

Kerio Operator

User Guide

Kerio Technologies

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This guide provides detailed description on *Kerio Operator*, version 1.0. All additional modifications and updates reserved.

For current versions of the product and related manuals, check

<http://www.kerio.com/operator/download/>.

Information regarding registered trademarks and trademarks are provided in appendix [A](#).

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Chapter 1

Introduction

Kerio Operator is a PBX which allows telephone calls either over SIP protocol or using the standard digital telephony ISDN (PRI/BRI). Besides management of calls, *Kerio Operator* allows to create conferences, manage call queues, create automated voice menus as well as for example configure specific types of hardware IP telephone devices. In short, *Kerio Operator* is a complex solution for your telephony.

1.1 Additional documentation

In addition to this document (*Kerio Operator, User Guide*), the following documentation goes hand in hand with *Kerio Operator*:

- [Kerio Operator, Administrator's Guide](#) — this document focuses on installation and advanced configuration of the *Kerio Operator* PBX.
- [Kerio Operator, Step-By-Step Guide](#) — this document focuses on installation and basic configuration of the *Kerio Operator* PBX.

Besides the documentation, you can also target various issues by referring to:

- The context help is built in the product.
- Product forum — in this discussion, you can encounter experience and problems of other administrators using the same product. You may find a working solution for your issues [here](#).
- Knowledge Base — here you can find a set of articles troubleshooting particular problems.

Chapter 2

Authentication to Kerio MyPhone

Kerio Operator enables every user with an account to login to the server and work with their voicemail. It also allows further configuration of the phone account.

The configuration is done through the *Kerio MyPhone* web interface. Login to your account as follows:

1. Ask you administrator to provide you with the URL or server name of the *Kerio MyPhone* login page and authentication details for your account.
2. Start a web browser (we recommend to use one of the supported browsers — see chapter [2.2](#)).
3. Enter the URL or server name in the address field.
4. If a correct URL is entered, an authentication page is opened requiring a username and a password. To access the account, click on *Login* (see figure [2.1](#)).

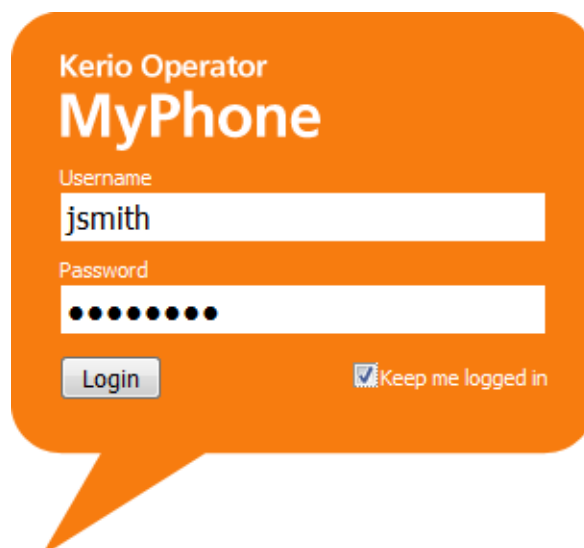
The image shows a login form for 'Kerio Operator MyPhone'. The form is contained within an orange speech bubble shape. At the top, it says 'Kerio Operator' in a small font and 'MyPhone' in a large, bold font. Below this, there are two input fields. The first is labeled 'Username' and contains the text 'jsmith'. The second is labeled 'Password' and contains a series of black dots. Below the password field is a 'Login' button. To the right of the 'Login' button is a checkbox labeled 'Keep me logged in'.

Figure 2.1 Login to Kerio MyPhone

2.1 Logout

Users should always log out when they finish working in *Kerio MyPhone*. To log out, use the *Logout* link in the upper right corner of the window. After logout, users get disconnected from *Kerio Operator* immediately, which prevents misuse of such connection.

2.2 Supported browsers

The full version of *Kerio MyPhone* supports the following browsers:

- Firefox 3.0, 3.5 and 3.6
- Internet Explorer 7 and 8
- Safari 4 and 5

Chapter 3

Dialing numbers

Dialing of numbers is available to all users who use software or hardware phone which has an extension of the *Kerio Operator* PBX configured. If the telephone is running, it is possible to dial the called number over *Kerio MyPhone*. The benefits are as follows:

- If you do not remember the callee's extension, simply use their name (in case that an extension is assigned to the name in the PBX). Automatic lookup finds any extension associated with the specified name and offers them for dialing (see figure 3.1).
- It is possible to look a number up in your computer, copy it and paste it to the field for definition of the called person.

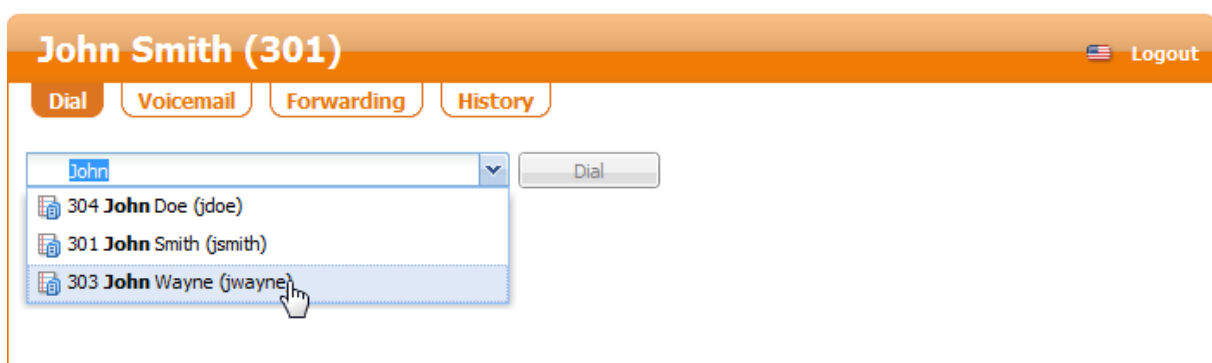


Figure 3.1 Dialing numbers

3.1 How it works

Dialing in *Kerio MyPhone* works on callback basis. This means that *Kerio MyPhone* connects directly with the PBX and the PBX contacts back your phone. Therefore, the side effect of this operation is that upon clicking on *Dial*, your phone starts to ring as well as the called person's one. Pick it up and wait for the called person to answer.

Chapter 4

Voicemail

Voicemail allows callers leave a voice message for the called person. It works similarly as a hardware message recorder but messages are stored on the server and they can be forwarded to user email boxes.

Voicemail allows:

- to redirect calls to voicemail if you are not available,
- to redirect calls to voicemail if your extension is busy,
- to access voicemail directly,
- to send voice messages to your email box.

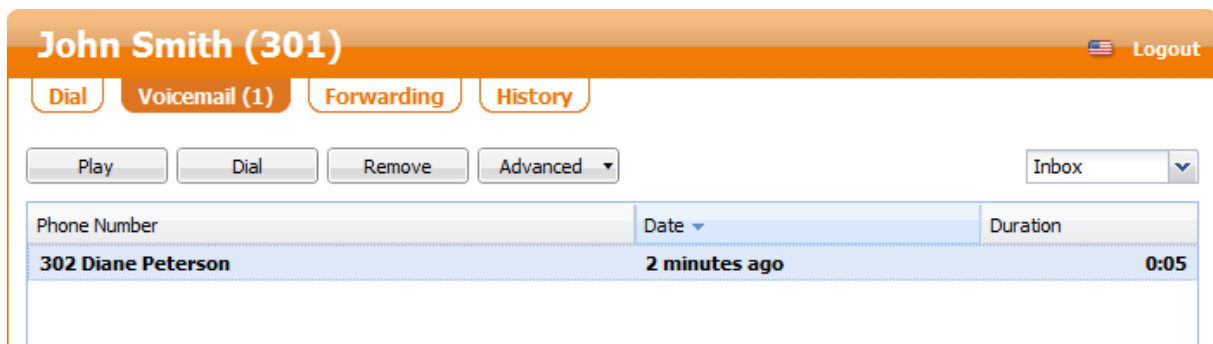


Figure 4.1 Voicemail

4.1 Accessing voicemail

You can access your voicemail by several methods:

- On the phone where your *Kerio Operator's* extension is set, enter voicemail number (you get this number from your network administrator) and play the message.
- In the *Kerio MyPhone* interface (for details, see section [4.2](#)).
- By forwarding voicemail to your mailbox (to get more information on this option, contact your network administrator).

4.2 Voicemail Management

You can administer your voicemail in the *Kerio MyPhone* interface. Login to the interface and go to the *Voicemail* tab.

On this page, you can *Play* or *Remove* select message or *Dial* its caller. You can also keep messages in the box and use various criteria to sort them in folders. You can do this by clicking on *Advanced* → *Move To*. This option opens a list of folders where messages can be sorted.

Messages in *Kerio MyPhone* can be marked as read. To do it, select the message and choose *Advanced* → *Mark as Read*.

Note: If your company uses *Kerio Connect* server for email communication and you also use integration with *Kerio Connect*, information about voicemail status (played, new) will be synchzonized..

Content of folders where played messages are stored can be viewed via option in the top right corner of the window (see figure 4.2).

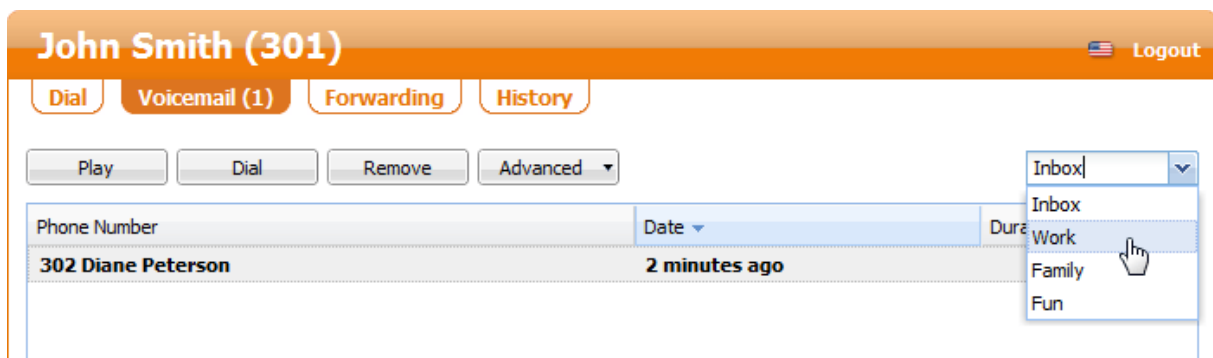


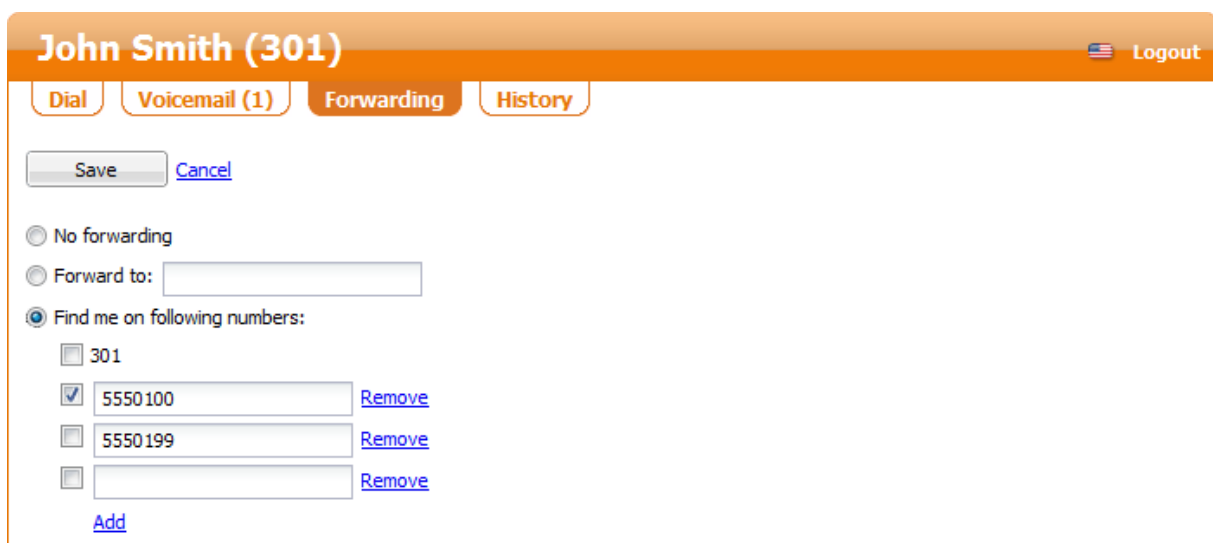
Figure 4.2 Voicemail folders

Note: In *Kerio MyPhone*, it is also possible to control the voicemail box by using the standard context menu. You can open it by right-clicking on a message.

Chapter 5

Redirecting Calls

In *Kerio MyPhone* you can set redirecting of calls to other telephone numbers. It is either possible to redirect them in a way that either these calls will not even ring on the particular extension or they will ring on multiple telephones at a time.



The screenshot shows the 'John Smith (301)' user interface. At the top, there's a header with the user's name and a 'Logout' button. Below the header are four tabs: 'Dial', 'Voicemail (1)', 'Forwarding', and 'History'. The 'Forwarding' tab is selected. Below the tabs, there are 'Save' and 'Cancel' buttons. The main content area has three radio button options: 'No forwarding', 'Forward to:', and 'Find me on following numbers:'. The 'Find me on following numbers:' option is selected. Below this, there is a list of numbers with checkboxes and 'Remove' links. The numbers are '301', '5550100', '5550199', and an empty field. The '5550100' and '5550199' numbers have their checkboxes checked. There is an 'Add' link at the bottom of the list.

Figure 5.1 Redirecting Calls

Advantages of this service are described in the following example:

A salesman does not spend much time in his office. He is often out of the company's office to deal with partners. On his desk, there is an IP telephone connected to *Kerio Operator*, with extension number 212. To be available even outside the office, the salesman has connected to *Kerio MyPhone* and configured forwarding of all calls on 212 to the number of his mobile phone. This setting makes all calls ring in his office first and after a defined no-answer period they get redirected to his mobile phone.

This configuration can be set as described here:

1. Go to the *Kerio MyPhone* interface (see chapter [2](#)).
2. Go to the *Forwarding* tab (see figure [5.1](#)).
3. Check option *Forward To* and enter the telephone number where the calls are suppose to ring.

-
4. If you want the calls to ring also on the original extension, enable option *Find me on the following numbers* and check the extension. This option allows specification of multiple extensions where calls will ring.
 5. Changes must be saved to take effect.

Chapter 6

History

Kerio MyPhone records all answered and unanswered calls. The icon with the colored arrow at the beginning of the call record tells us whether the call was incoming or outgoing.

History can be used to dial any of the numbers (this option is useful especially for missed calls):

1. Double-click on the line with the particular call record.
2. The application will switch to the *Dial* tab automatically and presets the required number in the corresponding field.
3. Click on *Dial*.

Upon clicking on *Advanced* → *Delete All* you can delete all recorded calls from the list.¹

Note: In *Kerio MyPhone*, it is also possible to control the history by using the standard context menu. You can open it by right-clicking on a call.

¹ The call record is actually not removed completely but hidden only. AT the *Kerio Operator* all calls will remain recorded and they will continue being displayed in the *Kerio Operator Administration*.

Chapter 7

Telephone Conferences

Telephone conferences are calls with more than two participants.

Telephone conferences allow participation both of users defined in *Kerio Operator* and external participants. To join the particular conference it is only necessary to enter conference number and possibly also its access code.

If you need to create a new conference and/or get the access code, contact your *Kerio Operator* administrator.

To join a conference, follow these steps:

1. Dial the conference telephone number / extension.
2. If the conference is protected, you will be asked to enter the PIN.

To leave the conference, simply close the call.

Chapter 8

Language Settings

Kerio Operator users and administrators can set what language will be used in the application.

8.1 Kerio MyPhone Language Settings

Kerio MyPhone language localization can be set in the right top corner of the window:



Figure 8.1 Interface language selection

1. Click on the flag indicating the currently used language version.
2. In the menu, select the language you want to use (see figure [8.1](#)).

The following languages are currently available:

- English
- Czech
- German

8.2 Setting PBX language

In *Kerio Operator*, it is possible to change so called system language of the PBX. This setting applies especially to voice records, notifications and guidelines used for communication with the PBX users. One of these records is for example the voice guide you hear when you call your voicemail box.

System language cannot be changed in *Kerio MyPhone* but you can ask your administrator for the change if you find it helpful. You can select from the following languages:

- English (British, American)
- Czech
- German

Chapter 9

Configuring software phones

This chapter provides setting guidelines for the most common software telephones:

- X-Lite,
- Ekiga,
- SJphone.

9.1 Information you need for connection of any software telephone

To configure a software phone, ask your network administrator for the following information:

- IP address or DNS name of the computer with *Kerio Operator*.
- Your extension number (double or triple-figure internal telephone number).
- Username and SIP password associated with your phone extension (provided by your administrator). Note that the SIP password does not have to match the password used for connection to *Kerio MyPhone*.

9.2 X-Lite

It is supposed that:

- The software phone has been already installed on your computer,
 - you already have any information necessary for connection of the telephone (see section [9.1](#)).
1. Run the application and wait for the telephone to display on your screen.
 2. Click on the configuration button (shown in figure [9.1](#)) and in the menu just opened, select *SIP Account Settings*.
 3. The *SIP Accounts* table shows. Click on the *Add* button to create a new account.
 4. This open the *Properties of Account* dialog.
 5. Enter your first and second name in the *Display Name* entry.

Configuring software phones

6. Enter your telephone extension in the *User name* entry.
7. In the *Password* field, enter the password provided by your administrator.
8. In the *Domain* entry, specify IP address or DNS name for the computer where the PBX is running.



Figure 9.1 X-Lite — SIP Account Settings

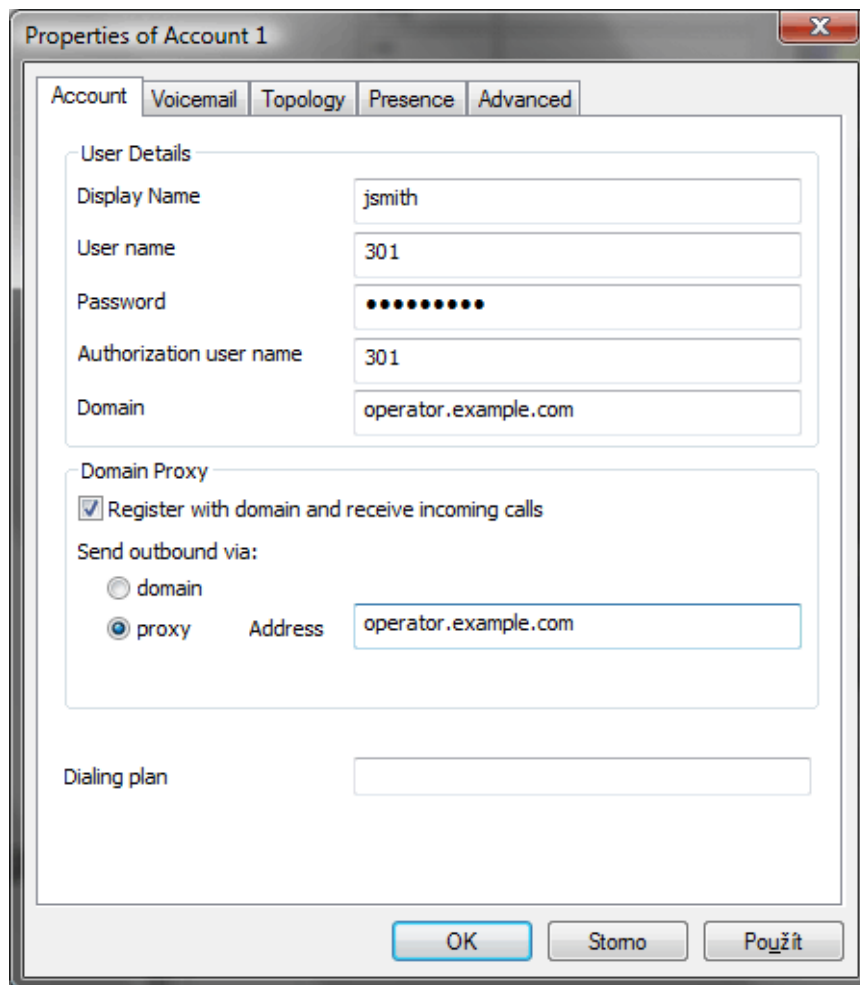


Figure 9.2 Account properties dialog

9.3 Ekiga (Gnome Meeting)

It is supposed that:

- The software phone has been already installed on your computer,
 - you already have any information necessary for connection of the telephone (see section 9.1).
1. Run the application and wait for the telephone to display on your screen.
 2. On the toolbar, go to *Edit* → *Accounts*.
 3. In the *Accounts* dialog, click on *Add*.
 4. This opens the dialog where a new telephone account can be created.

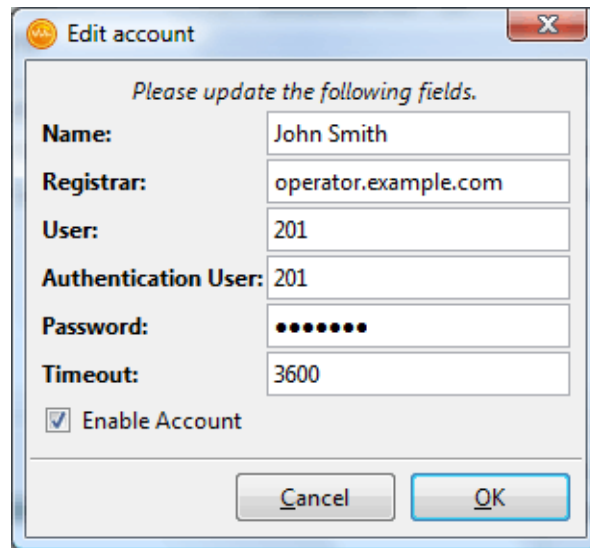


Figure 9.3 Account settings dialog

5. In the *Registrar* field, enter IP address or DNS name of the PBX.
6. In entries *User* and *Password*, specify telephone extension and SIP password for your account provided by your administrator (see figure [9.3](#)).

9.4 SJphone

It is supposed that:

- The software phone has been already installed on your computer,
 - you already have any information necessary for connection of the telephone (see section [9.1](#)).
1. Run the application and wait for the telephone to display on your screen.
 2. Click on *Menu* (see figure [9.4](#)).
 3. Menu with options is displayed. Click on *Options*.
 4. On the *Profiles* tab click on *New*. This opens the *Create New Profile* dialog where it is required to enter any profile name (you can use your username, for example). Save the profile.
 5. This opens the *Profile Options* dialog. Go to the *SIP Proxy* tab and enter IP address or DNS name of the *Kerio Operator* PBX.
 6. On the *Initialization* tab check options *Account*, *Password* and *Caller ID* (see figure [9.5](#)).

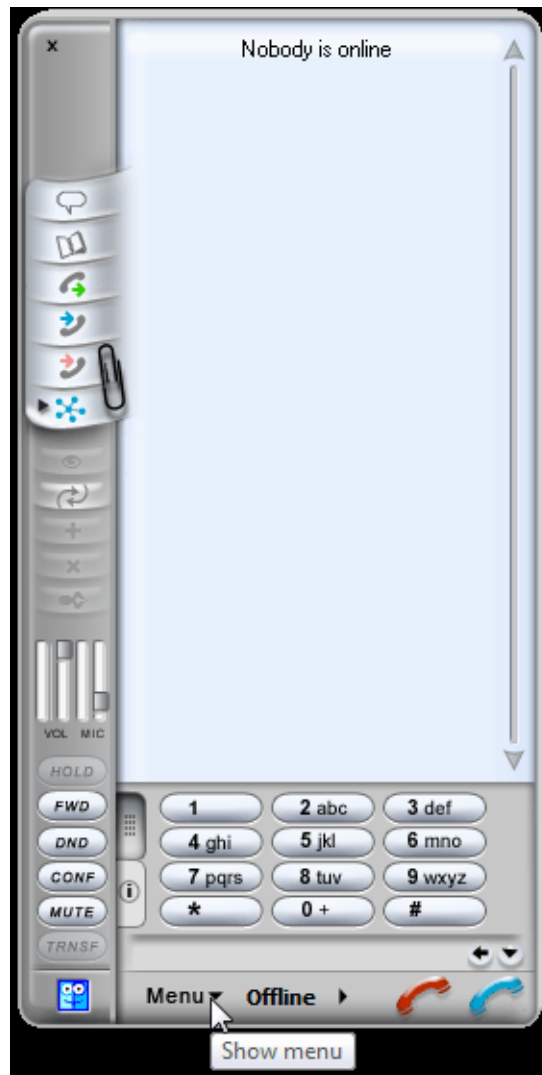


Figure 9.4 Software telephone SJphone

7. Dialog asking for authentication details and telephone extension gets opened automatically (see figure 9.6). In entries *Account* and *Password* specify your username and the SIP password associated with the extension and in the Caller ID field enter the extension assigned by your network administrator.

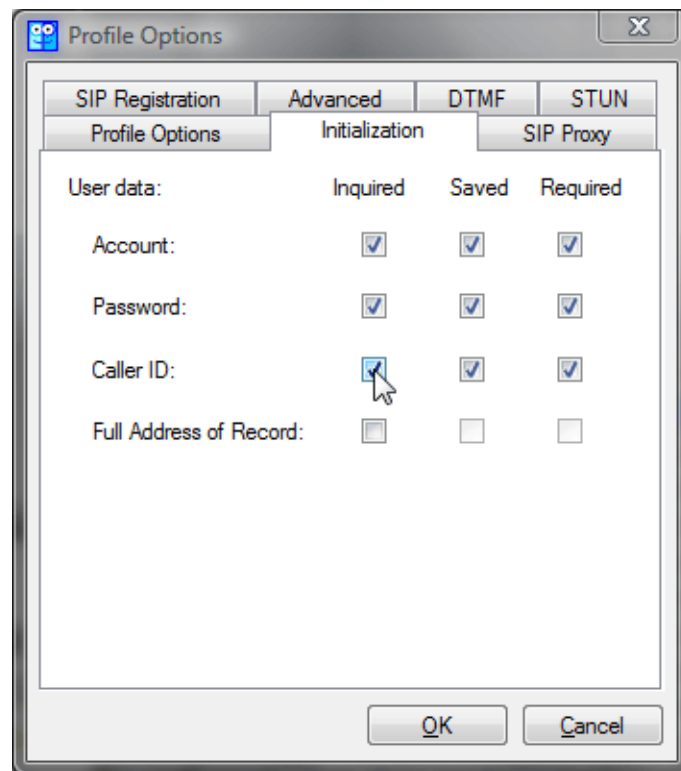


Figure 9.5 Profile Options → Initialization

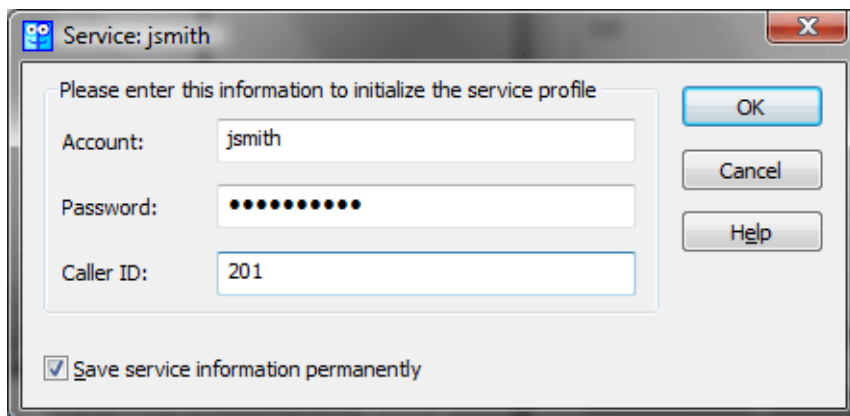


Figure 9.6 Profile Options —

Appendix A

Legal Notices

SJphone® is registered trademark of SJ Labs, Inc.

X-Lite is a software phone developed by CounterPath Corporation with registered trademark of CounterPath®.

Firefox® is registered trademark of Mozilla Foundation.

Internet Explorer® is registered trademark of Microsoft Corporation.

Safari™ is registered trademark of Apple Inc.

Glossary of terms

IP address

IP address is a unique 32-bit number used to identify the host in the Internet. It is represented by four bytes in the decimal system (0–255) separated by dots (e.g. 200.152.21.5). Each packet includes the information on where the packet was sent from (source IP address) and to which host it should be delivered (destination IP address).

SIP

SIP (Session Initiation Protocol) is a protocol used for signal transmission in Internet telephony.