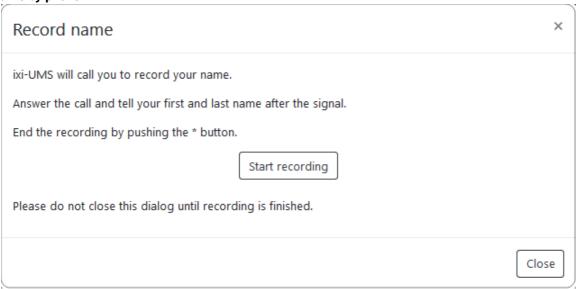


If the **-**button for recording an announcement is not highlighted in color, no <u>recording device</u> is stored under Settings.

Record name

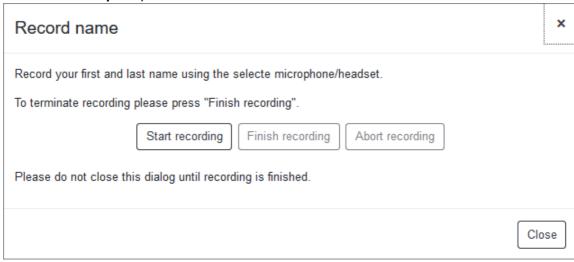
To record your name via the <u>recording device</u>, click on the button . This opens a dialog with all required information. If you have entered your announcement as text, it will be displayed to you.

Record name by phone



If you click on "Start Recording", the ixi-UMS Voice-Mail Server will call you after a short time and you can speak your announcement. Stop recording by pressing the * key on the phone.

Record name via the microphone/headset:



Click on "Start recording" and record your greeting. To finish, click on "Finish recording". The greeting is immediately valid.

Use existing announcement

With the button 2 you can load an existing announcement as a wav file into your ixi-UMS Voice-Mailbox. Please read the notes under Important Notes

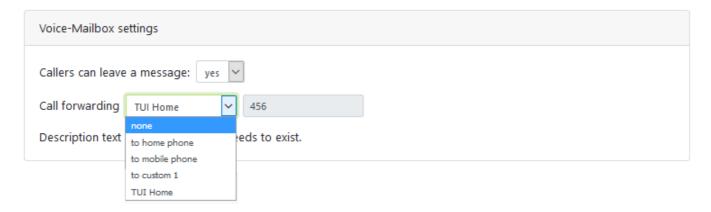
7.2.3 Voice-Mailbox settings

Regardless of whether you have a "personalized announcement" or one "individual welcome message" per profile, you can specify **for each profile** whether the caller leaves a message and/or can be connected further.

Callers can leave a message

Select whether the caller is allowed to leave a message (yes) or not (no).

The left voice-message will be sent to you as an attachment in an e-mail or can be heard in the ixi-UMS Web Journal.



Call forwarding

Call forwarding can only be configured and offered to you if the server meets certain criteria.

Activate call forwarding by selecting a <u>stored phone number</u>.

You can select the numbers stored on the server for your home phone and your mobile phone and set your own call forwarding numbers under "Edit call forwarding destinations".

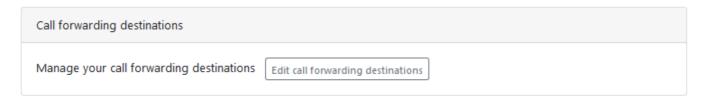
Whether you need to enter a <u>descriptive text</u> for each destination or offer the caller the choice in <u>your announcement</u> will be displayed to you.

Call forwarding destinations entered via the telephone are offered here for selection. Call forwarding over the telephone is represented by the name TUI. The telephone numbers/destinations entered on the telephone and the corresponding description text can only be changed or deleted via the telephone.

7.2.4 Call forwarding destinations

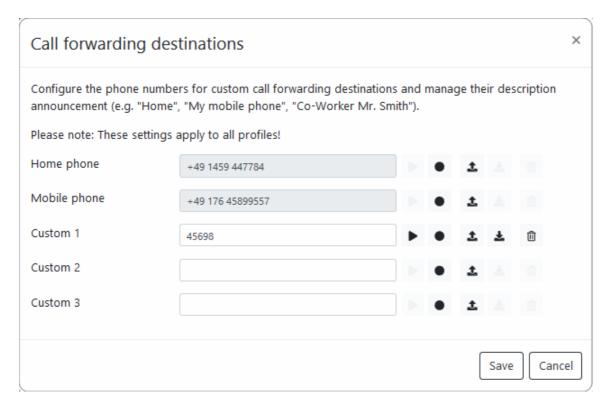
Please note that during "Call Forwarding" your announcement changes or has to change when you call the voice mailbox. For more information about call forwarding, see <u>Call Forwarding - Features and Options</u>

Call forwarding destinations may be provided with telephone numbers from the system. In addition, you can specify 3 additional phone numbers via "**Edit call forwarding destinations**".



You can enter and store these phone numbers as an extension or in the format +49

The number stored here is available in all profiles as a selection. If you change a phone number in one of the "Custom" entries, this has an influence on any profiles that have already been set up.



Announcement for Call Forwarding

If you need to record a descriptive text, you will be offered options for recording etc. on the right.

To record the announcement via your <u>recording device</u>, click on the button . This opens a dialog with all required information.

Use existing announcement

With the button extstyle extstyle

After saving the settings, the numbers are available to you for selection via the browser-based <ixi-UMS Voice-Mailbox Configuration.

When <u>setting up call forwarding</u> over the telephone, the destination and announcement must be defined independently of this.

7.3 Notifications

These settings are optional and might not be available or only in part.

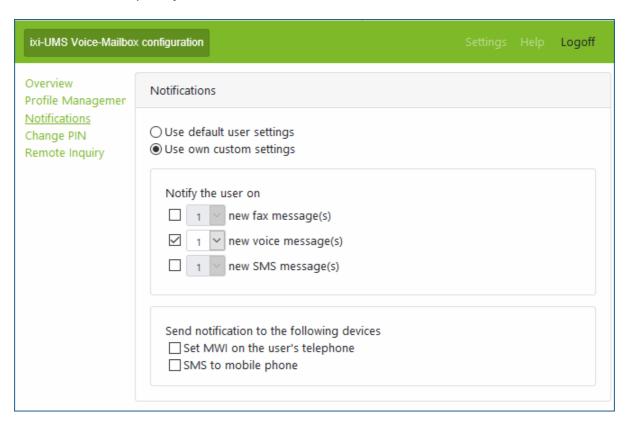
You can be informed about new ixi-UMS messages received by lamp on your phone (MWI) or by SMS.

Please follow your administrator's information as well.

If in the ixi-UMS Voice-Mail Server settings are stored, they can be adopted with the "**Use system settings**" option. To use your own, different settings, select the setting "**Use own custom settings**".

Now you can select:

- which type of messages you want to be informed about and after how many of them.
- how and on which telephone you want to be informed.



Hint:

Notifications about new e-mails are not sent.

When the messages are accessed via the ixi-UMS Voice-Mail Server (dial-in by telephone), the message counter and MWI-status (where applicable) on the phone is/are reset as soon as you call the message menu.

When the messages are accessed via the mail client, the message counter and the status indication on the telephone (when applicable) has/have to be reset manually.

You can do this via the ixi-UMS Client Tools or via an e-mail to NOTIFIER_EXPRESS_OFF@ixialert.com. The e-mail does not need to have any content.

7.4 Office Hours

Set Profiles

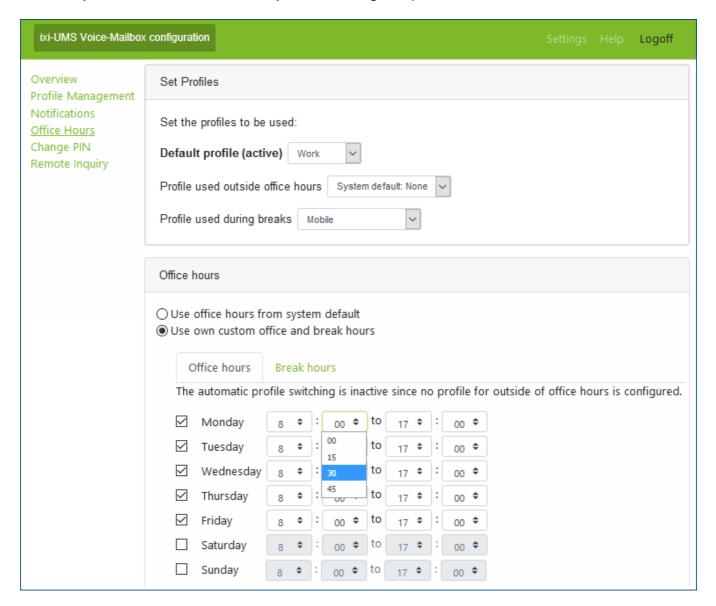
Here you can define which profile should be active during office hours and break times. For more information on the profiles, see <u>Overview</u> of ixi-UMS Voice-Mailbox configuration.

Office hours

During "office hours", if you call on your ixi-UMS Voice-Mailbox, the "default profile" you specify will be valid, while the break time will be the "break profile" you specify. Outside these times, the profile defined for "use otside office hours" becomes active.

If given free at ixi-UMS Voice-Mail Server, you can set the times for the "after-work" and the "break profile" yourself.

On the ixi-UMS Voice-Mail Server times are stored which you can accept by selecting "**Use system default**". Select "Use your own office and break times" if you want to change the specified times



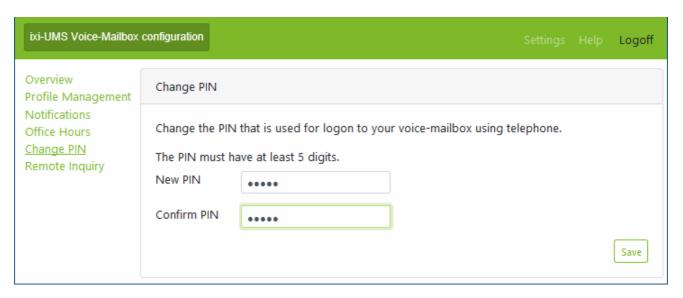
Remark:

These times are invalid for the "Vacation"-profile.

7.5 Change PIN

The first time you get a call on your ixi-UMS Voice-Mailbox - your "answering machine" - you will receive an e-mail with all relevant information. If you are allowed to set up your ixi-UMS Voice-Mailbox via the telephone, the e-mail contains a PIN that is automatically generated for you.

In "Change PIN" you can quickly and easily change your PIN. Make sure that your new PIN has the specified number of digits.

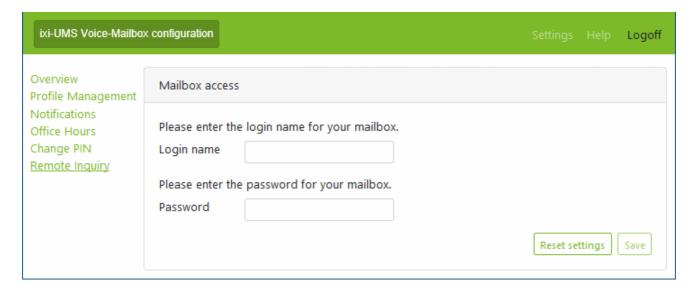


7.6 Remote Inquiry

This optional configuration depends on the mail server you are using and is only available if you are authorized to access your messages through the phone.

In order to be able to listen to your messages by telephone, the registration data must be stored for access to your mailbox.

Depending on the mailserver and the user database, you must enter your login name and/or password for logon to the mailserver.



[&]quot;Reset settings" will delete your password in ixi-UMS Enterprise system and the default settings stored on the ixi-UMS Voice-Mail Server will be valid.

7.7 Important note

Announcements and recordings

Please observe the following instructions for recording or creating your greeting:

- 1. The ixi-UMS Voice-Mail Server is controlled through DTMF sequences. Therefore you can only retrieve messages from a DTMF enabled telephone
- 2. If you use a hands-free telephone, you may encounter the effect that options in the ixi-UMS Voice-Mailbox menus are chosen arbitrarily without interaction from your side. The reason for this effect is that some tones in the announcement or menu voice are detected as DTMF. Turn down the volume of the phone or use the handset to avoid this problem.
- 3. The system can be set up at the server in a way that a global announcement valid for all the users is used. In this case, you can deposit your own announcement; however, this announcement might not be played. Please ask your administrator.
- 4. You can load existing announcements as a wav file into your ixi-UMS Voice-Mailbox.

 These announcements must be recorded with ixi-UMS or be in one of the following formats:

Variant 1: G.711 (u-law oder a-law) 1 Kanal (Mono) Sampling Rate 8 KHz Bits per sample: 8 Bit Variant 2:
PCM
1 Kanal (Mono)
Sampling Rate: 8 KHz
Bits per sample: 16 Bit

Notes on call forwarding

If call forwarding is set up, the caller can decide whether to leave a message or to connect to another number (for example, your phone). The ixi-UMS Voice-Mail Server offers two options:

- 1) The required selection for the caller is played by the server (mandatory for personalized announcement) or
- 2) You must offer the selection to the caller in your individual announcement additionally.

1. The selection is played from the server

In this case, the caller first plays the announcement you have stored. Thereafter, the following options are played by the ixi-UMS Voice-Mail Server:

"Press "1" to leave a message or "2" to be transferred to <description text> or <phone number>."

With this setting, you should record a description text in order that the caller is informed about to whom he is transferred. Please note that this greeting cannot be created via TTS.

This variant is mandatory for you if you use a "personalized" announcement.

2. The selection is offered by your individual announcement -

You have to record the selection "Press "1" to leave a message or "2" to be transferred to XXX" along with your announcement.

There is no announcement or selection imported from the server.

8 Info

8.1 About estos



Estos GmbH, headquartered in Starnberg near Munich, Germany, is a leading manufacturer of software solutions with focus on unified communication with unified messaging and CTI (Computer Telephony Integration). The products of estos IXI-UMS support existing standards like standard interfaces and standard hardware; proprietary solutions are avoided. The company strives to provide its customers with future-oriented product development, with a focus on integration in available environments.

Contact details:

estos GmbH Petersbrunner Str. 3a 82319 Starnberg Germany

Tel: +49 (8151) 36856-177 Fax: +49 (8151) 36856-199 E-mail: <u>info@estos.de</u> Web: <u>www.estos.com</u>

For more information about estos and its products, please visit estos website.

© estos GmbH. All rights reserved. Changes, errors and misprints reserved. Product names are registered trademarks or trademarks of their respective owners. The terms of business of estos GmbH come into force.

8.2 Version

Software: ixi-UMS Portal Server Guide: ixi-UMS User Portal

Version: 7.10 Date: 23.03.2021