Kerio Operator

User Guide

Kerio Technologies

Contents

Logging in to Kerio Operator

Which Kerio Operator interfaces are available

- administration interface (Kerio Operator Administration)

- user interface (Kerio Operator client)

We recommend to use the supported browsers to connect to the interfaces. For the list of the browsers, refer to the Kerio Operator product pages.

Web interfaces are currently localized into several languages. Select yours in the top right corner of the interface. The default language is set according to your browser language settings.

Kerio Operator Administration

How to login

Before you login the first time, make sure you have:

- DNS name of the server with Kerio Operator.

- Supported browsers

To login, enter the DNS name of the computer with Kerio Operator:

`kerio.operator.name/admin`

Administration runs solely via the HTTPS protocol on port 4021. The address is automatically redirected to:

`https://kerio.operator.name:4021/admin`

> If the PBX is located behind firewall, HTTPS on port 4021 must be enabled.

If the URL is entered correctly, your browser displays a warning about a SSL certificate. After the installation, Kerio Operator creates a certificate which is not signed by a trusted certificate authority — it is a self-signed certificate (for more information, read article about the SSL certificates). Since you know the certificate can be trusted, you can add the security exception and continue to a login page.

First login

When you connect to the PBX for the first time, a configuration wizard is displayed where you:

1. Set the configuration wizard language.

2. Accept the Kerio Operator license agreement.

3. Set a password for the administration account (be sure to remember the password, you will need it to login to the PBX).

> This admin password is synchronized with password of user `root` in the operating system where Kerio Operator is installed (Kerio OS).

4. Set the time zone of Kerio Operator (requires a restart of the PBX).

5. Set the PBX language for communication with you and other users (warnings, auto attendant scripts, voicemail, etc.).

6. Configure the first extension number. If you use phone provisioning, extensions will be created automatically beginning with the number you enter here.

After successful configuration, the login page is displayed. Enter the username and password you created earlier.
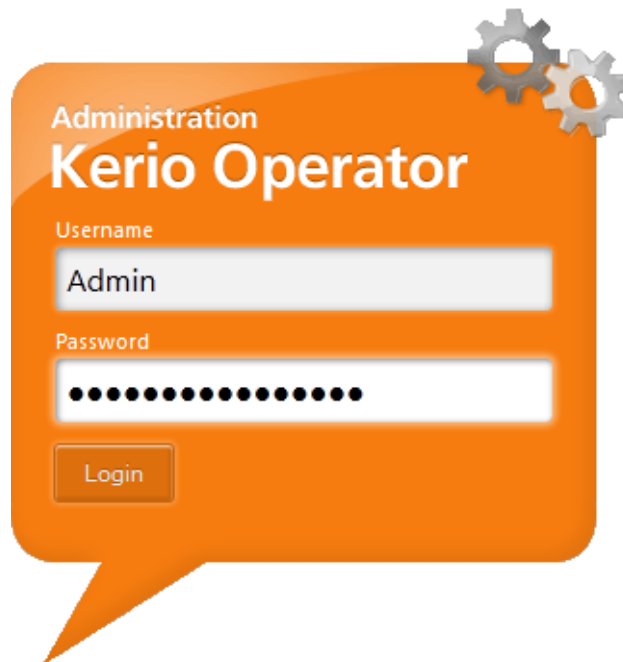

Figure 1   Login to administration

To change the password, use the following steps:

1. Login to Kerio Operator using the HTTPS protocol

   (e.g. `https://operator.company.com/admin`)

2. Open the **Configuration** → **Users** section.

3. In the user list, select the administrator account you are logged in with and double-click on it.

4. Change the password on tab **General**.

Kerio Operator client

Kerio Operator client overview

With Kerio Operator client, users can access their:

- voicemail,

- phone account configuration (change password, change PIN or call forwarding),

- call history.

You can also dial numbers in Kerio Operator client. You have to be connected to a phone (softphone on your computer or mobile phone or hardware phone on your desk). Dialing in Kerio Operator client works on callback basis. This means that when you dial a number, your phone rigs first. Once you answer your phone, Kerio Operator stars dialing the number and connects you.

The advantages of dialing via Kerio Operator client are:

- If you want to dial an internal extension, you don't have to know it by heart — just type in the name of the user.

- In Kerio Operator client, you can configure the speed dial buttons with names and numbers and dial with only one click.

How to login to Kerio Operator client

1. Specify URL in the browser in the following format:

   `http://kerio.operator.name/`

2. If the URL is entered correctly, Kerio Operator client login page is displayed.

3. Use credentials of Kerio Operator user.
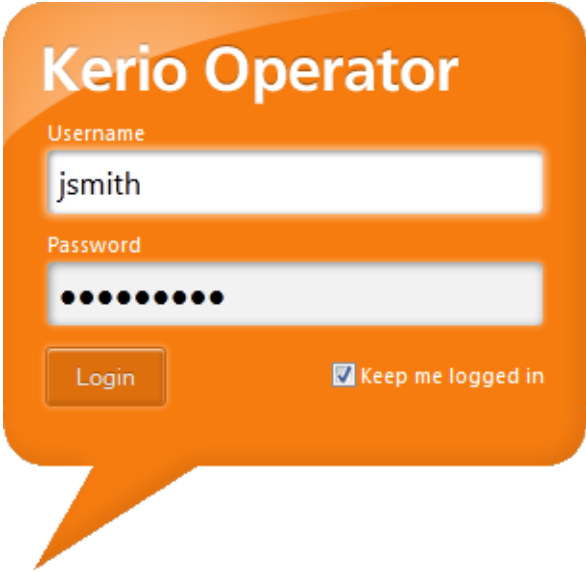
Figure 2 Login to Kerio Operator client

Using the Kerio Operator client interface.

Why dial numbers through Kerio Operator client?

- 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 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.

- You can add favorite buttons for often called people. You can see if they are free or busy for dialing.
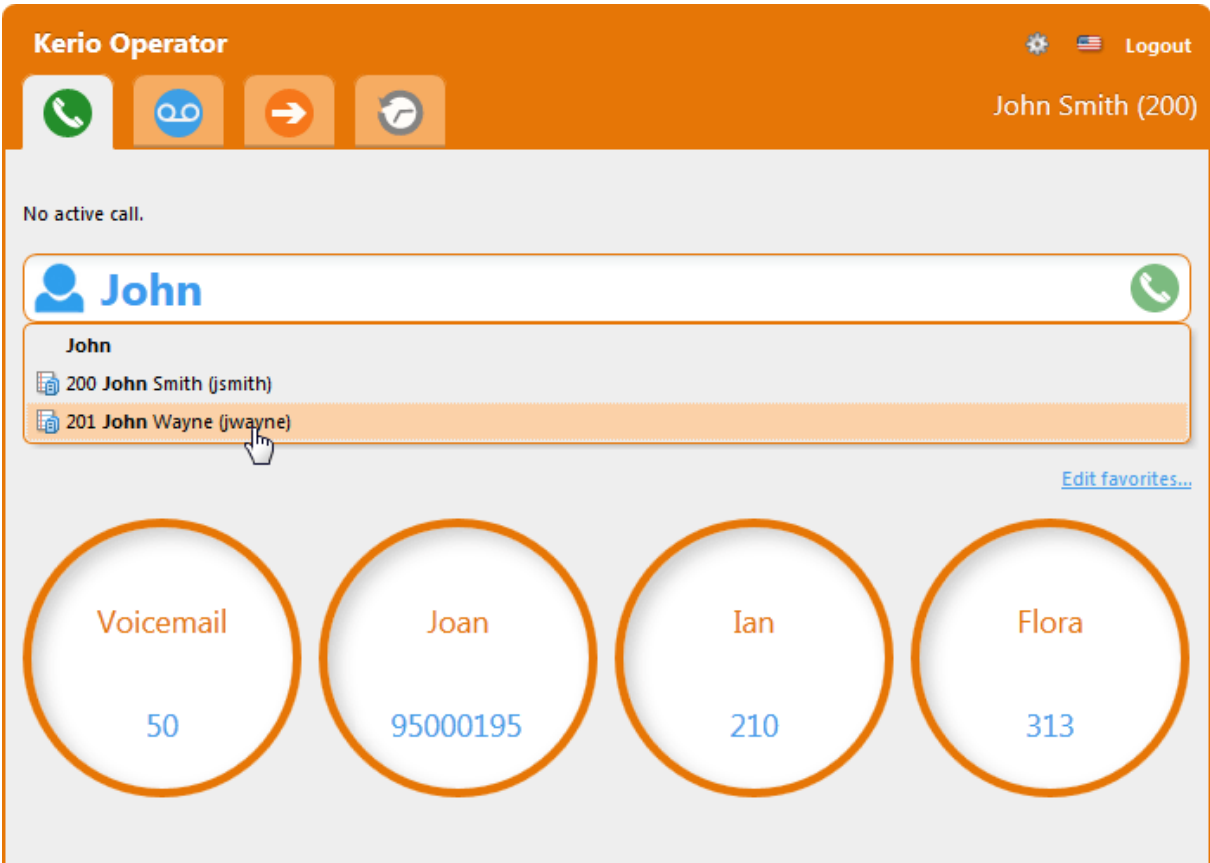
Figure 1 Dialing numbers

How it works

Dialing of numbers is available to all users who use a software or hardware phone which has an extension of the Kerio Operator PBX configured. If the telephone is connected, it is possible to dial the called number using the Kerio Operator client.

Dialing in the Kerio Operator client works on a callback basis. This means that Kerio Operator client 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.

Favorites

In Kerio Operator client, you can use the Favorite buttons. Enter names and phone numbers on the buttons. Then click on the button to dial the number.

Number formats

Enter the phone number of extension in the Favorite button in the format you use in your company network:

- Internal extensions should be in the format you usually use (e.g. two, three or four digits).

- If you do not use the prefix for outgoing calls (usually 0 or 9), for outgoing calls dial numbers in format — 5000195.

  If you call to an external network with a prefix (e.g. 9), numbers must be in the format as shown in figure 1.

Changing the number of buttons

1. Click **Edit favorites**.

2. Edit buttons (add names and numbers).

3. If you need it, add a new row and edit buttons.

4. Save the settings.

Dialing numbers if you use multiple extension or multiple registrations of an extension

If you use multiple registrations of an extension (for example, you use a softphone on your computer) or you have multiple extensions assigned, you can select from which extension or registrations to call.

On tab **Dial**, select an extension from the **Dial from** menu.

If you don't like the strings which identify individual registrations of extensions, you can edit them:

1. Click the Settings icon in the top right corner.

2. Click **Edit "Dial from:" descriptions**.
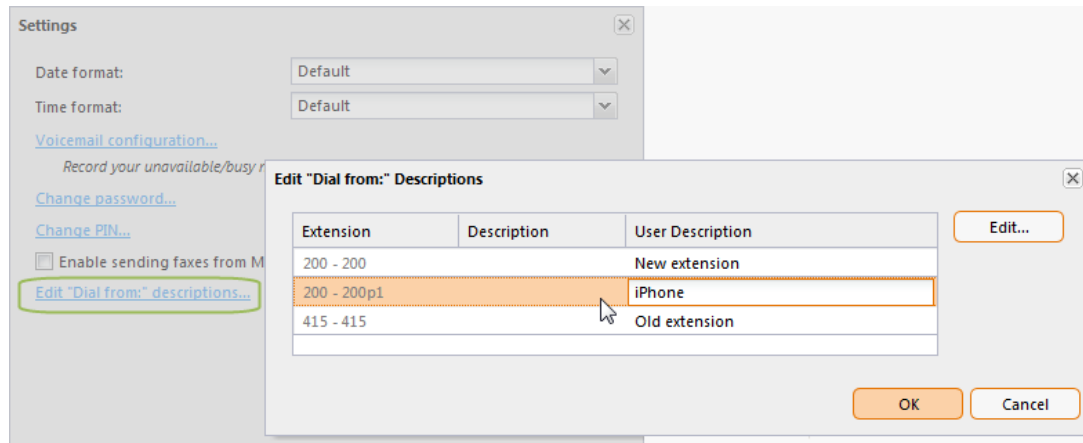
Figure 2 Dial from

3. In the user description field, enter, for example, the name of the device to which the registration or extension is assigned (see figure 2).

Using voicemail

Voicemail and its settings are described in article Configuring voicemail.

> ⚠️ For users of Apple iPhone, iPad and Apple Mac OS X: If you cannot play your voicemail messages in Kerio Operator client, contact the Kerio Operator administrator. An invalid certificate may be the reason.

Recording your own greeting for voicemail

If you wish to record your own greeting to voicemail, such as: "Hello. You have reached Kelly Jellybelly. I can't answer the phone right now, but please leave me a message.", follow these instructions:

1. Login to your voicemail, enter the PIN and press 0.

2. Follow the instructions of the auto attendant script.

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Using call forwarding

Redirecting calls to another phone is described in article Redirecting calls in Kerio Operator client.

Using history

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

1. Double-click 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 **Dial**.

Changing username and password for authentication at Kerio Operator client

1. Login to Kerio Operator client.

   ⚠️ You can change your password only via the HTTPS protocol. Enter the following address in your browser's address bar:
   `https://address`

2. This can be done by the **Settings** icon available on the toolbar (see figure 3).

3. Click **Change Password**.

Figure 3   Setting

If you do not remember your password, contact your network administrator. They can set a new password for you.

Changing the PIN number

1. Login to Kerio Operator client.

> ⚠️ You can change your PIN only via the HTTPS protocol. Enter the following address in your browser's address bar:
> `https://address`

2. This can be done by the **Settings** icon available on the toolbar (see figure 3).

3. Click **Change PIN**.

Changing 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 **Settings** (see figure 3).

2. In the **Settings** dialog box, select a format for the date and then for the time.

Redirecting calls in Kerio Operator client

Call forwarding overview

Incoming calls can be routed to different internal extensions or external numbers. Calls may either ring only at the redirected phone or at all phones at a time.

Redirecting calls to mobile phones

Oscar Jape wishes to redirect his calls:

- his desk phone,

- his work mobile phone with number 5550198,

- he wishes to disable voicemail because his boss, Mr Prank, hates the voicemail.

Do you need to solve a similar problem? Apply settings as described below:

1. In your browser, login to Kerio Operator client.

2. Switch to the ➡ **Forwarding** tab.

3. Select **Advanced forwarding** and click **Configure**.

4. In the Advanced Forwarding dialog box, check **Ring extension 200 for**.

5. Click **Add** and enter the mobile phone number and some description.

> ⚠️ Do not forget to add the prefix for outgoing calls (usually 0 or 9, so the final number may be 05550198 or 95550198).

6. Uncheck **Redirect to voicemail** and **Redirect to voicemail if the user is busy**.
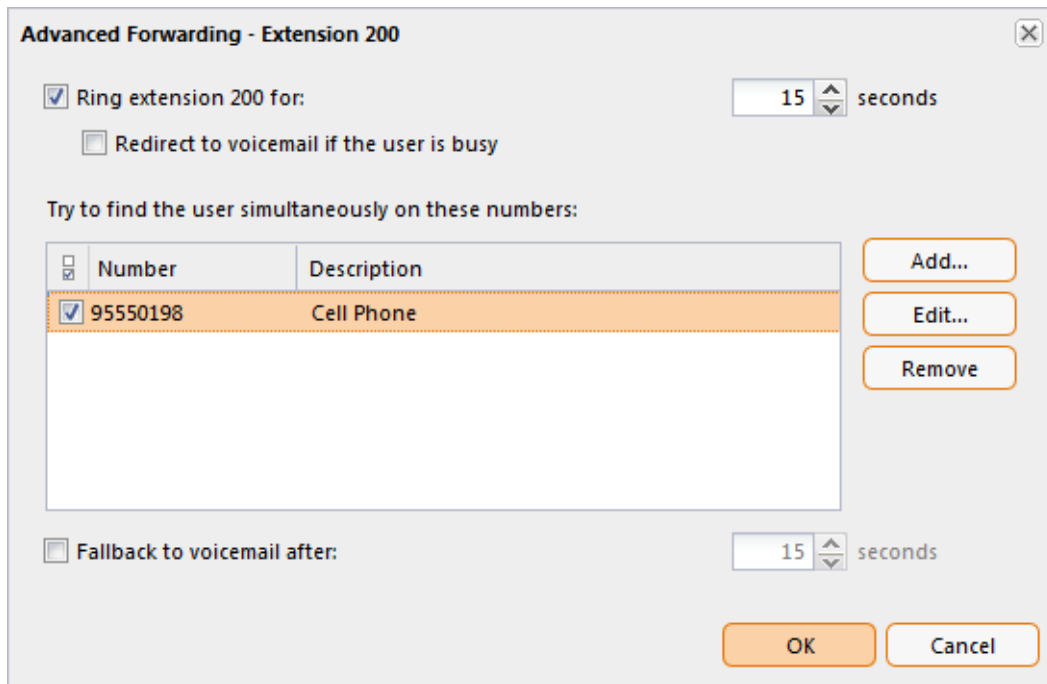
Figure 1   Redirecting calls to mobile phones

> These settings can also be changed by the administration interface. Contact the administrator, if you need help.

Redirecting calls to another extension/person

John Smith is not feeling well today. He decided to stay at home. He decided to redirect his calls to his colleague, Oscar, so that his phone does not ring all day. Do you need to solve a similar problem?

1. Login to Kerio Operator client.

2. Switch to the 🡆 **Forwarding** tab.

3. Select **Forward to**.

4. Type the extension of your colleague.

5. The result should be similar to the following image.

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Figure 2 Redirecting calls to a colleague in case of users absence

Hardware telephone basic usage

General information

This article includes information on how to use common functions of hardware phones (supported by Kerio Technologies).
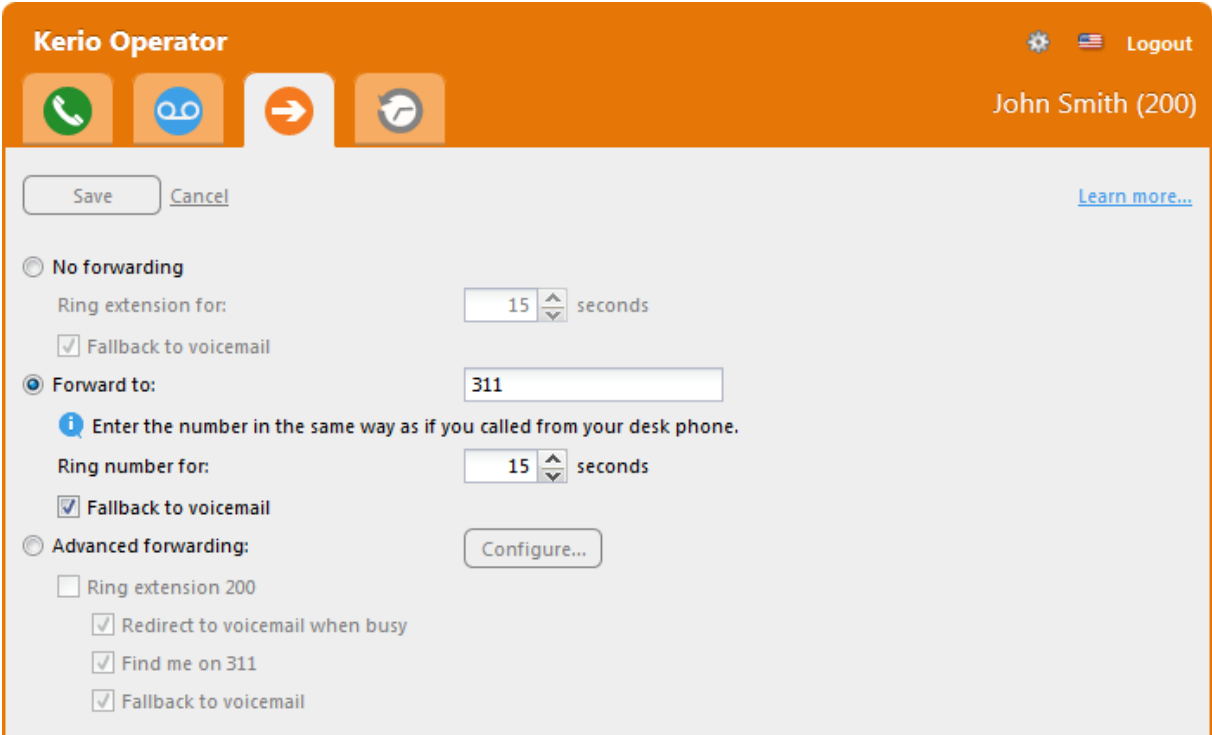
Using loud speaker

Every telephone has a special button for loud speaker ◁) (speaker button). You can usually press this button either before dialing or anytime during a call.

Using Do not Disturb

If you select Do not Disturb option (DnD), the phone will generate the busy tone to inform the other party that you are not available. If you wish to block all incoming calls from the phone, follow these instructions:

Cisco IP Phone 7960/7940

1. Press the **Settings** button [icon].

2. Scroll to **Call Preferences** and press **Select**.

3. Scroll to **Do Not Disturb**.

4. Press **Yes**.

Cisco SPA

1. Press **more**.

2. Press **DnD**.

Polycom IP 33x

1. Press **Menu**.

2. Select **Features**.

3. Select **Do not disturb**.

For unblocking incoming calls, use the same sequence.

Forwarding calls

You can configure forwarding on your phone. However, you can set it in Kerio Operator client too.

Conference calls

You can configure conference calls on your phone. However, the less complicated way is to create and use conferences in Kerio Operator.

Transferring calls

When you want to transfer a call, you usually have two options:

- attended transfer (you can connect with the third party, find out if the person is on the phone and make an announcement)

- blind transfer (the call is transferred without announcing)

Attended transfer (Cisco IP Phone 7960/7940)

1. Initiate or answer the call.

2. Press **more**.

3. Press **Transfer**.

4. Dial the number to which you want to transfer the call.

5. When the dialed number rings, press **Transfer** again, or wait for the other party's answer, announce the call and then press **Transfer**.

6. Hang up if the party accepts the call.

If the party refuses the call, return to the original call by pressing the **Resume** softkey.

Blind transfer (Cisco IP Phone 7960/7940)

1. Initiate or answer the call.

2. Press **more**.

3. Press **BlndXfr**.

4. Dial the number to which you want to transfer the call.

5. Terminate the call.

Attended transfer (Cisco SPA)

1. Initiate or answer the call.

2. Press **Trnsfer**.

3. Dial the number to which you want to transfer the call.

4. Wait for the connection.

5. Press **Trnsfer** again.

6. Hang up.

Blind transfer (Cisco SPA)

1. Initiate or answer the call.

2. Press **Trnsfer**.

3. Dial the number to which you want to transfer the call.

4. Press **Trnsfer** again.

5. Hang up.

Attended transfer (Polycom IP 33x)

1. Initiate or answer the call.

2. Press **Trans**.

3. Dial the number to which you want to transfer the call.

4. Wait for the connection.

5. Press **Trans** again.

6. Hang up.

Blind transfer (Polycom IP 33x)

1. Initiate or answer the call.

2. Press **Trans**.

3. Press **Blind**.

4. Dial the number to which you want to transfer the call.

5. Hang up.

Attended transfer (Snom 300)

1. Initiate or answer the call.

2. Press **L1/L2** key (hold).

3. Dial the number to which you want to transfer the call.

4. Wait for the connection.

5. Press **Transfer** key.

6. Press **OK** key.

7. Hang up.

Blind transfer (Snom 300)

1. Initiate or answer the call.

2. Press **Transfer** key.

3. Dial the number to which you want to transfer the call.

4. Press **OK** key.

5. Hang up.

Attended transfer (Snom 320/821)

1. Initiate or answer the call.

2. Press **Hold** key.

3. Dial the number to which you want to transfer the call.

4. Wait for the connection.

5. Press **Transfer** key.

6. Press **OK** key.

7. Hang up.

Blind transfer (Snom 320/821)

1. Initiate or answer the call.

2. Press **Transfer** key.

3. Dial the number to which you want to transfer the call.

4. Press **OK** key.

5. Hang up.

Configuring software phones on computer or mobile phone

Configuring softphones

To configure a software phone, have the following information ready:

- IP address or DNS name of the computer with *Kerio Operator*.

- Extension number.

- SIP username and SIP password associated with the phone extension (see article Creating extensions). Note that the SIP password does not match the password used for connection to *Kerio Operator client*.

- Information whether the extension will be behind NAT. If so, configure the user account in Kerio Operator.

How to configure a softphone

- Configuring the X-Lite software phone

- Configuring the Ekiga (Gnome Meeting) software phone

- Configuring the SJphone software phone

- Configuring the Acrobits Groundwire software phone

Configuring Kerio Operator Softphone

Kerio Operator Softphone overview

Kerio Operator Softphone is a software phone client for Android and iOS. Kerio Operator Softphone is designed to work with Kerio Operator IP PBX or any other SIP based VoIP service.

Kerio Operator Softphone supports auto-configuration with Kerio Operator.

Features

- Support for up to 4 accounts on any SIP-compliant server (Automatic provisioning with Kerio Operator)
- Integration of contacts from your phone's native contacts directory
- Call display and voice-mail indicator
- Ability to transfer to speakerphone, mute and hold functionality
- Call history
- Ringtones and contact avatars
- Dial plan support
- Multiple call support — swap between two active calls, merge and split calls, transfer calls
- DTMF via RFC 2833, SIP INFO and in-band
- VPN support
- Automatic codec selection for best call quality
- Supported codecs: G.711 a/u, G.722 (HD), iLBC, GSM

Advanced features:

- Global IP support
- STUN & ICE support
- Noise reduction, echo cancellation and VAD (Voice Activation Detection)
- Quality of Service
- Security and call encryption via TLS and SRTP
- DNS SRV record look-up
- Call quality statistics

System requirements

For Kerio Operator Softphone system requirements, refer to the Kerio Operator product pages.

Installing Kerio Operator Softphone

You can install Kerio Operator Softphone from:

- Google Play on Android

- Apple App Store on your Apple iPhone

Configuring Kerio Operator Softphone

1. Click the Kerio Operator Softphone icon.

2. Type your Kerio Operator username and password.

   The same credentials as for the Kerio Operator client interface.

3. Type the Kerio Operator domain name (**Provision Url** on iOS version).

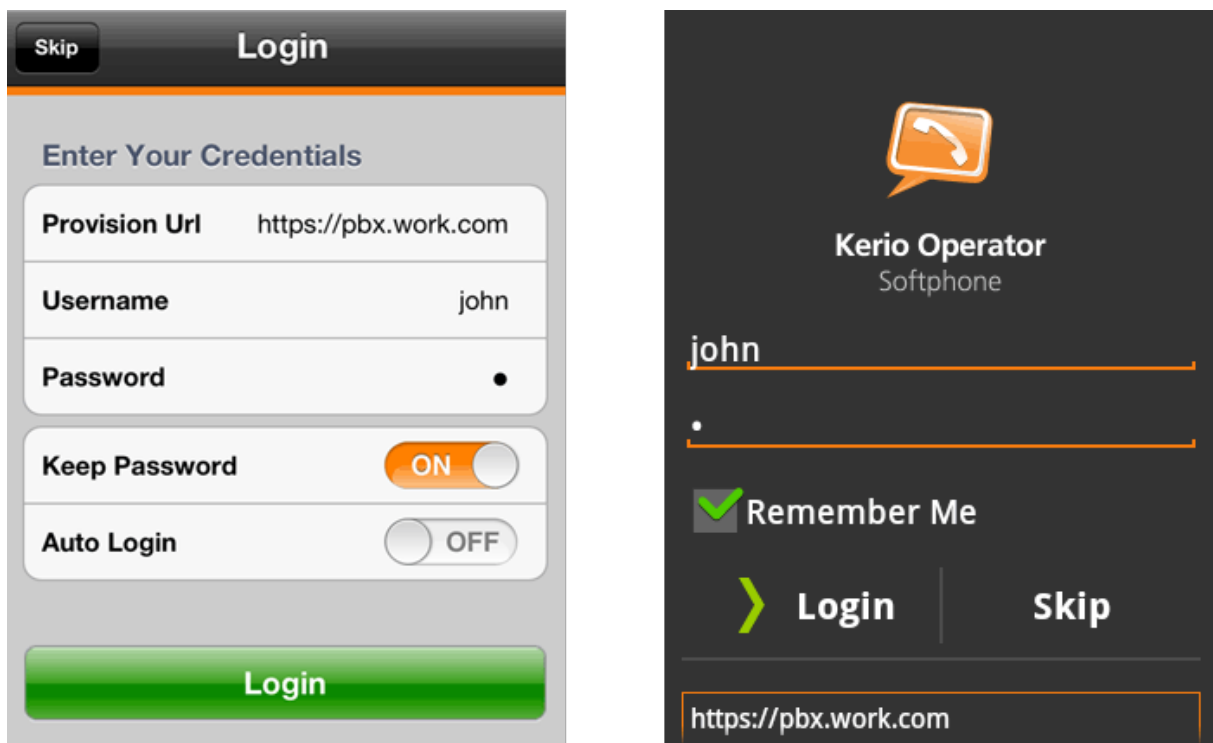   Use the following format: `https://address`

4. Tap **Login**.

Figure 1   Login to Kerio Operator Softphone

Configuring the X-Lite software phone

Configuring X-Lite

It is supposed that:

- you installed the softphone on your computer,

- you already have any information necessary for connection of the telephone.

📝 Tested on X-Lite 4.1

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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 1).

4. Check the **Call** option in **Allow this account for**.

5. In the **User ID** and **Password** entries, type your SIP username and SIP password (see article Creating extensions).

6. In the **Domain** entry, type IP address or DNS name for the computer where the PBX is running.

7. In **Display Name**, insert your name.

8. Check **Register with domain and receive calls** and type Kerio Operator's IP address or DNS name in **Address**,
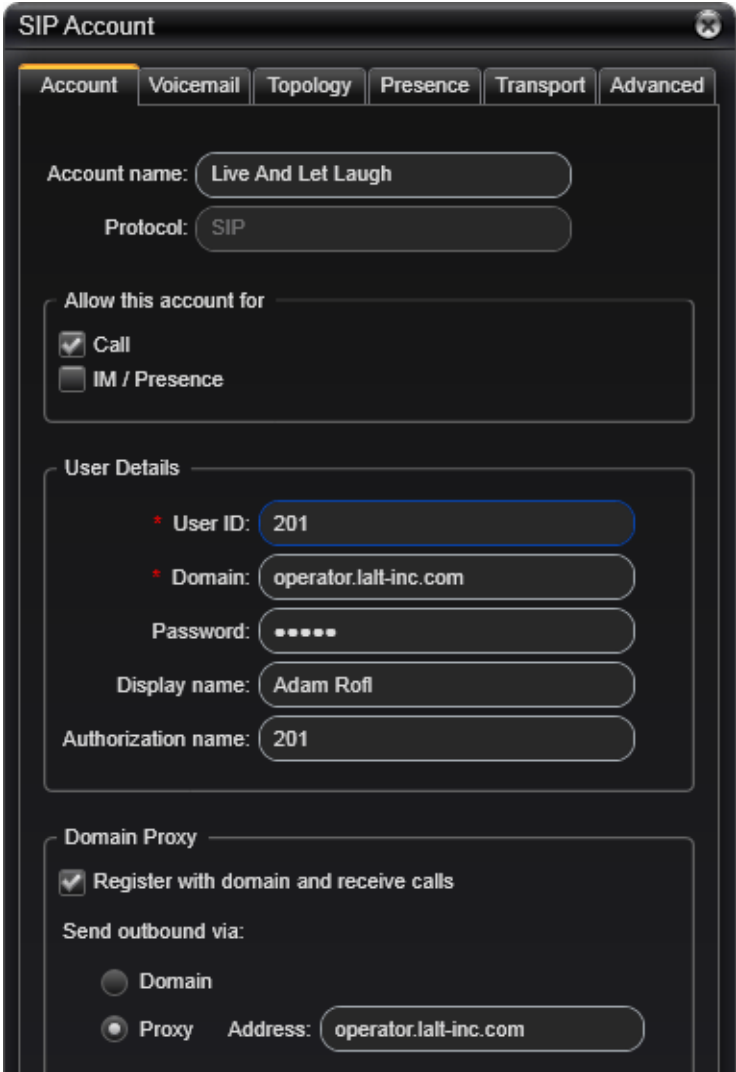
Figure 1 Account properties dialog

Configuring the Ekiga (Gnome Meeting) software phone

Configuring the Ekiga software phone

It is supposed that:

- you installed the softphone on your computer,

- you already have any information necessary for connection of the telephone.

> 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 box, click **Add**.

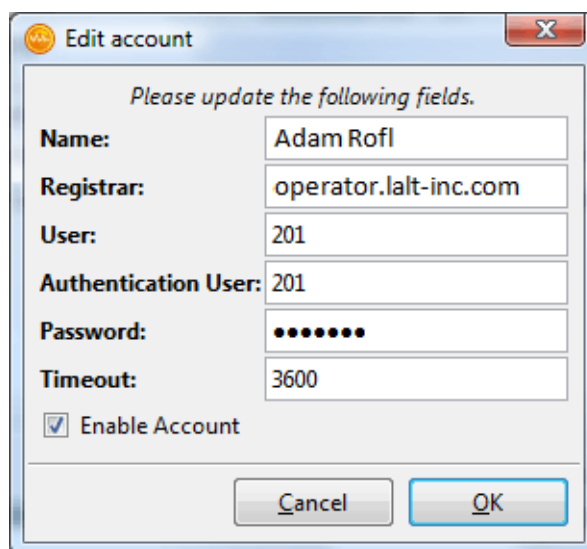4. This opens the dialog where a new telephone account can be created.

Figure 1 Account settings dialog

5. In **Registrator**, type IP address or DNS name of the PBX.

6. In entries **User** and **Password**, type the SIP username and SIP password for your account provided by your administrator (see article Creating extensions).

Configuring the SJphone software phone

Configuring SJphone

It is supposed that:

- you installed the softphone on your computer,

- you already have any information necessary for connection of the telephone.

Tested on SJphone 1.60

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1. Run the application and wait for the telephone to display on your screen.

2. Click **Menu** (see figure 1).

3. Menu with options is displayed. Click **Options**.

4. On the **Profiles** tab click **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 2).

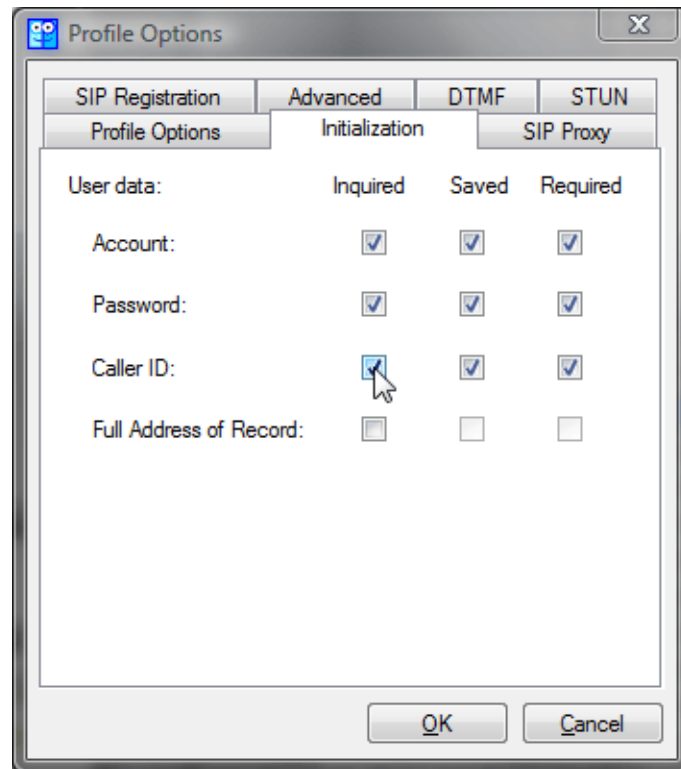**Figure 1**   Software telephone SJphone

Figure 2   Profile Options → Initialization

7. Dialog asking for authentication details and telephone extension gets opened automatically (see figure 3). In entries **Account** and **Password** specify your username and the SIP password associated with the extension and in the Caller ID field enter the SIP username assigned by your network administrator (see article Creating extensions).
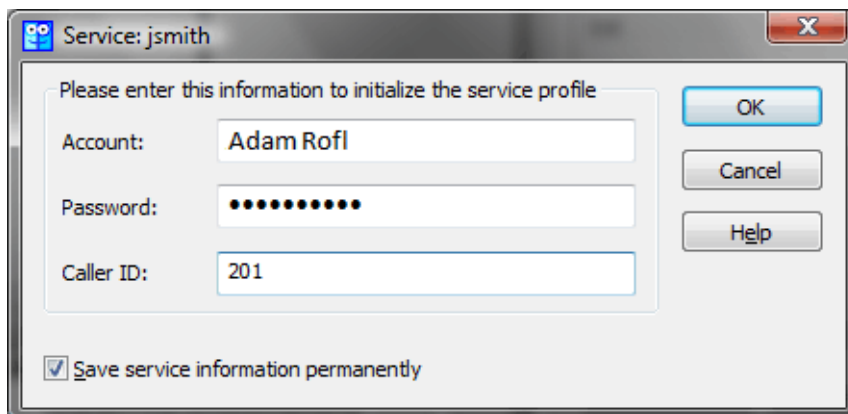

Figure 3   Profile Options —

Configuring the Acrobits Groundwire software phone

Configuring the Acrobits Groundwire software phone

It is supposed that:

- The SIP phone has been already installed on your *Apple iPhone*,

- you already have any information necessary for the phone configuration.

1. Run the application and wait for *Groundwire* to display on your screen.

2. Click the **no accounts** button located at the top-left corner of the telephone.

3. In **Settings**, select **SIP accounts**.

4. Under **SIP accounts**, click + to add a new account.

5. Type a name of the account in **Title** (e.g. `Kerio`).

6. In **Username** and **Password**, type your SIP username and SIP password.

   The SIP usernames/passwords do not correspond with usernames and passwords for Kerio Operator client. Using SIP usernames and SIP passwords describe the article Creating extensions.

7. In **Domain**, specify IP address or name of the DNS server where *Kerio Operator* is running.

8. In **Display Name**, insert your telephone extension number.

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