CommPortal

End User Guide

Version 1.2
August 3, 2018

Revision History

Revision	Date	Description	Initials
1.0	10/9/17	First published version.	CS
1.2	8/3/18	Revision for new release of CommPortal (EAS 9.4)	CS

Purpose

Use this guide to learn how to use CommPortal.

Audience

Information in this document is for all users of NHC telephone services.

Reference

Refer to this guide for more information about CommPortal:

CommPortal Administrator Guide

Contents

Overview

This quick reference guide explains how to view and manage information in NHC's CommPortal:

- Log In
- CommPortal Help
- Make Call
- CommPortal Interface

Log In

This section explains how to log into CommPortal the first time, and how to sign in routinely after that.

Initial Login

When you sign into CommPortal for the first time, a setup wizard prompts you to change your password, and your Voice Mail Pin. You can also record your voicemail greeting and name, or choose to accomplish those tasks later.
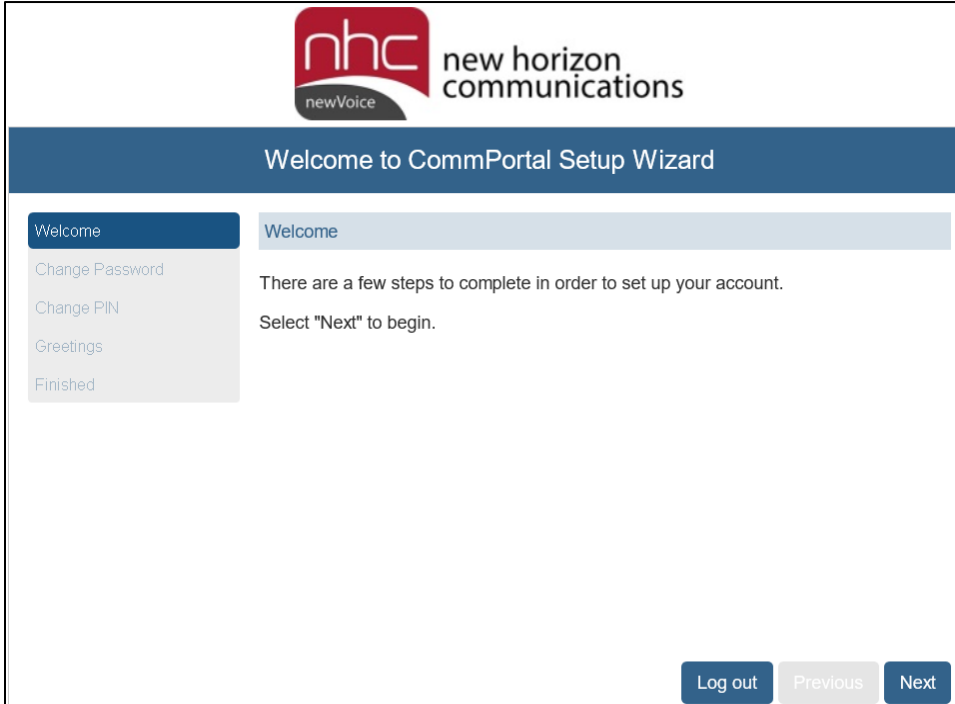
To get started, go to https://commportal.nhcgrp.com:
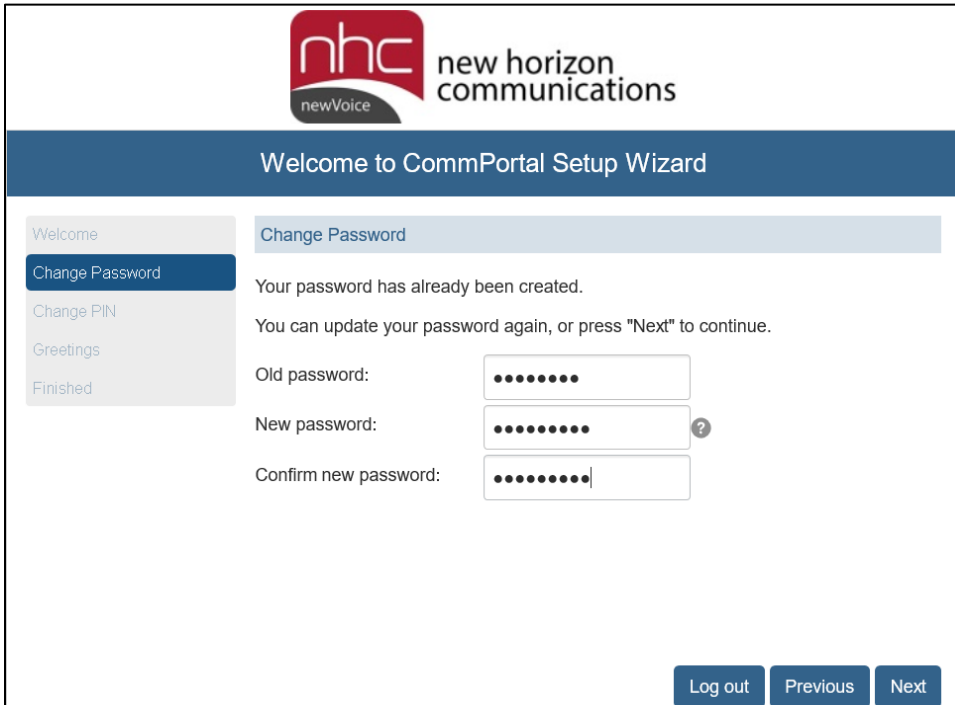

Log in with your ten-digit telephone number and generic password.

Welcome screen for the CommPortal Setup Wizard appears.

Click **Next**. The Change Password screen appears.

Enter your old password.

Choose a new password, then confirm your new password.

Note: Password must be alphanumeric, and contain at least one letter and one number. It must be eight to twenty characters long.

Click **Next**. Change PIN screen appears.
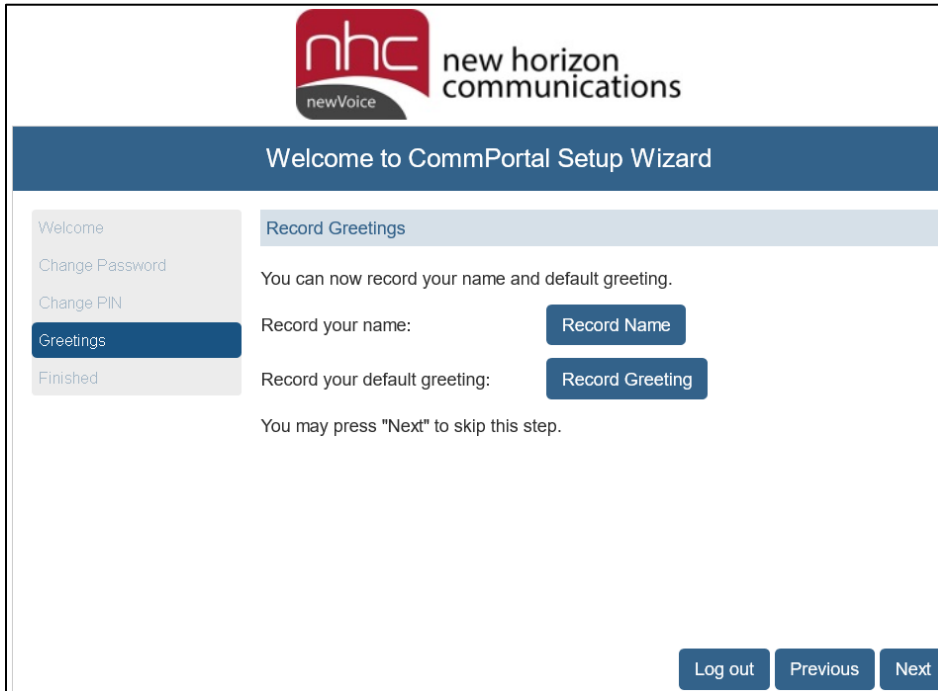
Enter your new PIN next to *Voicemail PIN*.

Note: PIN must be six to twenty digits long, with no numbers in sequence. You cannot use your telephone number, or part of your telephone number.

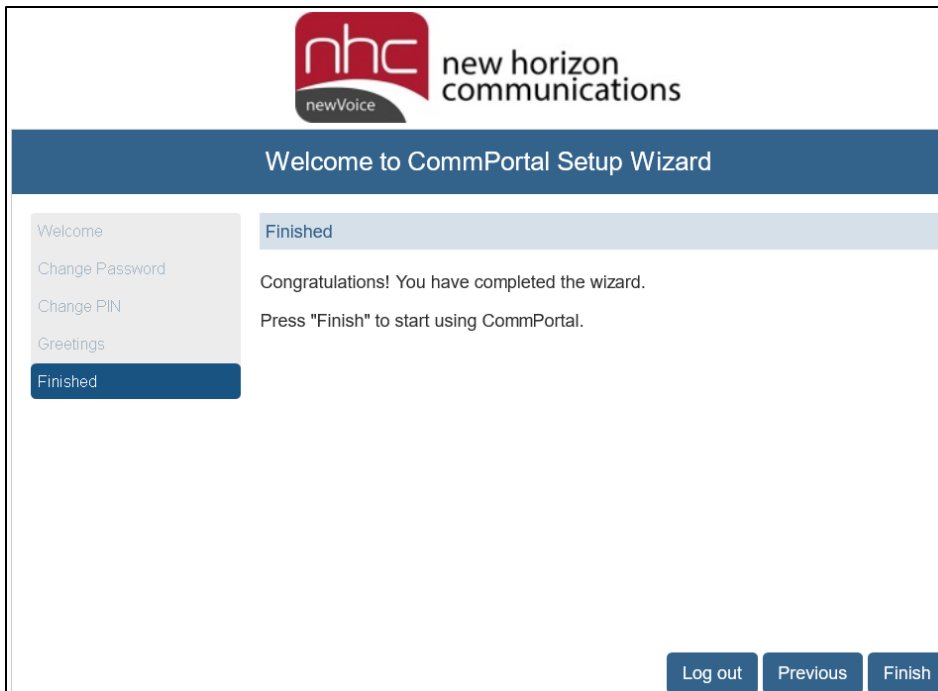Click **Next**. The Record Greetings screen appears.

At your option, click **Record Name** to record your name. Click **Record Greeting** to record your voicemail greeting. In each case, a pop-up appears with options to record.

Note: Connect a microphone to your computer to accomplish this step.

After you have finished recording, or to skip this step, click **Next**. The Finished screen appears.

Click **Finish** to open CommPortal.

Routine Login

To log into CommPortal after initial setup:

1. Open a web browser.

2. Navigate to https://commportal.nhcgrp.com.

3. Enter the following information:

   Number – Your ten-digit telephone number

   Password – Your CommPortal password

4. Click **Login** to open CommPortal.

CommPortal Help

For on-demand help, click **Help** under Support on the landing page.:
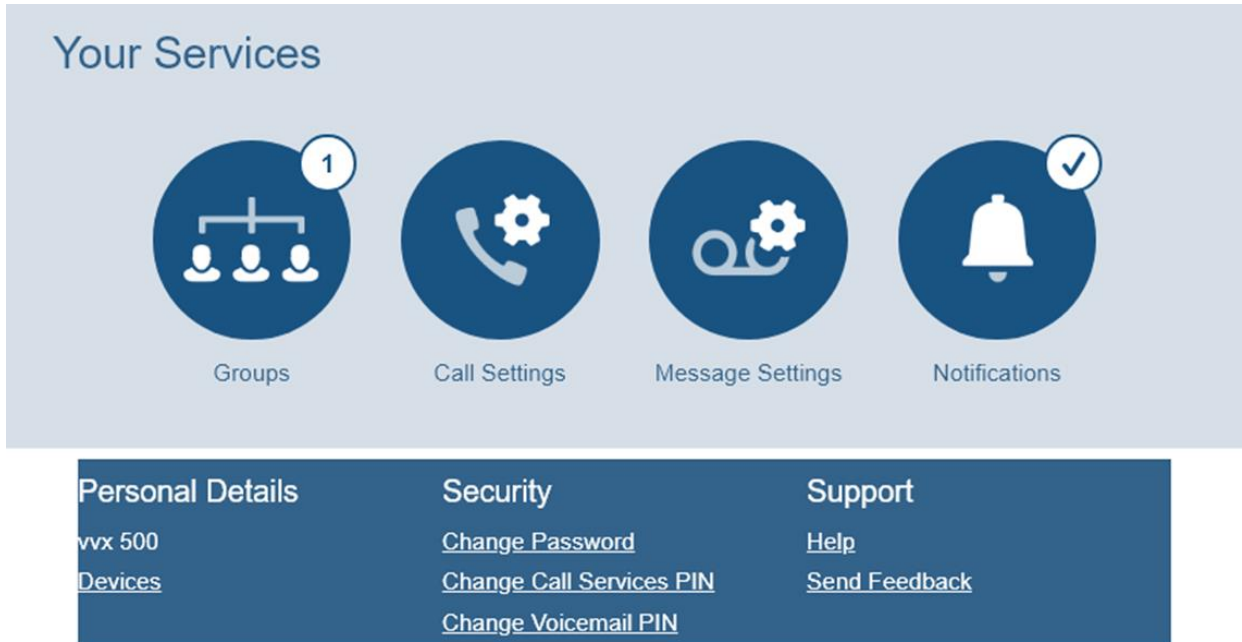
A sample help page appears below:

Make Call

lick **Make Call** in the top menu to open the Dialer pane. When you place a call from the Dialer, recipient's phone displays your office number, as if you called from your desk phone. You can also dial your desk phone from the CommPortal Dialer.

To make a call:

1. In the Phone Status screen, click **Make Call** at the upper right. Dialer pane opens.

2. Enter phone number under *Make a call to:*, or select a person in your business group from the drop-down list.
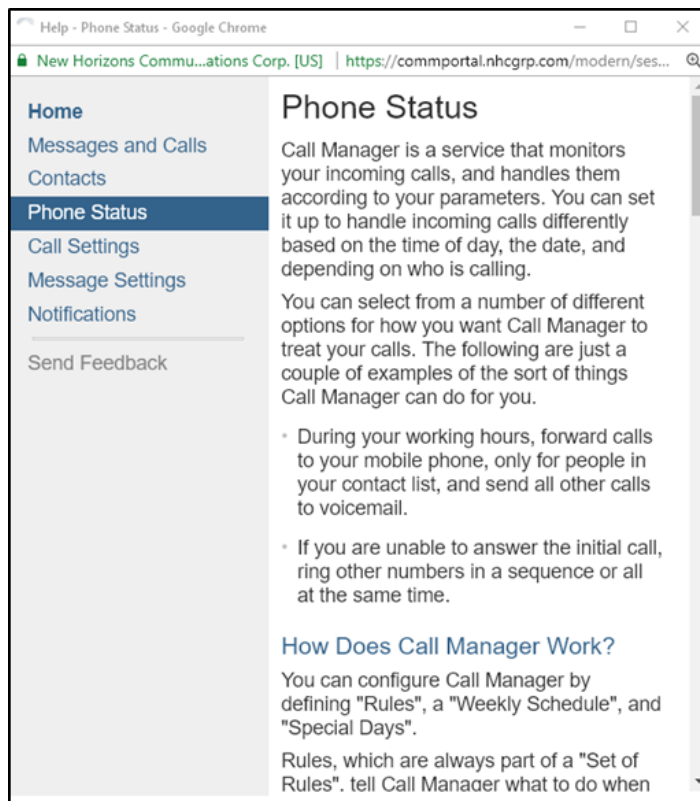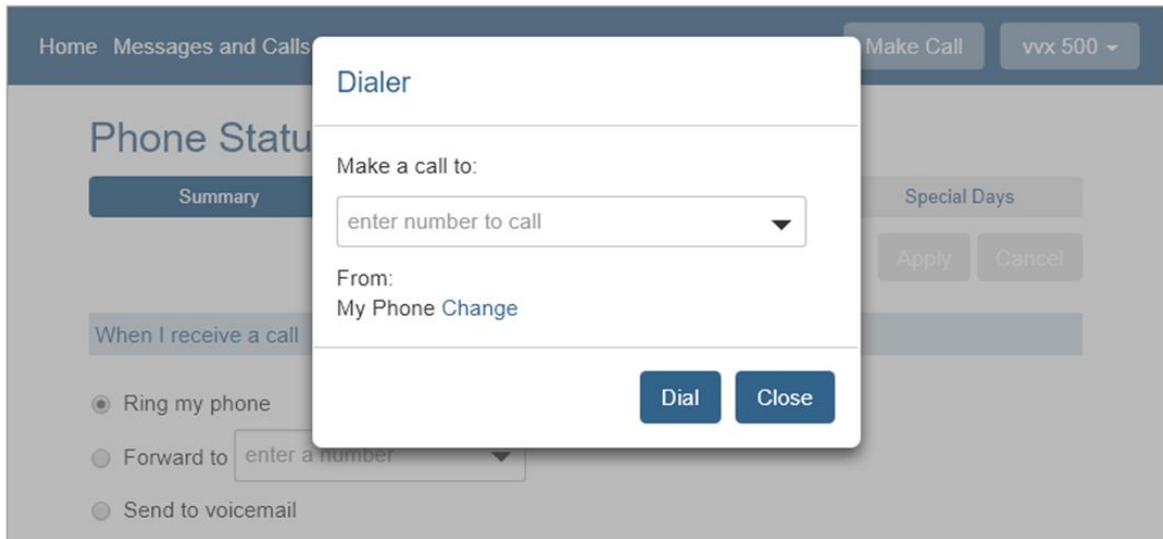
3. Click **Dial**.

   CommPortal places the call via your desk phone.

To use this feature to place a call from another phone, with your desk phone number displayed in caller ID:

1. Click **Change** next to *From: My Phone* in the Dialer pane.

   A pop-up appears.

2. Enter a new phone number, or select from the list of previously entered numbers.

3. Enter recipient's telephone number under *Make a call to:*.

4. Click **Dial**.

   CommPortal places the call as requested.

CommPortal Interface

The CommPortal Home page contains two parts: Phone Status and Your Services.

The top menu above Phone Status contains these selections:

- **Home:** Most common functions, including Phone Status or Call Manager, to specify how CommPortal handles your incoming calls.

- **Messages and Calls:** Provides call history, allows you to manage and listen to voicemails.

- **Contacts:** Provides a method for storing and retrieving contact details.

Under Your Services, you have access to:

- **Groups**: Allows you to manage the Hunt Groups you are subscribed to.

- **Call Settings**: General call settings.

- **Message Settings**: Displays the settings for voice mail.

- **Notifications**: Provides access to Notification settings.
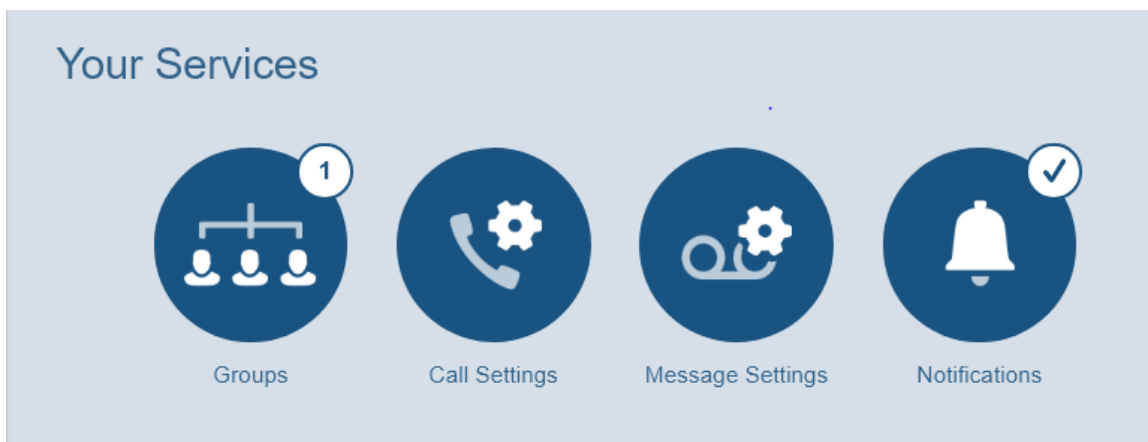
Messages and Calls

Click **Messages and Calls** in the top menu for access to voicemail messages and call summaries:

- To listen to your voicemail messages on your computer, click the play ▶ button.

- To manage your voicemail messages, click the Actions ▼ button for a drop-down list of options, such as Reply, Mark as Heard, or Forward as Email or Voicemail.

- To delete a voicemail message, click ✖ .

- View call information for your Missed, Dialed, Received, or Rejected calls, and view Deleted voicemail messages.

- To export call summaries in Comma Separated Values (CSV) format, click **Export** in the Missed, Dialed, Received, or Rejected tabs.

Contacts

Click **Contacts** in the top menu to manage your CommPortal Contact List, as well as your personal Speed Dials. You can also view the Extensions and Short Codes in your business group.

Perform these tasks in the Contact List tab:

- To locate individuals in your contacts list, enter your search string under Contacts and Groups.

- To add a new contact, click **New Contact**, then enter contact information in the desired fields.

- To add a new group, click **New Group**, then enter group information in the desired fields.

- To import contacts from another application, click **Import**, then follow the prompts.

- To export contacts another application, click **Export All**, then follow the prompts.

- To modify contact information, select the desired contact, then click **Edit** at the lower right.

- To remove a contact from the list, select the desired contact, then click **Delete** at the lower right.

Import Contacts

CommPortal permits you to store up to 1,000 contacts. You can import your contact list from another application via a .csv file. To create a sample .csv file, first enter a contact manually, then click **Export All**. Export downloads a .csv file to your computer, and gives you the correct format to upload.

1. Once your .csv file is ready, click **Import** at the bottom of the screen.

   Import Contacts pop-up appears.

2. Click **Browse** to locate the .csv file on your computer.

   Caution: By default, new contact details replace existing information if contact names are identical.

3. Click **Import**.

   CommPortal imports contact information from the .csv file.

Speed Dial Contacts

CommPortal permits you to create up to twenty-nine personal speed-dial contacts.

To create a speed-dial contact:

1. Click **Contacts** in the top menu, then click the Speed Dials tab.

2. Select the desired speed-dial number from the Speed Dial drop-down list on the right .

3. Enter the ten-digit telephone number that corresponds to the selected speed-dial number.

4. Click **Add**.

5. When all of your entries appear correctly in the left-hand panel, click **Apply**.

To delete an individual speed dial, click the X icon next to it, then click **Apply**.

To remove all speed-dial numbers from the left-hand pane, click **Clear List**, then click **Apply**.

The image below illustrates these procedures:

Extensions and Short Codes

Click **Contacts** in the top menu, then click the Extensions tab to view all of the extensions in your business group:

| Home | Messages and Calls (5) | Contacts | | | Make Call | vvx 500 ▾ |

| Contact List | Speed Dials | **Extensions** | Short Codes |

Extensions allow you to quickly dial other numbers in the Business Group. The table below shows all the lines in the Business Group and the extensions that are currently in operation.

Search for...

	Name	Telephone Number	Extension
	59520031	(595) 200 31	
	59520031	(595) 200 31	
	Jon VVX 300	(315) 572 48	48
	sla	(315) 572 48	48
	Test 3: Admin	(315) 572 48	48
	test 4800: Admin	(315) 572 48	48
	test 4801	(315) 572 48	48
	test 4804: Admin	(315) 572 48	48
	test 670: Admin	(315) 572 48	48
	test	(595) 200 32	
	vvx 500: Admin	(315) 572 48	48

Personal Details	Security	Support
vvx 500	Change Password	Help
Devices	Change Call Services PIN	Send Feedback
	Change Voicemail PIN	

Click **Contacts** in the top menu, then click the Short Codes tab to view all of the short codes in your business group:

Note: Entries in the Extensions and Short Codes tabs are view-only. The business group administrator can modify these listings through the administrator portal.

Home Screen Summary Tab

To manage your incoming calls, click **Home** in the top menu. Your phone's Summary tab opens:

Rules Tab

To set rules in the Call Manager, click the Rules tab under Phone Status. The tab lists three sets of rules in the left pane:

- Normal

- Reject Calls

- Screen Calls

The Rules tab appears below:

To modify a rule set, select the desired rule set under Sets of Rules, then click **Edit** or **Add New Rule** on the right. For example, if you select *Normal* under Sets of Rules, then click **Edit**, the following pane appears:

Thus when no rules apply in the Normal set of rules, select one of these options:

- Ring my phone: <select ringtone>

- Forward to: <enter number>

- Send to voicemail: sends all calls to voicemail

- Reject the call: rejects all calls

- Ask caller to give name

- Ring more than one phone

- Ask the caller to give name, then ring more than one phone

After you select your preference, click **Next** or **Finish**, as appropriate.

You can also specify what to do when you receive a call from an individual caller, or from someone in a designated group. If you select *Screen Calls* under Sets of Rules, then click **Edit**, the following pane appears:

You can select one of the options in the list:

- An individual contact: <select contact>
- A group of contacts: <select group>
- Anyone on my contact list
- Anyone in my business group
- A number, or group of numbers: <specify>
- Any anonymous number

Click **Next** or **Finish**, as appropriate.

Accomplish the following tasks in the Rules tab:

- To add a new rule set to the list, click **Add New Set of Rules** below the pane. To rename any rule set other than Normal, click **Rename**.

- To remove a set of rules from the list in the left pane, click ✖ to the right of the rule set.

- To remove a rule from the list of rules in the right pane, click ✖ to the right of the rule.

- The default rule always appears last. To move a created rule up one position in the list, click **Move Up**. To move a rule down one position in the list, click **Move Down**.

- To modify an existing rule, select the rule set and the rule, then click **Edit**.

- To add a rule to a selected rule set, click **Add New Rule**.

- To save your changes, click **Apply** at the lower right.

To create or modify rules in the Rules tab:

1. Select *Normal*, *Reject Calls*, or *Screen Calls* under Sets of Rules in the left pane.

   To add a new set of rules, click **Add New Set of Rules**. To rename an existing set of rules, click **Rename**.

2. Click **Add New Rule** when you want to add a rule to the selected rule set. Otherwise, click **Edit** to modify the default rule, or to modify a rule you have added.

   A list of options appears. For example, if you select *Screen Calls* under Sets of Rules, then click **Add New Rule**, these options appear:

3. Click the desired option, or accept the default option.

4. Click **Next**. In the next pane, specify how to handle the call.

5. Click **Finish** to add the new rule to rule set.

You can have Call Manager ring more than one phone at the same time, or in sequence. To do so, click **Add New Set of Rules** in the Rules tab, or click **Edit** to modify an existing rule set. The example below uses the Normal rule set.

1. Select *ring more than one phone at a time or in sequence*, then click **Next**.

When no rules apply in the "Normal" set of rules

When no rules apply

○ ring my phone using [the Standard Ringtone ▾]

○ forward to [enter a number   ▾]

○ send to voicemail

○ play a reject message and reject the call

○ ask the caller to say their name before I accept the call

◉ ring more than one phone at the same time or in sequence

○ ask the caller to say their name before ringing more than one phone at the same time or in sequence

[< Back] [Next >] [Finish] [Cancel]

2. In the next panel, select first phone to ring in the *Phone Number* drop-down list, then set number of seconds phone should ring in the *Start* and *End* drop-down lists.

   Note: Each ring lasts approximately five seconds.

3. Click **Add**.

4. Select a ringtone, if desired.

5. Enter additional numbers, if desired. Click **Add** for each number.

6. Select action to take if you don't answer, or if all lines are busy.

7. Click **Finish**.

8. Click **Apply** to activate changes.

Note: For calls that ring multiple lines, and no one answers, call goes to first voicemail that picks up the call.

Apply Rules

To apply a rule set to incoming calls:

1. Click the Summary tab under Phone Status.

2. Select *Use my … rules* under *When I receive a call.*

3. Select the desired rule set in the drop-down list.

4. Click **Apply** to save changes.

Weekly Schedule Tab

Open the Weekly Schedule tab to create custom rules for calls based on defined periods during the week. To get started, select from:

- An example schedule that you can customize, *or*
- A blank schedule

For this procedure, we have chosen a sample schedule you can customize (see below). Font colors for Lunch, Weekend, and Working Hours on the left match times blocked out in the weekly schedule. Thus Lunch appears in blue from 12:00 – 1:00 pm, Monday to Friday. White designates all periods other than Lunch, Weekend, and Working Hours.

To modify time blocks in the schedule:

1. Under Periods on the left, click the period you want to schedule.

   Lunch is selected in the illustration.

2. Use your mouse to click and drag the period over the days and times in the schedule you want that period active.

3. Click **Apply** to save changes.

Apply Weekly Schedule

To apply a weekly schedule, return to the Summary tab:

1. Under When I receive a call, select Handle depending on the time or day.

    Several drop-down lists appear below your selection. Lists contain default rule sets, such as Normal, and custom sets you have created.

2. Use the drop-down lists to select which rule set to use during each period.

3. Click **Apply** at the upper right to save changes.

Special Days Tab

You can apply special rules during public holidays, vacation days, or business trips. To do so, click the Special Days tab:

To specify how to handle calls on these days, open the Rules tab, click **Add New Set of Rules**, and create a rule set called *Special Days*:

Then return to the Summary tab to apply the new rule set:

1. Select *Use my … rules* under *When I receive a call.*

2. Select *Special Days* from the rules drop-down list.

3. Click **Apply**.

The system now handles your calls according to the Special Days rule set.

Groups

Click the Groups icon to view Multi-Line Hunt Groups your line may be part of. Select a group under Group Membership on the left to view members of the group on the right. Gray arrow icons next to a member's name indicate logged-in or logged-out status. To log out of a group, click **Logout**. To log in, click **Login**.

The Groups icon is not visible if your line is not part of a Multi-Line Hunt Group.

Security

Under Security, you can set or modify the following security information:

- *Change Password* – Allows you to change your CommPortal login password.
- *Change Call Services PIN* – Allows you to change your PIN for remote call Services.
- *Change Voicemail PIN* – Allows you to change your PIN for voicemail.

Personal Details	Security	Support
vvx 500	Change Password	Help
Devices	Change Call Services PIN	Send Feedback
	Change Voicemail PIN	

Change Password

Click **Change Password** under Security to open the Change Password pane:

Change Password

Current password:

New password:

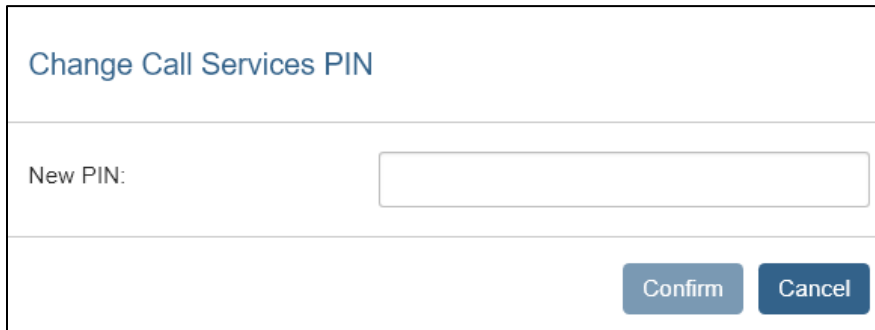Confirm new password:

Confirm Cancel

To change your account password:

1. Enter your current password.
2. Enter your new password.
3. Confirm your new password.
4. Click **Confirm** to save the change.

Note: Password must be 8 to 20 alphanumeric characters, with at least one letter and one number.

Change Call Services PIN

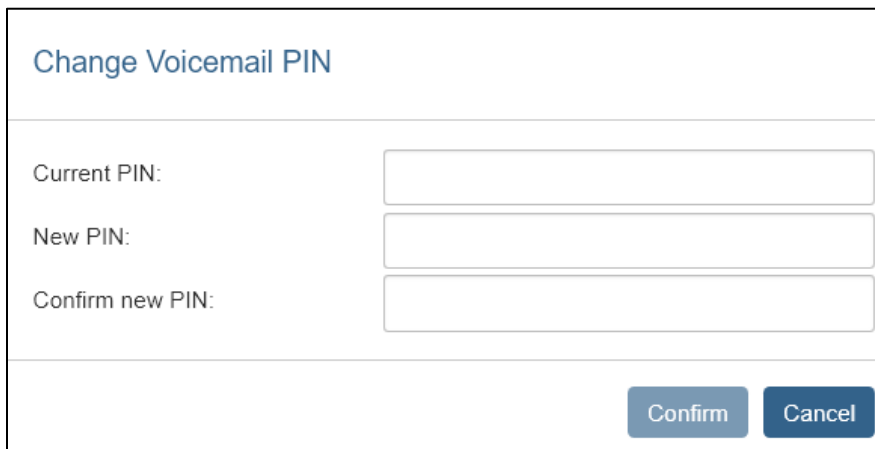Under Security, click **Change Call Services PIN**:

To change your call services PIN:

1. Enter new PIN.
2. Click **Confirm.**

Note: PIN must be four numbers long.

Change Voicemail PIN

Under Security, click **Change Voicemail PIN**:

To change your voicemail PIN:

1. Enter current PIN.
2. Enter new PIN.
3. Confirm new PIN.
4. Click **Confirm** to save the change.

Note: Voicemail PIN must be 6-20 numbers long, with no numbers in a sequence. It also cannot be the number of your phone line, or contain part of the phone number.

Devices

Under Personal Details, click **Devices**:

The Devices pane appears:

Click **set keys** to open a separate interface, where you can add or remove programmable keys for your desk phone.

Note: Options for programming keys on your phone depend on the type of phone ordered.

Call Settings

Use Call Settings to specify how to handle incoming and outgoing calls under particular circumstances.
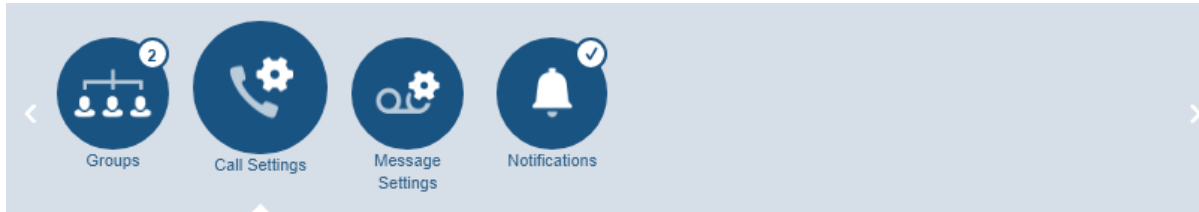
Call Settings

Apply   Cancel

General

Caller transfer is not available as no operator number has been set for your business group.

- ☐ Withhold caller ID when making calls
- ☑ Provide caller ID for incoming calls
- ☑ Provide caller name for incoming calls

Call Forwarding

Ask me for a forwarding number each time I turn on forwarding from my phone using an access code:

- ☑ Immediate Forwarding
- ☑ Busy Forwarding

Call Blocking

Choose which types of phone numbers should be blocked.

- ☐ Local
- ☐ National and Mobile
- ☐ International
- ☑ Premium Rate
- ☐ Operator
- ☐ Directory
- ☐ Access Codes
- ☐ Access codes that change configuration

General

Check boxes under General allow you to:

- *Withhold caller ID when making calls* – Check this box to withhold your outgoing caller ID.

- *Provide caller ID for incoming calls* – Check this box to receive caller ID number for incoming calls.

- *Provide caller name for incoming calls* – Check this box to receive caller ID Name for incoming calls.

Call Forwarding

When you turn on call forwarding from your phone, specify how you want the system to handle your calls.

Call Blocking

Checkboxes under Call Blocking allow you to restrict which types of calls can be dialed from your telephone. Check the boxes for the types of calls you wish to disallow.

Message Settings

Use Messages Settings to configure voicemail services.

General

General section under Message Settings contains these items:

Check *Incoming calls are forwarded to voicemail after* to set the number of rings before a call forwards to voicemail. One ring equals approximately five seconds.

Check *Forward messages as emails* to send voicemail messages as .wav files to your email address. To enable and configure this feature:

1. Check the box next to *Forward messages as emails*.

2. Click **add an email address**.

3. Enter e-mail address, then click **Add**.

4. Click **Apply** at the upper right.

   Note: Check *Leave Original in Inbox* if you want to leave the original voicemail message in your voicemail box when you forward it to email.

Mailbox Access

Mailbox Access section under Message Settings contains these options for your voicemail box:

- *Skip PIN* – Option is available only if you check *Fast Login*. Select if you do not want to enter your PIN when you check your voicemail.

- *Fast Login* – System recognizes your phone number when you log into your voicemail box from your own telephone. Enter only your PIN.

- *Auto-play voicemail* – Check if you want your voicemail messages to play automatically when you open your inbox.

- *Voicemail playback* – In the drop-down list, select:

    Details and Message to hear who the message is from and when it was left, as well as the recorded message.

    Message only to hear only the recorded message.

    Details only to hear only who the message is from and when it was left.

Click **Apply** at the upper right to save your changes.

Voicemail Greeting

You can record voicemail greetings with a microphone attached to your computer. In the drop-down list next to *Use the greeting*, select which greeting to play when a caller leaves a voicemail message:

- *Extended Absence* – Click record to open pane to record or upload extended absence greeting.

- *Personal* – Click **record** to open pane to record or upload personal greeting.

- *System with name ** – Click **edit** to open pane to record or upload spoken name.

- *System with number*

- *System*

Click **more options** to show two more options for special purpose greetings:

- *Use a different greeting when I'm in a call.* – Click **record** to open pane to record or upload a personal busy message.

- *Use different greeting within my business group.* – Click **record** to open pane to record or upload a greeting for members of your business group.

Click **Apply** at the upper right to save your voicemail greetings.

Notifications

Click the Notifications icon to configure alerts for your voicemail messages.

Message Waiting Indicator

To specify that you want your Message Waiting Indicator light to flash when you receive a voicemail message:

1. Under Message Waiting Indicator, check *Send phone notification of incoming messages to the following phone numbers*.

2. To specify one or more phone numbers, click **New Entry**, enter a phone number, then click **Add**.

3. Specify Urgent Voicemail or All Voicemail for each number, then click **Apply** to save your changes.

Email

To specify that you want to receive email notification of new voicemail messages:

1. Under Email, check *Send email notification of incoming messages to the following addresses*.

2. To specify one or more email addresses, click **New Entry**, enter an email address, then click **Add**.

3. Specify Urgent Voicemail or All Voicemail for each address, then click **Apply** to save your changes.

Outdial

To specify that you want the voicemail system to call you when you receive a new message:

1. Under Outdial, check *Send outdial notification of incoming messages, according to the following schedule:*.

2. Enter the phone number to send outdial notifications to.

3. Specify Urgent Voicemail or All Voicemail.

4. Specify how many times, and how often the system tries to reach you.

5. Click **Apply** to save your changes.

Override

To specify that you want to override existing outdial and pager notifications:

1. Under Override, check *Override your outdial and pager notifications, sending them according to the schedule:*.

2. Set an expiry date for the override.

3. Enter the phone number to send outdial notifications to.

4. Specify Urgent Voicemail or All Voicemail.

5. Specify how many times, and how often the system tries to reach you.

6. Click **Apply** to save your changes.

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