

Kerio Operator

User Guide

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This guide provides detailed description on *Kerio Operator*, version 1.2. 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.

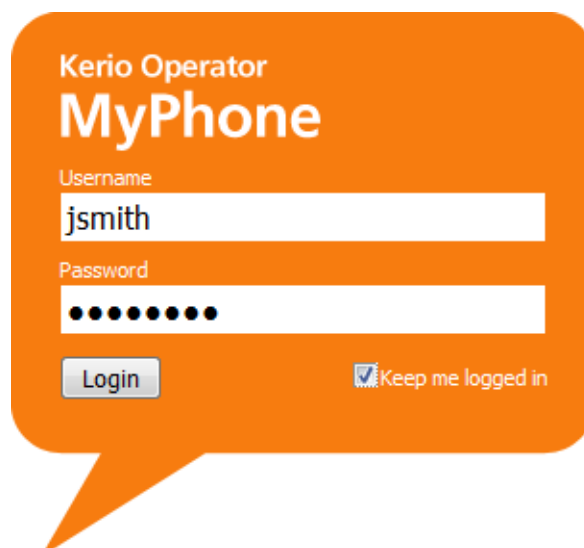
Chapter 2

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 your 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](#)).



Kerio Operator
MyPhone

Username
jsmith

Password
●●●●●●●●

Login 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

For the list of the supported browsers, refer to [the Kerio Operator product pages](#).

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.

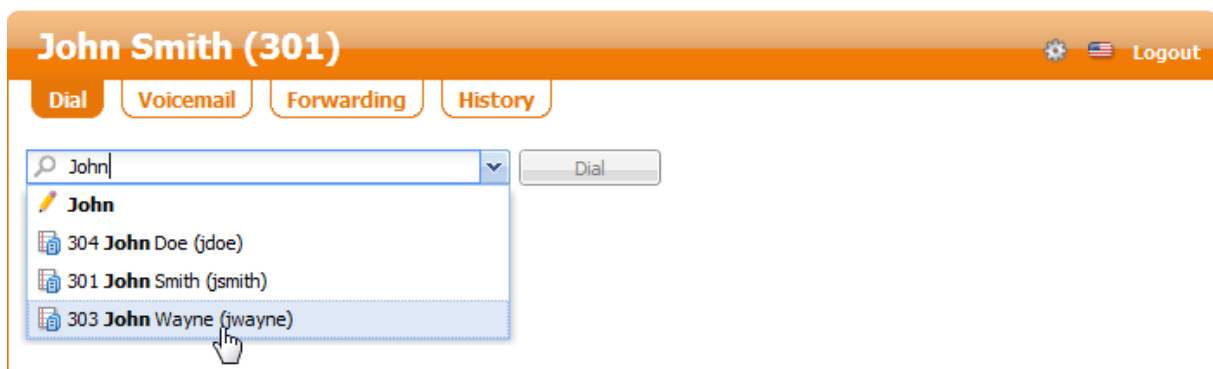


Figure 3.1 Dialing numbers

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.

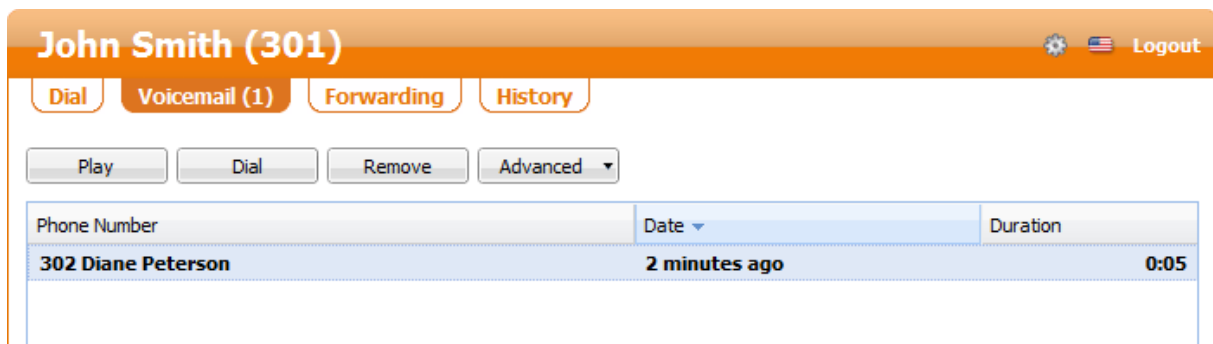


Figure 4.1 Voicemail

4.1 Accessing voicemail

You can access your voicemail by several methods:

- On your phone, press voicemail button or dial voicemail number 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.

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

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.

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 synchronized..

4.3 Voicemail Menu

After reaching your voicemail, an automatic menu will navigate you through your messages and other options. You can view the whole menu in picture [4.2](#).

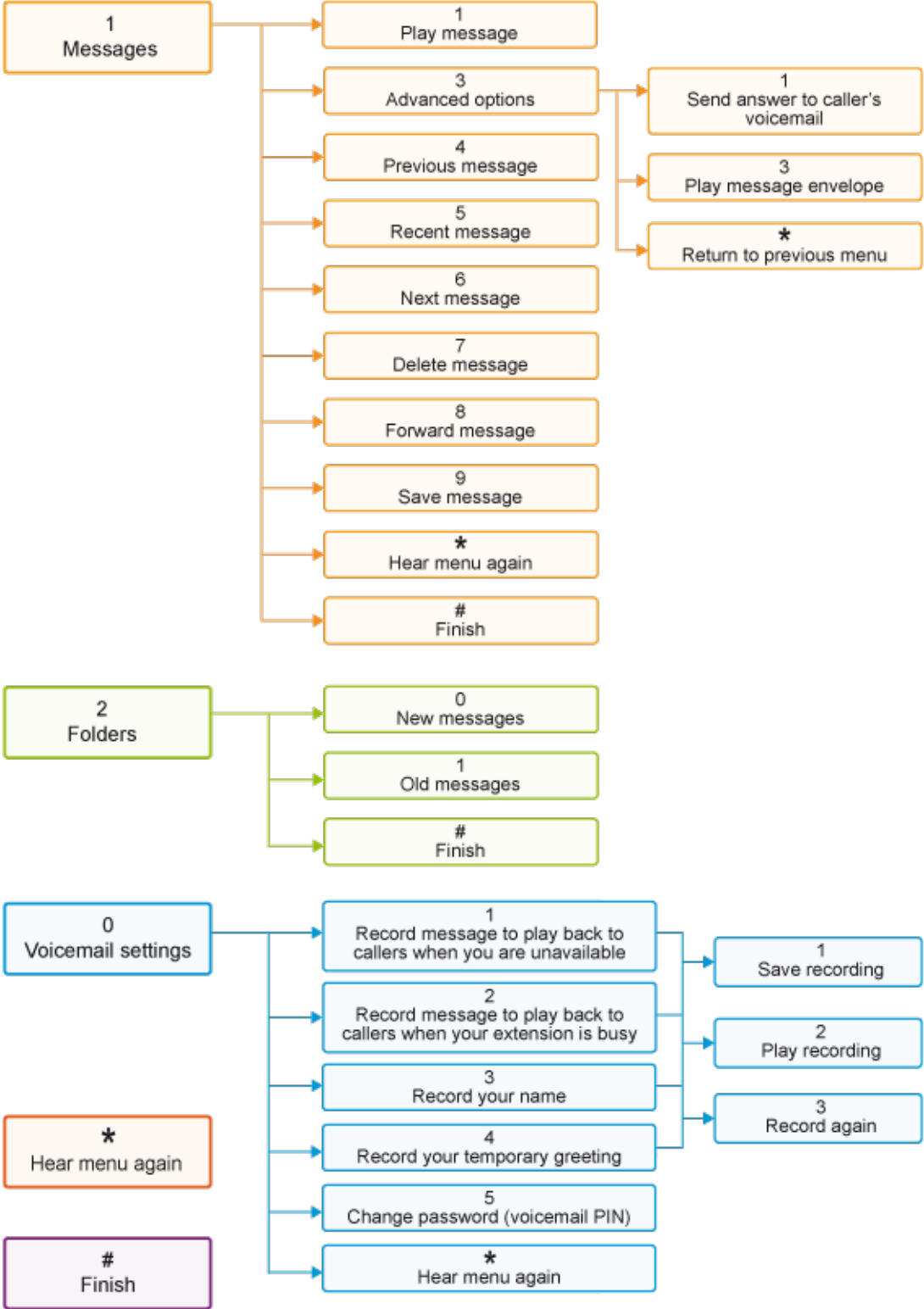


Figure 4.2 Voicemail Menu

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.

John Smith (301)

Dial Voicemail (1) **Forwarding** History

Save Cancel

No forwarding

Ring extension for: 15 seconds

Fallback to voicemail

Redirect to voicemail when busy

Forward to:

Enter the number in the same way as if you called from your desk phone.

Ring number for: 15 seconds

Fallback to voicemail

Advanced forwarding: Configure...

Ring extension 301

Redirect to voicemail when busy

Find me on 955550199 - Home

Find me on 955550197

Fallback to voicemail

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 301. To be available even outside the office, the salesman has connected to *Kerio MyPhone* and configured forwarding of all calls on 201 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 supposed to ring.
4. If you want the calls to ring also on the original extension, enable option *Advanced forwarding* 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 keeps track of 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 a particular conference it is only necessary to dial conference number and its access code if desired.

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 terminate 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:

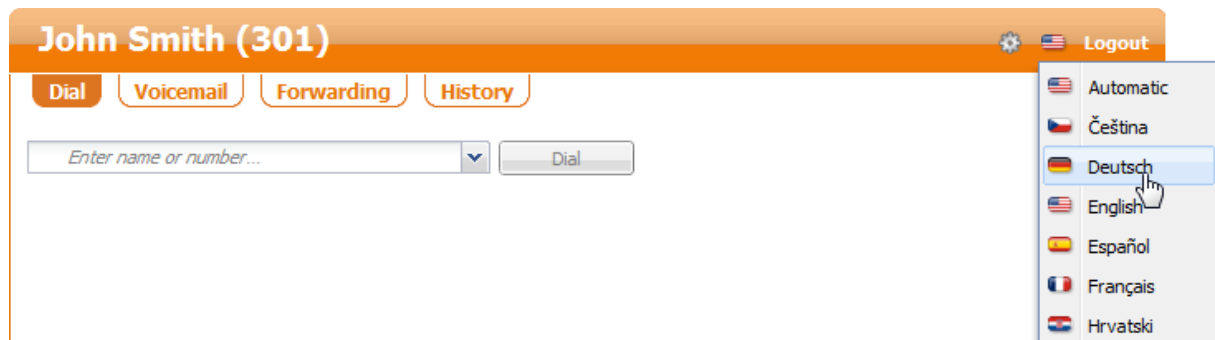


Figure 8.1 Interface language selection

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](#)).

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

Note: You can upload other language sets to Kerio Operator. To get more information, ask your administrator.

Chapter 9

Changing your password and PIN

To change your user password or PIN for access to your voicemail, click the *Settings* button situated on the tool bar (see figure [9.1](#)).

Warning:

You can change your password and PIN only via the HTTPS protocol. Enter the following address in your browser's address bar:

https://address



Figure 9.1 Settings

Chapter 10

Changing the Date and Time Format

If you are not satisfied with the date and time format (for example, in history), you can change it:

1. Click on *Settings* (see figure [9.1](#)).
2. In the *Settings* dialog, select a format for the date and then for the time.
3. Click OK to confirm settings.

Chapter 11

Configuring software phones

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

- X-Lite,
- Ekiga,
- SJphone.

11.1 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*.
- Whether your extension will be behind NAT. If yes, contact the Kerio Operator administrator so that they can configure the settings.

11.2 How to set your extension on multiple devices

Using one telephone extension on multiple devices (e.g. softphone on a desktop and an SIP phone on a mobile device) is called multiple registration and it requires using special user names. To get such a user name, contact your administrator who should generate it for you.

These special user names are not required if you use desktop IP telephones. They are required in those cases where manually configured telephones are used (especially softphone applications installed on computers and SIP clients on mobile devices). If you use more than one device of this kind and want to use an identical telephone extension for all of them, ask your administrator to generate multiple UserIDs for you (one for each device/telephone).

This UserID (e.g. strings 201u1 and 201u2 for extension 201) should be inserted in configuration in items where your extension number would otherwise be used (User Name on X-Lite, User on Ekiga, Caller ID on SJphone, Username on Groundwire).

Note: Apart from UserID, Display Name is usually required. You can use the original unchanged number of your extension.

11.3 X-Lite

It is supposed that:

- you installed the softphone on your computer,
- you already have any information necessary for connection of the telephone (see section [11.1](#)).

Note: Tested on X-Lite 4.1

1. Run the application and wait for the telephone to display on your screen.
2. Click *Softphone* → *Account Settings*.
3. The *SIP Accounts* table is displayed. Configure the first tab, *Account* (see figure [11.1](#)).
4. Check the *Call* option in *Allow this account for*.
5. Enter your telephone extension in the *User ID* entry.
6. In the *Domain* entry, specify IP address or DNS name for the computer where the PBX is running.
7. In the *Password* field, enter the password provided by your administrator.
8. In *Display Name*, insert your name.
9. Check the *Register with domain and receive calls* option and fill in Kerio Operator's IP address or DNS name in *Address*,

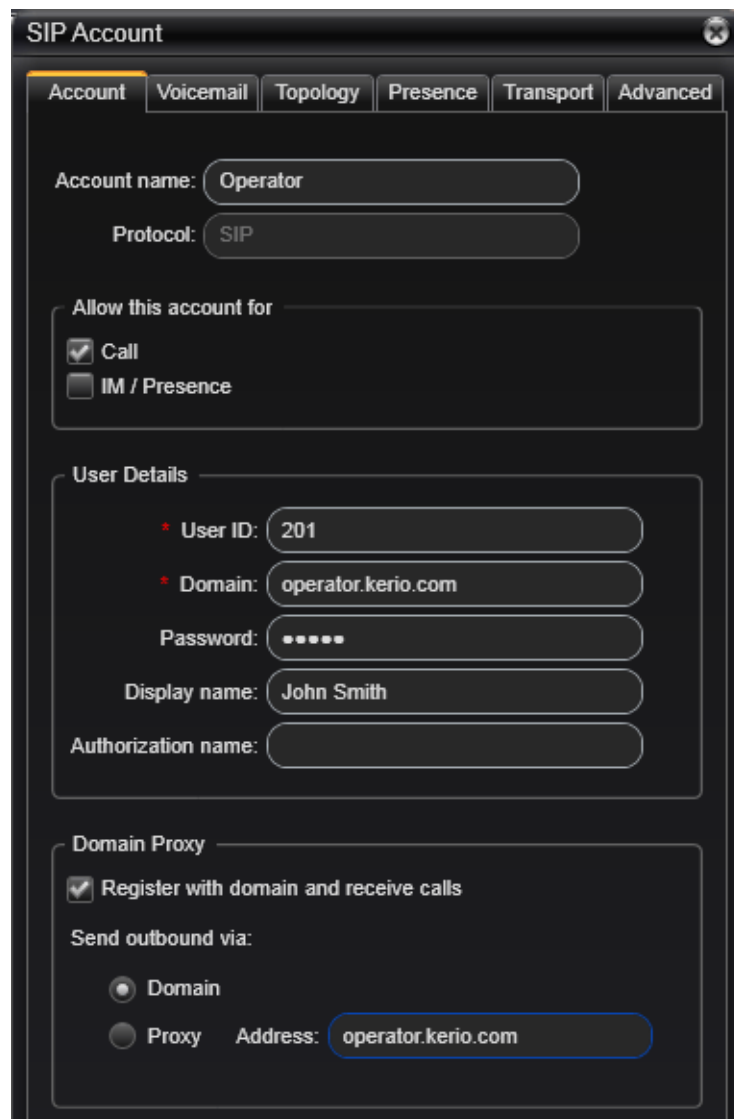


Figure 11.1 Account properties dialog

11.4 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 [11.1](#)).

Note: Tested on Ekiga 3

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.

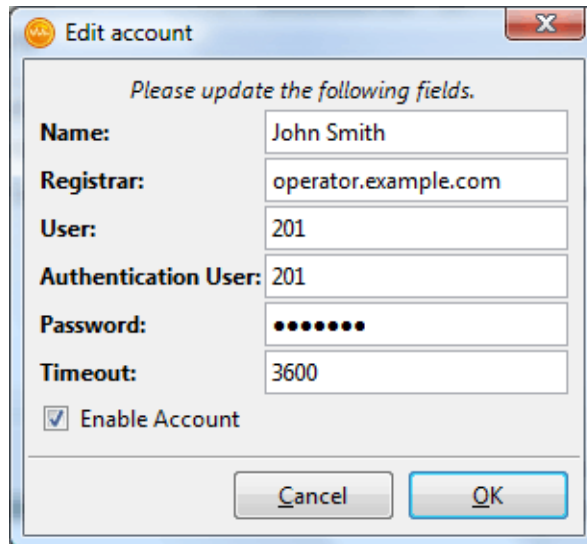


Figure 11.2 Account settings dialog

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 [11.2](#)).

11.5 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 [11.1](#)).

Note: Tested on SJphone 1.60

1. Run the application and wait for the telephone to display on your screen.
2. Click on *Menu* (see figure [11.3](#)).
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.

Configuring software phones

- 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 [11.4](#)).



Figure 11.3 Software telephone SJphone

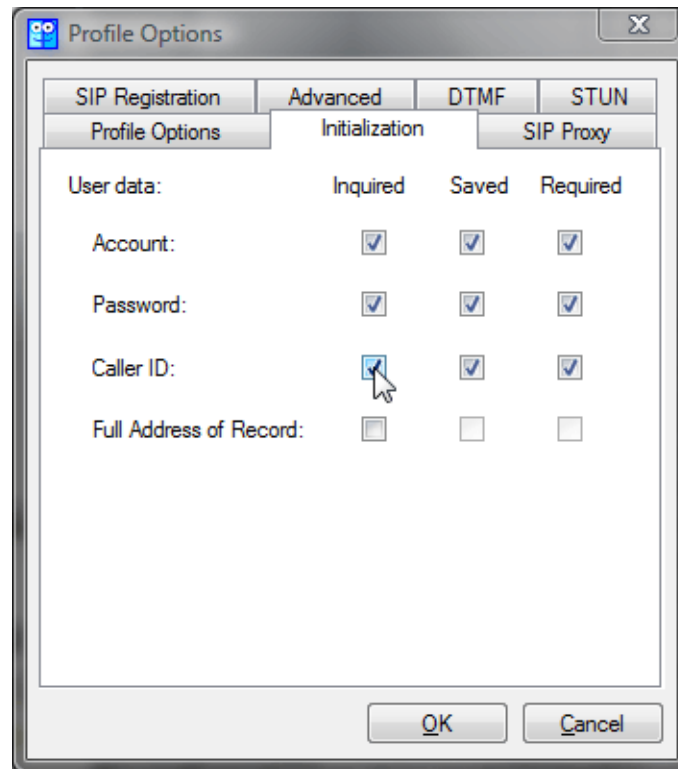


Figure 11.4 Profile Options → Initialization

- Dialog asking for authentication details and telephone extension gets opened automatically (see figure 11.5). 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.

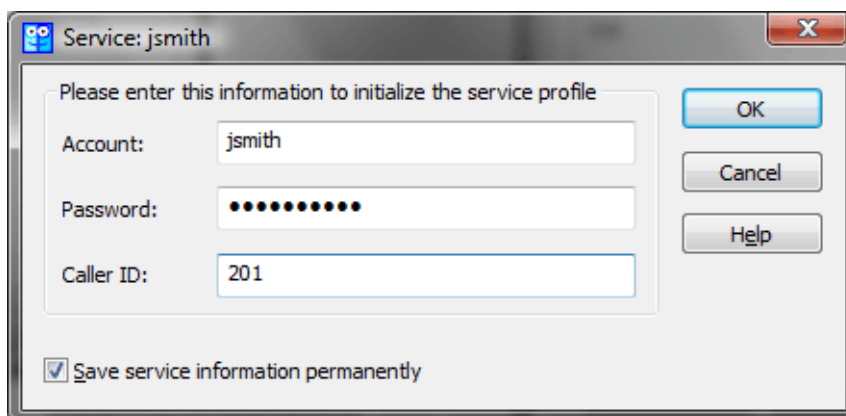


Figure 11.5 Profile Options —

Chapter 12

Configuring mobile access

You can connect to *Kerio Operator* with software phones installed on your smartphones.

12.1 Acrobits Groundwire

It is supposed that:

- The SIP phone has been already installed on your *Apple iPhone*,
- you already have any information necessary for connection of the telephone (see section [11.1](#)).

1. Run the application and wait for *Groundwire* to display on your screen.
2. Click on the *no accounts* button located at the top-left corner of the telephone.
3. In *Settings*, select *SIP accounts*.
4. Under *SIP accounts*, click on the + icon to add a new account.
5. Enter name of the account in *Title* (e.g. *Kerio*).
6. In *Username*, insert your telephone extension number.
7. In *Password*, specify your SIP password (provided by your network administrator).

Warning:

SIP password does not necessarily have to be identical with the password to your *Kerio Operator* account.

8. In *Domain*, specify IP address or name of the DNS server where *Kerio Operator* is running (contact your network administrator).
9. In *Display Name*, insert your telephone extension number.

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®.