ixi-UMS Business Portal

User Guide

Onlineversion

Content

1 Introduction

The ixi-UMS Business Portal provides you with web applications to display and configure your ixi-UMS Business functions. The options available to you depend on the settings on the ixi-UMS Business server.

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

- at least Microsoft Internet Explorer 11
- Microsoft Edge
- at least Mozilla Firefox 68
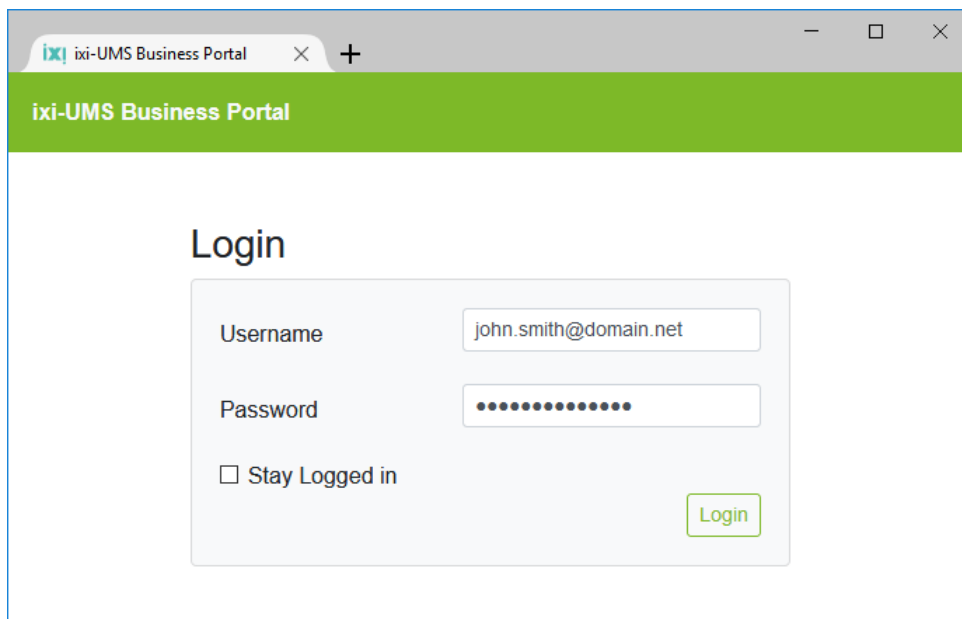- at least Google Chrome 78

2 Login

The link to open the ixi-UMS Business Portal will be given to you by your administrator or in the welcome- or info-mail.

You must always enter your e-mail address for registration. Depending on your user management, you have received a special password from your administrator or use your "Windows - Password" to log on to the server

Example:
E-Mailadresse: john.smith@domain.net
Password: xxxxxxx

After registration the following modules may be available to you:

ixi-UMS Web Journal
- View incoming messages and confirmations in the ixi-UMS Web Journal
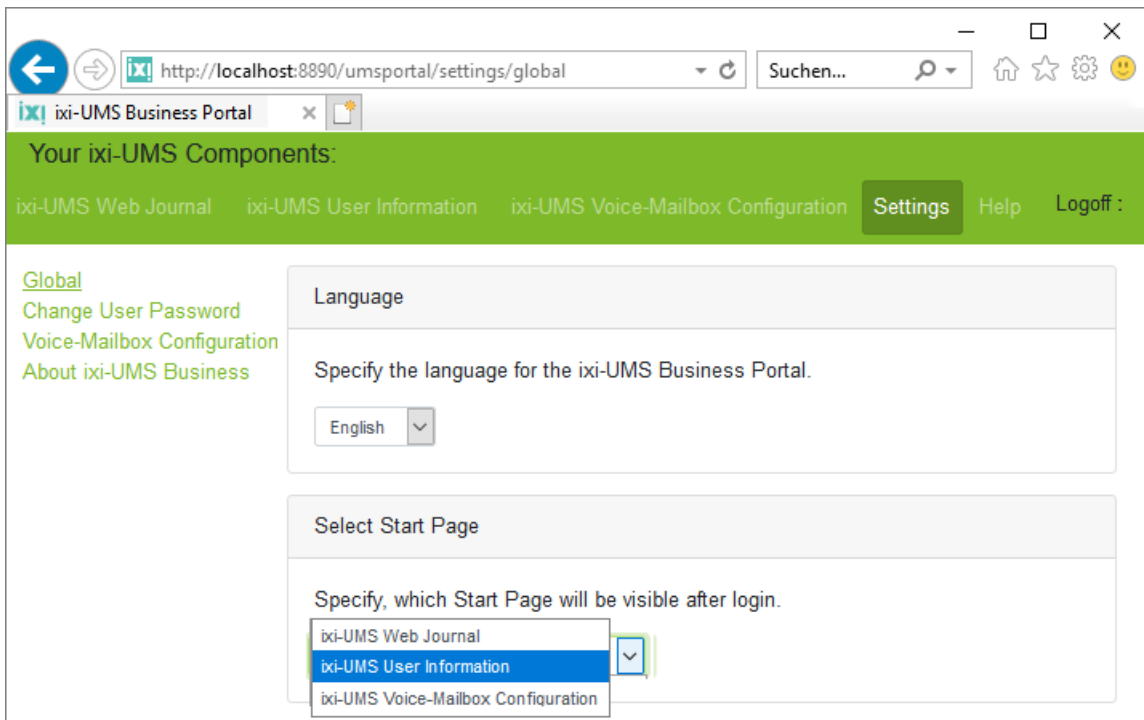
ixi-UMS User Information
- Information about permissions for Fax, SMS, Voice permissions.

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.

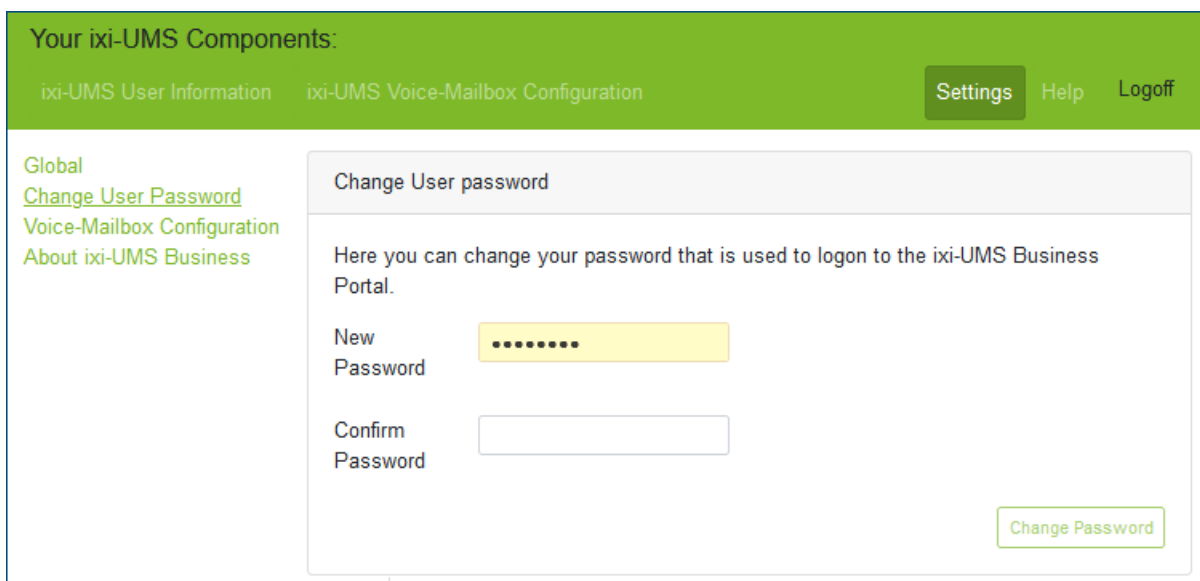

You can change these settings at any time.
Please note: These settings are stored in your browser. If you change your workstation or browser, you will have to set these settings again.

In the upper part the available web pages are offered to you as tab.
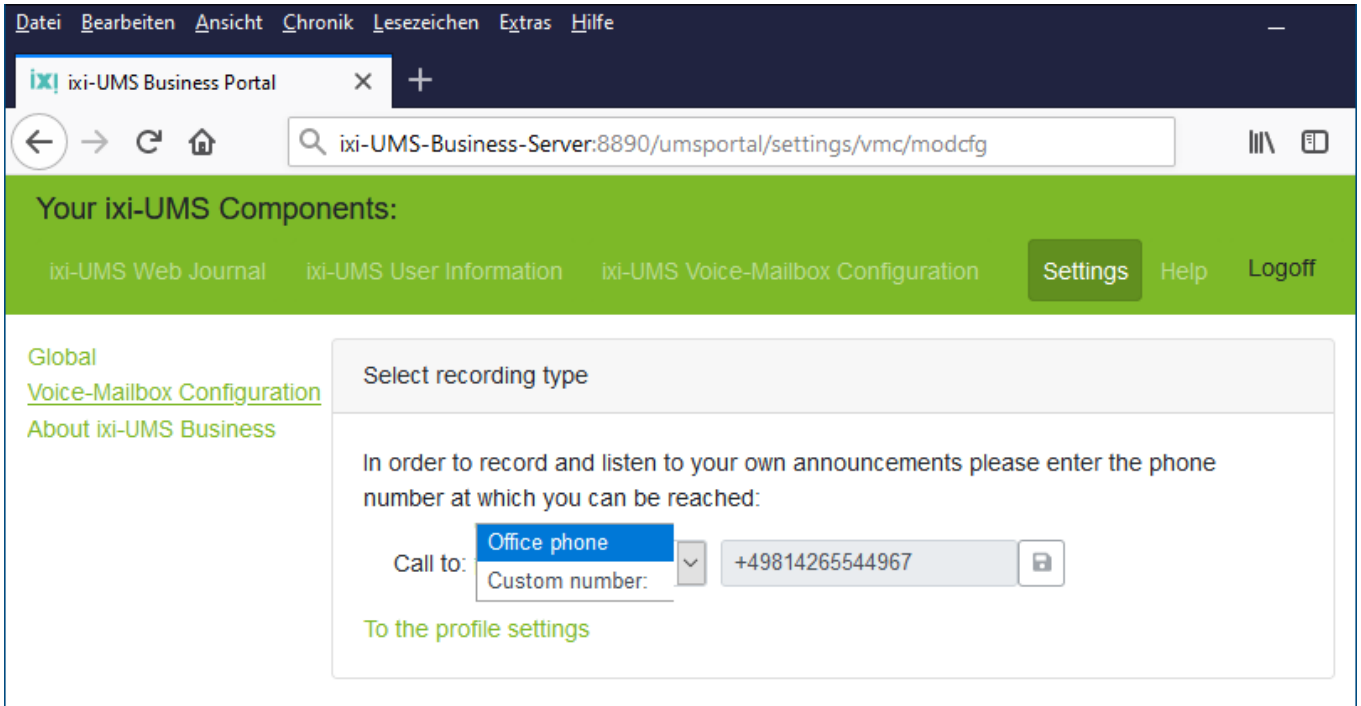
4 Change User Password

This menu item is only available if you have received a password required for login in the info mail.
In this case you can change the password for the login at ixi-UMS Business Portal here.

5 Recording mode for the voice-mailbox

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

To record announcements over a phone ixi-UMS Business must call you. By default ixi-UMS Business 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 Business 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.

6 ixi-UMS Web Journal

In the "ixi-UMS Web Journal" you can check all incoming and outgoing ixi-UMS Messages and open them if necessary. Whether you can open, view or save your ixi-UMS Messages depends on the settings on the ixi-UMS 7 Business server.

You can mark the entries "as read" 🖂 or "as unread" 🖂 or hide them in the journal 🚫.

Via the Details button you can view further information on the messages and open the messages

If the option "Archive all files" is activated in <%PRODUCTNAME%>, you can print or save incoming and outgoing faxes and SMS including the report and listen to voice messages left by callers.

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.
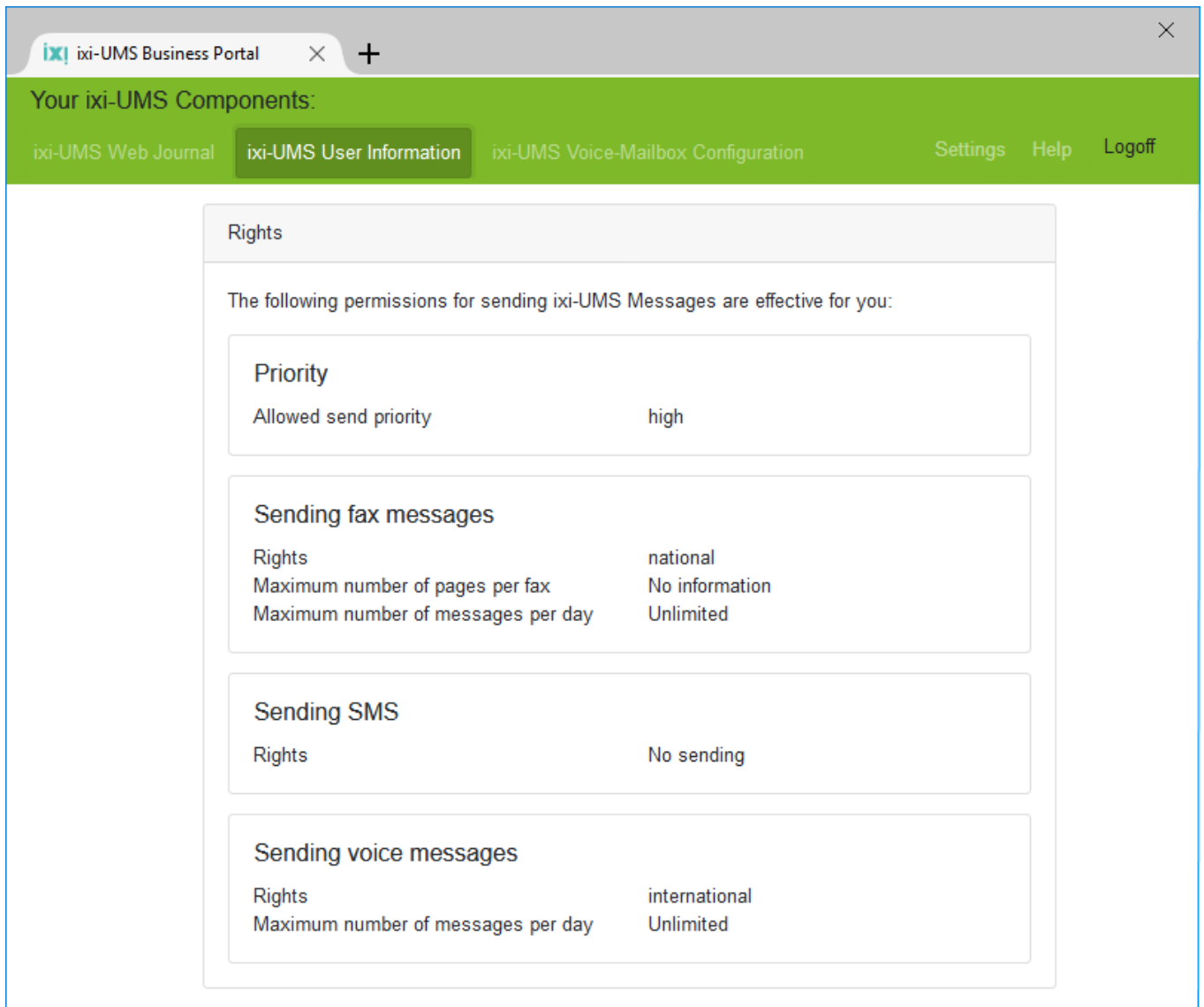
Details for received call

Sender:	+4917297454
Recipient:	+49 8142 48384562
Transmission time:	12:51:53 02.Jul.2019
Subject:	-
Result:	-

[Save voice message] [Play voice message] [Print details]

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

7 ixi-UMS User Information

In the ixi-UMS User Information you can see the permissions for the Fax, SMS and Voice functions defined by the administrator in ixi-UMS Business.

8 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 Business Portal.

The configuration options offered in the ixi-UMS Voice-Mailbox configuration depend on the settings in the ixi-UMS Business server and the rights assigned to you.

8.1 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 L**ogoff** and switch to the ixi-UMS Business Portal Settings.

Set Profiles

Determine which profiles should be used:

Default profile (active) [Work ▼]
Edit profile
✓ announcement in German available
✓ announcement in English available
✓ callers are able to leave messages
✗ call forwarding is inactive

Profile used outside office hours [Mobile ▼]
Edit profile
✓ announcement in German available
✗ no announcement in English available
✓ callers are able to leave messages
✗ call forwarding is inactive

Profile used during breaks [None ▼]

Divergent profile for internal callers is active:
Edit profile
✓ announcement in German available
✓ announcement in English available
✓ callers are able to leave messages
✗ call forwarding is inactive

Set Profiles

The D**efault 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.

Valid for all profiles

Selection of announcement language
⦿ defined: [German ▼]
○ manual ("Press one for german, press two for english")

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.

Informations about your voice-mailbox

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

Informations about your voice-mailbox

Your access to the voice-mailbox includes
✓ configuration
✓ remote inquiry

Determine the menu language [German ▼]

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

8.2 Profile Management

On this page you can configure your profiles. Select the profile you want to configure.

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.

Evening profile
Office hours are fixed at ixi-UMS 7 Business from 8 am - 5 pm. You can enter the profile that is active after office hours here. You can change the office hours if necessary.

8.2.1 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 telephone, upload ⬆ a Wav file with your greeting to ixi-UMS Voice-Mail Server or save it ⬇ on your PC, delete 🗑 the greeting file or convert the entered text into a greeting using "Text-to-Speech".
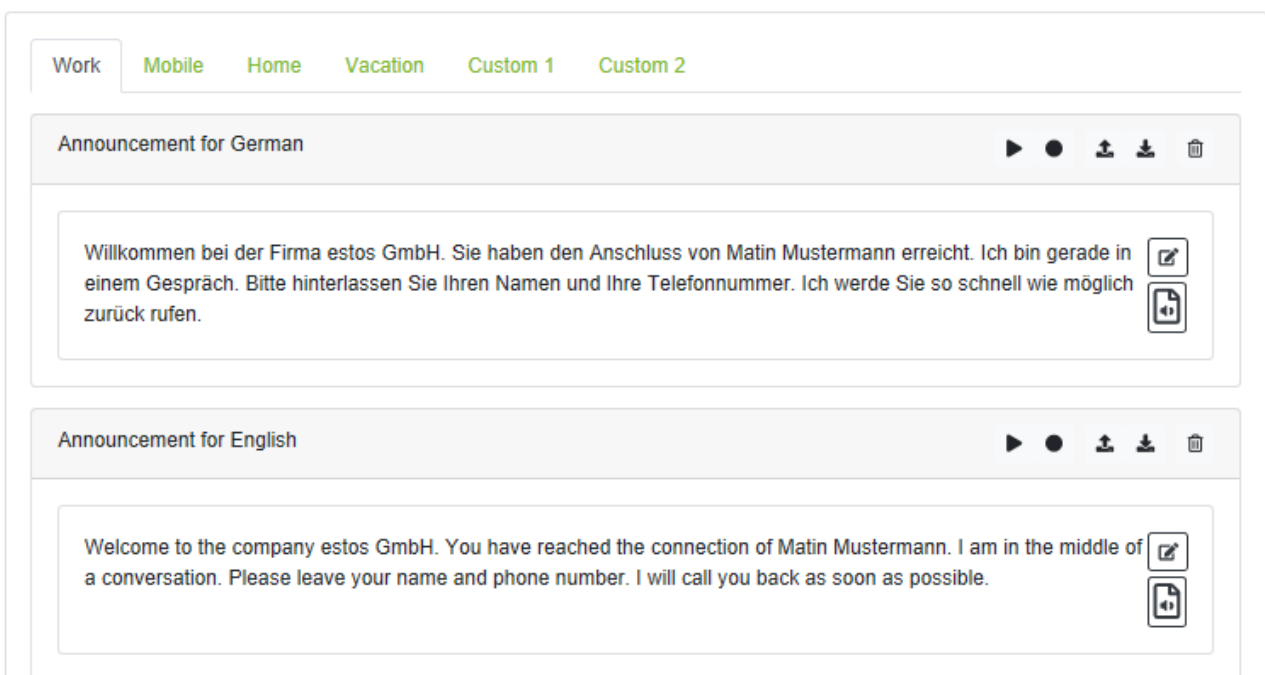
Please note:
If you set up "call forwarding", this option is offered to the caller. In this case you should record a description text for the destination.

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 set the functions/options of the voice mailbox.

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. ▶.

Work	Mobile	Home	Vacation	Custom 1	Custom 2

Announcement for German   ▶ ● ⬆ ⬇ 🗑

Willkommen bei der Firma estos GmbH. Sie haben den Anschluss von Matin Mustermann erreicht. Ich bin gerade in einem Gespräch. Bitte hinterlassen Sie Ihren Namen und Ihre Telefonnummer. Ich werde Sie so schnell wie möglich zurück rufen. 📝 📄

Announcement for English   ▶ ● ⬆ ⬇ 🗑

Welcome to the company estos GmbH. You have reached the connection of Matin Mustermann. I am in the middle of a conversation. Please leave your name and phone number. I will call you back as soon as possible. 📝 📄

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

Record announcement

To record the greeting via the telephone 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 recording device is stored under Settings.

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.

Use existing announcement

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

8.2.2 Voice-Mailbox settings

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.

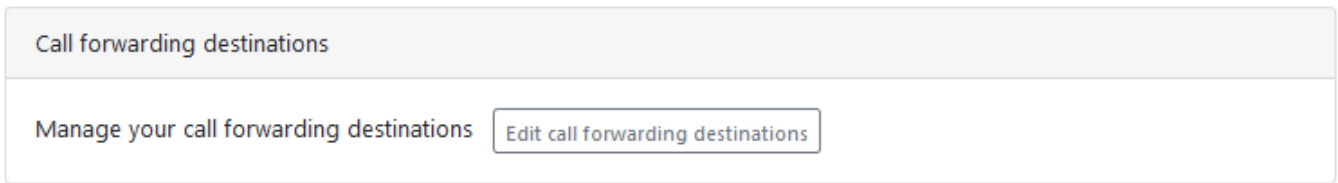Activate call forwarding by selecting a stored phone number.
You can select the numbers stored on the ixi-UMS Business for your home phone and your mobile phone and set your own call forwarding numbers under "Edit call forwarding destinations".

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. Refer to the ixi-UMS Voice-Mailbox manual for more information on settings via telephone.

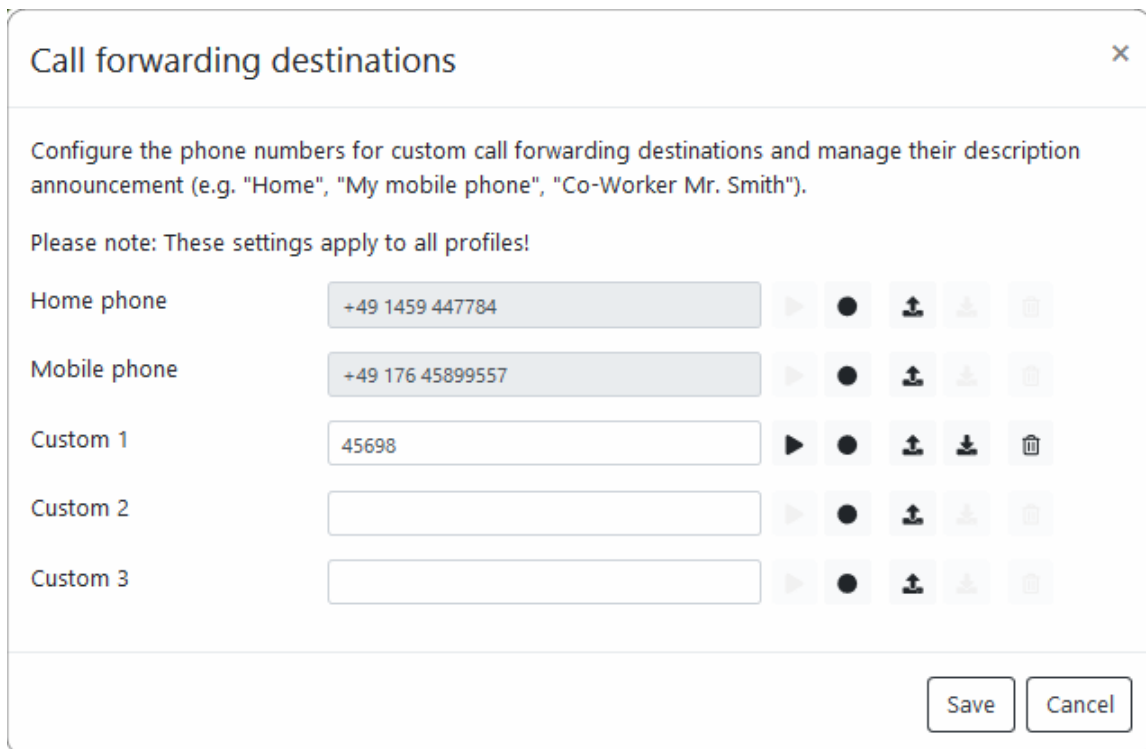You need to enter a descriptive text for each destination.

8.2.3 Call forwarding destinations

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.

Please note that with "call forwarding" your announcement changes when you call the voice box. The caller is offered a menu for selection:
"Press 1 to leave a message. 2 to forward the call to < the fixed number>"

Optionally, you can record a descriptive text. In this case, your greeting is played instead of the phone number you specified as forwarding destination.

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 recording device, click on the button ⬤. This opens a dialog with all required information.

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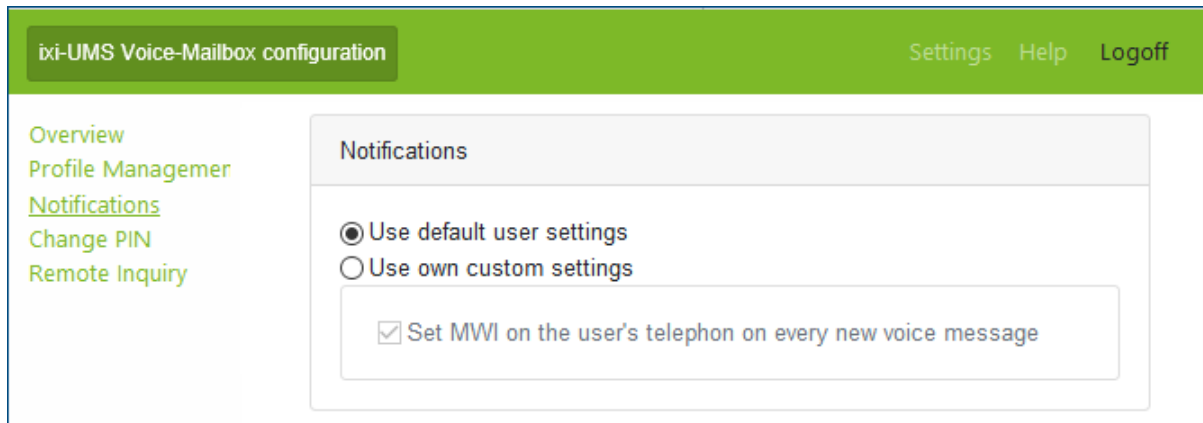Please read the notes under Important Notes

After saving the settings, the numbers are available to you for selection via the browser-based <ixi-UMS Voice-Mailbox Configuration.
When setting up call forwarding over the telephone, the destination and announcement must be defined independently of this.

8.3 Notifications

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

You can be informed about new ixi-UMS voice-messages received by lamp on your phone (MWI).
Please follow your administrator's information as well.

When the messages are accessed via ixi-UMS Business (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.

8.4 Office Hours

Optionally you will see the "office hours". In this case, you can adjust your working hours yourself..

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.

You can set the profiles in the overview of the ixi-UMS Voice-Mailbox Configuration.

On ixi-UMS 7 Business times from 8 o'clock - 17 o'clock 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

If office hours are not displayed, ask your administrator if the office hours are active and how they are set.

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

8.5 Change PIN

Wenn Sie das erste Mal einen Anruf auf Ihrer ixi-UMS Voice-Mailbox - Ihrem "Anrufbeantworter" - bekommen, erhalten Sie eine E-Mail mit der für Sie automatisch generierten gültigen PIN.
In this menu, you can change your PIN easily and quickly.

8.6 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.

"**Reset settings**" will delete your password in ixi-UMS Business system and the default settings stored on the ixi-UMS Business will be valid.

8.7 Important note

Announcements and recordings

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

1. The ixi-UMS Voice-Mailbox 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 Business or be in one of the following formats:

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

9 Info

9.1 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.

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

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9.2 Version

Software: ixi-UMS 7 Business
Guide: ixi-UMS Business Portal
Version: 7.00
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