Unify OpenScape Business

myAttendant

User Guide

A31003-P3030-U108-13-7619

Atos

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Contents

1 History of changes

Changes mentioned in the following list are cumulative.

Changes in V3R3

Impacted chapters	Change description
User Interface Elements on page 12	Changes regarding the 'Caller notice' icon
Conferences on page 55	User interface updates in conferences chapter
How to View Fax Messages on page 121	Added information about incomplete fax messages

Changes in V3R2 FR1

Impacted chapters	Change description
Subscriber Management on page 112 How to Change the Number of User Buttons on page 113	New chapter for changing the number of the user buttons
Call Number Formats on page 43 Desktop Dialer on page 44	Improvements in order to allow the users to dial numbers including special characters
Introduction on page 12 First Steps on page 22 Unified Communications on page 26 Attendant Console Functions on page 107 Configuration on page 128	User interface changes in whole impacted chapters
User Interface Elements on page 12	Changes on caller notice icon
Message Center on page 116	Multiple changes on fax messages

Changes in V3R2

Impacted chapters	Change description
How to Delete an Instant Message on page 105 How to Leave an Instant Message Conversation on page 105	New chapters for deleting instant messages and leaving a conversation
How to Delete Journal Entries on page 41	Added information about the deleted journal entries
Directories on page 32 How to Search for Subscribers on page 34 How to Filter the Internal Directory on page 35	Adjust and filter content of internal directory and search results

Changes in V3R1 FR1

Impacted chapters	Change description
How to Copy User Buttons from Another User on page 114	Added note for not allowing to copy personal contacts
Journal on page 39 How to mark a conversation as completed on page 43	Added note for Disable conversation tracking

Changes in V3R1

Impacted chapters	Change description
How to Copy User Buttons from Another User on page 114	New Chapter
User Interface Elements on page 12	Added information about changing the size of buttons, icons and fonts on user interface

Changes in V2R7

Impacted chapters	Change description
How to Install myAttendant	Updated the installation procedure

Changes in V2R6

Impacted chapters	Change description
How to Add a Scheduled Call How to Open a Missed Event Screen Pop by Using a Hot Key	WP3 UC Suite
Presence Status Status-based Call Forwarding	Note about hiding sick status
Screen Pops	Show original number
How to mark a conversation as completed	Mark open call as completed
Directories	Group name support

1.1 History of improvements/fixes

Changes mentioned in this chapter are cumulative.

Changes in V3R3

Service case ID	Date of change	Description of change	Impacted chapters
PRB000064157	17 Jul 2023	Updated supported image formats.	How to Insert your Own Picture on page 129

History of changes

Changes in V3R2

Service case ID	Date of change	Description of change	Impacted chapters
PRB000059102	15 Jun 2022	Updated symbols and information about directories	Directories on page 32

2 About this Documentation

This section contains some introductory information on this documentation.

2.1 Display Conventions

This documentation uses a variety of methods to present different types of information.

Type of information	Presentation	Example
User Interface Elements	Bold	Click **OK**.
Menu sequence	>	**File** > **Exit**
Special emphasis	Bold	**Do not delete** Name.
Cross-reference text	Italics	You will find more information in the topic*Network*.
Output	Monospace font, e.g., Courier	Command not found.
Input	Monospace font, e.g., Courier	Enter LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>

2.2 Types of Topics

The types of topics include concepts and tasks:

Type of topic	Description
Concept	Explains the "What" and provides an overview of context and background information for specific features, etc.
Task (operating instructions)	Describes task-oriented application cases (i.e., the "How") step-by-step and assumes familiarity with the associated concepts. Tasks can be identified by the title **How to ...**.

3 Introduction

This document is intended for the users of myAttendant and describes its installation, configuration and operation.

3.1 myAttendant

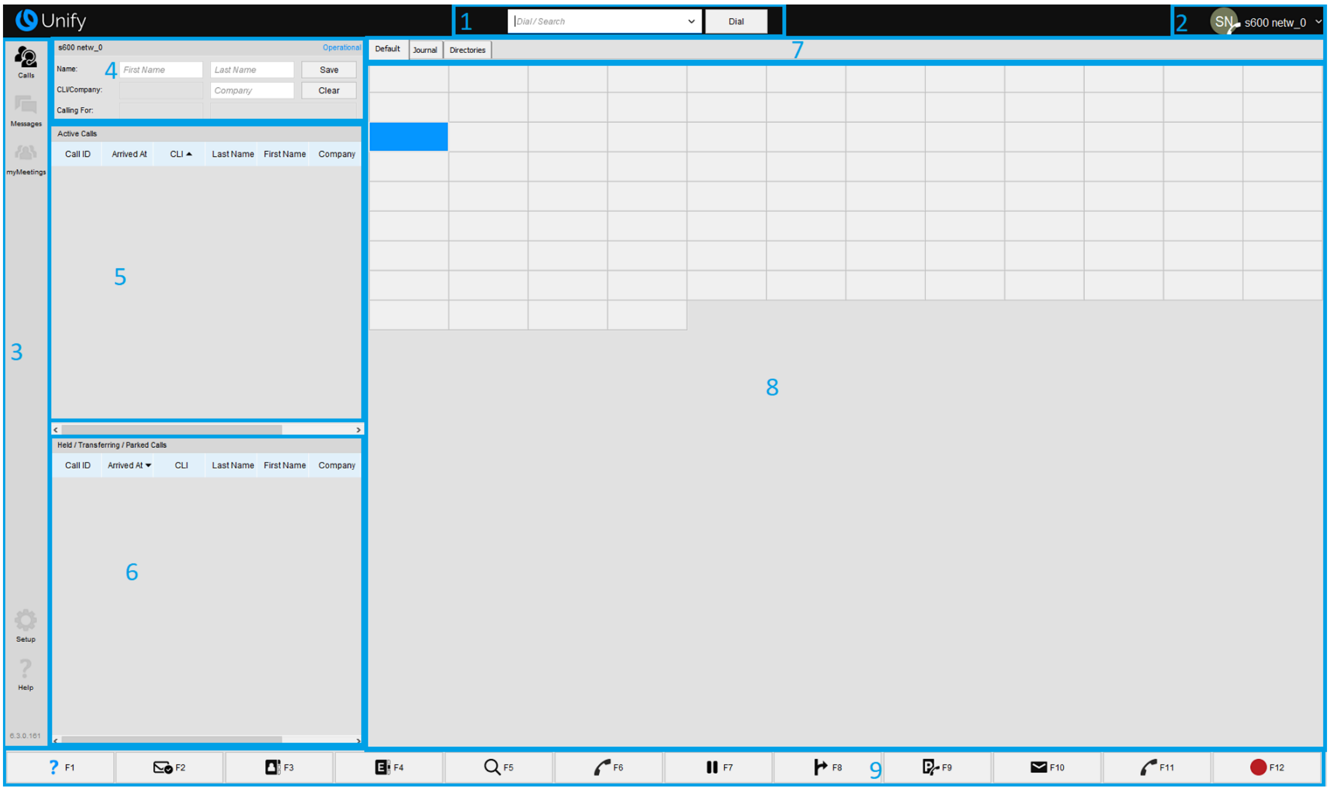
myAttendant is a unified communications solution for Attendant functions. Besides convenient Attendant functions, dialing aids via phone directories and information on the presence status of other subscribers, myAttendant can, for example, also be used to access voicemails and faxes. Instant Messaging supports the communication with internal subscribers.

myAttendant provides the following features:

- Attendant functions
- Directories
- Journal
- Pop-up windows
- Change the presence status of subscribers
- Record calls
- Message Center
- User Buttons
- Manage voice and fax messages
- Instant Messaging
- Team functions
- Conference management

3.2 User Interface Elements

The main window with the function and user buttons is the central interface for setting up and operating myAttendant.



The main window includes the following elements:

1) Display phone number for current call
2) Profile picture, presence status, first name and last name
3) Menu bar
4) Display of self phone status with detailed information about the call (e.g., callback, forwarded)
5) Display of parked, transferred calls and calls on hold
6) Display of active calls
7) Tabs for user buttons, **Standard directory**, **Journal** and **Directories**.
8) User Buttons
9) Function Buttons

User Buttons

When the cursor hovers over the user button of a subscriber, a screen pop with information on that subscriber is displayed.

The following are displayed:

- Name, Extension and Department of the subscriber
- Presence status
- Voicemails
  - Normal voicemails
  - Private voicemails
  - Urgent voicemails
- Notes
- Fax Messages
  - New Fax messages

- Read Fax messages
- Deleted Fax messages

Function Buttons

Function buttons are available for the most important functions for controlling Attendant functions and invoking directories.

The individual functions are activated with a click or by pressing the appropriate function key on the keyboard. The assignment of the function button to each function key can be customized by the user.

The following is an explanation of what these buttons do (default assignment following the installation).

Button	Function key	Description
?	F1	Opens online help page
	F2	Caller notice opens default email client with caller details
	F3	Display and edit the communication system's internal subscribers.
	F4	Display company-wide contacts.
	F5	Search for subscribers in the internal and external directory.
	F6	Accept or release calls.
	F7	Hold and reconnect (unhold) callers.
	F8	Perform screened or unscreened call transfers.
	F9	Park and unpark calls.
	F10	Open the Attendant Message Center.
	F11	Dial station numbers.
	F12	Record calls.

Screen Pops

Situation-based screen pops appear in the main window of myAttendant and offer you convenient ways to respond to the situation with a single click. Examples: you can accept inbound calls immediately, listen to new voicemails directly and also start web collaboration sessions directly from within the screen pops.

Displaying Missed Calls

Missed calls are also shown as an icon and tray pop in the Microsoft Windows task bar. Click on the icon to have the number of missed calls displayed.

Operating myAttendant

myAttendant can be operated in different ways:

- With user buttons operated with the mouse - This is the primary method described in this manual.
- With the function keys (F1 to F12) on the keyboard
- With the number pad on the keyboard to enter phone numbers
- With function buttons

This documentation always describes the most common and most direct operating methods.

Using myAttendant with two Monitors

For an installation at a PC with two connected monitors, only the primary monitor should be used when working with myAttendant.

Minimizing and Maximizing the Screen Display

You can optionally maximize the myAttandant display screen to the full screen size or minimize the screen. This is done with the familiar Windows functionality in the upper right corner of the window.

> **INFO:** Please avoid a screen display with 120 dpi, since all the information of myAttendant cannot be presented with this setting.

Adjusting the size of buttons

You can adjust the size of BLF buttons by using CTRL and +/-. Additionally, you can also hold down the CTRL key and use the mouse wheel. This adjustment changes the button size, the font size of names, and the user/contact icons. Up to 5x zoom is supported.

> **NOTICE:** When you use CTRL + the mouse wheel for zooming in/out and the size of the buttons reach the minimum or maximum zoom level, the mouse wheel reverts to scrolling the screen, even if you keep holding the CTRL button.

Setup

Some operating tasks (mainly for the configuration) are executed via the **Setup** (F2) button. After clicking **Setup**, you should normally log in again with your password for security reasons. This operating step will no longer be listed explicitly in the individual operating tasks.

Related concepts

Unified Communications on page 26
Directories on page 32

Attendant Functions on page 107
Subscriber Management on page 112
Message Center on page 116

Related tasks

How to Select the User Interface Language on page 22
How to Initiate a Call Manually on page 111

3.3 Online Help

The integrated online help describes key concepts and operating instructions. The online help is context-sensitive and opens the associated Help topic for each opened OpenScape Business Assistant (WBM) page.

Navigation

The buttons in the online help provide the following functions:

- **Contents**

  provides you with an overview of the structure
- **Index**

  provides direct access to a topic using keywords
- **Search**

  allows you to do a full-text search and selectively find all relevant topics

4 Installing, Starting and Closing myAttendant

This section explains how to install, start and close myAttendant and the procedure for an upgrade or update.

NOTICE: The PC must have Oracle Java 8 or higher or alternatively OpenJDK 8 installed. If an older version is installed, you will need to update it to Version 8 or higher before starting the installation.

The UC Suite clients myAttendant and myPortal are called from the same startup routine

4.1 How to Install myAttendant

Prerequisites

Your PC meets the requirements for myAttendant

The administrator of your communication system has made the installation file `CommunicationsClients.exe` or the link to the file available to you.

NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file, which is located in the storage directory of the install files.

Step by Step

1. Run the `CommunicationsClients.exe` install file.
2. If the **User Account Control** window appears with the message `An unidentified program wants access to your computer`, click **Allow**.
3. Enter the IP address provided by your administrator and click **Next**.
4. After validation of IP address, the installer will check if .NET 4.5 is available and install it if not.
5. Click on **myPortal for Desktop** to mark it for installation.

   Clicking on an application will cycle between actions:

Icon	Function
	**Install**
	**Repair**
	**Remove**

6. If you want, change the installation folder in the **Install To:** field.
7. Click **Install**.
8. Follow the instructions of the installation program.

Next steps

Start myAttendant for the first time.

4.2 How to Start myAttendant the First Time

Prerequisites

myAttendant is installed on your PC.

You are configured as an Attendant Console in the communication system.

Step by Step

1. Click **Start** > **Program Files** > **Communication Clients** > **myPortal**. You will then be presented with the login screen.
2. Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
3. Enter your current password in the **Password** field. The default password when logging in for the first time is `1234`. If you have any questions, please contact the administrator of your communication system.
4. In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
5. Click **Login**. myPortal for Desktop is started.
6. It is probably best to change your password immediately to prevent unauthorized access.

   NOTICE: The password applies to myAttendant, myReports, myAgent, myPortal for Desktop and myPortal for Outlook as well as phone access to your voicemail box.

7. Exit myPortal for Desktop.
8. Click **Start** > **Program Files** > **Communication Clients** > **myPortal**. You will then be presented with the login screen.
9. Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
10. Enter your current password in the **Password** field. The default password when logging in for the first time is `1234`. If you have any questions, please contact the administrator of your communication system.
11. In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
12. Select **myAttendant** in the drop-down list.
13. Click **Login**. myAttendant is started.

4.3 How to Start myAttendant

Prerequisites

myAttendant is installed on your PC.

You are configured as an Attendant Console in the communication system.

Step by Step

1. Click **Start** > **Program Files** > **Communication Clients** > **myPortal**. You will then be presented with the login screen.
2. Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
3. Enter your password, which must consist of only digits, in the **Password** field. The maximum number of repeated characters is two and the maximum number of sequential characters is three. The account name (reversed or not) cannot be part of the password. The user is forced to change the default password after the first use. The maximum number of erroneous login attempts is five. The default password when logging in for the first time is `1234`. If you have any questions, please contact the administrator of your communication system.

   NOTICE: If the wrong password is entered five times, your access to all UC Suite clients will be locked. Unlocking is only possible by the administrator of your communication system.

4. If you want to use myAttendant with an automatic login in the future, enable the **Save Password** check box. The Login window will then no longer be displayed. Note that a normal startup of myPortal for Desktop will subsequently no longer be possible.

   NOTICE: You should use the automatic login only if you are certain that no-one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

5. In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
6. Select **myAttendant** in the drop-down list.
7. Click **Login**.

   NOTICE: When you start myAttendant for the first time, you will be asked to change the password. This prompt is not displayed if you have already changed the password via another client application or via the phone menu of the voicemail box.

If you are starting myAttendant after an initial installation, enter the default password **1234** in the `Old password` field.

Enter your new password, which must consist of only digits and include at least six digits, in the **New password** and **Confirm password** fields.

The password is valid for all UC Suite clients and for accessing your voicemail box via the telephone.

4.4 Closing myAttendant

Generally, myAttendant does not need to be explicitly closed, but logs off automatically when the computer shuts down.

INFO: On 64-bit Microsoft Windows operating systems, it may be necessary to manually close myAttendant before shutting down the PC.

4.5 How to Uninstall myAttendant

Prerequisites

myPortal for Desktop is also no longer required.

Step by Step

1. Close myAttendant.

   NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file, which is located in the storage directory of the install files.

2. Select one of the following options:
   - Windows XP:

     Click in the **Control Panel** on **Software**.
   - Windows Vista:

     Click in the **Control Panel** on **Programs and Features**.
3. Click on **Edit** in the context menu of the **CommunicationsClients** entry.
4. Click **Modify**.
5. Select the **myPortal for Desktop / myAttendant** feature to be uninstalled.
6. If a message about deleting shared files appears, click on **No to all**.

4.6 Automatic Updates

Automatic updates ensure that myAttendant is always kept up-to-date with the latest version.

If myAttendant determines that there is a newer version than the one currently running, a corresponding message will be displayed. The automatic update is performed on exiting myAttendant.

4.6.1 How to Perform Automatic Updates

Prerequisites

Your PC meets the requirements for myAttendant

You have received a message such as: `Client update available. Please wait while the update is done. Please close the following programs to continue the update: [...].`

Step by Step

Close the named programs.

Next steps

Restart myAttendant after the automatic update.

5 First Steps

The following important or helpful steps should be performed right at the outset (for detailed instructions, see below).

Selecting the Language

Select the language for the myAttendant user interface.

Assigning Subscribers to User Buttons

Specify which users you want to have displayed on user buttons (with a direct overview of their calls/messages).

5.1 How to Select the User Interface Language

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Appearance**.
3. Select the desired language under **Language**.
4. Click **Save**.

Next steps

Exit myAttendant and restart the application.

Related concepts

User Interface Elements on page 12

5.2 How to Select the Language of the Voicemail Box

Step by Step

1. Click on **Setup**.
2. Click on **Communications** > **VoiceMail Settings**.
3. Select the desired language from the **VoiceMail Language** drop-down list.
4. Click **Save**.

5.3 How to Record your Name Announcement

NOTICE: You can also record your name announcement via the Phone menu of the voicemail box.

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on any profile.

3. Click **Record**.
4. Click on **My VoiceMail Name** in the list of announcements.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Accept the call from the voicemail box.
7. Speak out your name after the tone.
8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record** again.
11. Click on **Close**, followed by **Save**.

5.4 How to Record your Personal Greeting

NOTICE: You can also record your personal greeting via the Phone menu of the voicemail box.

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on any profile.
3. Click **Record**.
4. Select one of the following options:
   - If you want to record the general personal greeting, click on **My VoiceMail Greeting**.

     NOTICE: The maximum recording length of Voicemail Greeting is limited to 1 minute.
   - If you want to record the personal greeting for **Busy**, click on **Busy**.
   - If you want to record the personal greeting for **No Answer**, click on **No Answer**.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Accept the call from the voicemail box.
7. Speak out your personal greeting after the tone.
8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record**.
11. Click **Save**.

5.5 How to Specify your Email Address

Prerequisites

The administrator of your communication system has configured the sending of emails.

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Enter your email address under **Email**.
4. Click **Save**.

5.6 How to Configure Function Keys

Step by Step

1. Click on **Setup**.
2. Click on **myAttendant** > **Key mapping**. In the left column of the following window, you will see the available functions such as **Help**, **Settings**, **Search**, **Park**, etc.
3. Select the desired function key for each key mapping in the drop-down menu of the middle column.
4. Select the desired numberpad keys for each keymapping in the drop-down menu of the right column.
5. Click **Save**.

> **NOTICE:** If you accidentally press a function key or assign a key on the numeric keypad twice, an error message will appear on saving the entries, and you can then correct the invalid entry.

5.7 How to Reset Function Key Assignments

Step by Step

1. Click on **Setup**.
2. Click on **myAttendant** > **Key mapping**.
3. Click the **Reset** button.
4. Click **Save**.

5.8 Outlook connectivity

You can connect myAttendant directly to Microsoft Outlook and thus obtain a conveniently integrated calendar.

5.8.1 How to Configure Outlook Connectivity

Prerequisites

The user must have Outlook email setup configured on his personal computer. Else, if flag :"Automatically generate calendar appointments from my presence change" is activated then myAttendant applications will not function properly in case of presence status change.

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Outlook Connectivity**.
3. Select the **Import Outlook Contacts on Startup** check box if you want to use this function.
4. Select the check box **Automatically generate calendar appointments from my presence changes** if you want to use this function.
5. Select the desired calendar function from the drop-down list. The possible options are: **No Calendar Integration**, **Outlook Calendar Integration** or **Exchange Calendar Integration**.
6. Click **Save**.

6 Unified Communications

Unified Communications is the integration of various communication systems, media, devices and applications within an environment (e.g., IP telephony, site-based and mobile telephony, email, instant messaging, desktop applications, voicemail, fax, conferencing and unified messaging).

Related concepts

User Interface Elements on page 12

6.1 Presence Status

The Presence status provides information on the availability of internal subscribers. It is indicated in the internal directory and on the User buttons.

The following presence states are possible:

Icon	Presence status	Availability
	Office Only selectable if the CallMe service is not active Otherwise, **CallMe** appears here.	Available at the normal workplace
	CallMe Only selectable if the CallMe service is active Otherwise, **Office** appears here.	Available at an alternative workplace
	Meeting Only selectable if the CallMe service is active Otherwise, **Office** appears here.	Busy, may not be able to respond
	Sick	Absent
	Break	Absent
	Out of Office	Absent
	Holiday	Absent
	Lunch	Absent
	Home	Absent

Icon	Presence status	Availability
	Do not Disturb	Do not disturb

NOTICE: The 'sick' presence status may not be available, depending on system settings by the administrator.

Icon	Presence or connection status
	Subscriber receives a call
	Subscriber is calling
	The subscriber is on the phone
	Presence status is not visible
	Phone is not connected

INFO: For subscribers without system telephones (e.g., ISDN or analog), the internal directory does not show any Presence status, but only the connection status.

Call Forwarding to the Voicemail Box

If your Presence status is not **Office** or **CallMe**, the communication system redirects calls to you to your voicemail box by default and notifies the callers via status-based announcements about the nature of your absence and the scheduled time for your return.

Automatic Reset of the Presence Status

You can have your Presence status automatically reset to **Office** at the end of your scheduled absence. Otherwise, the communication system extends the current Presence status in increments of 15 minutes until you change it yourself.

Visibility of your Presence Status

For each subscriber in the internal directory, you can specify whether that subscriber can see your Presence status other than **Office** and **CallMe** as well as the scheduled time of your return and any info text you may have entered.

Screen Pops on Changing the Presence Status

You can have changes to your Presence status indicated by a screen pop.

6.1.1 How to Change the Presence Status of Other Subscribers

Step by Step

1. Right-click on the user button of the user, whose presence status you want to change.
2. Select **Change Users Status**.
3. Select the desired presence status (only possible for internal subscribers).

6.1.2 How to Enable or Disable Automatic Resetting of the Presence Status

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Select one of the following options:
   - If you want to enable automatic resetting of the Presence status to **Office**, select the **Change status automatically to 'Office'** check box.
   - If you want to disable automatic resetting of the Presence status to **Office**, clear **Change status automatically to 'Office'** check box.
4. Click **Save**.

6.1.3 How to Change the Visibility of your Presence Status for Others

Step by Step

1. Click on **Setup**.
2. Click on **Sensitivity** > **Presence Visibility**.
3. Choose one the following options in the area:
   - If you want to make your presence visible to a specific subscriber, enable the check box in the appropriate row.
   - If you want to make your presence invisible to a specific subscriber, clear the check box in the appropriate row.
   - If you want to make your presence visible to all subscribers, click **Select All**.
   - If you want to make your presence invisible to all subscribers, click **Unselect All**.
4. Click **Save**.

6.1.4 How to Enable or Disable Screen Pops on Changing the Presence Status

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select one of the following options:
   - If you want to enable screen pops on changing the Presence status, select the check box **Display tray pop on change of presence**.
   - If you want to disable screen pops on changing the Presence status, clear the check box **Display tray pop on change of presence**.
4. Click **Save**.

6.2 CallMe Service

The CallMe service can be used to define any phone at an alternative workplace as the CallMe destination at which you can be reached through your own internal phone number. You can use the UC client at your alternative workplace exactly as in the office and thus also make outgoing calls from the CallMe destination.

Inbound Calls

Calls to your internal number are redirected to the CallMe destination. Your internal phone number is displayed to the caller. Unanswered calls are forwarded to the voicemail box after 60 seconds.

Outbound Calls

When you dial a number in the UC client, the communication system first calls you at the CallMe destination. If you answer the call, the communication system then calls the desired destination and connects you with it. Your internal phone number is displayed at the destination (One Number Service).

Presence Status

When the CallMe service is enabled, the message "`CallMe active`" appears in the display of your phone (not for analog and DECT phones). Other subscribers will see your presence status as **Office**.

Activation

You can activate the CallMe service manually. In addition, the CallMe service is also reactivated by an automatic reset of the Presence status following an absence, provided it was active earlier. Then following types of CallMe destinations are not supported:

- Group
- Redirected telephone

Deactivation

The CallMe service remains active until your Presence status changes.

> **NOTICE:** CallMe function should not be used when dialing or calling in an open conference.

6.2.1 How to Enable the CallMe Service

Step by Step

1. Select **Office** in the drop-down list for the Presence status.
2. Click on **More**.
3. Click on the option **Enable CallMe service**.
4. Set the call number of the CallMe destination by one of the following methods:
   - Select one of your additional call numbers from the drop-down list.
   - Enter a phone number in dialable format or in canonical format in the drop-down list.

   > **NOTICE:** Do not enter a group or a redirected phone as the CallMe destination.
5. Click **OK**.

6.3 Status-based Call Forwarding

In this case, the operating mode of myAttendant is controlled by the presence status. The following operating modes are available:

- When I am in a meeting, forward my phone to:
- When I am sick, forward my phone to:
- When I am on a break,forward my phone to:
- When I am out of the office, forward my phone to:
- When I am on vacation, forward my phone to:
- When I am at lunch, forward my phone to:
- When I have gone home, forward my phone to:

If you change the presence status, the communication system activates call forwarding to the destination you specified.

The presence status is displayed at the upper end of the Call Control area.

6.3.1 How to Define Forwarding Destinations

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Forwarding Destinations**.
3. Select the corresponding **forwarding destination** for the respective absence status:
   - **None**
   - **Voicemail**
   - **Mobile**
   - **Assistant**
   - **External 1**
   - **External 2**
   - **Home**
4. Click **Save**.

6.4 Rule-Based Call Forwarding

Calls can be forwarded on the basis of specific rules or even discarded. You can configure these rules yourself.

6.4.1 How to Create a Call Forwarding Rule

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Rules Engine**.
3. Click on **New**. The **Rules Wizard** is opened.
4. Enter a **Name** for the rule.
5. Click **Next**.
6. Select the condition for the rule in the next window of the Rules Wizard.
7. Click **Next**.
8. If required, select an exception for the rule in the next window of the Rules Wizard.
9. Click **Finish**. The name of the newly created rule now appears in the Rules Engine.

6.4.2 How to Edit a Call Forwarding Rule

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Rules Engine**.
3. Mark the desired rule.
4. Click on Edit; the Rules Wizard opens, and the rule is displayed.
5. Click **Next**.

6. Select the condition for the rule in the next window of the Rules Wizard.
7. Click **Next**.
8. If required, select an exception for the rule in the next window of the Rules Wizard.
9. Click **Next**. The edited rule is displayed.
10. Click **Finish**.
11. Click **Save**.

6.4.3 How to Rename a Call Forwarding Rule

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Rules Engine**.
3. Mark the desired rule.
4. Click on Rename.
5. Enter a new name for the rule in the Rename Rule window.
6. Click **OK**.
7. Click **Save**.

6.4.4 How to Delete a Call Forwarding Rule

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Rules Engine**.
3. Mark the desired rule and click Remove.

> **INFO:** The rule will be immediately deleted, without any additional prompt!

4. Click **Save**.

6.4.5 How to Activate a Call Forwarding Rule

Step by Step

1. Click **Setup**.
2. Click on **Call Rules** > **Rules Engine**.
3. Select the check box in front of the desired rule to enable it.
4. Click **Save**.

6.5 Directories

Directories organize your contacts.

The following functionality is supported:

Icon	Directory
	Internal Directory Contains: • **Users**, specifically internal subscribers and MULAP groups for which the display is activated in the system with their Presence status (only system telephones). When a subscriber is absent, you can see the scheduled time of return in the **Date / Time** column, provided that subscriber has allowed his or her Presence status to be visible to you. Any info text that may have been entered by the subscriber are also displayed. • **Virtual Users**, marked with the icon . • **Groups**, marked with the icon . • **UCD Groups**, which mean groups of agents (subscribers) that can be reached at a single phone number. They are marked with the icon . By default, the Internal Directory shows only **Users**. You can filter the Internal Directory to show **Users**, **Virtual Users**, **Groups** or **UCD groups** by activating the corresponding checkbox.
	External Directory Contains contacts from a corporate directory and must be configured by the administrator of the communication system.
	External Offline Directory Contains contacts from the LDAP corporate directory and must be configured by the administrator of the communication system. The entries are always updated whenever you open the directory.
	Speed Dials Contains frequently needed external phone numbers. Every number is represented by a speed-dial number which is used instead of the full phone number.
	Personal directory You can use the personal directory to either add, edit and delete your personal contacts individually or to import your Outlook contacts on starting myAttendant. If you import the Outlook contacts, you cannot edit them in myAttendant.

NOTICE: Phone numbers stored in user settings and directories should be entered in canonical format in order to be reachable both from UC and device.

Access code should not be in the number.

Contact Details

Depending on the directory involved, the List view of the contacts shows different details from among those listed below: **Extension**, **Last Name**, **First Name**, **Mobile**, **Assistant**, **External**, **Home**, **Business**, **Fax**, **Email**, **Department**, **Site**, **Company**.

Simple Search

You can search the directories by **First Name**, **Last Name** or a call number. You can select which directories are to be included in the search. The search can be conducted using whole words and also with partial search terms such as a part of a station number, for example. The set search options remain in effect for subsequent searches. All search terms used are saved. You can optionally delete the list of search terms used.

Advanced Search

You can selectively search in one or multiple fields of the advanced search window such as: **Title**, **First Name**, **Last Name**, **Company**, **Extension**, **Company Ph.**, **Business 1**, **Business 2**, **Home 1**, **Home 2**, **Mobile** and **Email** and limit the maximum number of results.

Sorting

You can sort the contacts of a directory by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order.

Related concepts

User Interface Elements on page 12

6.5.1 How to Search for Subscribers

You can search both the internal and external directory for subscriber details, such as station number or name.

Step by Step

1. Click **Search**.
2. Enter the search string. For example, the first two digits of an extension number.
3. Select the directory (internal, external, personal or external offline directory) where you want to run the search by using the **Search Options** button, at the top right of the Search menu.

   If you don't select at least one directory to search in, then no search results will be displayed.
4. If you have selected the **Internal Directory**, you can select one or more of the following filter options:

   - **Users**
   - **Virtual Users**
   - **Groups**

- **UCD Groups**

The option **Users** is selected by default.

5. Enter a search string in the search field. You can select one of the following Search options:
   - If you want to search for a full word, enable the **Match Full Word** check box.

     NOTICE: When **Match Full Word** is enabled, the search term must not contain any space.

   - If you want to search for a part of a word, clear the **Match Full Word** check box.

     NOTICE: Search terms with spaces only apply to **First Name** and **Last Name**.

6. If necessary, click on **Advanced** button at the top right of the menu, to switch between simple and advanced search.
7. Click **Search**.

The results are shown on the bottom side of the window.

Related tasks

How to Send Instant Messages (Chat) on page 104

6.5.2 How to Dial a Station Number from the Internal Directory

Step by Step

1. Click on **Internal Directory**
2. Double-click on the selected subscriber entry.

6.5.3 How to Sort Internal Subscribers

Step by Step

1. Click on **Internal Directory**.
2. Click on the column header (Last Name, First Name, Extension etc.) you want to use as the sort criterion for sorting subscribers.

6.5.4 How to Filter the Internal Directory

You can filter the Internal Directory to show only Users, Virtual Users, Groups or UCD groups.

Step by Step

1. Click on **Internal Directory**.

2. Click on **Directory Options** at the top right of the menu.
3. Select one or more of the following:
   - **Users**
   - **Virtual Users**
   - **Groups**
   - **UCD Groups**
   - **Show Columns**

   The option **Users** is selected by default.

   The option **Show Columns** allows to select specific columns, to show or hide them from the directory.

The directory is updated to match your selection.

6.5.5 How to Add External Contacts

You can save external subscriber data as contacts in the external directory. This give you direct access to this data.

Step by Step

1. Click **External Directory**. A list of all external contacts is displayed.
2. Click on **New** or on **Add**. An empty input field appears.
3. Enter details for the new contact.
4. Click **Save**.
5. Click **Close**.

6.5.6 How to Edit External Contacts

You can edit the details of a contact such as the title, first name, last name, business ph. 1, business ph. 2, mobile/cell and home numbers in the external directory.

Step by Step

1. Click on **External Directory**.
2. Click on the contact whose details you want to edit.
3. Select **Edit** from the menu and make the desired changes.
4. Click **Save**.
5. Click **Close**.

NOTICE: It is also possible to edit an external contact after searching it in the directory, right click on it and click on Edit.

6.5.7 How to Delete External Contacts

INFO: A deleted external contact cannot be restored.

Step by Step

1. Click **External Directory**.
2. Click on the contact to be deleted.
3. Click on **Remove**.
4. Click **Close**.

6.5.8 How to Add a Note for a Station

You can add notes for a subscriber. You can use these notes as reminders. You can view, edit or delete these notes in the Message Center (where they are called LAN messages).

Step by Step

1. Right-click on the user button of the subscriber for whom you want to add a note.
2. Select **Notes**.
3. Enter the text at the bottom part of the window.
4. Click **Add**.
5. Click **Save**.
6. Click **Close**.

A letter icon appears on the subscriber's entry in the internal directory.

6.5.9 How to Add or Extend a Note for a Subscriber

Step by Step

1. Right-click on the user button of the subscriber, whose note you want to see.
2. Select with **LAN Notes**; the LAN Notes window opens.
3. Edit or extend the note as required.
4. Click **Save**.
5. Click **Close**.

6.5.10 How to Delete a Note for a Station

Step by Step

1. Right-click on the user button of the subscriber, whose note you want to see.

2. Select **Notes**.
3. Select the note you wish and click **Remove**.
4. Click **Close**.

6.5.11 How to Add a Personal Contact

You can save private data in the personal directory. This give you direct access to this data.

Step by Step

1. Click on the **Directories** tab.
2. Click on **Personal Directory**.
3. Click **Add** on the top right corner.
4. Enter the details of the contact in the **Personal Contact** window.
5. Click **Save**.

6.5.12 How to Edit a Personal Contact

You can edit private data in the personal directory at any time.

Step by Step

1. Click on the **Directories** tab.
2. Click on **Personal Directory**.
3. Right-click on the contact you want to modify.
4. Click **Edit Contact**.
5. Edit the contact details and click **Save**.

> **NOTICE:** Bear in mind that the phone number must always be entered in canonical format.

6. Click **Save**.

6.5.13 How to Delete a Personal Contact

You can delete private data in the personal directory at any time.

Step by Step

1. Click on the **Directories** tab.
2. Click on **Personal Directory**.
3. Right-click on the contact you want to delete.
4. Click on **Remove Contact**.

6.6 Journal

The Journal is the list of all your inbound and outbound calls. You can use it to quickly and easily call your contacts again or to respond to missed calls.

Folder for Call Types

The calls are arranged on the following tabs:

- **Open**

  Contains the unanswered missed calls for which a call number was transmitted. As soon as you answer one of these calls, all associated entries with that call number are dropped from the list.
- **All calls**
- **Missed**

  - Incoming (Leftwards Arrow)

  - Outgoing (Rightwards Arrow)
- **Answered**
- **Internal**
- **External**
- **Inbound**
- **Outbound**

Call Details

Every call is shown with the Date and Time and, if available, with the **Call Number**. If a directory contains further details on the call number such as the **Last Name**, **First Name** and **Company**, then this information is also shown. In addition, the **Direction**, **Duration** and the **Call Complete** column are displayed.

Direction	Meaning
	Inbound
	Outbound

Call Complete	Meaning
	The call was successful or was answered.

NOTICE: Call Complete column is not displayed, if the system administrator has enabled the **Disable conversation tracking** option.

Grouping

The calls in all folders are grouped by the same criterion, as selected by you:

- Date (for example, **Today**, **Yesterday**, etc., **Last Week**, **Two Weeks Ago**, **Three Weeks Ago**, **Last Month** and **Older**)
- Phone number
- Last Name,First Name
- First Name, Last Name
- Company

Sorting

The number of Journal entries contained in the group is displayed on the right of the group designation in parentheses.

You can sort the calls in the Journal by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order.

Zooming in on an Entry

You can zoom in on a specific entry one character at a time in the column by which the entries are sorted. For example, you could jump to the first Last Name starting with "Sen" one letter at a time. This method can also be used in the results of a search.

Retention Period

The communication system saves a record of the calls in the Journal for a maximum period of time, which can be configured by the administrator. As a subscriber, you can reduce this time. After the retention period expires, the communication system automatically deletes all associated entries.

You can also delete the entries manually at any time.

The administrator can generally prohibit the deletion of journal entries via the WBM of the communication system (Application Suite-> UC Suite -> General Settings).

Exporting Journal Data

You can export the log data for the current day manually or automatically to a CSV file. The storage location of the CSV file can be freely selected. Once a manual export is completed, a window appears with a link to the generated CSV file containing the exported journal data.

The automatic export is performed:

- whenever the Export button is pressed,
- at every shutdown of the PC,
- at midnight (if the PC is not shut down).

The file is named according to the scheme <phone number>-<yyyymmdd>.csv. If the file already exists, the data is appended to it. The file contains the journal data of all call types except **Open** and **Scheduled** in the following fields: **Start Date**, **Start Time**, **End Date**, **End Time**, **From**, **To**, **First Name**, **Last Name**, **Company**, **Direction**, **Duration**, **Status** and **Domain**.

6.6.1 How to Sort the Journal

Step by Step

1. Click **Journal**.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound**.
3. If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4. Click on one of the column titles, e.g., **Last Name**, to sort the Journal entries by this criterion in ascending alphanumeric order.
5. If you want to reverse the sort order, click again on column header.

6.6.2 How to Group Journal Entries

Step by Step

1. Click **Journal**.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound**.
3. Click on **Group By** at the top right of the directory and select one of the following options:
   - **Group By:Date**
   - **Group By:Phone Number**
   - **Group By:Last Name, First Name**
   - **Group By:First Name, Last Name**
   - **Group By:Company**
4. Double-click on the triangle on the left of the relevant group to expand the associated entries.

6.6.3 How to Delete Journal Entries

Step by Step

1. Click **Journal**.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound**.
3. If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4. Select one of the following options:
   - Click on the relevant entry.
   - Mark the relevant entries.
5. Select **Delete** in the context menu.
6. Confirm the following prompt with **OK**.

Journal entries that you delete in myAttendant are also immediately deleted from myPortal for Desktop and myPortal for Outlook (live updated) if you are logged in with the same account.

6.6.4 How to Change the Retention Period for Journal Entries

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Under **Keep call history for**, enter the number of days, that the call history is to be retained.
4. Click **Save**.

6.6.5 How to Configure the Journal Export

Use the following steps to

- specify the storage location of the CSV file for manually and automatically exported journal data
- enable or disable the automatic export of journal data

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. In the **Journal** area, under **Export path**, click on **Browse**.
4. Select the desired storage location for the CSV file and click **Save.**
5. Enable or disable the automatic export of journal data:
   - If you want to activate the automatic export, select the **Enable export** check box.
   - If you want to deactivate the automatic export, clear the **Enable export** check box.
6. Click on **Save**.

6.6.6 How to Export the Journal Manually

Prerequisites

You have specified a storage location for the journal data to be exported.

Step by Step

1. Click on the **Journal** tab or in the corresponding window.
2. Click on **Export** at the top right of the directory.

   Once a export is completed, a window appears with a link to the generated CSV file containing the exported journal data.
3. Click on **OK** to close the window.

6.6.7 How to Generate an External Entry from Journal

Step by Step

1. Click on the **Journal** tab.
2. Right-click on the relevant entry you want to add in the external directory and select **Copy to external**.
3. Fill in the fields with the relevant information in the **Personal Contact** window.
4. Click on Save.

6.6.8 How to mark a conversation as completed

A conversation is a series of unanswered calls to and from a contact.

A conversation is only valid for a number of days. This number of days is configured by the administrator. After that period of time, a new conversation is opened for the contact in case of a missed call. You can mark manually all journal entries of a conversation as completed.

Step by Step

1. Click on the **Journal** tab.
2. Locate the journal entry from the user you want to mark as completed and right click on the entry.
3. Click on **Close Conversation** option.

   All journal entries of the conversation with the user are marked as completed.

> **NOTICE:** The **Close Conversation** option will not be available, if the system administrator has enabled the **Disable conversation tracking** in WBM.

6.7 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Canonical	Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + ( ) [ ] / - : ; are allowed.	+49 (89) 7007-98765

Format	Description	Example
Dialable	Exactly as you would dial the call number on the system telephone in your office, always with the trunk access code. Blanks and the special characters + ( ) [ ] / - : ; are allowed.	• 321 (internal) • 0700798765 (own local network) • 0089700798765 (external local network) • 0004989700798765 (international)

INFO: If possible, you should always use the canonical call number format. This ensures that a phone number is always complete, unique and consistent for networking and mobile stations in every situation.

When dialing an external station (dialable format) manually, the CO access code must always be dialed as well. The CO access code must likewise also be specified when manually entering the destination number (dialable format) for the CallMe service (UC Suite) in UC clients.

When dialing an external phone number in dialable format from a directory (and when using the Desktop Dialer and Clipboard Dialer for certain UC clients), the communication system automatically adds the CO access code (route 1). The automatic addition of the CO access code also occurs when you select a phone number of your own personal data (**Mobile number**, **Private Number**, etc.) as a destination number for the CallMe service (UC Suite).

NOTICE: For calls within the USA via CSTA to a number in canonical format, phone numbers are converted to the dialable format.

6.8 Desktop Dialer

Using the Desktop Dialing function, you can call a selected destination from many applications such as an editor or an Outlook e-mail.

You can use either clipboard dialing, or desktop dialing. Both methods dial the number which is selected but the handling regarding the tagging of the number is different. Clipboard dialing is the preferred method.

Depending on the type of string used, the Dialer works as follows:

- A phone number in canonical format is dialed directly.
- A station number in dialable format is dialed directly if the communication system can decide whether an internal or external destination is involved. Otherwise, the user is asked to make the appropriate selection.

- A string which contains letters or special characters that are not allowed in canonical and dialable format, is searched in the directories as a first name or last name.

The tagged number is dialed after a specified time period. Within this time period, you can still cancel the dialing.

If you change the default value of 3s to 0s, the dialing will occur immediately. Over time more and more applications have become technically incompatible with the Desktop Dialing method.

If the Desktop Dialing method does not work any longer e.g. after an update of the operating system and/or application the Clipboard Dialing method has to be used instead.

NOTICE: The Desktop Dialing method is not supported by Apple Mac OS in general. In this case Clipboard dialing has to be used.

6.8.1 How to Make a Call via the Clipboard or Desktop Dialer

Prerequisites

If you are working under a Mac OS: **System Preferences** > **Accessibility** > **Enable Access for Assistive Devices** is enabled.

Step by Step

If the string is a phone number, you have the following options:

- For Clipboard Dialer, tag the number to be dialed by pressing the right mouse button and drag the mouse pointer over it. The tagged number is highlighted at the display. Afterwards press the configured key combination (e.g. CTRL + SHIFT + D) at the keyboard.
- For Desktop Dialer, tag the number to be dialed by pressing the right mouse button and drag the mouse pointer over it while pressing the configured (CRTL) key. A green line appears which indicates the tagged range. After releasing the right mouse button the tagged number is dialed.

NOTICE: If you want to cancel the dialing of a number, click within five seconds on the Close symbol in the screen pop up. If the string consists of characters, the search window opens and displays the existing names that match the string in the directories. Clicking on an entry with the right mouse button opens a context menu with different phone numbers; you can call directly with the left mouse button.

6.8.2 How to Configure the Desktop Dialer and Clipboard Dialer

Step by Step

1. Click on **Setup**.

2. Click on **My Preferences** > **Hot Keys**.

3. If you want to use the Desktop Dialer, proceed as follow:

a) Select the **Hot Key Enabled** check box for **via Desktop**.

b) If you want to change the key/mouse combination for the Desktop Dialer, click in the rectangular box for **via Desktop**. Hold down one or more of the desired `Shift`, `Ctrl` and `Alt` keys and then click the additional mouse button desired.

4. If you want to use the Clipboard Dialer, proceed as follow:

a) Select the **Hot Key Enabled** check box for **via Clipboard**.

b) If you want to change the key combination for the Clipboard Dialer, click in the rectangular box for **via Clipboard**. Hold down one or more of the desired `Shift`, `Ctrl` and `Alt` keys and then press the additional key desired for the key combination.

5. In the **Desktop Dial Timeout (seconds)** field, change the preset value (default `3`) if required. Within the time period specified here, you can still cancel the dialing. At 0 seconds, dialing occurs immediately.

6. Click on **Save**.

After this, the defined key combination can be used to start the Dialer.

6.8.3 How to Change the Key Combination for the Desktop Dialer or Clipboard Dialer

Follow these steps if the configured key combination does not start the Dialer.

Step by Step

1. Click on **Setup**.

2. Click on **My Preferences** > **Hot Keys**.

3. Select one of the following options:

- If you want to change the key combination for the Desktop Dialer, click in the rectangular box for **via Desktop**.
- If you want to change the key combination for the Clipboard Dialer, click in the rectangular box for **via Clipboard**.

4. Select one of the following options:

- If you want to change the key/mouse combination for the Desktop Dialer, hold down one or more of the `Shift`, `Ctrl` and `Alt` keys and then click the additional mouse button desired.
- If you want to change the key combination for the Clipboard Dialer, hold down one or more of the `Shift`, `Ctrl` and `Alt`

keys and then press the additional key desired for the key combination.

5. Click on **Save**.

After this, the key combination defined in step 3 can be used to start the Dialer.

6.9 Screen Pops

Screen pops (also called tray pops or pop-up windows) offer you convenient ways to respond to incoming calls or new voicemails with a single click.

Screen pops appear in the lower right corner of the screen. There are different types of screen pops. Screen pops for calls and messages show phone number, name and image of the caller, if possible. The buttons in the screen pops change, depending on the situation. You can control functions in screen pops via the keyboard (`TAB` or arrow keys and `Enter`).

Screen pops can be minimized to a tray icon. As soon as more than three screen pops are opened for calls, they are automatically minimized and shown as icons on the task bar.

You can define the following settings for the screen pops:

- Open main window on incoming calls
- Open screen pop on inbound calls
- Open screen pop on outbound calls
- Close screen pop at the end of a call
- Open screen pop on new voicemail
- Open screen pop on new fax message
- Open messages window on new voicemails
- Open messages window on new fax messages
- Open summary (overview) on starting the UC client

The screen pop can also be displayed in a new user interface. In this interface, the symbols described below are grouped differently and have a slightly different appearance.

The user interface includes also a field called **Forwarded from:**. This field is displayed in the screen pop when the inbound call is forwarded by another extension. In this way, you can see the original caller and the person who forwarded the call to you.

If multiple screen pops are open, they can be expanded and collapsed.

NOTICE: The Windows task bar on a Citrix server client should only be operated at 1 height unit so that pop-ups remain visible and easily accessible

Screen Pop on Inbound Calls

The following functions are available:

Icon	Function
	Answer
	Forwarding Forwards the call to the voicemail box.
	Record (if enabled in the system)
	Conference The call can be expanded to an ad-hoc conference and further participants can be added.
	Answer with message
	Caller notice Email to a subscriber to forward the data of the caller to that subscriber. The email recipient (To... :) field is not prefilled. The contact data of the caller is transferred to the email text.
	Send Instant Message Message to the caller.

Screen Pop During the Call

The following functions are available:

Icon	Function
	Hang Up
	Transfer Transfers the call after the input of a number to be dialed or a name to be found.
	Hold The communication partner is placed on hold so that you can consult with someone in the room or call some other subscriber. The caller on hold cannot hear your conversations.
	Record (if enabled in the system)
	Conference The call can be expanded to an ad-hoc conference and further participants can be added.

Icon	Function
	Answer with message Email to the communication partner. The email recipient (To:) field is prefilled with the email address of the communication partner, provided the address could be determined from a contact. In addition, you can define a text that is automatically displayed as the email text via **Setup** > **My Preferences** > **Miscellaneous** > **Answer with message**.
	Caller notice Email to a subscriber to forward the data of the communication partner to that subscriber. Example: You have picked up the call of a colleague and want to notify the colleague. The email recipient (To... :) field is not prefilled. The contact data of the communication partner is transferred to the email text.
	Instant Messaging Message to the communication partner.
	Schedule Callback Configure the date and time as well as an info text to call the communication partner again.
	Start Collaboration Starts the separate Web Collaboration product for access to features such as desktop and application sharing, file sharing, and video chat.
	Transfer / Search If a phone number is entered in the **Phone Number** field, clicking on the icon will transfer the call to that phone number. When the initial letters of a name are entered in the field, the arrow changes to a magnifying glass. Clicking on the magnifying glass opens the Search, and the results for the entered letters are displayed.

Screen Pops on Outbound Calls

The following functions are available:

Icon	Function
	Hang Up

Icon	Function
	Answer with message Email to the communication partner. The email recipient (To:) field is prefilled with the email address of the communication partner, provided the address could be determined from a contact. In addition, you can define a text that is automatically displayed as the email text via **Setup** > **My Preferences** > **Miscellaneous** > **Answer with message**.
	Caller notice Email to a subscriber to forward the data of the communication partner to that subscriber. Example: You have picked up the call of a colleague and want to notify the colleague. The email recipient (To... :) field is not prefilled. The contact data of the communication partner is transferred to the email text.
	Instant Messaging Message to the communication partner.
	Schedule Callback Configure the date and time as well as an info text to call the communication partner again.
	Start Collaboration Starts the separate Web Collaboration product for access to features such as desktop and application sharing, file sharing, and video chat.

Screen Pop for New Voicemails

The screen pop also displays the date and time the voicemail message was received. The following functions are available:

Symbol	Function
	Play Message Through Phone
	Play Message Through Speakers
	Pause
	Stop

Symbol	Function
	Email Email to a subscriber to forward the data of the voice message to that subscriber. The email recipient (To... :) field is not prefilled. The contact data of the called party is transferred to the email text.
	Instant Messaging Message to the communication partner.
	Rewind
	Forward

Screen Pop after Sending a Fax Message

This screen pop shows the date and time as well as the number of successful or failed transmissions. This type of screen pop only appears if the UC client is open when sending fax messages. The following functions are available:

Symbol	Function
	View
	Close

Screen Pop with Overview on Starting the UC Client

On starting the UC client, the screen pop displays an overview (summary) with the number of voice and fax messages received and the open calls. The following functions are available:

Symbol	Function
	Voicemails: number
	Fax messages: number
	Open calls: number

You can jump to the specific details by clicking on the respective symbols.

If your presence status is not **Office**, you will receive a corresponding message.

Screen Pop on Overdue Presence Status

The screen pop is displayed if your presence status is not **Office**, and the scheduled time of your return has passed. If you close the screen pop, it will reappear after one hour if your presence status is still overdue. The following functions are available:

Icon	Function
	Change the presence status to **Office**.

6.9.1 How to Enable or Disable Screen Pops on Inbound Calls

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select one of the following options:
    - If you want to enable screen pops on inbound calls, select the check box **Display tray pop on inbound calls**.
    - If you want to disable screen pops on inbound calls, clear the check box **Display tray pop on inbound calls**.
4. Click **Save**.

6.9.2 How to Enable or Disable the Opening of the Main Window on Inbound Calls

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select one of the following options:
    - If you want to enable the opening of the main window on inbound calls, select the check box **Pop up application on inbound calls**.
    - If you want to disable the opening of the main window on inbound calls, clear the check box **Pop up application on inbound calls**.
4. Click **Save**.

6.9.3 How to Enable or Disable the Closing of Screen Pops at the End of a Call

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select one of the following options:
    - If you want to enable the closing of screen pops at the end of a call, select the check box **Close screen pop on call termination**.

- If you want to disable the closing of screen pops at the end of a call, clear the check box **Close screen pop on call termination**.

4. Click **Save**.

6.9.4 How to Enable or Disable Screen Pops on Outbound Calls

Step by Step

1. Click on **Setup**.

2. Click on **My Preferences** > **Notifications**.

3. Select one of the following options:

- If you want to enable screen pops on inbound calls, select the check box **Display tray pop on outbound calls**.
- If you want to disable screen pops for inbound calls, clear the check box **Display tray pop on outnbound calls**.

4. Click **Save**.

6.9.5 How to Enable or Disable Screen Pops for New Voicemails

Step by Step

1. Click on **Setup**.

2. Click on **My Preferences** > **Notifications**.

3. Select one of the following options:

- If you want to enable screen pops on new voicemails, select the check box **Display tray pop on new voice mail**.
- If you want to disable screen pops on new voicemails, clear the check box **Display tray pop on new voice mail**.

4. Click **Save**.

6.9.6 How to Enable or Disable the Automatic myAttendant Screen Pop on Receiving a New Voicemail

Step by Step

1. Click on **Setup**.

2. Click on **My Preferences** > **Notifications**.

3. Select one of the following options:

- If you want myAttendant to appear automatically in the foreground on receiving a voicemail, select the check box **Open the messages window when I receive a new voicemail message**.
- If you do not want myAttendant to appear automatically in the foreground on receiving a voicemail, clear the check box **Open the messages window when I receive a new voicemail message**.

4. Click **Save**.

6.9.7 How to Enable or Disable Screen Pops for Received Chat Messages

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select one of the following options:
   - If you want to enable screen pops on receiving chat messages, select the check box **Display tray pop when I receive a chat message**.

     If selected, when you receive chat messages the **Instant Message** window pops up on your screen in case that the window is closed or in the background and you are not typing on the keyboard. Otherwise, a screen pop appears on the bottom right corner of the screen when you receive chat messages in any of the following conditions:

     – The **Instant Message** window is minimized in the taskbar.
     – There is no selected conversation in the **Instant Message** window.
     – There is a selected conversation in the **Instant Message** window but the received chat message is from another conversation.
     – You are typing on the keyboard but not in the **Instant Message** window.
     – You log into myPortal for Desktop and there are received chat messages that are missed or unseen.
   - If you want to disable screen pops on receiving chat messages, clear the check box **Display tray pop when I receive a chat message**.

     If not selected, when you receive chat messages the **Instant Message** window pops up on your screen.
4. Click **Save**.

6.9.8 How to Open a Missed Event Screen Pop by Using a Hot Key

You can use a hot key to reopen the overview of a missed event.

Prerequisites

The set up hot key opens the overview traypop only if there are notifications to be displayed, that is, at least 1 voicemail message or 1 fax message or 1 open call.

Step by Step

1. Click on the **Setup** symbol.

2. Click on **My Preferences > Hot Keys**.
3. Enter the desired hot key in the **Display Overview Traypop** field, and then select the **Hot Key Enable** check box next to it.
4. Click on **Save**.

When you press the hot key, the overview traypop is displayed.

6.10 Conferences

In a conference, multiple participants (including external parties) can communicate with one another at the same time. The Conference Management function enables you to quickly and easily host different types of conferences and also to schedule them in advance.

Types of Conferences

The different types of conferences offer the following features:

	AdHoc	**Meet Me**	**Permanent**	**Permanent Open**
Usage	• Phone-controlled • Application-controlled	• Application-controlled	• Application-controlled	• Application-controlled
Start	• Manually	• Scheduled	• Manually	• Manually
End	• Manually	• Scheduled • Manually	• Manually	• Manually
Duration of the reservation of conference channels	• 1 hour by default	• Scheduled	• Until the deactivation or deletion of the conference	• Until the deactivation or deletion of the conference
Extension	-	x	-	-
Recurrence	• Manually	• Scheduled	-	-
Direction of connection setup from the viewpoint of the system	• Outbound	• Outbound • Inbound	• Inbound	• Inbound
Set of participants	• Fixed	• Fixed	• Fixed	• Open
Authentication of conference participants	-	• Individual conference ID (optional) • Password (optional)	• Individual conference ID (optional) • Password (optional)	• Shared conference ID (optional)

	AdHoc	Meet Me	Permanent	Permanent Open
Recording, if enabled in the system	• Manually (On Demand Conference Recording)	• Automatically (Auto Conference Recording) • Manually (On Demand Conference Recording)	• Automatically (Auto Conference Recording) • Manually (On Demand Conference Recording)	• Automatically (Auto Conference Recording) • Manually (On Demand Conference Recording)
Invitation by Email with:	• Conference Name • Link for Web Collaboration session	• Conference Name • Dial-in number • Conference ID • Password • Date and time of the start and end of the conference • Link for Web Collaboration session	• Conference Name • Dial-in number • Conference ID • Password • Link for Web Collaboration session	• Conference Name • Dial-in number • Conference ID • Password
Outlook appointment as an email attachment (.ics)	-	x	-	-

Application-controlled conference

As a subscriber, you can initiate, control and manage a conference with the Conference Management feature of myPortal for Desktop, myAttendant or myPortal for Outlook. A license is required for the use of Conference Management.

Phone-controlled Conference

As a subscriber, you can initiate a phone-controlled conference and then control it via the phone by the following methods:

- Call the desired conference participant and connect him or her to the conference
- Extend a consultation call into a conference
- Extend a second call into a conference

Virtual conference room

The virtual conference room enables you to follow a conference and its participants in a graphical environment and to also manage the conference if you are the conference controller. The virtual conference room shows the phone number, name and presence status to the conference participants, where available.

Symbol	Meaning
	Conference
	Adhoc conference
	Schedule Outbound Call
	Meet Me conference
	Permanent Conference
	Permanenet Open conference
	No participants in conference
	Conference controller
	Conference is being recorded
	Stop conference recording

Every arrow between the communication system and the conference controller or its participants indicates the direction of the connection setup from the viewpoint of the communication system.

- **Outbound**:

  The communication system calls the participant. Note that this applies to internal participants only if the subscriber has not enabled forwarding to voicemail.
- **Inbound**:

  The conference participants or conference controller dials into the conference using the dial-in number.

While participating in a conference, making a call or accepting another call disconnects the participant from the conference.

Dial-in number

The administrator can change the conference dial-in numbers that were set up during the basic installation. You can display the dial-in number for a conference.

Conference Controller

The initiator of a conference is automatically the conference controller until this is explicitly changed. Depending on the type of conference, the controller can:

- Add or remove conference participants:

  Removed participants do not remain in the conference.
- Disconnect or reconnect conference participants:

Disconnected participants remain in the conference. When the conference controller is connecting a conference participant, all other conference participants remain connected to one another. If there is only one participant connected, that participant will hear music on hold.

- Record a conference

  Conferences in which a participant is on hold cannot be recorded.
- Set another internal participant on the same node as the conference controller
- Leave the conference without ending it:

  The longest attending internal participant of the conference automatically becomes the conference controller.
- End the conference

Conference tone

When connecting or disconnecting a conference participant, the other participants hear the conference tone. The administrator can activate or deactivate the conference tone.

Conference Participants

Conference participants can leave the conference and optionally dial-into it again (Meet Me and permanent conferences). As long as a conference has only one participant, the participant hears music on hold. The administrator can specify whether multiple external conference participants are allowed. The maximum number of external conference participants is determined, among other things, by the number of available trunks.

Automatic Termination without a Conference Controller

If there are only external subscribers left in a conference, the participants will hear an alert tone after a specified time period. Following a further timeout, the conference is automatically terminated by the communication system. The administrator can change these timeouts.

Notification by Email and Outlook Appointment

The system can automatically notify conference participants by email and, for Meet Me conferences, additionally through an Outlook appointment as an attachment (.ics):

Event	Notified conference participants	Outlook appointment
New conference	All	Automatic creation
Delete the conference		Automatic deletion
Reschedule the conference		Automatic update
Adding conference participants	Those affected	Automatic creation (those affected)

Event	Notified conference participants	Outlook appointment
Remove conference participants		Automatic deletion (those affected)

This requires the administrator to have configured the sending of emails. In addition, an internal conference participant must have specified his or her email address. For external conference participants, the initiator of the conference must enter their individual email addresses.

NOTICE: For email notifications, no return acknowledgments are obtained for failed deliveries or absence messages, since the emails are sent directly from the system due to the integration of Web Collaboration.

Further Calls

While participating in a conference, making a call or accepting another call disconnects the participant from the conference.

Park, Toggle/Connect

The Park and Toggle/Connect features are not available in a conference.

Call Charges

Toll charges are assigned to the party who set up the toll call. When a conference is transferred to another conference controller, all further charges are assigned to that controller.

Video Monitoring

Any ongoing video transmission must be terminated before participating in a conference.

6.10.1 Ad-hoc Conference

An ad-hoc conference occurs spontaneously and is started manually by the conference controller. The conference controller can save ad-hoc conferences in order to set them up again at some later point in time.

Starting the Conference

The system opens the window with the virtual conference room automatically for all internal conference participants, provided they have started myPortal for Desktop with the user interface, myAttendant or myPortal for Outlook. The system calls all conference participants simultaneously. On joining the conference, each conference participant hears a greeting announcement with the name of the conference controller.

Recording the Conference

Conference controllers can record a conference manually for themselves or for all connected internal conference participants, provided the live recording of calls has been activated in the system. Participants located in the own node receive the recording in the voicemail box; participants in other nodes, via e-mail. The duration of the recording is only limited by the available storage capacity of the system.

Ending the Conference

The conference controller can end the conference in the client or simply hang up. Alternatively, the conference ends when all conference participants have left the conference.

Expanding a Call to a Conference

An internal subscriber who is conducting a call can convert the call to an ad-hoc conference and add further subscribers. For this, the subscriber must have a UC Suite Conference license.

6.10.1.1 How to Configure and Initiate an Ad-hoc Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Click on + symbol. The **myMeetings** window opens with you set as the conference controller.
4. Add any conference participants as needed
5. Select in the **myMeetings** window, the **I would like to start the call now** from the drop-down list.
6. Click on **Start**. The system now calls you and all other conference participants.
7. If you want to use OpenScape Web Collaboration in this conference, click on **Start Collaboration**.

6.10.1.2 How to Display your Own Ad-hoc Conference

Prerequisites

You have saved an ad-hoc conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Ad-hoc Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.

6.10.1.3 How to Determine the Conference Controller of a Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

   The **Information** tab appears.

   - The First Name and Last Name of the conference controller can be found on the right side of the ★ symbol.
   - Links to directly call or chat the conference controller can be found on the right side of the and symbols respectively.

6.10.1.4 How to Determine the Dial-in Number of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the dial-in number from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The dial-in number can be found under **Conference DID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.1.5 How to Determine the Conference ID of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the conference ID from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The conference ID can be found under **Conference ID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.1.6 How to Add Conference Participants

Prerequisites

A conference with you as the conference controller has been started in the virtual conference room.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the desired conference.
5. Add the conference participants by one of the following methods:
   - From a directory:

     Using the mouse, drag one of the participants from the **Directories** into the **myMeetings** window.
   - From the results of a search:

     Search the directories and then drag any of the participants from the listed results into the **myMeetings** window.
   - From the Participants tab:

     Click on symbol if the **Participants** tab does not appears on the right side of the **myMeetings** window.

     Enter one of the following details for the participant in the **Type a name or number** search field of the **Participants** tab: **name** or **phone number** in canonical or dialable format. Move your mouse over the desired name or phone number and click on + symbol on the right hand side of the name or phone number.
   - Any participant:

Click on ✎ symbol in the **myMeetings** window. Enter one of the following details for the participant in the **Type a name or number** field of the **myMeetings** window: **name** or **phone number** in canonical or dialable format, and then click on **Save**.

6. If you want to select a specific station number for the participant, move your mouse above the relevant participant in the **Participants** tab and click on ⚙ symbol.

   The **Participant Information** window appears.

7. Select the desired station number from the **Phone Number** drop-down list and click on **OK**.

6.10.1.7 How to Disconnect a Conference Participant

Prerequisites

An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step

Move your mouse over the relevant, connected conference participant (not in the participants tab but in the center area of the **myMeetings** window where the connected participants appear) and click on **Disconnect** symbol.

The connection to the participant is cleared, but the participant remains in the conference.

6.10.1.8 How to Reconnect Conference Participants

Prerequisites

An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step

Move your mouse over the relevant conference participant (in the participants tab) that you want to reconnect and click on **Dial** symbol.

6.10.1.9 How to Remove Conference Participants

Prerequisites

A conference with you as the conference controller has been started in the virtual conference room.

Step by Step

There is an option in the context menu of the relevant conference participant:

- Click on **Remove** symbol.

The connection to the participant is cleared, and the participant is removed from the conference.

6.10.1.10 How to Expand a Call into an Ad-hoc Conference

Prerequisites

You are conducting a call.

The screen pop (pop-up window) for incoming or outgoing calls is enabled.

You have a UC Suite Conference license.

Step by Step

1. During the call, click in the **Inbound Call from ...** or **Outbound Call to ...** screen pop on the **myMeetings** symbol. The **myMeetings** window opens with you set as the conference controller.
2. Add the conference participants by one of the following methods:
   - From a directory:

     Using the mouse, drag one of the participants from the **Directories** into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click on **OK**.
   - From the results of a search:

     Search the directories and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click on **OK**.
   - Any participant:

     Click in the **AdHoc Conference** window on **Participants** > **Add Participant**. Enter the following details for the participant in the **Add Participants** window: **Name** and **Phone Number** in canonical or dialable format, and then click on **OK**.

6.10.1.11 How to End an Ad-hoc Conference

Prerequisites

An active conference with you as the conference controller has been started in the virtual conference room.

NOTICE: You can end an ad-hoc conference in any event by hanging up.

Step by Step

1. Click on the relevant conference under the **myMeetings** tab and then click on **Stop**.

   The Stop Conference pop-up window appears.
2. If you want to terminate the conference right now, enable the **I would like to stop this conference now** option.
3. You can also extend the conference's duration. To do this:
   a) Disable the **I would like to stop this conference now** option.
   b) Under **Extend Conference Time**, enter the time by which the conference you want to be extended and then click on **OK**

6.10.1.12 How to Repeat an Ad-hoc Conference

Prerequisites

You have saved an ad-hoc conference under a specified name.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Ad-hoc Conferences.
4. Click on the desired conference.
5. Click on **Start** . The communication system now calls you and the conference participants.

6.10.1.13 How to Delete an Ad-hoc Conference

Prerequisites

You have saved an ad-hoc conference under a specified name.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Ad-hoc Conferences.
4. Click on the conference that you want to delete.
5. Click on **Remove** symbol which is on the side of the conference's name under the **myMeetings** tab. If the conference has already started, it is terminated.
6. Click on **OK**.

6.10.2 Meet Me Conference

A Meet Me conference occurs at some point in the future with a defined duration and may be set up to recur repeatedly at the same time.

A Meet Me conference will run for the entire scheduled duration even if there are no connected participants. The conference controller saves a Meet Me conference under a specified name.

Options for Configuring a Meet Me Conference

The initiator of the conference can define the following properties:

- Start time and End time
- Recurring conference
- Presence of conference controller required
- Authentication of conference participants on joining the conference required (by entering a conference ID and password via the phone keypad).

  NOTICE: Mobility Entry users must enter the code for DTMF suffix dialing before their authentication.

  The default password for conferences is 123456. The conference controller can change this for the conference participants individually.
- Language of the announcements and invitations by email (by default, this is the language of the voicemail box).
- Direction for the connection setup for each conference participant (default: **outbound**).

Starting the Conference

The system opens the window with the virtual conference room at the scheduled time automatically for all internal conference participants, provided they have started myPortal for Desktop with the user interface or myPortal for Outlook. If the presence of the conference controller is required, the system first calls the controller. After the successful authentication of the controller, all the other conference participants are called simultaneously. Conference participants who have forwarded their calls to their voicemail boxes or who are determined to be absent by their presence status are not called. Depending on how the connection setup has been configured, the system calls the conference participants or the participants can dial in themselves. The system announces every participant who joins the conference by name, as in: "`... has joined the conference`", provided the initiator has recorded his or her name announcement.

NOTICE: In order to enable the participants of a Meet Me conference without authentication to hear the name announcement at the start of the conference, you will need to have first already initiated a conference with authentication on one occasion.

Dialing In

Every conference participant can use the dial-in number to dial into the conference within the scheduled time period, regardless of which direction for the conference setup was set for that participant. Attempts to dial into the conference outside the scheduled time period result in a corresponding announcement.

Forcing Authentication with the Star (*) Key

The conference controller can set the conference so that each conference participant is forced to provide authentication by at least by pressing the * key. This ensures that only the participants who are actually present are connected to the conference, as opposed to a voicemail box, for example.

Extending the Conference

Ten minutes before the scheduled end of the conference, the participants hear an announcement indicating that the conference is about to end and are offered the option of extending the conference by dialing a specific digit. Any conference participant can extend the conference by dialing that specific digit. The conference controller can extend the conference in myPortal for Outlook at any time.

Recording the Conference

Conference controllers can record a conference automatically or manually for themselves or for all connected internal conference participants, provided the live recording of calls has been activated in the system. Participants located in the own node receive the recording in the voicemail box; participants in other nodes, via email. The duration of the recording is only limited by the available storage capacity of the system.

Ending the Conference

The conference ends at the time scheduled for the end of the conference or if the conference controller terminates the conference.

6.10.2.1 How to Configure a Meet Me Conference

Prerequisites

Your administrator has configured a dial-in number for conferences.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Click on **+** symbol. The **myMeetings** window opens with you set as the conference controller.
4. Add any conference participants as needed.
5. Select in the **myMeetings** window, the **I would like a call to be started automatically** from the drop-down list.
6. Enter the **Conference Name**.

7. Enter a **Start Date**.
8. Enter a **Start Time**.
9. Enter the **End Time**.
10. If the conference is to occur repeatedly, select the either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** from the respective drop-down list. Otherwise select **Occurs only once**.
11. If you want to delete a conference appointment time for a conference series, perform the following steps:
    a) Click on **Edit** symbol which is on the right side of the drop-down list mentioned in the previous step .
    b) Click on **Exceptions**.
    c) Click on **Add**.
    d) Select the relevant date in the **Original Date/Time** drop-down list.
    e) Select **Remove this recurrence**.
    f) Click on **OK**.
    g) Click on **Close**.
    h) Click on **OK**.
12. If you want to reschedule a conference appointment for a conference series, perform the following steps:
    a) Click on **Edit** symbol which is on the right side of the drop-down list mentioned in the previous step .
    b) Click on **Exceptions**.
    c) Click on **Add**.
    d) Select the relevant date in the **Original Date/Time** drop-down list.
    e) Click on **Reschedule this recurrence**.
    f) Select a **New scheduled date**.
    g) Select a new **Start Time**.
    h) Click on **OK**.
    i) Click on**Close**.
    j) Click on **OK**.
13. Click on **Advanced**.
14. Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
15. Enable the check box **This conference is an active conference**.
16. If you want to mandate the authentication of conference participants using passwords, select the check box **Request for a password when participant join**.
17. If you want the conference to occur only when the conference controller is present, enable the check box **This conference requires the controller to be present**.
18. If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
19. If you want the system to automatically record the conference, select the **Automatically record this conference** check box.

20. If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
21. If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
22. If you want to force the conference participants to authenticate by pressing the * (star) key, select the check box **Force called participant to enter "*" (star) to join the conference**.

> **NOTICE:** This option is recommended if the conference participants do not have to authenticate via a password. This ensures that only the participants who are actually present are connected to the conference, as opposed to a voicemail box, for example.

23. If you want to add some introductory text to the invitation email or the **Information** tab, enter this in the **Notes**.
24. Click on **Save**.
25. If you want to change the direction of the connection setup for a conference participant, proceed in the following steps:
    a) Click on **Participants** symbol if the **Participants** tab does not appears.
    b) Click on i symbol of the relevant conference participant
    The **Participant information** window appears.
    c) Under **Direction**, click on **Outbound** or **Inbound** to change the direction.

6.10.2.2 How to Display your Own Meet Me Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant scheduled conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to view the general settings of the conference, click on **Edit** symbol.

6.10.2.3 How to Determine the Conference Controller of a Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.

4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

   The **Information** tab appears.

   - The First Name and Last Name of the conference controller can be found on the right side of the ★ symbol.
   - Links to directly call or chat the conference controller can be found on the right side of the and symbols respectively.

6.10.2.4 How to Determine the Dial-in Number of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the dial-in number from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The dial-in number can be found under **Conference DID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.2.5 How to Determine the Conference ID of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the conference ID from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.

2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The conference ID can be found under **Conference ID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.2.6 How to Display More Information of your Own Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

   The **Information** tab appears.

   - More information about the conference can be found under the **Notes** area.

6.10.2.7 How to Determine the Scheduled Date and Time of a Meet Me Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Meet Me Conference, click on **Information** symbol.

   The **Information** tab appears.

   - The frequency of the Meet Me conference can be found under the **Scheduled** area.
   - The date and time of the upcoming Meet Me conference can be found under the **Next Recurrence** area.

6.10.2.8 How to Change the Password for a Participant of a Meet Me Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant Meet Me conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Participants** symbol if the **Participants** tab does not appears.
6. Click on i symbol of the relevant conference participant.
   The **Participant information** window appears.
7. Enter the new password under the **Password** field.
8. Click on **OK**.
9. Click on **Save**.
10. Click on **Close**.

6.10.2.9 How To Display a Meet Me, Permanent or Open Conference as the Conference Controller

Step by Step

1. Click on **myMeetings**.
2. Click on **Manage my conferences**.
3. Click on the **Conferences that I belong to** tab.
4. Click on a conference under **Conference Name** and then on **View**.

6.10.2.10 How to Extend a Meet Me Conference

Prerequisites

An active conference with you as the conference controller has been started in the virtual conference room.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.

4. Click on the relevant Meet Me conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **More** symbol and then click on **Extend Conference**.
   The **Extend Conference Time** window appears.
6. Select one of the following methods:
   - Click on one of the entries **10 minutes**, **20 minutes**, **30 minutes** or **1 hour**.
   - Then click on **More**, enter the desired time period for the extension under **Extend by** in minutes, and click on **OK**.

6.10.2.11 How to Reschedule a Meet Me Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant Meet Me conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Edit** symbol.
6. Select a new **Start Date**.
7. Select a new **Start Time**.
8. Select a new **End Time**.
9. Click on **Advanced**.
10. Select the **Automatically send email invitation to conference participants** check box.
11. Click on **Save**.

6.10.2.12 How to Reschedule a Conference Appointment for a Meet Me Conference Series

Prerequisites

You are the conference controller of the Meet Me conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant Meet Me conference under **myMeetings** tab, in order to be displayed on screen.

5. Click on **Edit** symbol.
6. Click on **Edit** symbol which is on the right side of the lower drop-down list.
7. Click on **Exceptions**.
8. Click on **Add**.
9. Select the relevant conference appointment in the **Original Date/Time** drop-down list.
10. Select **Reschedule this recurrence**.
11. Select a **New scheduled date**.
12. Select a new **Start Time**.
13. Click on **OK**.
14. Click on **Close**.
15. Click on **OK**.
16. Click on **Advanced**.
17. If you want to add some introductory text to the invitation email, click in the **Notes** input field and enter the desired text.
18. Click on **Save**.

6.10.2.13 How to Specify another Conference Controller

Prerequisites

A conference with you as the conference controller has been started in the virtual conference room.

The new conference controller is an internal subscriber from the same node.

> **NOTICE:** A different conference controller for an associated Web Collaboration session, for example, can only be set there.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the desired conference under **myMeetings** tab, in order to be displayed on screen.
5. Move your mouse over the relevant conference participant that you want set as conference controller (in the participants tab) and click on **i** symbol.

   The **Participant Information** window appears.
6. Enable the **Set as conference controller** checkbox.
7. Click on **OK**.

6.10.2.14 How to Delete a Meet Me Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the conference that you want to delete.
5. Click on **Remove** symbol which is on the side of the conference's name under the **myMeetings** tab. If the conference has already started, it is terminated.
6. Click on **OK**.

6.10.2.15 How to End a Meet Me Conference

Prerequisites

An active conference with you as the conference controller has been started in the virtual conference room.

NOTICE: You can end a Meet Me conference in any event by hanging up.

Step by Step

1. Click on the relevant conference under the **myMeetings** tab and then click on **Stop**.

   The Stop Conference pop-up window appears.
2. If you want to terminate the conference right now, enable the **I would like to stop this conference now** option.
3. You can also extend the conference's duration. To do this:
   a) Disable the **I would like to stop this conference now** option.
   b) Under **Extend Conference Time**, enter the time by which the conference you want to be extended and then click on **OK**

6.10.2.16 How to Delete a Conference Appointment for a Meet Me Conference Series

Prerequisites

You are the conference controller of the Meet Me conference.

Step by Step

1. Click on **myMeetings**.

2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Meet Me Conferences.
4. Click on the relevant Meet Me conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Edit** symbol.
6. Click on **Edit** symbol which is on the right side of the lower drop-down list.
7. Click on **Exceptions**.
8. Click on **Add**.
9. Select the relevant conference appointment in the **Original Date/Time** drop-down list.
10. Click on **Remove this recurrence**.
11. Click on **OK**.
12. Click on **Close**.
13. Click on **OK**.
14. Click on **Advanced**.
15. If you want to add some introductory text to the invitation email, click in the **Notes** input field and enter the desired text.
16. Click on **Save**.

6.10.3 Permanent Conference

A permanent conference is not subject to time restrictions. The conference participants can dial in at any time.

The conference controller saves a permanent conference under a specified name. The conference is retained until it is explicitly deleted.

Options for Configuring a Scheduled Conference

The initiator of the conference can define the following properties:

- Authentication of conference participants on joining the conference required (by entering a conference ID and password via the phone keypad).

  NOTICE: Mobility Entry users must enter the code for DTMF suffix dialing before their authentication.

  The default password for conferences is 123456. The conference controller can change this for the conference participants individually.
- Language of the announcements and invitations by email (by default, this is the language of the voicemail box).

Starting the Conference

As soon as the first conference participant dials in, the system opens the window with the virtual conference room automatically for all internal conference participants, provided they have started myPortal for Desktop or myPortal for Outlook. All conference participants dial in themselves. The system announces every participant who joins the conference, as in: "`... has joined the conference.`"

Dialing In

Every conference participant can use the dial-in number to dial into the conference at any time.

Recording the Conference

Conference controllers can record a conference automatically or manually for themselves or for all connected internal conference participants, provided the live recording of calls has been activated in the system. Participants located in the own node receive the recording in the voicemail box; participants in other nodes, via email. The duration of the recording is only limited by the available storage capacity of the system.

6.10.3.1 How to Configure a Permanent Conference

Prerequisites

Your administrator has configured a dial-in number for conferences.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Click on **+** symbol. The **myMeetings** window opens with you set as the conference controller.
4. Add any conference participants as needed.
5. Select in the **myMeetings** window, the **I would like to create a conference room that is always available** from the drop-down list.
6. Enter the **Conference Name**.
7. Click on **Advanced**.
8. Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
9. Enable the check box **This conference is active**.
10. If you want to mandate the authentication of conference participants using passwords, select the check box **Request for a password when participant join**.
11. If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
12. If you want the system to automatically record the conference, select the **Automatically record this conference** check box.

13. If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
14. If you want to add some introductory text to the invitation email or the **Information** tab, enter this in the **Notes**.
15. Click on **Save**.

6.10.3.2 How to Display your Own Permanent Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Permanent Conferences.
4. Click on the relevant permanent conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to view the general settings of the conference, click on **Edit** symbol.

6.10.3.3 How to Determine the Conference Controller of a Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

   The **Information** tab appears.

   - The First Name and Last Name of the conference controller can be found on the right side of the ★ symbol.
   - Links to directly call or chat the conference controller can be found on the right side of the and symbols respectively.

6.10.3.4 How to Determine the Dial-in Number of a Conference

Prerequisites

You are the conference controller.

> **NOTICE:** As the conference controller, you can obtain the dial-in number from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.
   The **Information** tab appears.
6. The dial-in number can be found under **Conference DID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.3.5 How to Determine the Conference ID of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the conference ID from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.
   The **Information** tab appears.
6. The conference ID can be found under **Conference ID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.3.6 How to Display More Information of your Own Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

The **Information** tab appears.

- More information about the conference can be found under the **Notes** area.

6.10.3.7 How to Change the Password for a Participant of a Permanent Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Permanent Conferences.
4. Click on the relevant permanent conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Participants** symbol if the **Participants** tab does not appears.
6. Click on i symbol of the relevant conference participant.

   The **Participant information** window appears.
7. Enter the new password under the **Password** field.
8. Click on **OK**.
9. Click on **Save**.
10. Click on **Close**.

6.10.3.8 How to Specify another Conference Controller

Prerequisites

A conference with you as the conference controller has been started in the virtual conference room.

The new conference controller is an internal subscriber from the same node.

NOTICE: A different conference controller for an associated Web Collaboration session, for example, can only be set there.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the desired conference under **myMeetings** tab, in order to be displayed on screen.

5. Move your mouse over the relevant conference participant that you want set as conference controller (in the participants tab) and click on **i** symbol.

   The **Participant Information** window appears.
6. Enable the **Set as conference controller** checkbox.
7. Click on **OK**.

6.10.3.9 How to Delete a Permanent Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Permanent Conferences.
4. Click on the permanent conference that you want to delete.
5. Click on **Remove** symbol which is on the side of the permanent conference's name under the **myMeetings** tab. If the permanent conference has already started, it is terminated.

6.10.4 Permanent Open Conference

Open conferences are intended for a fixed number of arbitrary participants. Any participant who has the requisite access data can dial into them.

The conference controller saves a permanent conference under a specified name. The conference is retained until it is explicitly deleted.

Options for Configuring a Permanent Open Conference

The initiator of the conference can define the following properties:

- The number of conference participants (max. 16).
- Authentication of conference participants on joining the conference required (by entering a conference ID and password via the phone keypad).

  NOTICE: Mobility Entry users must enter the code for DTMF suffix dialing before their authentication.

  The default password for conferences is 123456. The conference controller can change this for the conference participants individually.
- The common conference ID for all conference participants.

- Language of the announcements and invitations by email (by default, this is the language of the voicemail box).

Starting the Conference

All conference participants dial in themselves. The system announces every internal participant who joins the conference, as in: `"... has joined the conference."`

Dialing In

Every conference participant can use the dial-in number to dial into the conference at any time.

Recording the Conference

Conference controllers can record a conference automatically or manually for themselves or for all connected internal conference participants, provided the live recording of calls has been activated in the system. Participants located in the own node receive the recording in the voicemail box; participants in other nodes, via email. The duration of the recording is only limited by the available storage capacity of the system.

6.10.4.1 How to Configure a Permanent Open Conference

Prerequisites

Your administrator has configured a dial-in number for conferences.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Click on **+** symbol. The **myMeetings** window opens with you set as the conference controller.
4. Add any conference participants as needed.
5. Select in the **myMeetings** window, the **I would like to create a conference room that is available to anyone** from the drop-down list.
6. Enter the **Conference Name**.
7. Select the maximum number of conference participants under **Number of Channels**
8. If you want to add some introductory text to the invitation email or the **Information** tab, enter this in the **Notes**.
9. Click on **Advanced**.
10. Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
11. Enable the check box **This conference is active**.
12. If you want the system to automatically record the conference, select the **Automatically record this conference** check box.

13. If you want to define the conference ID yourself, proceed in the following steps:
    a) Select the **Create your own conference ID** check box.
    b) Enter the desired **Conference ID** (4-8 characters) in the input field.
14. Click on **Save**.

6.10.4.2 How to Display your Own Permanent Open Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Permanent Open Conferences.
4. Click on the relevant permanent open conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to view the general settings of the conference, click on **Edit** symbol.

6.10.4.3 How to Determine the Conference Controller of a Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

   The **Information** tab appears.

   - The First Name and Last Name of the conference controller can be found on the right side of the ★ symbol.
   - Links to directly call or chat the conference controller can be found on the right side of the and symbols respectively.

6.10.4.4 How to Determine the Dial-in Number of a Conference

Prerequisites

You are the conference controller.

> **NOTICE:** As the conference controller, you can obtain the dial-in number from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The dial-in number can be found under **Conference DID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.4.5 How to Determine the Conference ID of a Conference

Prerequisites

You are the conference controller.

NOTICE: As the conference controller, you can obtain the conference ID from the email with the invitation to the conference.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. Click on **Information** symbol.

   The **Information** tab appears.
6. The conference ID can be found under **Conference ID** on the top of the **Information** tab.
7. Click on **Close**.

6.10.4.6 How to Display More Information of your Own Conference

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Conferences.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own Conference, click on **Information** symbol.

The **Information** tab appears.

- More information about the conference can be found under the **Notes** area.

6.10.4.7 How to Delete a Permanent Open Conference

Prerequisites

You are the conference controller.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Permanent Open Conferences.
4. Click on the conference that you want to delete.
5. Click on **Remove** symbol which is on the side of the conference's name under the **myMeetings** tab. If the conference has already started, it is terminated.
6. Click on **OK**.

6.10.5 Scheduled Outbound Call

A scheduled outbound call is started by the call scheduler after confirming the execution of the call through a screen pop, which appears on scheduled date and time.

If the call scheduler is busy at the time the scheduled outbound call is to be made, the communication system defers the scheduled outbound call until you are free again. Additionally, call scheduler is informed of any pending scheduled outbound call on starting and exiting myPortal for Desktop, in order to delete such calls or save them with a new scheduled time.

Options for Configuring a Scheduled Outbound Call

The initiator of the scheduled outbound call can define the following properties:

- Start time
- Add participants

Schedule Outbound Call and Licensing

- If the user does not have an active Conference license, he will only be able to see the option: **Schedule Outbound Call**.
- On the other hand, if the user has an active Conference license, he will be able to see additional options: **Ad-hoc**, **Meet Me**, **Permanent**, **Permanent Open** conference.

When the scheduled outbound call has more than one participant (excluding the call scheduler), then the system will redirect the **myMeetings** window, to initiate an **Ad-hoc** conference instead.

Starting the Scheduled Outbound Call

The system opens a screen pop on the scheduled date and time to the call scheduler. From this screen pop, call scheduler can start the scheduled outbound call by clicking on **Dial** symbol.

Dialing In

If the call scheduler clicks on **Dial** symbol then the scheduled outbound call participant can use the **Answer** symbol from the **Inbound Call** screen pop to answer the scheduled outbound call.

Recording the Scheduled Outbound Call

Call schedulers can record a scheduled outbound call, provided the live recording of calls has been activated in the system. The duration of the recording is only limited by the available storage capacity of the system.

6.10.5.1 How to Configure a Scheduled Outbound Call

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Click on **+** symbol. The **myMeetings** window opens with you set as call scheduler.
4. Add a single call participant.
5. Select in the **myMeetings** window, the **I would like to be reminded to start a call later** from the drop-down list.
6. Enter a **Reminder Date**.
7. Enter a **Reminder Time**.
8. If you want to add some introductory text to the invitation email or the **Information** tab, enter this in the **Notes**.
9. Click on **Save**.

A screen pop will appear on the scheduled date and time. From this screen pop, call scheduler can start the scheduled outbound call by clicking on **Dial** symbol or delete it by clicking on **Remove** symbol. Additionally, in this window call scheduler can edit the parameters of this scheduled outbound call by clicking on **Edit** symbol. Finally, there are also the options of snooze the scheduled outbound call and open the **myMeetings** window with the **Snooze** and **Journal** symbols respectively.

NOTICE: When the scheduled outbound call has more than one participant (excluding the call scheduler), then the system will redirect the **myMeetings** window, to initiate an **Ad-hoc** or a **Meet Me** or a **Permanent** or an **Permanent Open** conference instead. Otherwise the scheduled outbound call is initiated.

6.10.5.2 How to Configure a Scheduled Outbound Call for a Journal Entry

Step by Step

1. Click on the **Journal** tab or in the corresponding window.
2. Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound**.
3. Double-click on the triangle on the left of the relevant group to expand the associated Journal entries if required.
4. Click on the relevant entry.
5. Select **Schedule Outbound Call** in the context menu.

   The **myMeetings** window opens with you set as call scheduler, the selected contact as participant, and the **I would like to be reminded to start a call later** option from the drop-down list.
6. Enter a **Reminder Date**.
7. Enter a **Reminder Time**.
8. If you want to add some introductory text to the invitation email, enter this in the **Notes**.
9. Click **Save**.
10. Close **myMeetings** window.

A screen pop will appear on the scheduled date and time. From this screen pop, call scheduler can start the scheduled outbound call by clicking on **Dial** symbol or delete it by clicking on **Remove** symbol. Additionally, in this window call scheduler can edit the parameters of this scheduled outbound call by clicking on **Edit** symbol. Finally, there are also the options of snooze the scheduled outbound call and open the **myMeetings** window with the **Snooze** and **Journal** symbols respectively.

6.10.5.3 How to Display your Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.
4. Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.
5. If you want to view the general settings of the scheduled outbound call , click on **Edit** symbol.

6.10.5.4 How to Display More Information of your Own Scheduled Outbound Call

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own scheduled outbound calls.
4. Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own scheduled outbound call, click on **Information** symbol.

   The **Information** tab appears.

   - More information about the scheduled outbound call can be found under the **Notes** area.

6.10.5.5 How to Determine the Scheduled Date and Time of a Scheduled Outbound Call

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own scheduled outbound calls.
4. Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.
5. If you want to display information about your own scheduled outbound call, click on **Information** symbol.

   The **Information** tab appears.

   - The date and time of the scheduled outbound call can be found under the **Scheduled** area.

6.10.5.6 How to Reschedule a Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.
4. Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.

5. Click on **Edit** symbol.
6. Select a new **Reminder Date**.
7. Select a new **Reminder Time**.
8. If you want to add some introductory text to the invitation email, enter this in the **Notes**.
9. Click on **Save**.

6.10.5.7 How to Delete a Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1. Click on **myMeetings**.
2. Click on symbol if the **myMeetings** tab does not appears.
3. Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.
4. Click on the scheduled outbound call that you want to delete.
5. Click on **Delete** symbol which is on the side of the scheduled outbound call's name under the **myMeetings** tab and then click on **OK**.

6.11 Web Collaboration

The UC PC clients myPortal for Desktop (Windows) and myPortal for Outlook support the convenient integration of the separate product OpenScape Web Collaboration for simultaneous multi-media collaboration during phone calls and conferences. This provides quick access to functions such as desktop and application sharing, file sharing, co-browsing, whiteboarding, URL push, IM chat and video chat with multiple participants.

Web collaboration can be started by a subscriber during a phone call via the pop-up window of the UC PC client or by the conference controller of an active conference from within the conference. This opens the web collaboration session. A local installation of Web Collaboration on the UC PC client is not required. If an email program is available on the UC PC client, an email with the link to the web collaboration client can be sent to the communication partners. Detailed information on web collaboration can be found in the Web Collaboration product documentation.

When creating or editing a conference, the conference controller can also schedule a web collaboration session. On deleting or ending a conference, the associated web collaboration session is automatically deleted as well.

NOTICE: In order to enable UC PC clients to start web collaboration automatically, proxy authentication must be disabled whenever the UC PC clients access the Internet via a proxy server.

Supported Types of Connections

The web collaboration integration supports phone calls and phone-controlled conferences as well as the following types of application-controlled conferences:

- Ad-hoc conference
- Scheduled conference
- Permanent conference

Integration of Web Collaboration

For the integration of Web Collaboration, the address of the Web Collaboration server must be known to the communication system. The vendor offers the web collaboration server as a service on the Internet (Public Server). Alternatively, it may also be possible to use a Custom Server located on the customer's own network or with a partner. If the server is on the customer's own network, it is usually addressed by the communication system on TCP port 5004 using http. In the case of a hosted solution on the Internet (Public Server), a secure https connection is used instead, since the license number and password are transmitted over this connection. By default, TCP port 5100 is used for this purpose.

NOTICE: In order to use web collaboration, the communication system requires an Internet connection (default router and DNS server). Connections via proxy are not supported.

Internal conference participants with UC PC clients are automatically connected to the appropriate web collaboration session on starting the conference. To do this, FastViewer is automatically downloaded and opened in the background, which may take several seconds. External conference participants with known email addresses receive an email with an appropriate link to the Web Collaboration session.

NOTICE: Users working under a MAC OS must close the alert dialog for the terminated session manually after completion of a web collaboration session.

For a scheduled conference, it is possible to connect to the Web Collaboration session as early as 5 minutes before the start of the scheduled conference.

Instant Messaging and Web Collaboration

Note that Instant Messaging of the system and Instant Messaging of a Web Collaboration session are mutually independent, i.e.: the instant messages from a UC PC client do not appear in a web collaboration session of the same participant, and vice versa.

6.11.1 How to Start a Web Collaboration Session

Prerequisites

Access to the Web Collaboration server is set up in the communication system.

An email program is installed on the client PC.

Screen pops for inbound and outbound calls have been activated.

You are currently conducting a call or participating in a conference as a conference controller.

Step by Step

1. Click on the **Start Collaboration** symbol in the **Inbound Call** screen pop or the **Outbound Call to ...** screen pop.

   The web collaboration session (fastviewer) is started. In addition, the email program opens, and an email with a link to the web collaboration client is created.

   > **NOTICE:** The email body which includes the invitation to the web collaboration is default and can not be changed.

2. Add the email address(es) and send the email.
3. As soon as a communication partner launches the Web Collaboration client, he or she is added to the web collaboration session.

6.11.2 How to End a Web Collaboration Session

Prerequisites

Screen pops for inbound and outbound calls have been activated.

You are currently conducting a call or participating in a conference.

A web collaboration session has been started.

Step by Step

Click on the **Stop Collaboration** symbol in the **Inbound Call** screen pop or the **Outbound Call to ...** screen pop.

The web collaboration session (fastviewer) is started. In addition, the email program opens, and an email with a link to the web collaboration client is created.

> **NOTICE:** The email body which includes the invitation to the web collaboration is default and can not be changed.

6.12 Voice and fax messages

The Voicemail and Fax services integrated in the system enable subscribers to receive and manage voicemails and fax messages via myPortal for Desktop and myPortal for Outlook. Fax messages can be sent by subscribers using Fax Printer.

6.12.1 Voicemail Box

The voicemail box records voice messages and recorded calls centrally. You can access these messages using myPortal for Outlook.

You can view or edit the personal settings of your voicemail box; for example, you can select the language of the voicemail box, determine its call number, switch between recording and announcement modes, control the announcement of your Presence status, record your announcements and import announcements. The system performs the automatic level control and normalization needed to meet the "USA / TIA 968 Signal Power Limitations" requirements.

NOTICE: In order to enable callers to reach your voicemail box on **Busy** and **No Answer**, the administrator must set up call forwarding to your voicemail box. Alternatively, you can also do this yourself by setting up a "call diversion after time" on your phone.

Determining the Call Number of the Voicemail Box

You can determine under which extension you can reach the voicemail box from any phone to listen to your voicemails or change your Presence status, for example.

Selecting the Recording or Announcement Mode

In Recording mode, callers can leave a message for you on reaching your voicemail box exactly as with an answering machine, whereas in Announcement mode, they will only hear your announcement. You can specify this setting separately for every Presence status.

Announcements

You can record or import the following types of announcements:

- Name announcement:

  Your name announcement is used at the start of conferences for which you have invited others and to announce when you join a conference. In addition, the name announcement you have recorded is used as a greeting when you have enabled the announcement of your Presence status for the caller involved and your Presence status is not **Office**, **CallMe** or **Do Not Disturb**.
- General personal greeting

This announcement is heard by callers in default mode when no presence status is enabled (status **Office** or **CallMe**). For example, on reaching your voicemail box, the caller would hear a message such as, "Unfortunately, I cannot take your call at the moment …".

- Personal greeting for **Busy**:

  This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) on reaching your voicemail box when your line is busy. For example: "I am currently on the phone and unable to take your call …" If no personal greeting for **Busy** has been recorded, callers will hear your general personal greeting.
- Personal greeting for **No Answer**:

  This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) when their calls are forwarded to your voicemail box manually or on no answer after a specific amount of time. For example: "I am unfortunately unable to take your call at this moment …" If you have not recorded any personal greeting for **No Answer**, callers will hear your general personal greeting.
- Personal announcements for custom profiles of the personal AutoAttendant:

  These announcements are not used by the voicemail box in default mode, but only in conjunction with the personal AutoAttendant.

NOTICE: Before using announcements or music from other sources, make sure that you do not infringe on any copyrights.

The voicemail box can generate situation-based announcements of your Presence status (except for **Office**, **CallMe** and **Do Not Disturb**) with an indication of your scheduled time of return; for example: "`xxx is in a meeting until two thirty p.m. today`". You can enable or disable the announcement of your Presence status for specific callers and for all external callers separately.

In default mode, the voicemail box plays back announcements in the following order (from left to right):

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
Busy	-	-	for **Busy** (if not recorded: general)
No answer	-	-	for **No Answer** (if not recorded: general)

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
Meeting	x (if you have enabled the announcement of your Presence status for the caller involved)	x (if you have enabled the announcement of your Presence status for the caller involved)	general
Sick			
Break			
Out of Office			
Vacation			
Lunch			
Home			
Do Not Disturb	-	-	general

Example: Announcement of your Presence status is enabled for the caller

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
Meeting	"Natalie Dubios"	"`is in a meeting until two thirty p.m. today`".	"I am unfortunately unable to take your call at the moment …"

Example: Announcement of your Presence status is disabled for the caller

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
Out of Office	-	-	"I am unfortunately unable to take your call at the moment …"

Central AutoAttendant

The central AutoAttendant enables the administrator of your communication system to offer callers time-based choices to forward their calls to numbers he or she has defined or to your voicemail box. As with the personal AutoAttendant, callers signal their choices by entering digits at the phone. Due to the central AutoAttendant, further announcements may follow those described above.

Announcement of your Presence Status

You can define whether callers should hear the announcement of your Presence status on reaching your voicemail box. You can enable or disable this collectively for all external callers and for specific subscribers.

Retrieving your Voicemail through the Attendant

Using myAttendant, you can grant or deny the Attendant permission to access your voicemails and Fax messages. In the latter case, the Attendant can only determine how many messages you have.

Bypassing the Password Prompt

If you call the voicemail box from one of your additional phone numbers, the password prompt can be bypassed if configured so by the system administrator. This setting also applies to the phone notification service of the voicemail box.

Language of the Voicemail Box

You can define in which language the voicemail box plays back the menu choices and the internal system announcements.

6.12.1.1 How to Determine the Call Number for your Voicemail Box

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. You will find the call number of the voicemail box in the **VoiceMail Number** field.
4. Click on **Close**, followed by **OK**.

6.12.1.2 How to Select Recording or Announcement Mode

Step by Step

1. Click on **Setup**.
2. Click on **Communications** > **VoiceMail Settings**.
3. Select one of the following values for each Presence status in the **VoiceMail Settings** area:
   - If you want callers to be able to leave messages in your voicemail box, select **Active**.
   - If you want callers to only hear the announcements of your voicemail box, select **Inactive**.

   NOTICE: When the Profile is activated, the caller can leave a message in your voicemail box even if the **Voicemail recording** is set to **Inactive**.
4. Click **Save**.

Related tasks

How to Edit a VoiceMail Profile for the Personal AutoAttendant on page 126

6.12.1.3 How to Record an Announcement

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on any of the profiles.
3. Click **Record**.
4. Click on the announcement with the desired designation in the list of announcements.
5. Click **Record**. The voicemail box will now call you on your phone.
6. Accept the call from the voicemail box.
7. Speak out the text of your announcement after the tone.

> **INFO:** If you are using announcements or music from other sources, make sure that you do not infringe on any copyrights.

8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record** again.
11. Click **Save**.

6.12.1.4 How to Import an Announcement

Prerequisites

The audio file is available as a PCM file with the following properties: 8 kHz, 16 bit, mono.

> **INFO:** Before using announcements or music, make sure that you do not infringe on any copyrights.

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on any of the profiles.
3. Click **Record**.
4. Click **Upload**.
5. Select the desired file and click **Open**.
6. Read and click **OK** in the **Warning!!!** window.
7. Click **OK**.
8. Click on **Close**, followed by **Save**.

> **NOTICE:** On importing announcements, the system performs the automatic level control and normalization needed to meet the "USA / TIA 968 Signal Power Limitations" requirements.

6.12.1.5 How to Delete an Announcement

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on any of the profiles.
3. Click **Record**.
4. Click on the announcement with the desired designation in the list of announcements.
5. Click **Remove**.
6. Click on **Close**, followed by **Save**.

6.12.1.6 How to Enable or Disable the Announcement of your Presence Status for External Callers

Step by Step

1. Click on **Setup**.
2. Click on **Sensitivity** > **VoiceMail Presence**.
3. Select one of the following options:
   - If you want to activate the voicemail box announcement of your Presence status for external callers, enable the check box **My presence will be played to external callers when they reach my VoiceMail**.
   - If you want to deactivate the voicemail box announcement of your Presence status for external callers, clear the check box **My presence will be played to external callers when they reach my VoiceMail**.
4. Click **Save**.

6.12.1.7 How to Enable or Disable the Announcement of your Presence Status for Specific Callers

Prerequisites

In order to disable the announcement of your Presence status for a specific number, this number must be transmitted with the call.

Step by Step

1. Click on **Setup**.
2. Click on **Sensitivity** > **VoiceMail Presence**.
3. Select one of the following options:
   - If you want to suppress the voicemail box announcement of your Presence status for a specific number, click **Add**, enter the desired number in the input field, and click **OK**.

> **NOTICE:** You can use the following character as placeholders to define a call number range: `?` for any single digit and `*` for any number of digits.

- If you want to allow the voicemail box announcement of your Presence status for a specific number, click on desired entry and then on **Remove**.

4. Click on **Save**.

6.12.1.8 How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages

Step by Step

1. Click on **Setup**.
2. Click on **Sensitivity** > **Security and Access**.
3. Select one of the following options:

- If you want to allow your voicemail and fax messages to be retrieved by the Attendant, enable the check box **Receptionists are able to listen to my voicemail and to read my fax messages**.
- If you want to prevent your voicemail and fax messages from being retrieved by the Attendant, clear the check box **Receptionists are able to listen to my voicemail and to read my fax messages**.

4. Click **Save**.

6.12.1.9 How to Select the Language of the Voicemail Box

Step by Step

1. Click on **Setup**.
2. Click on **Communications** > **VoiceMail Settings**.
3. Select the **VoiceMail Language** in the drop-down list.
4. Click **Save**.

6.12.2 Managing Voicemail

You can listen to and forward voicemails, for example, or move them to another folder, save them as WAV files or call the sender.

Folders for Voicemail

myPortal for Desktop organizes voice messages in the following folders:

- **Inbox**
- **Played**
- **Saved**

- **Deleted**

Displaying Voicemail Messages

The following symbols identify different types of voicemail:

Symbol	Type of voicemail
-	Voicemail to a subscriber
	Voicemail to a group
	Recorded call
	Recorded Conference

The List view of voicemails shows the following details:

- Symbol for the type of voicemail
- **Date**
- **Time**
- **Group**, if available
- **Call number**, if available
- **Last Name**, if available

  For recorded conferences: conference name, if available; otherwise, Last Name of the second conference participant, if available
- **First Name**, if available
- **Company**, if available
- **Priority**

  Color coding: urgent (rot), private (blue), normal (black). When listening to the voicemail Inbox, an announcement notifies you of the number of messages per priority.
- **Duration**

Retention Period for Voicemail

The communication system automatically deletes voicemails after a defined retention period (which can be configured by the administrator) expires.

Voicemail for Groups

The administrator can set up groups for voice messages with a separate call number for each group. The communication system forwards voice messages to a group to each group member. As soon as one of the subscribers has listened to a new message, that message is flagged as "played" for all group members. If a group member deletes a message, that entry is also deleted for all other group members.

Listening to Voicemail

You can optionally listen to voice messages on the phone or your PC. When a new voice message is listened to for the first time, the communication system moves it automatically from the **Inbox** folder to the **Played** folder.

Calling the Sender of a Voicemail

You can call the sender of a voice message.

Forwarding a Voice Message

You can forward a voice message easily to other internal subscribers.

Moving a Voice Message

You can move a voice message to another folder.

Saving a Voice Message as a File

NOTICE: The communication system saves voice messages for a limited period of time, which can be configured per folder by the administrator. When this time period expires, the voice messages are automatically deleted by the communication system.

You can save a voice messages as a WAV file in the file system of your PC to archive it permanently or send it to any recipient by email.

6.12.2.1 How to Listen to a Voice Message on the Phone

Prerequisites

Your Presence status is **Office** or **CallMe**.

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Inbox**.
3. Click on the desired voicemail.
4. Click on **Play through phone**.

Next steps

Accept the call from the voicemail box.

6.12.2.2 How to Listen to a Voice Message on the PC

Prerequisites

Your PC has a properly configured sound card with speakers or headphones.

NOTICE: If you use iTunes under the Mac OS to play your multimedia files, the voicemails that you listen to will be automatically transferred to iTunes library. Under some circumstances, these messages may then be transmitted to the iCloud and to other devices automatically by syncing and should therefore be deleted manually.

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Inbox**.
3. Click on the desired voicemail.
4. Click on **Play through speakers**.
5. In the screen pop, click on **Play**.

6.12.2.3 How to Call back the Sender of a Voice Message

Prerequisites

The caller's phone number has been transmitted.

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click on **Call Sender** and if several phone numbers are offered for selection, click on the desired number.

6.12.2.4 How to Forward a Voicemail Message

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click on **Forward Message**, in the context menu.
5. To sort the list of recipients, click on the column headers **Extension** or **Name** to sort by that criterion in alphanumeric ascending order.
6. If you want to reverse the sort order of the list of recipients, click again on the column header.
7. Activate the check box for the desired recipient or recipients.
8. If you want to add a comment, proceed in the following steps:
   a) Click on **Comment**.
   b) Click on **Start**. The voicemail box will now call you on your phone.
   c) Accept the call from the voicemail box.
   d) Speak out the text of your comment after the tone.
   e) Click on **Stop**.
   f) If you want to listen to the comment on the phone, click on **Listen**. To exit the playback loop, click on **Stop**.

g) If you want to record the comment again, click on **Record** again.

9. Click on **Redirect**.

6.12.2.5 How to Move a Voice Message

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Select the desired folder in the context menu under **Move Message to** > **...**.

6.12.2.6 How to Save a Voice Message as a WAV File

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Played**.
3. Click on the desired voicemail.
4. Click on **Save as WAV** in the context menu.
5. Select a folder in the **Save** window, enter a file name of your choice in the input field, and click **Save**.

6.12.2.7 How to Sort Voice Messages

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on the desired folder, e.g., **Played**.
3. Click on one of the column titles: **Type**, **Date**, **Time**, **Group Name**, **Call no**, **Last Name**, **First Name**, **Company Name**, **Priority** or **Duration** to sort the voicemails by this criterion in ascending alphanumeric order.
4. If you want to reverse the sort order, click again on column header.

6.12.2.8 How to Delete a Voicemail

Step by Step

1. Click on the **Voicemail** tab or in the corresponding window.
2. Click on one of the folders: **Inbox**, **Played** or **Saved**.
3. Select one of the following options:
   - Click on the desired voicemail.
   - Mark the desired voicemails.
4. Select **Move Message to** > **Move to Deleted** in the context menu.

5. If you want to delete the Fax messages permanently:
   a) Click on the **Deleted** folder.
   b) Select the desired voice message(s).
   c) Select **Move Message to** > **Permanently Delete Message** in the context menu.

6.13 Messages

Messages enable you to chat with other peers. The communication system supports instant messaging with users of UC Suite and multi-user chats (or a combination of both).

Sent and received messages are presented to you and your communication partners as a dialog.

The status of the relevant subscriber is indicated in the right top corner of the **Instant Message** window.

Icon	**Status**
	Logged in
	Logged out

If one of the communication partners is offline, the following occurs with the instant message, depending on the type of the selected recipient:

Recipients	**Behavior**
Individual subscribers	The instant message is displayed at the next login.
Group in Favorites	The instant message is never displayed for the subscribers who are offline.

External Instant Message

You can also chat with *one* external communication partner (e.g., a Google Talk user).

Multi-user chat

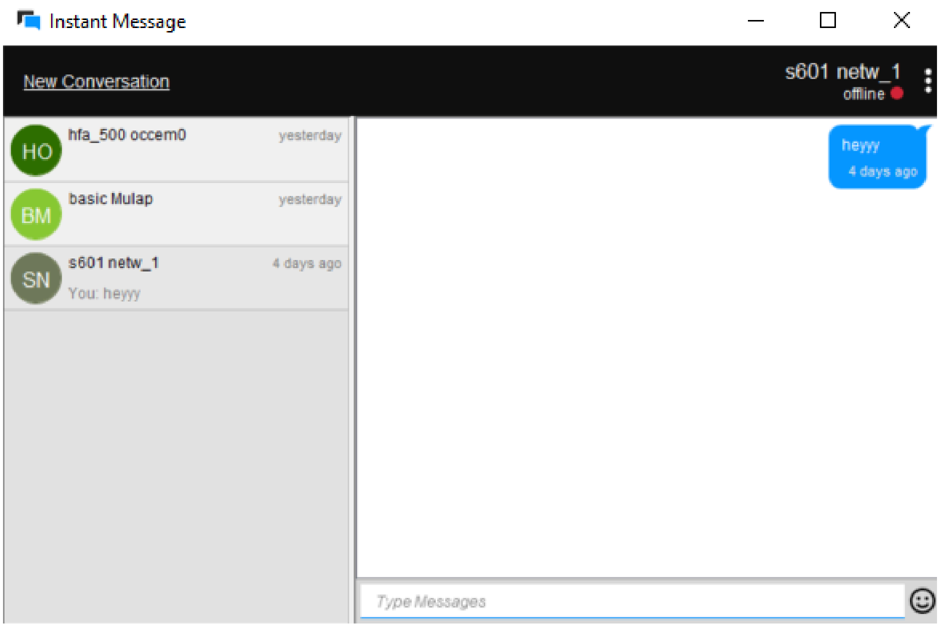
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external communication partner.

Instant Message and Web Collaboration

Note that Instant Messaging of the system and Instant Messaging of a Web Collaboration session are mutually independent, i.e.: the instant messages from a UC client do not appear in a Web Collaboration session of the same participant, and vice versa.

Instant Message Window

The **Instant Message** window consists of the following areas:



- User area

  This area at the left of the window, shows every participating communication partner as a symbol or with a picture, if available.
- Message area

  This area at the center of the window, shows the current presence status and the instant messages of all the chatting subscribers.

  You can also see:

  – When someone is typing a message to you by an indicator on the bottom left of the chat window.
  – What messages someone has seen by a "Seen by" label.

  NOTICE: The presence status of an external communication partner is displayed only if you have explicitly requested this from the external communication partner via the context menu by using the subscription feature, and your request was granted.
- Input area

  This area at the bottom of the window, contains the input field for the instant messages.

6.13.1 How to Send Instant Messages (Chat)

You can send instant messages to one or more subscribers in the internal directory, i.e., "chat" with the subscribers.

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

Step by Step

1. Click on **Messages**.

   The **Instant Message** window appears.
2. Select **New Conversation** and search for the user you want to chat with.
3. If you want to add further communication partners to the chat (to create a group chat), drag them from **Directories** to the **Instant Message** window.
4. Enter the text in the **Type Messages** text box of in the input area.
5. Press **Enter** on your keyboard to send the message.

Related tasks

How to Search for Subscribers on page 34

6.13.2 How to Delete an Instant Message

You can delete a single message or all messages that you have sent in a conversation.

Prerequisites

Instant Messaging is enabled in the system.

Step by Step

1. Click on **Messages**.

   The **Instant Message** window appears.
2. Select a conversation and:
   a) To delete a single message that you have sent, hover over the message and click on

      The message is deleted for all participants.

   b) To delete all your messages in the conversation, click on the and select **Delete Messages**.

      All your messages are deleted for all participants.

NOTICE: The option **Delete Messages** is also available by right clicking on the selected conversation in the conversation list.

6.13.3 How to Leave an Instant Message Conversation

You can leave a conversation at any time.

When you leave a conversation with only one person, the conversation is permanently deleted for both of you.

When you leave a conversation with multiple people, the conversation is removed from your conversation list but other participants can continue to use it.

Before leaving a conversation, you can delete all your messages in it.

Step by Step

1. Click on **Messages**.

   The **Instant Message** window appears.
2. Select the conversation you want to leave, click on ⋮ and select **Leave**.

   A pop-up window appears.
3. If the conversation is with only one person, click on **OK**.
4. If the conversation is with multiple people, do one of the following:
   a) Click on **OK**, if you want to delete all your messages in the conversation before you leave.
   b) Click on **No**, if you want your messages to remain in the conversation.

NOTICE: The option **Leave** is also available by right clicking on the conversation in the conversation list.

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7 Attendant Console Functions

The Attendant Console functions describe the Attendant functions of myAttendant, as well as Subscriber Management and the Message Center.

7.1 Attendant Functions

The Attendant functions are used to control inbound phone calls. You can accept calls, transfer them to subscribers, place them on hold or park them. These functions are executed in the **Call Control** area of the main window.

Active Calls

The **Active Calls** area shows the list of inbound calls currently active. Only the **ID** field is completed if the call is from an unknown caller for whom no data is yet stored in the system. You then have the opportunity to fill in the other fields with the relevant info and to save the details to the external directory. For data that is already saved, the following details are shown for each active call:

Column	Icon	Description
Call ID	Unique identification code that the system automatically assigns for every call. You can assign this identification code to a caller so that they can be identified in future when you receive inbound calls from this number.	
Arrived At	Indicates when a call was received for the first time and displays an icon on the respective call status.	
		Ringing
		On The Phone
		Parked
		On Hold
		Transfer
		Dialing
	-	Call Waiting
CLI	Shows the caller's station number.	
Last Name, First Name, Company	Provides detailed information if the callers are stored (first name, last name, company). If the caller ID is assigned to a customer whose data is stored in an external directory, for instance, the customer's data is displayed on inbound calls in the fields "Name" and "Station Number/Company".	

Column	Icon	Description
Calling For	Shows who the call is for. This function is particularly useful when myAttendant receives a number of calls at once.	
Status	Shows the status of a call, e.g., Ringing, Talking, etc. Right-clicking a call will bring up functions that can be applied to the call such as: **unpark** - if a call is parked. **disconnect** - if you are on a call.	

Variable column width in the "Active Calls" area

You can modify the column width in the **Active Calls** area. myAttendant keeps track of the column width set by you and opens the window at a later login exactly as you set it.

Held/Transferring/Parked Calls

The list of incoming calls that you have transferred, parked or placed on hold are displayed in the **Held/Transferring/Parked Calls** area. Caller details are displayed for every connection like in the **Active Calls** area.

Related concepts
User Interface Elements on page 12

7.1.1 How to Answer a Call

Step by Step

1. Right-click on the call in **Ringing** status in the **Active Calls** area of the Call Control.
2. Click on
   - **Answer Call**
   - Press **0** on the numeric keypad

   You are talking to the caller.

7.1.2 How to Park a Call

Parking moves a call to a free park slot until the party called is once again available to accept calls.

Prerequisites

You must have accepted the call.

Step by Step

1. Right-click on the relevant call in the Call Control's **Active Calls** area.

2. Click on **Park Call**.

   The call is moved to the Call Control's **Held/Transferring/ Parked Calls** area. Both the status of the call (**Parked**) and the park slot are displayed.

7.1.3 How to Unpark a Call

A parked call must be unparked before it can be resumed.

Step by Step

1. Right-click on the parked call.
2. Click on **Unpark Call**.

7.1.4 How to Place a Call on Hold

An inbound call is placed on hold if you are already conducting a call with another subscriber.

Step by Step

1. Right-click on the relevant call in the Call Control.
2. Click on
   - **Place Call on Hold**
   - Press **-** on the numeric keypad.

   The call is moved to the Call Control's "Held/Transferring/Parked Calls" area. The call status is indicated as "On Hold".

7.1.5 How to Resume (Reconnect) a Call

Select "Reconnect Call" to resume a held call.

Step by Step

1. Right-click on the held call.
2. Click on
   - **Reconnect Call**
   - Press **-** on the numeric keypad.

7.1.6 How to Transfer a Call

Prerequisites

The call was accepted.

Step by Step

1. Click on the call.
2. You have the following options:

- With the mouse button held down, drag the call to the user button of the desired subscriber and then release the mouse button (drag & drop)
- Press **+** on the numeric keypad.

3. Answer the prompt **Does the other party wish to talk?** in the screen pop with **Yes**.

7.1.7 How to Record and Play Back a Call

Prerequisites

You are connected to the other party.

Step by Step

1. Click on **F12**(Record). The call will be recorded.
2. A screen pop appears when the call ends:
   - Click **Listen**. The recorded call will be played back over the PC's loudspeaker.

     or
   - Click **Close**. The recorded call is stored under Voicemail at the Message Center under your own credentials and marked with a red dot. The red dot is a symbol for recorded calls.

> **INFO:** The phone number of the recorded call is saved in the journal.

7.1.8 How to Disconnect a Call (Hang Up)

The "Hang Up" function is used to disconnect an ongoing call.

Step by Step

1. Right-click on the call in "Talking" status in the Call Control.
2. Select
   - **Disconnect Call** from the displayed options or
   - press the `Enter` key.

7.1.9 How to Contact Unavailable Subscribers by E-mail

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

1. Click on the **Answer with Message** symbol in the **Inbound Call** and **Outbound Call to ...** screen pops.

2. Outlook opens with an e-mail message. The e-mail recipient field is prefilled with the e-mail address of the caller.

> **NOTICE:** You can define the text to be automatically displayed as the e-mail text via **Setup** > **My Preferences** > **Miscellaneous** > **Answer with Message**.

3. If desired, change the subject line and expand any preset e-mail text as required.
4. Click on **Send**.

7.1.10 How Send Call Data to a Subscriber by E-mail

Prerequisites

Screen pops for inbound and outbound calls have been activated.

If screen pops for calls are not active this functionality is available via the **F2 - Caller notice** function button.

Step by Step

1. Click on the **Caller notice** symbol in the **Inbound Call** and **Outbound Call to ...** screen pops.
2. Outlook opens with an e-mail message. The contact data of the call is transferred to the e-mail text.
3. Enter the intended e-mail recipient.
4. If desired, change the subject and add other explanatory text to the contact data.
5. Click on **Send**.

7.1.11 How to Initiate a Call Manually

Step by Step

1. Select one of the following options:
   - Enter the phone number in dialable format or in canonical format in the drop-down list for phone numbers.
   - Enter the first few letters of a name (at least 3 characters) in the drop-down list for phone numbers. All names starting with the entered letters are displayed in a list. Select the desired name.
   - Select a phone number or a name from the drop-down list for phone numbers.
2. Click on **Dial** or press the `Enter` key.

Related concepts

User Interface Elements on page 12

7.2 Subscriber Management

Subscriber management is performed in myAttendant via user buttons, the internal directory, and the external directory. Internal subscribers are referred to as users in the user interface; external subscribers are referred to as contacts.

User Buttons

The user buttons are located on the **Default** tab and are a part of the main window of myAttendant.

The user buttons are sorted in alphabetical order by default.

There are 100 user buttons available on a user buttons tab by default.

You can change the number of the available user buttons per tab. See also How to Change the Number of User Buttons on page 113.

You can configure multiple tabs for user buttons and select the names for these user buttons freely.

Internal, external and personal contacts (users) can be assigned to user buttons.

Presetting user buttons with internal subscribers

After creating a new group, the associated user buttons can be preset with the internal stations of the communication system.

Related concepts
User Interface Elements on page 12

7.2.1 How to Assign User Buttons to Multiple Subscribers

User buttons can be assigned to multiple subscribers via the internal and external directories.

Step by Step

1. Navigate to a **User Buttons** tab.
2. Right-click on an empty user button and select **Add User**.
3. In the pop-up window, select the directory you want and search for the subscriber.
4. Click **Add**.

7.2.2 How to Sort Subscribers

Step by Step

1. Navigate to a **User Buttons** tab.
2. Right-click on a user button.

3. Perform sorting:
   - Right-click on **Sort** > **First Name** or
   - Right-click on **Sort** > **Last Name**.

> **INFO:** You might have to provide the **Setup** password, for this operation to apply.

7.2.3 How to Delete a Subscriber Entry

You can remove an internal and external subscribers from the user buttons. The subscriber is not deleted from the respective directory.

Step by Step

1. Click on the User Buttons tab.
2. Click on the subscriber to be deleted.
3. Right-click on **Remove User**.

7.2.4 How to Create a New Tab for a User Button

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Group Setup**.
3. Click on **New** and assign a name for the tab.
4. Click **OK**.
5. Mark the new item created for the tab and click on **Auto Populate**.
6. Select the Department or Site from the **Create groups based on** drop-down list.
7. Select the Last Name and First Name from the **Sort groups by** drop-down list.
8. Click on the radio button **Append new groups to the end of my existing groups**.
9. Click **OK**.
10. Click **Save**.

7.2.5 How to Change the Number of User Buttons

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Select the desired number of user buttons per user buttons tab from the **Number of Attendant Buttons** drop-down list.

   The available options are:

- 50
- 100
- 150
- 200
- 300

4. Click **Save**.

7.2.6 How to Create a New Structure for User Buttons

NOTICE: When you create a new tab structure for user buttons, the old structure is deleted.

Step by Step

1. Click on the **Setup**.
2. Click on **myAttendant** > **Group Setup**.
3. Click on **New** and assign a name for the tab.
4. Click **OK**.
5. Mark the new item created for the tab.
6. Click **Auto Populate**.

   NOTICE: Up to 90 subscriber entries can be managed on a tab. Entries without names are listed at the end of the last tab. Sorting occurs by IP phones with names, IP phones without names, fax numbers with names and fax numbers without names.

7. Select the Department or Site from the **Create groups based on** drop-down list.
8. Select the Last Name and First Name from the **Sort groups by** drop-down list.
9. Click on the radio button **Re-create my group structure**.
10. Click **OK**.
11. A confirmation prompt follows. Click **Yes**.
12. Click **Save**.

7.2.7 How to Copy User Buttons from Another User

Prerequisites

Allow other users to copy my BLF layout must be enabled by the user you want to copy the buttons.

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Group Setup**.

3. Click on **Copy from user**.
   A new window is displayed.
4. In the **From User** drop down list, select the user who has the buttons you want to copy.
   When you select the user, a summary of the groups is displayed.

   NOTICE: Users that have no groups are not available for selection and will not appear in the drop down list.

5. Click **OK**.
6. Click **Save**.

The BLF groups and buttons are copied to the local user, overriding any group configuration that the local user may already have.

NOTICE: You do not have the option to copy the Personal contacts of the user.

7.2.8 How to Sort Tabs for User Buttons

You can change the order in which user button tabs are displayed.

Prerequisites

Multiple tabs are configured with user buttons.

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Group Setup**.
3. Click a group in the **Group Name** field.
4. Click on the button **Move Up** or **Move Down**.
5. Repeat steps 3 and 4 as appropriate.
6. Click **Save**.

7.2.9 How to Delete Tabs for User Buttons

Deleted tabs cannot be restored.

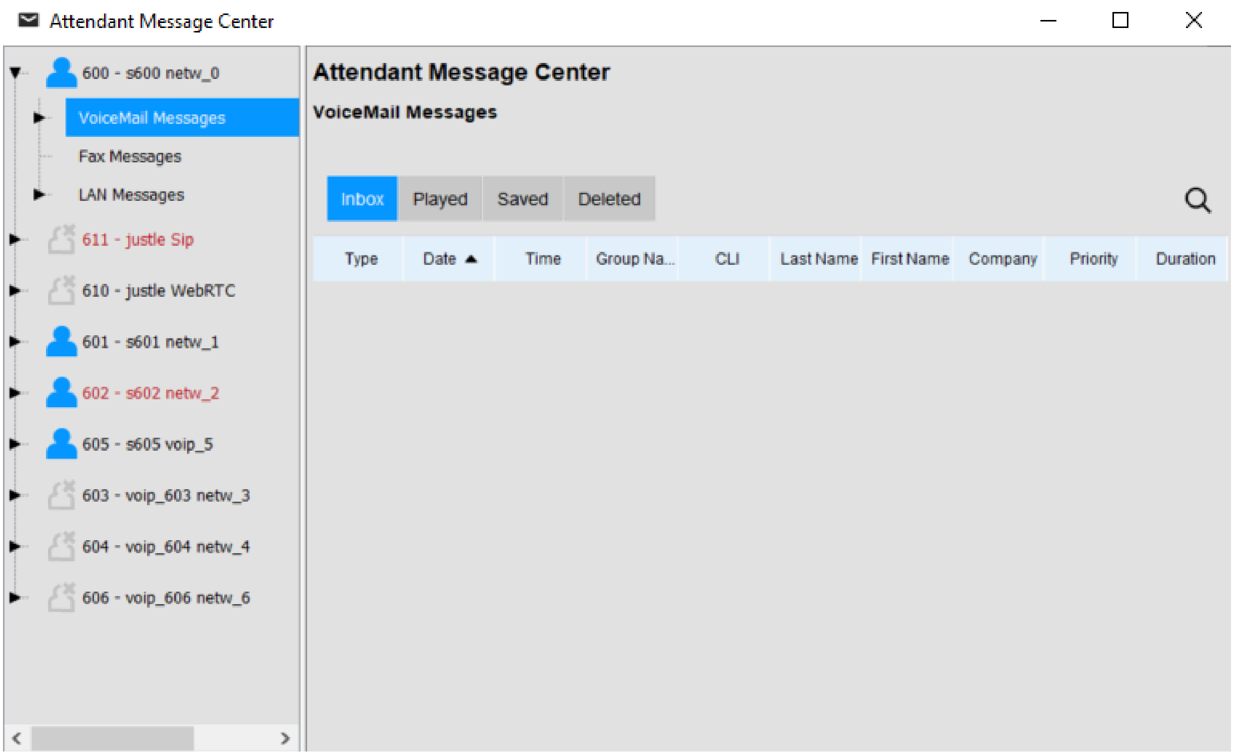
Step by Step

1. Click **Setup**
2. Click on **myAttendant** > **Group Setup**.
3. Select the group in the **Group Name** field.
4. Click **Remove**.
5. Click **Save**.

7.3 Message Center

All voicemails, faxes, instant messages and SMS messages are recorded and managed via the **Message Center**.

Messages can also be managed for other subscribers, provided these subscribers have granted the appropriate permission for this.



The left window pane, referred to below as the Subscriber List window, contains a list of all communication system subscribers with their presence/absence status. Your own status is displayed first in a drop-down message overview. The other subscribers follow in alphabetical order.

Depending on what is selected in the message overview, the right window pane, referred to below as the Message Details window, contains a table of message-specific information that can be selected for further processing.

The various message types can be processed as follows:

- **Voice Messages (i.e., voicemails)** can be played back, deleted and forwarded,
- **LAN Messages** can be read, edited and deleted,
- **SMS** messages can be read, written and sent to internal subscribers.
- **Fax messages** can be forwarded.

LAN Messages

LAN messages can be created only by myAttendant users. They serve as a kind of "bulletin board" for the subscriber, on which he or she enters notes (about individual subscribers). These messages can be viewed, edited or deleted, but cannot be sent to other subscribers.

Related concepts

User Interface Elements on page 12

7.3.1 How to Start the Message Center via a Function Key

Step by Step

Click on **Attendant Message Center**.

> **NOTICE:** If the Message Center is already open in the background, perform a task switch to display it on top. You can only open one Message Center session per PC.

7.3.2 How to Start the Message Center via the Right Mouse Button

Step by Step

1. Right-click in the main window of myAttendant on the user button of the subscriber for whom you want to open the Attendant Message Center. A screen pop appears.
2. On the pop-up window, click on **Attendant Message Center**.

> **NOTICE:** If Attendant Message Center is already open in the background, perform a task switch to display it on top. You can only open one Attendant Message Center session per PC.

7.3.3 How to Display a Message Overview

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on one of the stations.

7.3.4 How to Listen to Voicemails

Prerequisites

In order to listen to the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.

3. Click on the triangular symbol before the **Voicemail** entry.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Played**, **Saved**, **Deleted** and **Total**.
4. Click on one of these categories:
5. Mark a voicemail with a right mouse click. Click on **Play Message.**
6. Click on one of the categories:
   - **Through Phone**
   - **Through Speakers**

7.3.5 How to Move Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on the triangular symbol before the **Voicemail** entry.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Played**, **Saved**, **Deleted** and **Total**.
4. Mark a voicemail with a right mouse click. Click on **Move Message to**.
5. Click on one of the categories:
   - **Inbox**
   - **Played**
   - **Saved**
   - **Deleted**

7.3.6 How to Forward Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on the triangular symbol before the **Voicemail** entry.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Played**, **Saved**, **Deleted** and **Total**.
4. Mark a voicemail with a right mouse click. Click on **Forward Message**.

7.3.7 How to Save Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on the triangular symbol before the **Voicemail** entry.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Played**, **Saved**, **Deleted** and **Total**.
4. Click on one of these categories:
5. Mark a voicemail with a right mouse click. Click on **Save as Wav**.

7.3.8 How to Move Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on **Move Message to**.
7. Click on one of the available categories:
   - **Inbox**
   - **Played**
   - **Saved**
   - **Deleted**

7.3.9 How to Forward Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click. Click on **Forward Message**.
   The Forward Message window opens allowing you to search and add contacts as destinations.
6. Click on **OK**.

7.3.10 How to Save Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on **Save As**.
7. Select a location and type a file name.
8. Click on **Save**.

7.3.11 How to View Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows groups of fax messages in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.

   If a fax message is partially received, an exclamation mark flag is shown next to the number of received pages, indicating that the message is not complete.

   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on **View Fax**.
   The fax message is displayed in the new window.

7.3.12 How to Call the Sender of a Fax Message

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on .
   The sender of the fax message is being called.

7.3.13 How to Delete Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on one of the displayed fax groups.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on **Move Message to**.
7. Click on **Deleted**

7.3.14 How to Display a Fax Transmission Report

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on the **Sent Items** fax group.
   The fax messages of the Fax Group are displayed in the Message Details window.
5. Mark a Fax message with a right mouse click.
6. Click on **iProperties**.
   The Spool Jobs windows opens showing information about the fax message.
7. Click on the fax message and click on **Transmission report**.
   myReports Viewer window opens in your default browser.

7.3.15 How to Sort Fax Messages

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on **Fax Messages**.
   The Message Details window shows voicemails in the following categories: **Inbox**, **Read**, **Deleted**, **Sent Items** and **Sending Items**.
4. Click on the desired folder, e.g., **Read**.
5. Click on one of the column titles: **Date**, **Time**, **Call no**, **Last Name**, **First Name**, **Company Name**, **Fax Group** or **Pages** to sort messages in ascending alphanumeric order.
6. If you want to reverse the sort order, click again on column header.

7.3.16 How to Edit a LAN Message

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

1. Click on **Attendant Message Center**.
2. Click in the stations list on the triangular symbol in front of a station.
3. Click on the triangular symbol before the **LAN Messages** entry.
4. Click on the corresponding message in the right pane.
5. You can edit (update) or delete the message.

7.3.17 How to View, Edit or Delete LAN Messages

INFO: LAN messages that were saved as text modules are not deleted. Only text entered directly in the LAN Messages area is deleted.

Step by Step

1. Start the Attendant Message Center.
2. Click in the stations list on the triangular symbols in front of the desired stations.
3. Click on the triangular symbol before the **LAN Messages** entry.
   The LAN messages of this subscriber are displayed.
4. Click in the table on the display of the desired LAN message.
5. Click on **Update** to edit the LAN message or
6. click on **Delete** to delete it.

7.4 Personal AutoAttendant

The personal AutoAttendant offers callers the option of forwarding their voice calls to the phone numbers defined by you or to your voicemail box, depending on your Presence status. Callers signal their choice by entering digits at the phone.

Custom VoiceMail Profiles for the Personal AutoAttendant

For every Presence status there is a custom profile in which you can define the choices for your callers. You can activate or deactivate each profile separately. By default, no profile is active. When you deactivate a profile, the default behavior of your voicemail applies to the Presence status involved.

Announcements

When this profile is activated, the voicemail box plays back the following announcements:

- Name announcement:

  If you have enabled dynamic announcements, the name announcement you recorded is used for the greeting, unless your Presence status is **Office**, **CallMe** or **Do Not Disturb**.
- Dynamic announcements:

  If you have enabled dynamic announcements, the voicemail box generates situation-based announcements for your Presence status (except for **Office**, **CallMe** and **Do Not Disturb**) with an indication of the scheduled time of your return, e.g., "`... is in a meeting until two thirty p.m. today`". You can activate or deactivate the playback of dynamic announcements individually for each profile. If the dynamic announcements for a profile have been enabled, you can activate or deactivate the announcements for your Presence status for certain callers and for all external callers separately.
- Personal announcement for the profile:

  Before you activate a profile, you must record a personal announcement for this profile that indicates to your caller the appropriate digits and associated choices, e.g.: To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3." When you disable dynamic announcements for the profile, you may find it useful to start your personal announcement by indicating your Presence status.

The voicemail box plays back announcements for a profile in the following order (from left to right):

VoiceMail Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Busy	-	x	x
No answer	-	x	x

VoiceMail Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Meeting	x (if dynamic announcements have been enabled)	x (if dynamic announcements have been enabled)	x
Sick			
Break			
Out of Office			
Holiday			
Lunch			
Home			
Do Not Disturb	-	-	x

Example: dynamic announcements enabled

VoiceMail Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Meeting	"Natalie Dubois"	`"is in a meeting until two thirty p.m. today".`	"To leave a message, press 1. To speak with my representative, press 2."

Example: dynamic announcements disabled

VoiceMail Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Out of Office	-	-	"I am currently out of the office. To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3."

NOTICE: In case of "**Busy**" and "**No answer**" profiles:

Without "**Skip dynamic greeting**" set, voicemail box plays back the following announcements:

Dynamic greeting - profile announcement - 'please leave a message after the tone ...'

With "**Skip dynamic greeting**" set, voicemail box plays back the following announcements:

Profile announcement - 'please leave a message after the tone ...'

Actions

When editing the profile, you can define the appropriate actions for the digits indicated in the announcement.

- **Record**

  The caller can leave a message in your voicemail box.
- **Transfer**

  The caller is redirected to a destination defined by you.
- **- None -**

  The announcements for this profile are repeated.

7.4.1 How to Edit a VoiceMail Profile for the Personal AutoAttendant

Prerequisites

You have recorded an announcement for the relevant status.

Step by Step

1. Click **Setup**.
2. Click **VoiceMail Profiles** and then on the profile for the corresponding status.
3. In the row with the appropriate digit, select one of the following options for the desired **Action**:
   - If the callers are to be redirected to the voicemail box on entering this digit, select **Record**.
   - If the callers are to be transferred to another destination on entering this digit, select **Transfer**.
   - If no action is to be taken on entering this digit, select **- None -**.
4. If you have selected **Transfer**, enter the phone number in dialable format or in canonical format in the **Target** text box.
5. Select one of the following options for the function of the profile:
   - If you want to activate the profile, enable the **Profile Active** check box.
   - If you want to deactivate the profile, disable the **Profile Active** check box.
6. Select one of the following options for the announcement of your Presence status:
   - If you want your voicemail box to announce your Presence status, clear the **Skip Dynamic Greeting** check box.

- If you do not want your voicemail box to announce your Presence status, enable the **Skip Dynamic Greeting** check box.

7. Click **Save**.

Related tasks

How to Select Recording or Announcement Mode on page 95

8 Configuration

You can use myAttendant to configure call forwarding rules, direct inward dialing numbers, etc. The configuration settings can be saved and restored.

NOTICE: When a new extension is created on the system, both first name and last name fields are synchronized to the UC Suite package. This synchronization happens when system restarts or any settings changed for the station in WBM. If the first name and last name fields are greyed out, the system administrator has blocked the function that allows you to edit the first and last name.

8.1 How to Edit your Own Data

Step by Step

1. Click **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. You can enter or edit the following data:
   - **Login Name**
   - **Extension**
   - **Password**
   - **First Name**
   - **Last Name**
   - **VoiceMail Number**
   - **Mobile Number**
   - **External Number 1**
   - **External Number 2**
   - **Home Number**
   - **Fax Number**
   - **Assistant Number**
   - **Email**

   NOTICE: If you want to change your first and last name, this has to be done by the administrator. Otherwise, the changes will not be kept after a synchronization happens. A synchronization happens when the system restarts or any settings are changed by the administrator.

4. The following of these entries can be set to visibile or invisible for other users by selecting or clearing the **Visibility** check box as required:
   - **Mobile Number**
   - **External Number 1**
   - **External Number 2**
   - **Home Number**

5. Click **Save**.

8.2 How to Insert your Own Picture

Prerequisites

You have an image file with your picture in one of the following file formats: BMP, JPG/JPEG/JFIFI, PNG.

The size of the image file does not exceed 10MB.

Step by Step

1. Click **Setup**.
2. Click on **Personal Details** > **My Picture**.
3. Click on **Select** to browse your device for the picture.
4. Select the new profile picture and click **Open**.
5. Click **Save**.

8.3 How to Change your Password

NOTICE: For security reasons, you should change your password after logging in for the first time. Otherwise, unauthorized users could, for example, potentially access your data by using the default password.

NOTICE: You can also change the password via the Phone menu of the voicemail box.

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Under **Password**, click on **Change**.
4. Enter your current password in the **Current** field.
5. Enter your new password in the **New** and **Confirm** fields.
   a) a. The password must consist of only digits and include at least six digits.
   b) b. The maximum number of repeated characters is two and the maximum number of sequential characters is three.
   c) c. The account name (reversed or not) cannot be part of the password.
   d) d. The user is forced to change the default password after the first use.
   e) e. The maximum number of erroneous login attempts is five.

NOTICE: The password is valid for all UC Suite clients and for accessing the voicemail box via the telephone.

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6. Click on **OK**, followed by **Save**.

8.4 How to Specify your Email Address

Prerequisites

The administrator of your communication system has configured the sending of emails.

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Enter your email address under **Email**.
4. Click **Save**.

8.5 How to Define an Additional Phone Number

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Enter an additional phone number in dialable or canonical format in one of the following fields: **Mobile Number**, **External Number 1**, **External Number 2**, **Private Number** or **Assistant Number**.
4. Select one of the following options:
   - If you do not want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, clear the **Visibility** check box next to the phone number.
   - If you want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, select the **Visibility** check box next to the phone number.
5. Click **Save**.

8.6 Programming the Function Keys of a Telephone

Your telephone is equipped with a certain number of function keys. Some of these function keys are programmed with predefined functions. You can customize the functions of both the predefined and other function keys to suit your requirements by using myAttendant.

> **INFO:** In the case of phones with a display, you can also program some function keys directly at the phone.

Programming Function Keys on Different Levels

You can program the function keys on two levels: the first level can be assigned all the offered functions, and the second level can be assigned external phone numbers. The Shift key must be configured on the phone in order to use the second level. The LED of the function key is always assigned to the first level.

8.6.1 How to Program the Function Keys of the Telephone

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Click on the **Start** next to the Program Phone Keys row. A window for programming the function keys of the telephone is opened in the Browser.
   a) If a message such as `There is a problem with this website's security certificate.` appears, click on **Continue to this website**.
4. Under the phone icon, Click on the key area that you want to edit.
5. In the detailed view of the key area, click on the key icon at end of the corresponding row. The key icon goes red and indicates that the function is active for programming.
6. Select the desired function from the **Choose Function** drop-down list.
   a) If a function requires additional information (parameters), select these details or enter the required data.

   > **INFO:** Select the **Shift Key** function for a function key to access a second level where you program external phone numbers.

7. Click **Save**.
8. If you selected a system phone with automatic key labeling (such as an optiPoint 420 Standard, for example), you can enter the text that should appear in the display of the function key in the **Labeling** column.
9. If you have programmed a function key as the **Shift Key**, select the check box **2. Level**. Enter the external numbers as described.
10. If you want to program further function keys, repeat steps 4 through 9.
11. Close the Browser window for key programming.
12. Click **Save** in the **myAttendant Setup** window.

8.7 How to Change the Password

NOTICE: For security reasons, you should change your password after logging in for the first time. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

NOTICE: You can also change the password via the Phone menu of the voicemail box.

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Under **Password**, click on **Change**.
4. Enter your current password in the **Current** field.
5. Enter your new password in the **New** and **Confirm** fields.
   a) The password must not consist of only digits.
   b) The maximum number of repeated characters is two and the maximum number of sequential characters is three.
   c) The account name (reversed or not) cannot be part of the password.
   d) The user is forced to change the default password after the first use.
   e) The maximum number of erroneous login attempts is five.

   NOTICE: The password is valid for all UC Suite clients and for accessing the voicemail box via the telephone.
6. Click on **OK**, followed by **Save**.

8.8 How to Change the Login Name

Step by Step

1. Click on **Setup**.
2. Click on **Personal Details** > **My Personal Details**.
3. Enter the desired user name in the **Login Name** field.

   NOTICE: This selected **Login Name** applies to all UC Suite clients. If you want to interconnect **myAttendant** with the **myPortal to go** and **myPortal @work** UC clients, you must enter your own internal number as **Login Name**
4. Click on **OK**, followed by **Save**.

8.9 How to Enable or Disable an Automatic Login

NOTICE: You should use the automatic login only if you are certain that no-one else has access to your PC. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

Step by Step

1. Click on **Setup**.

2. Click on **Sensitivity** > **Security and Access**.

3. Select one of the following options:

- If you want to enable the automatic login, select the check box **Remember my password and automatically log me into myAttendant**.
- If you want to disable the automatic login, clear the check box **Remember my password and automatically log me into myAttendant**.

4. Click **Save**.

8.10 How to Allow others to See your Call Details

You can allow directory users to see information about your current active call, such as who you are talking to, whether it is an inbound or outbound call and the call duration. This option is disabled by default.

Prerequisites

The option of enabling this feature is activated by your system administrator.

Step by Step

1. Click on the **Setup** symbol.

2. Click on **Sensitivity> Security and Access**.

3. Select the option **Allow others to see who I am talking to**.

4. Click **Save**.

8.11 Notifications

You can have myAttendant notify you about calls and other actions.

The following notification options are available to you:

- Display tray pop on inbound calls
- Display tray pop on outbound calls
- Display tray pop on new voicemail
- Display tray pop on change of presence

- Screenpop the messages window when I receive a new voicemail message
- Pop up application on inbound calls

8.11.1 How to Configure Notifications

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Notifications**.
3. Select the check box in front of every notification that you want to receive.
4. Click **Save**.

8.12 How to Select the User Interface Language

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Appearance**.
3. Select the desired **Language**.
4. Click **Save**.

Next steps

Close and restart the client.

8.13 How to Change the User Interface Skin

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Appearance**.
3. Select the user interface **Skin** you want.
4. Click **Save**.

Next steps

Close and restart the client.

8.14 Hotkeys

You can configure shortcut keys for certain applications and thus facilitate dialing from the desktop, for example.

Hotkey can be defined for the following functions:

- Answer/Disconnect call
- Forward/Transfer call
- Display Call Traypop

8.14.1 How to Configure and Activate Hotkeys

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Hot Keys**.
3. Hold down the **CTRL+SHIFT** or **CTRL+ALT** or **SHIFT+ALT** key combination and then press any key to define it as a hotkey.
4. Select the check box **Hot Key Enabled** to activate the configured hotkey.
5. Click **Save**.

8.15 How to Change the Server Address

You can change the IP address of the communication system as follows:

Step by Step

1. Click **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Edit the default address under **Server address**.
4. Click **Save**.

8.16 How to Configure a Call Transfer

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Select one of the following options in the **Transfer Method** drop-down list:
   - If you want to transfer the call directly to a subscriber without first speaking to that subscriber, select **Blind Transfer**.
   - If you want to speak to the subscriber before transferring the call to that subscriber, select **Supervised Transfer**.
4. Click on **Save**.

8.17 How to Enable or Disable Dialing by Entering a Name

Step by Step

1. Click on **Setup**.
2. Click on **My Preferences** > **Miscellaneous**.
3. Select one of the following options:
   - If you want to enable dialing by entering a name, select the **Enable live search** check box.
   - If you want to disable dialing by entering a name, clear the **Enable live search** check box.

4. Select one of the following options:
   - If you want the LDAP contacts to also be included in the live search when dialing by entering a name, select the **Include LDAP contacts in live search** check box.
   - If you do not want the LDAP contacts to be included in the live search when dialing by entering a name, clear the **Include LDAP contacts in live search** check box.
5. Click **Save**.

8.18 How to Specify DID Numbers

If myAttendant is shared by a number of different companies, for instance, the virtual station numbers (IDs) defined indicate which company the call is for.

Prerequisites

A direct inward dialing number must be set in the communication system for every virtual station number (DID).

NOTICE: This function should only be performed by a trained technician.

Step by Step

1. Click on **Setup**.
2. Click on **myAttendant** > **DIDs**.
3. Click on **Add** and enter the virtual station number in the **DID Number** field and the relevant company name in the **DID Name** field.
4. Click on **OK**, followed by **Save**.

8.19 Configuring Backups for myAttendant

You can save various configuration settings for myAttendant in backup files and restore them later or delete them if required.

8.19.1 How to Save the Configuration

You can save configuration settings for your myAttendant session in a backup file.

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Backup and Restore**.
3. Click **Create Backup**.
4. Enter a file name as appropriate. Click **OK**.

5. Click **Save**.

Related tasks

How to Restore the Configuration on page 137

8.19.2 How to Restore the Configuration

Prerequisites

You must have already created a backup file of your configuration.

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Backup and Restore**.
3. Select a backup file.
4. Click **Restore Backup**.
5. Click **Save**.

Related tasks

How to Save the Configuration on page 136
How to Delete the Configuration File on page 137

8.19.3 How to Delete the Configuration File

Prerequisites

You must have already created a backup file of your configuration.

Step by Step

1. Click **Setup**.
2. Click on **myAttendant** > **Backup and Restore**.
3. Select the backup file to be deleted.
4. Click **Delete Backup**.
5. Click **Save**.

Related tasks

How to Restore the Configuration on page 137

9 Appendix

The appendix contains reference information such as a list of features that can be used with SIP phones, for example.

9.1 Features of the UC Clients that can be used with SIP Telephones

The following features of the UC clients myAttendant, myPortal for Desktop and myPortal for Outlook can be used with SIP telephones.

The used SIP telephone must satisfy the following prerequisites:

- 3PCC as per RFC 3725 is supported.
- The "Call waiting" feature is supported.
- Do Not Disturb is disabled.

  Alternatively, for subscribers with SIP phones, DND can be activated in the communication system.

> **NOTICE:** The full functionality of the features depends on the SIP phone used and cannot be guaranteed.
>
> A successful test of the following features was performed with OpenStage 15 S.

- Connection-/call-oriented features:
  - Make Call
  - Redirect call
  - Resume call
  - Application-controlled conference
  - Hold
  - Toggle/Connect
  - Consultation
  - Disconnect
  - Transfer
- Phone-oriented features:
  - Do Not Disturb
  - Call forwarding

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