

## COMMON TOOLS

Polycom Phones

### Blind Transfer (no consultation-IP phones)

While on an active call, press the Transfer soft key (LCD display), press Blind and the extension.

### Consultative Transfer

While on an active call, press the Transfer soft key (LCD display), dial extension, announce call, hit Transfer again to complete or Cancel to take the call back.

### Conference Call (3-way initiation)

While on an active call, press the Conference soft key, dial the extension or number desired, announce call, and press the Conference button again to join all 3.

### Conference Call (join 2 existing)

While on an active call, press the More soft key, then the Join soft key. All parties will be joined on a 3-way call. To break the parties up, press the Split soft key and they will be separated.

### Transfer Direct to Voice Mail

To transfer a caller directly to someone's voice mail Press the Transfer key, then press feature code \*55 and then the extension.

*See your administrator for a complete list of available feature codes.*

### A copy (or all) of Voice Mails can be sent to your email.

Ask your administrator.

## PERSONAL VOICE PORTAL

### First Log in With Voice Portal

Dial your phone number/extension or the voice portal number/extension (999) or hit the message button on your Polycom, and then:

1. If requested, enter your phone number.
2. Enter a new pass code at the (voice portal wizard) prompt.
3. Re-enter your pass code at the prompt.
4. Record your name at the prompt.
5. Press #.

### Accessing the Voice Portal

You can access your personal voice portal using your own phone, or another phone.

To log in, dial one of the following:

- Your phone number/extension
- Group voice portal number/extension
- Message button on phone (Polycom)
- Location code/extension
- Enterprise voice portal number/extension (if enabled)

Your administrator provides you with the phone number/extension for the group and/or enterprise voice portals. (This guide refers to both as the voice portal number/extension.)

**NOTE:** Your voice portal may be configured with keypad numbers and menus different from those listed on this card. If so, please see your group administrator for more information.

### Log In

**Dial your phone number/extension, and then:**

From your own phone:

1. Enter the correct pass code to reach the Voice Messaging Main Menu.
2. At Voice Messaging menu, press \* to reach the Voice Portal Main Menu.

**From your own phone with auto login enabled:**

1. At Voice Messaging menu, press \* to reach the Voice Portal Main Menu.

**From a phone other than your own:**

1. Press \* during your outgoing greeting to reach the login prompt.
2. Enter the correct pass code to reach the Voice Messaging Main Menu.
3. At the Voice Messaging menu, press \* to reach the Voice Portal Main Menu.

**Dial the voice portal phone number/extension (999), and then:**

From your own phone:

- Enter the correct pass code to reach Voice Portal Main Menu.

**From your own phone with auto login enabled:**

- Select a menu item from the Voice Portal Main Menu.

**From a phone in your group other than your own:**

1. Press \* during the greeting to reach the Voice Portal login prompt.
2. Enter your phone number/extension.<sup>†</sup>
3. Enter the correct pass code to reach the Voice Portal Main Menu.

**From a phone outside of your group:**

1. Enter your phone number/extension.<sup>†</sup>
2. Enter the correct pass code to reach Voice Portal Main Menu.

**From a phone outside of your group with auto login enabled:**

- Enter your phone number/extension to access the Voice Portal Main Menu.<sup>†</sup>

<sup>†</sup> Option: If allowed, enter your number including the area code or a Voice Mail Alias followed by the pound key #.

**Hit the Messages button on your Polycom phone for direct access to the voice messaging system:**

**From your own phone with auto login enabled:**

- Select a menu item from the Voice Portal Main Menu.

**From your own phone without auto login enabled:**

From your own phone:

3. Enter the correct pass code to reach the Voice Messaging Main Menu.
4. At Voice Messaging menu, press \* to reach the Voice Portal Main Menu.

### Leaving Messages for Other Users

**During greeting:**

#	Interrupt the greeting and start recording voice or video message
*	Transfer out of greeting to Voice Portal password prompt.
0	Transfer out of greeting to configured number

**While recording message:**

*	Cancel recording and transfer to Voice Portal password prompt
0	Cancel recording and transfer to configured number
#	Stop recording and review message

# Personal Voice Portal

## While reviewing message:

1	Erase message and record again
2	Listen or view current message
3	OR hang up to send message
6	Set or clear the urgent indicator
7	Set or clear the confidential indicator
*	Cancel recording and transfer to Voice Portal password prompt
0	Cancel recording and transfer to configured number
#	Repeat menu

## Voice Portal Main Menu

1	<b>Access Voice Messaging</b> †
2	Change CommPilot Express Profile †
3	Record Personalized Name
4	Change Call Forwarding Options †
	Route Call to External Device (optional)
6	Make Calls †
7	Access Hoteling †
8	Change Passcode
9	Exit
#	Repeat menu

† These options are provided only if their services have been assigned to you.

## Voice Messaging

1	<b>Play Messages (see Play Messages table below)</b>
2	Busy Greeting Menu (see <b>Busy Greeting</b> table below)
3	No Answer Greeting Menu (see <b>No Answer Greeting</b> table below)
5	Compose Message Menu (see <b>Compose Message</b> table below)
7	Delete All Messages
	Passcode (optional)
	Personalized Name (optional)
*	Return to previous menu
#	Repeat menu

## Play Messages Menu

#	<b>Save message</b>
7	Delete message
2	Play or repeat message; skip envelope
4	Play previous message
5	Play message envelope
6	Play next message
8	Initiate call to sender
	Compose message (optional)
	Reply message (optional)
	Forward message (optional)
9	Hear additional options (see <b>Additional Options</b> table below)
	Personalized Name (optional)
	Passcode (optional)
*	Return to previous menu
	Repeat menu (optional)

## While playing messages:

1	<b>Skip backward 3 seconds</b>
2	Pause playback
3	Skip forward 3 seconds
4	Skip to beginning of message
6	Skip to end of message

NOTES: You can interrupt the message or envelope to perform any function.

New messages flagged as urgent are played first.

## Additional Options

	<b>Save Message (optional)</b>
	Delete Message (optional)
	Play Envelope (optional)
	Call Back Caller (optional)
	Compose message (optional)
1	<b>Reply to message (see Reply to Message table below)</b>
2	Forward Message (see <b>Forward Message</b> table below)
	Personalized Name (optional)
	Passcode (optional)
*	Return to previous menu
#	Repeat menu

## Reply to Message

3	<b>Send reply</b>
1	Change current reply
2	Listen to current reply
6	Set or clear urgent indicator
7	Set or clear confidential indicator
*	Return to previous menu
#	Repeat menu

## Forward Message

3	<b>Send message to specific group members</b>
4	Send message to entire group
5	Send message to distribution list (option offered only if enabled. See <b>Select Distribution List</b> table below.)
1	Change current introduction
2	Listen to current introduction
6	Set or clear urgent indicator
7	Set or clear confidential indicator
*	Return to previous menu
#	Repeat menu

NOTES: Messages marked confidential cannot be forwarded.

If you have an Enterprise Voice Portal, you can forward messages to others outside your group but not the entire group.

## Select Distribution List

0	<b>Select distribution list 0</b>
1	Select distribution list 1
2	Select distribution list 2
...	Distribution lists are numbered consecutively from 0 to 15
15	Select distribution list 15
*	Return to the previous menu
#	Repeat menu

## Distribution List Menu

3	<b>Send the message to selected list</b>
1	Select another distribution list
2	Review the selected distribution list
*	Return to the previous menu
#	Repeat menu

## Busy Greeting Menu

1	<b>Record new Busy Greeting</b>
2	Listen to current Busy Greeting
3	Revert to system default Busy Greeting
*	Return to Voice Messaging Main Menu
#	Repeat menu

## No Answer Greeting Menu

1	<b>Record new No Answer Greeting</b>
2	Listen to current No Answer Greeting
3	Revert to system default No Answer Greeting
*	Return to previous menu
#	Repeat menu

# Personal Voice Portal

## Compose Message

3	<b>Send message to specific group member(s)</b>
4	Send message to entire group
5	Send message to distribution list (option offered only if enabled. See <b>Select Distribution List</b> table below.)
1	Change current message
2	Listen to current message
4	Send message to entire group
5	Send message to distribution list (if configured)
6	Set or clear urgent indicator
7	Set or clear confidential indicator
*	Return to Voice Messaging Main Menu
#	Repeat menu

**NOTE:** In an Enterprise Voice Portal, you can send messages to others outside of your group but not the entire group.

## CommPilot Express<sup>†</sup>

1	<b>Activate “Available – In Office” Profile</b>
2	Activate “Available – Out of Office” Profile
3	Activate “Busy” Profile
4	Activate “Unavailable” Profile
5	No Active Profile
*	Return to Voice Portal Main Menu

<sup>†</sup> If you use a traditional telephone, you use CommPilot Express SR. For more information, see the *CommPilot Express SR* service configuration web page.

## Personalized Name

1	<b>Record new Personalized Name</b>
2	Listen to current Personalized Name
3	Delete Personalized Name
*	Return to Voice Portal Main Menu
#	Repeat menu

## Call Forwarding

1	<b>Activate Call Forwarding</b>
2	Deactivate Call Forwarding
3	Change forwarding destination
4	Listen to forwarding status
*	Return to Voice Portal Main Menu
#	Repeat menu

### Forwarding Destination

#	<b>Enter forward to number, followed by the pound key</b>
*	Return to Call Forwarding Menu

## Make Calls

	<b>Enter the destination digits. While engaged in a call, press ## to terminate and make another call</b>
#	Return to Voice Portal Main Menu

## Passcode

#	<b>Enter new pass code, followed by the pound key</b>
*	Return to previous menu

## Auto Attendant Greetings

In order to update the organizations Business Hours or After Hours greeting you must call the Voice Portal from a phone **without** auto login enabled.

	<b>Dial 999(9) depending on your organizations extension digit length, to reach the Voice Portal</b>
*	Press the star key as prompted since you are not calling from your own phone. You are the Auto Attendant now and do not have a phone.
	Enter the mailbox ID of the Voice Portal, 999(9)# 3 or 4 digit extension followed by the # key
	Enter the Group Voice Portal Passcode (see your administrator)
1	To change your AA message(s)
1	To change Business Hours message
2	To change After Hours message
	Follow prompts to review, hang up, and test. Reviews switch settings to insure they match new greeting.