



# **CUSTOMER HORIZON USER GUIDE (v1 05.2020)**

- 1) Polycom VVX450 IP Handsets
- 2) Cisco 8841 IP Handsets
- 3) Horizon Collaborate
- 4) Horizon Mobile App for iOS and Android
- 5) Horizon Mobile Connect Widget for iOS and Android
- 6) User Basic Portal Guide











# Polycom VVX411 User Guide

### Make a call

#### Procedure

- 1. Do one of the following:
- Start typing a phone number.
- Select New Call.
- Press a line key.
- Pick up the handset, press •, or press •).
- 2. Enter a number or select a recent contact.
- 3. Select Dial.



### Receive a call

#### Procedure

1. Do one of the following:

Pick up the handset.

Press ) or select **Answer**.

Press **(**).

After you answer the incoming call, the call becomes active.

# End a call

You can end active calls at any time; however, you must resume held calls before you can end the call.

You can end an active call on your phone at any time.

- 1. Do one of the following
  - Place the handset on the cradle.
  - Press End Call.
  - In the Calls screen, highlight the call and press End Call

### Transfer a call

You can transfer active or held calls to another person using the following transfer types:

- Blind transfer—Transfers the call directly to another line without speaking with the other party first.
- Consultative transfer—Enables you to speak with the other party before completing the transfer.

You can transfer a call to another contact and choose the transfer type you want to use for the call.

Procedure

- 1. During a call, do one of the following
- Press **Transfer** to use the default transfer type.
- Press and hold **Transfer** to use the non-default transfer type.

For example, if Blind is the default, press and hold **Transfer** to perform a Consultative transfer.

• Press Transfer > More and select Blind or Consultative.

Depending on the default transfer type, either the Blind or Consultative option displays. For example, if the default transfer type is Blind, then you can select Consultative.

2. Dial a number or choose a contact from the Recent Calls or a directory.

If the transfer type is set to Blind, the call is transferred immediately.

3. If the transfer type is set to Consultative, select **Transfer** after speaking with your contact.

### Cancel a Transfer

If a contact does not answer the transfer or you want to remain speaking with the contact on your line, you can cancel the transfer before it is complete.

#### Procedure

• 1. Select Cancel.

The call is not transferred and becomes active.

#### Call Records

You can view your Missed, Received, Dialled calls by pressing the navigation key (round up, down, left, right key).

### Mute and Unmute Audio

You can mute the microphone so other parties cannot hear you. Microphone Mute applies to the handset, headset, and speakerphone. You can still hear all other parties when you mute your microphone.

#### Procedure

- 1. During a call, including a conference call, press the mute key
- The other parties cannot hear you.
- 2. Press again to unmute the microphone.

### Personal Voicemail

#### Procedure

- Navigate to Messages.
- 2. Select Message Center.
- 3. If you have multiple lines on your phone, select the line that has the new message.

From the Messages screen, select Connect and follow the prompts to access your messages

# Call Forward (Extension Only, Not Ring Group)

You can forward an incoming call to a contact or forward all incoming calls to a contact.

To forward an incoming call:

- 1. In the Incoming Call screen, select Forward.
- 2. From the Call Forwarding screen, enter the forwarding number, and select Forward.

To forward all incoming calls:

- 1. Select **Forward** or navigate to **Settings > Features > Forward**.
- 2. If your phone has multiple lines, select a line.
- 3. On the Forwarding Type Select screen, select a forwarding type.
- 4. Enter a contact's number if enabled and select Enable.

If you selected the No Answer option, enter the number of rings before the call is forwarded.

To disable call forwarding:

- 1. Select Forward.
- 2. If your phone has multiple lines, select a line.
- 3. From the Forwarding Type Select screen, select your forwarding type, and select Disable.

### Do Not Disturb

You can enable DND to prevent your phone from ringing and to send all incoming calls directly to voicemail. All calls you receive while DND is enabled are logged in the Recent Calls list.

Enabling DND on shared lines disables ringing only. A visual notification of the call still displays, and you have the option to answer or ignore the call.

Note: When you set your presence status to Do Not Disturb and enable DND on your phone, a message stating that your status is set to Do Not Disturb scrolls under the time display, and the DND icon does not display in the status bar.

### Hold

Procedure

During an active call, select **Hold** 

If you're in the Calls screen, select the call first.

A hold icon is displayed on the line of the held call and a red LED light flashes on the line key

### Resume a call

Do one of the following -

- Select **Resume**.
- From the Calls screen, select the call and select **Resume**.

### Initiate a Conference Call

You can initiate a conference call with up to two contacts.

Note: When your phone is set up for single key press conferences, you do not need to select the Conference soft key a second time to join parties to a conference call.

#### Procedure

- 1. Call a contact.
- 2. When the contact answers, select the **Conference** soft key.

The call is held.

- 3. Enter another contact's number or select a contact from the directory or the call lists.
- 4. When the contact answers, select the **Conference** soft key.

All call participants are added to a conference call.

## **View Directory**

You can view and add contacts to the Contact Directory. To view the Contact Directory:

• From the Home screen, **Directories** > **Contact Directory**.



Helpline: 03333 660 770

24/7 ticket support: support@excel-comms.co.uk





## Cisco 8841 User Guide

# Make a call

Enter a number and pick up the handset.



Use your speakerphone for hands-free calling. Keep in mind that your coworkers might be able to hear your call too.

Procedure

Step 1 Enter a number using the keypad.

Step 2 Press Speakerphone .

### Receive a call

Procedure

When your phone rings, press the flashing line button to answer the call.

### Decline a call

You can send a ringing call to your voicemail system (if configured) or to a preset phone number. If not set up, the call is rejected, and the caller hears a busy tone.

Procedure

Decline a call by performing one of the following actions:

Press Decline.

If you have multiple incoming calls, highlight the incoming call and press Decline.

# **Using Line Keys**

You can interact with the features on your phone in several ways:

Softkeys, located below the screen, give you access to the function displayed on the screen above the softkey. The softkeys change depending on what you are doing at the time. The More ... softkey shows you that more functions are available.

Feature and line buttons, located on either side of the screen, give you access to phone features and phone lines.

Feature buttons—Used for features such as Speed dial or Call pickup, and to view your status on another line.

Line buttons—Used to answer a call or resume a held call. When not used for an active call, used to initiate phone functions, such as the missed calls display.

Feature and line buttons illuminate to indicate status:

Green, steady LED—Active call or two-way intercom call
Green, flashing LED—Held call
Amber, steady LED—Privacy in use, one-way intercom call, or logged into a Hunt Group
Amber, flashing LED—Incoming call or reverting call
Red, steady LED—Remote line in use (shared line or Line Status) or Do Not Disturb (DND) active
Red, flashing LED—Remote line on hold

## **Using Busy Lamp Fields**

A Busy Lamp field lets you see if colleagues' lines are free to take calls.

You can have up to 8 Busy Lamps on the Cisco 8841/8851 and 8861, all programmable through the Horizon Portal. The line button is green if it's free, or red if it's not.

Excel Comms are here to help you setup your busy lamp fields if you are not familiar with the horizon portal.

#### Transfer a call

- 1. From a call that is not on hold, press Transfer.
- 2. Dial the extension you require or press up on the large circular key to reveal internal speed dials
- 3. Dial the number you require or press a speed dial
- 4. Announce the caller and if accepted press transfer and then hang up.
- 5. If the caller does not wish to take the call, press the red hang up button and you will see "Resume" appear on the screen; press Resume to speak with the caller.

### Call Records

Check to see who's called you recently.

#### Procedure

- Step 1 Press Applications .
- Step 2 Select Recents.

When the phone is in the idle state, you can also view the Recent calls list by pressing the Navigation cluster up.

Step 3 If you have more than one line, select a line to view.

If two lines on your phone are configured for the same number, only the line that receives the call shows the call details in the call history.

### Mute and Unmute Audio

You can mute the microphone so other parties cannot hear you. Microphone Mute applies to the handset, headset, and speakerphone. You can still hear all other parties when you mute your microphone.

#### Procedure

- 1. Press Mute.
- 2. Press Mute again to turn mute off.

### Personal Voicemail

#### Procedure

- 4. Navigate to Messages.
- 5. Select Message Center.
- 6. If you have multiple lines on your phone, select the line that has the new message.

From the Messages screen, select Connect and follow the prompts to access your messages

#### Do Not Disturb

Use do not disturb (DND) to silence your phone and ignore incoming call notifications when you need to avoid distractions.

# Hold/Call Park

You can use your phone to park a call. You can then retrieve the call either from your phone or another phone, such as a phone at a coworker's desk or in a conference room.

There are two ways you can park a call: call park and directed call park. You'll only have one type of call park available on your phone.

A parked call is monitored by your network, so you won't forget about it. If the call remains parked for too long, you hear an alert. You can then answer, decline to answer, or ignore the call on your original phone. You can also continue retrieving it from another phone.

If you don't answer the call within a certain length of time, it's routed to voicemail or another destination, as set by your administrator.

A parked call occupies one line.

### Place a Call on Hold with Call Park

You can park an active call that you answered on your phone and then use another phone in the call control system to retrieve the call.

You can park only one call at the call park number.

Before you begin

Your call must be active.

Procedure

Step 1 Press Park, and then hang up.

Your phone displays the number where the system parked the call. The parked call is put on hold, and you can press Resume to resume the call on your phone.

Step 2 (Optional) Communicate the parked number to the person who needs to answer the call.

### Retrieve a Call on Hold with Call Park

You can pick up a parked call from anywhere in your network.

Before you begin

You need the number that was used to park the call.

Procedure

Enter the number where the call is parked to retrieve the call.

#### Resume a call

Do one of the following -

- Select Resume.
- From the Calls screen, select the call and select **Resume**.

#### Initiate a Conference Call

You can talk with several people in a single call. You can dial another person and add them to the call. If you have multiple phone lines, you can join two calls across two lines.

When you add more than one person to a conference call, wait a few seconds between adding participants.

As the conference host, you can remove individual participants from the conference. The conference ends when all participants hang up.

### Add Another Person to a Call

When you add more than one person to a call, wait a few seconds between adding participants.

Procedure

Step 1 From an active call, press Conference.



Step 2 Add the other person to the call by doing one of the following:

Press Active calls and select a held call.

Enter the phone number and press Call.

Step 3 Press Conference.

## Swap Between Calls Before You Complete a Conference

You can talk to a person before you add them to a conference. You can also swap between the conference call and the call with the other person.

Procedure

Step 1 Call a new conference participant, but do not add the participant to the conference.

Wait until the call is connected.

Step 2 Press Swap to toggle between the participant and the conference.

# View and Remove Conference Participants

If you create a conference, you can view the details of the last 16 participants who join the conference. You can also remove participants.

Procedure

- Step 1 While you are in a conference, press Show Details to view a list of participants.
- Step 2 (Optional) Highlight a participant and press Remove to drop the participant from the conference.

### **View Directory**

Speed dials allow you to call a number simply by pressing one or two pre-programmed digits.

You should always set up and manage all speed dials through the Horizon Portal to make sure they're not deleted every time you run a system upgrade or firmware refresh. To set up speed dials, see your Horizon Portal guide.

Save.



Helpline: 03333 660 770

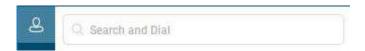
24/7 ticket support: support@excel-comms.co.uk





#### **HORIZON** Collaborate

### Find Someone



The quickest way to find someone via Collaborate is to start a search by typing the person's name, phone number, or Instant Messaging address in the *Search* box on the Collaborate main window. The results display automatically.

### Add a Contact

You can add people who you regularly contact to your buddy list. This will enable you to contact them more easily and you will see their presence. To add a contact:

- 1. Find the person you want to speak to
- 2. Right-click the person's name
- 3. Click *Add to Contact*

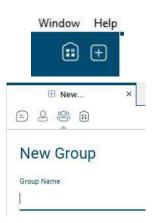
You can then add the user to a group by right clicking on the saved user and save to a group or add them to your favourites.



## **Creating Groups**

You can sort your contacts into groups for ease of management.

- 1. Click on the *New* button on the main screen
- 2. On the opened tab, click on Groups
- 3. Create a group name and click *Add to Contacts*

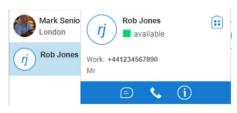


Outlook (1)

Richard Bachman

View Profile
Add to Contacts

### Instant Message a Contact



Select a user from your contact list or search a new user and then double click on their name or hover over their name and click the IM icon. This will open up a chat window, where you can type your message.

## Escalate the call to voice, video and sharing

Within the contacts open tab, select the appropriate call type you wish to make, voice video sharing

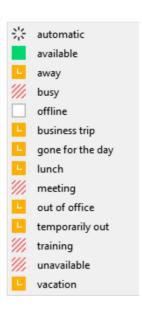
You are also able to see a person's contact card by pressing on the information icon

### Managing your Presence

Presence enables you to see the status of the person you want to contact, so you can decide the best way of talking to them. Presence is derived from the user's calendar and along with their activity within Collaborate, such as making a voice call.

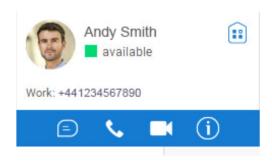


To change your presence, click on your presence status and then select an appropriate one from the list. The status will remain until you select 'automatic' or log out of the client call.



# Voice Calling a Contact

Select a user from your contact list or search a new user and then you can double click on their name, or hover over their name and click the voice icon. This will start the Voice conversation.



#### In Call Control

Once the call is connected, you will have access to the following:

- Hang Up
- Mute
- Conference
- Call Park
- Hold
- Transfer
- Call Park
- Escalate the call to video



## Voice Calling from a Chat Window

You can change a call type at any time from within a chat window. This is useful when you want to check someone is available to take a voice call.

- 1. Double click on a user to open the chat window
- 2. Click on the icon to start a voice call
- 3. You will have access to the *in call* controls to manage the call

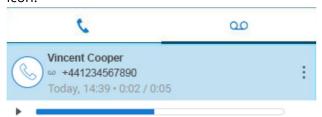
You can escalate the call to video by clicking on the icon

The call can be easily tuned into a conference call by using the *in call* controls, or simply dragging and dropping a user into the open tab. www



### Visual Voicemail

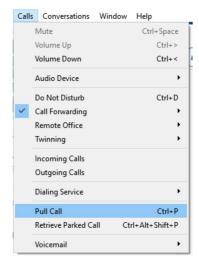
Access your voicemails from Call history and click on the voicemail icon. Select the voicemail and then press *play*. You can manage your voicemails from the *more options* icon.



Play Delete Save the file

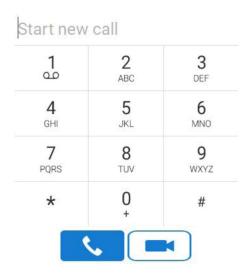
### **Pull Call**

You can move a call from your mobile softclient to your desktop, or from your desktop to your mobile client, without interrupting the call. This feature is available on voice calls and voice conference calling. When a call is made or received on the mobile client, the following option will become available. Simply click on *Calls* and then *Pull Call* (or press Ctrl. P) and the call will now be on the desktop.



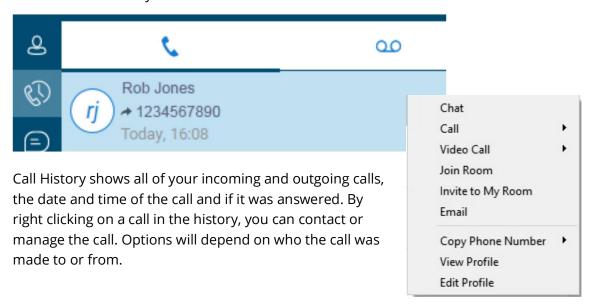
## Dialpad

The keypad is available to manually dial a number or for use in a call such as entering numbers in a legacy audioconference bridge. A number can be cut and pasted into the Dialpad.



# **Call History**

Select the Call History icon and then select the calls.





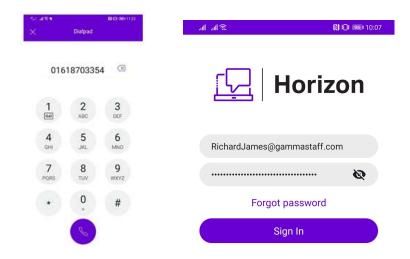
Helpline: 03333 660 770

24/7 ticket support: support@excel-comms.co.uk





## Horizon Mobile App for iOS and Android



# Call History

Once you've logged in, the first screen you'll see is your Call History. This is all calls made and receive from your Horizon account, so will include calls made and received by any desk phone or other Horizon client. This will also show calls received into any call groups that you may be in.

An arrow pointing to a south-west position signifies an incoming call, and an arrow pointing north-east signifies a call you've made. If you have missed a call, the number and arrow will show red. Black is a connected call.

You can tap any of these entries and then click "Call" to call someone back.

You can delete your call history by clicking on the trash can in the top right-hand corner.

Deleting your call history cannot be retrieved by your Company Administrator and will delete your call history across all your Horizon devices and clients.

If you wish to make a call, you can use the Call History tab. Alternatively, you can make a call in one of the following ways:

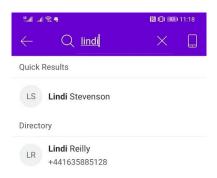
#### Directory

First click the three-line icon in the top left of your screen and then select "Directory" from the list.



Using the Directory, you can search your entire Horizon Company, any contacts that your Company Administrator has set up in the corporate directory and your device contacts (providing you have allowed Horizon access to your phone contacts).

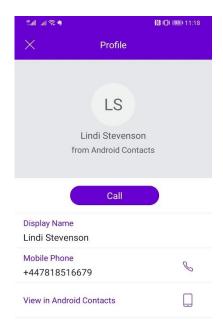
Type in the contact you wish to search for, and Horizon will search all these directories in one go.



Tap a contact and then you can click "Call" to make a call to your contact from your Horizon client (this is also true of contacts found in your phone's contacts).

If the contact is taken from your mobile device, it will show "from Android Contacts" under the name. You can still call the person using your Horizon client, even though it is taken from your Android contact list.

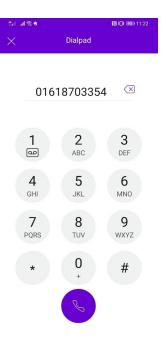
If you want a new Directory entry adding so all users can have access to this, contact your Company Administrator and request that they add an entry to the Corporate Directory.



#### Dialpad

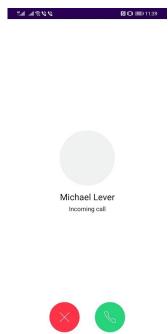
The dialpad allows you to enter a telephone number to be called, much like using your mobile phone or desk phone. Just type in the numbers and press the call button.

If you've made a mistake, you can press the backspace icon.



# Receiving a Call

Horizon will alert you when you are called.

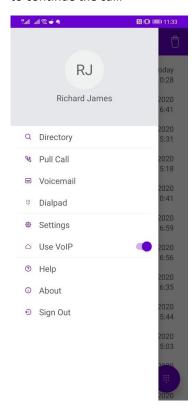


You can answer the call by simply hitting the green answer button.

You can choose to decline a call by tapping red decline button.

#### Pull a Call

If you have a desk phone or another client (for example, a PC client or desk phone) which you've answered a call on, you can "pull" the call to your mobile client by selecting "Pull Call" from the menu. The client will then "pull" the call from the other Horizon device to your mobile client for you to continue the call.



All you need to do is select the three-line icon in the top left of the application and then "Pull Call".

### Voicemail

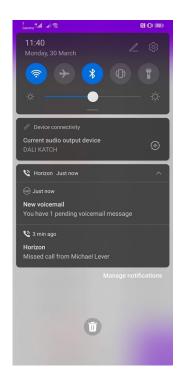
If your Company Administrator has set you up to have Voicemail, you can access your voicemails through the Horizon client.

You will receive a push notification for every new voicemail left. Tapping the notification will take you straight to your Voicemail.

Alternatively, tapping the three-line icon in the top left corner of the application, you can then select "Voicemail".

Tap on the voicemail and you can then listen to the voicemail, call them back, mark the voicemail as new again or delete the voicemail.

Once a voicemail has been deleted, this cannot be retrieved by your Company Administrator.



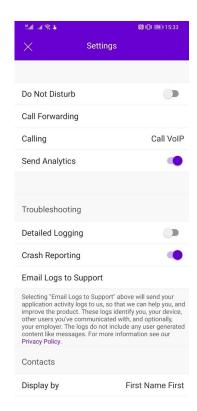
# **Horizon Settings**

You can edit some of your Horizon settings from the mobile client. These are:

#### Do Not Disturb

Do Not Disturb (DND) allows you to turn off call notifications to all your Horizon devices and clients whilst enabled.

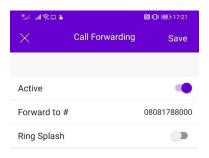
When you have enabled this setting, all calls will be sent to whatever call treatment you have set up for "Call Busy". To confirm what this is, you should speak to your Company Administrator.



#### Call Forwarding

You can enable all your calls to be forwarded to any other telephone number (it does not have to be a Horizon number), and then you can activate / deactivate this from here.

If "Ring Splash" is enabled, then your mobile client will ring once before your call is forwarded to the number you've entered.



## Calling

Use VoIP should always be enabled for the Horizon mobile client to work. This setting can be adjusted if you are a Horizon Connect user and you wish to use your mobile's native dialler to make and receive calls ("On" is the setting you should have if you want to receive calls on your client, and "Off" if you are wishing to use Connect).

# **Twinning**

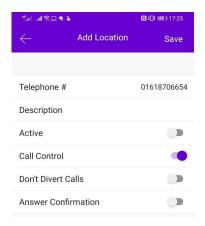
Twinning allows you to ring up to 5 other numbers at the same time when you receive a call. This could be a home office or another mobile phone. If numbers have been set up already by your Company Administrator, these will appear in the list here.

You can add "locations" (numbers) by tapping "Add Location". Enter the telephone number and you can then activate this number selecting "Active". To deactivate twinning, you set Active back to disabled.

#### Call Control

The Call Control setting is for those users that also use Horizon Integrator or Horizon Receptionist. You can control the call from your Integrator or Receptionist client whilst on a twinned call if this Call Control setting is enabled.

For example, you answer the call on your twinned number and Call Control is set to "On", you can put a call on hold using your Integrator or Receptionist client. If this setting isn't on, then Call Control from the Integrator client won't work.



#### Don't Divert Calls

Don't Divert Calls prevents Horizon from forwarding calls when the call hits the twinned destination, and will only send calls that are received directly by the user (i.e. those where the Directory has been used, or a calling user has dialled the extension or telephone number).

#### **Answer Confirmation**

When you answer the call on your twinned device, Horizon will ask the user if they can press a button to confirm that you have answered the call before the call is connected. This is to stop a voicemail on a twinned destination "answering" the call in error

### **Contact Display**

You can change your contact display settings here. You can:

- Display contacts by either First Name First (i.e. "Richard James") or Last Name First (i.e. "James, Richard)
- Sort contacts by either First Name or Last Name
- Short Name Format can either display a user's Full Name, First Name & Last Initial, First Initial & Last Name, First Name Only or Last Name Only. The default is "Full Name"



Helpline: 03333 660 770

24/7 ticket support: support@excel-comms.co.uk





### Horizon Mobile Connect for iOS and Android





Use with the Connect Widget (as pictured above)

When the user is not on a call, the widget will show:

- Outgoing Number
- Recent Calls
- Pull Call
- Do Not Disturb

Outgoing Number displays to the user their current Mobile Presentation setting (i.e. the number the user presents when calling from the mobile). If the user has been given permission by the Administrator, they can change Mobile Presentation using the toggle available on the widget.

Recent calls show the latest calls, which the user can simply tap to call back.

Pull Call allows the user to move an ongoing call from a Horizon fixed device to their mobile.

Finally, the widget allows quick access to Do Not Disturb, which can be enabled/disabled by tapping on the DND button.

# On Call Widget

The 4x1 widget is a smaller version of the widget, displaying Outgoing Number and Recent Calls.



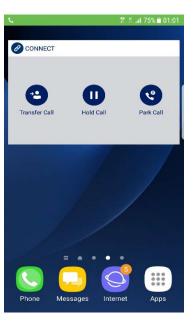
#### On-call widget

When the user is on a call, the widget provides quick

access to the following mid-call features:

- Transfer Call
- Hold Call
- Park Call





## Transfer Call

Consultative transfer (sometimes referred to as attended transfer) is supported by the Myconnect app. This means that the user has to first establish a call with the contact he will transfer the call to before transferring the ongoing call.

#### Steps

- User is on a call with user B
- Before transferring the call to user C, user calls user C putting user B on hold
  - NB: this is done using the 'Add call' feature of the native dialler
- User accesses to the Connect widget while on the call by entering the phone screen where the Connect widget has been placed on

• User taps on the 'Transfer Call' button on the Connect widget

### Hold Call

Allows the user to put the ongoing call on hold playing the announcement set in Horizon via the 'Music on Hold' feature.

#### Steps

- User accesses to the Connect widget while on the call by entering the phone screen where the Connect widget has been placed on
- User taps on the 'Hold Call' button on the Connect widget

### Park Call

Allows the user to hold the call for an extended period of time, allowing them access to other features and calls. The MyConnect app allows the user to park calls against their own extension number, it is not possible to park calls against other numbers.

# My Connect App

#### **Basics**

The main view contains the following tabs, allowing the user to:



Access and search the Company Directory and their own mobile contacts



View calls (made, received and missed)



Access, playback and manage voicemails





Access Outgoing Number and other calling settings, as well as Help details

### **Contacts**

There are two tabs giving the user access to:

- "Company Directory": contacts from the Horizon directory, which gets updated after every sign- in or can be refreshed by pulling down the Contacts screen
- "My Contacts": user's mobile contacts

The search function is accessible from the top bar and allows the user to search by name or number. The contact search is performed against both Company Directory and mobile contacts.

The user can add and delete contacts to/from their mobile contacts. However, contacts cannot be added to the Company Directory, or deleted, because this directory is managed by the Horizon company administrator. The user can add a contact from the Company Directory to their mobile contacts.

Tapping on a contact opens up "Contact Info", showing the selected contact details and allowing the user to call, send a text or an email.

Even if the call is started from the MyConnect app, it is performed by the native mobile dialler which is automatically displayed to the user as soon as the call is placed.

### Calls

There are two tabs giving the user access to:

- "All calls": view all calls (made, received and missed)
- "Missed": view missed calls only

In addition to calls received/made from the mobile, calls received/made from user's Horizon fixed devices and soft clients are also shown. Horizon mobile clients can be used to make an receive calls over Wi-Fi. It is recommended that you only use Horizon mobile clients in an emergency, e.g. when you are in a poor coverage area but you have Wi-Fi. For more information, refer to the Appendix.

The user can call back from any of the call entries, or can tap to access "Call details", which shows information such as type of call, date and time of the call.

The user can also delete the whole call history in one go, tapping the bin icon on the top bar

### Voicemail

All voicemails received by the user are visually displayed here, with new voicemails highlighted with a red dot. The user can select any of the voicemails and once a voicemail is selected the user can:

- Playback the message (loud speaker and bluetooth are supported)
- Call back the caller who left the voice message
- Send a text
- Delete the voice message

The user can also delete all voice messages in one go, tapping on 'Delete All Voicemails' from the contextual menu.

