Unify OpenScape Business

myPortal for Outlook

User Guide

A31003-P3030-U127-18-7619

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Contents

1 History of changes

Changes mentioned in the following list are cumulative.

Changes in V3R3 FR1

Impacted chapters	Change description
How to Install myPortal for Outlook on page 19 How to Start myPortal for Outlook on page 19	Added the DNS name option.

Changes in V3R3

Impacted chapters	Change description
Conferences on page 72	User interface updates in conferences chapter
How to Display a Fax Message on page 118	Added information about incomplete fax messages.

Changes in V3R2 FR1

Impacted chapters	Change description
Call Number Formats on page 65 Desktop Dialer on page 71	Improvements in order to allow the users to dial numbers including special characters.
Screen Pops on page 140 How to Enable or Disable Screen Pops on Received Instant Messages on page 149	Added information about enabling or disabling the screen pops on received instant messages.
Introduction on page 15 First Steps on page 23 Unified Communications on page 27 Configuration on page 133	User interface changes in whole impacted chapters
Directories on page 43	Corrected internal directory icon
Presence status on page 27	Incorrect word and paragraph formatting
Directories on page 43	Changed Icon for internal directory
Directories on page 43	Moved exchange public contacts under external offline directory
User Interface Elements on page 15 Screen Pops on page 140	Changed Play through Phone and Play through Speakers icons
Directories on page 43	Corrected information on the External and External Offline directories
Directories on page 43	Moved exchange public contacts under external offline directory

Impacted chapters	Change description
User Interface Elements on page 15 Screen Pops on page 140	Changed Play through Phone and Play through Speakers icons
Directories on page 43	Corrected information on the External and External Offline directories
How to Specify a Default Number for a Favorite Contact on page 53	Added info regarding email as default for contacts.
How to Install myPortal for Outlook on page 19	Changed version of .NET Framework.

Changes in V3R2

Impacted chapters	Change description
Directories on page 43	**System Directory** renamed to **Speeed dials**
How to Search in Directories on page 46	Added information about the filtering of the Internal Directory search results
How to Filter the Internal Directory on page 48	New chapter for filtering the Internal Directory
How to Delete an Instant Message on page 127 How to Leave an Instant Message Conversation on page 128	New chapters for deleting instant messages and leaving a conversation
How to Delete Journal Entries on page 61	Added information about the deleted journal entries

Changes in V3R1 FR2

Impacted chapters	Change description
Favorites List on page 49	Favorite groups

Changes in V3R1 FR1

Impacted chapters	Change description
How to Mark a Conversation as Completed on page 64 Journal on page 57	Added note for Disable conversation tracking

1.1 History of improvements/fixes

Changes mentioned in this chapter are cumulative.

Changes in V3R3 FR1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000072382	19 Mar 2024	Added note regarding hotkeys configuration across applications.	How to Activate or Deactivate a Hotkey on page 140

Changes in V3R3

Service case ID	Date of change	Description of change	Impacted chapters
PRB000064157	17 Jul 2023	Updated supported image formats.	How to Provide your own Picture on page 135
PRB000071677	29 Nov 2023	Removed text for non-supported feature.	Screen Pops on page 140
PRB000071592	10 Jan 2024	Added 'VoiceMail Management' section.	Managing Voicemail on page 111
PRB000072484	25 Jan 2024	Added explanation about quick search function.	Directories on page 43

Changes in V3R2 FR1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000062948	23 Nov 2022	Added chapter 7.12 to document the behavior of traypops	How to Change between Classic and Modern traypop on page 139

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 43

Changes in V3R1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000053323	31 May 2021	Added note for deflected calls	Journal on page 57
PRB000055711	14 Jan 2022	Added note for CallMe status	Presence status on page 27

History of changes

Service case ID	Date of change	Description of change	Impacted chapters
PRB000055842	30 Mar 2022	Updated information about the supported file formats and size limit for uploading a picture	How to Provide your own Picture on page 135

2 About this Documentation

This section contains some introductory information on this documentation.

2.1 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 ...**.

Related concepts
Display Conventions on page 13

2.2 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>`

Related concepts

Types of Topics on page 13

3 Introduction

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

3.1 myPortal for Outlook

myPortal for Outlook is a plug-in application for unified communications in Microsoft Outlook. Besides convenient dialing aids via phone directories and favorites and information on the presence status of subscribers, you can, for example, also access your voicemails and fax messages.

myPortal for Outlook provides the following features:

- Directories
- Favorites List
- Journal
- Desktop Dialer
- Screen pops
- Presence Status
- CallMe service with ONS (One Number Service)
- Status-based call forwarding
- Personal AutoAttendant
- Conferences
- Record calls
- Recording conferences
- Instant Messaging
- Voice and fax messages

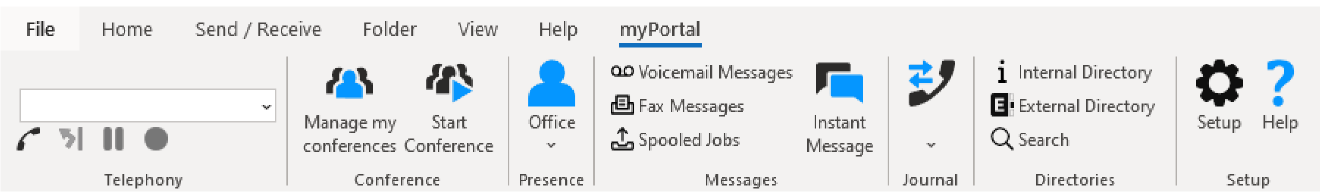
3.2 User Interface Elements

The user interface of myPortal for Outlook consists of the myPortal for Outlook tool bar integrated in Microsoft Outlook, a separate window with the Favorites list and further windows and screen pops, depending on the situation.

NOTICE: myPortal for Outlook is limited to display at 96dpi. In other case display issues may be appear.

Outlook 2016

The symbols of myPortal for Outlook are located on the **myPortal** ribbon tab:



NOTICE: The toolbar for myPortal for Outlook with reduced functionality can be additionally found in each Outlook contact.

Symbols

Icon	Function
	Drop-down list for call numbers The drop-down list contains up to ten previously dialed numbers and serves as an input field for numbers to be dialed or names to be found.
	**Answer**
	**Redirect**
	**Hold**
	**Record**
	**Manage my conferences**
	**Start Conference**
	**Presence**
	**Voicemail Messages**
	**Fax**
	**Spooled Jobs**
	**Instant Message**
	**Journal**
	**Internal Directory**
	**External Directory**
	**Search**
	**Setup**
?	**Help**

NOTICE: The toolbar of myPortal for Outlook can also be found in every Outlook contact, but with reduced functionality.

Context menus

Context menus provide situation-based actions for selection. Context menus can be opened by clicking on the relevant object with the second (usually the right) mouse button. Under some circumstances, it may not be always possible to display information on the presence status in the context menus, e.g., in the case of low bandwidth for teleworkers.

Tooltips

Tooltips are tiny windows in which myPortal for Desktop displays more information on certain objects of the graphical user interface such as icons, input fields or buttons, for example.

... at the end of a label indicates "incomplete due to lack of space". The appropriate tool tip appears when you let the mouse pointer hover over that element for a brief period of time.

Quick action toolbar for Directories and Journal

You can quickly communicate with your contacts via the quick action toolbar on the bottom right of the user interface. The following actions can be performed for the selected contact on your journal or directory:

Icon	Function
	Dial
	Start conference
	Call pickup
	Send email
	Send instant message
	Schedule outbound call

Ouick action toolbar for Messages

You can quickly perform actions related to your messages, such as moving a message to another folder, or playing a voicemail message through your speaker. The following actions can be performed via the quick action toolbar, which is displayed on the bottom right of your Messages user interface:

Icon	Function
	Move message to folder (e.g. Saved)

Icon	Function
	Play through phone
	Play through speaker
	Forward voicemail
	Send in E-Mail
	Save voicemail message
	Copy to Outlook

Related concepts
Favorites List on page 49
Screen Pops on page 140
Conferences on page 72
Presence status on page 27
Journal on page 57
Directories on page 43
Managing Voicemail on page 111
Managing Fax Messages on page 116
Related tasks
How to Select the User Interface Language on page 139
How to Change Skin for the User Interface on page 139

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 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 and Starting myPortal for Outlook

The use of myPortal for Outlook is subject to specific requirements.

4.1 How to Install myPortal for Outlook

Prerequisites

The administrator of your communication system has made the installation file(s) or the link to the file(s) available to you.

> **NOTICE:** Please make sure that you refer to the notes in the `ReadMe first.rtf` file.

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 or DNS name (hostname) provided by your administrator and click **Next**.

4) After validation of IP address, the installer will check if .NET Framework version 4.8 is available and install it if not.

5) Click on **myPortal for Outlook** to mark it for installation.

Clicking on an application will cycle between actions:

Symbol	Function
Green circle	**Install**
Orange circle	**Repair**
Red circle	**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.

Related tasks

How to Start myPortal for Outlook on page 19
How to Uninstall myPortal for Outlook on page 21

4.2 How to Start myPortal for Outlook

Prerequisites

myPortal for Outlook is installed on your PC.

Step by Step

1) Double-click on the Outlook program icon to start Outlook with myPortal for Outlook.

> **NOTICE:** If you want to start Outlook without myPortal for Outlook, click in the Login window on **Work Offline**. You can then use myPortal for Outlook only after restarting Outlook.
>
> You can start Outlook without myPortal for Outlook only if the automatic login has not been enabled.

> **NOTICE:** The concurrent usage of myPortal for Outlook with myPortal for Desktop or with myAttendant under the same user name is not supported.
>
> The concurrent usage of myPortal for Desktop with myAgent under the same user name can lead to restrictions (see *myAgent, User Guide Notes on Using Clients Concurrently*).

2) Enter your call number in the **User Name** field of the Login window.

3) Enter your **Password**. The default password when logging on for the first time is 1234. Otherwise, contact the administrator of your communication system.

> **INFO:** When you start a PC client for the first time, you will be prompted to change your password, provided you have not already changed it via the phone menu of the voicemail box.
>
> Enter your previous password 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 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 password applies to myPortal for Desktop, myPortal for Outlook, Fax Printer, myAgent, myReports and myAttendant as well as phone access to your voicemail box.

> **NOTICE:** If the wrong password is entered five times, your access to all clients will be locked.

Unlocking is only possible by the administrator of your communication system.

4) If you want to use myPortal for Outlook with an automatic login in the future, enable the check box **Save Password**. The Login window will then no longer be displayed. You can change this option at any time.

NOTICE: You should use the automatic login only if you are certain that no-one else has access to your 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) If the **Server IP** is displayed, enter the IP address or DNS name (hostname) of the communication system or UC server in that field.

6) Click **Login**.

Related tasks

How to Install myPortal for Outlook on page 19
How to Change the Password on page 137
How to Deactivate the Automatic Login on page 138
How to Resolve the Problem: No Connection to the Communication System (Windows) on page 153

4.3 How to Uninstall myPortal for Outlook

Step by Step

1) Close Outlook.

NOTICE: Please make sure that you refer to the notes in the `ReadMe first.rtf` file.

2) Click in the **Control Panel** on **Programs and Features**.

3) Click on **Change** in the context menu of **myPortal for Outlook**.

4) Click **Modify**.

5) Select the **myPortal for Outlook** feature to be uninstalled.

Related tasks

How to Install myPortal for Outlook on page 19

4.4 Automatic Updates

Automatic updates ensure that the UC clients are always kept up-to-date with the latest version.

If a new version is available, the update will either be installed automatically or you will be notified that an update is available.

If necessary, a message is displayed indicating that one or more applications must be closed to perform the update.

NOTICE: We recommend that you always perform the updates offered. This also applies to software that is required for certain UC clients.

4.4.1 How to Perform Automatic Updates

Prerequisites

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 Outlook.

Next steps

Restart myPortal for Outlook after the automatic update.

5 First Steps

The First Steps describe the recommended actions to be taken right at the beginning.

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.

Select the language settings

Select the respective language for:

- the user interface of myPortal for Outlook
- the menu and internal system announcements.

Record your name announcement

Your name announcement is used as an independent component of the announcements played back by the communication system:

- when your voicemail box notifies callers about your Presence status
- for conferences where you are the inviter, as a greeting to the participants:

  `"... has invited you to participate in a conference"`
- for conferences, to inform participants that you have joined:

  `"... has joined the conference."`

Record your personal greeting

Your personal greeting is played back to callers by default when they reach your voicemail box. For example: "I am unfortunately unable to take your call at the moment …". The following announcements are possible as personal greetings:

- general personal greeting
- Personal greeting for **Busy**:
- Personal greeting for **No Answer**:

> **NOTICE:** You can record further announcements; see Voicemail Box on page 103.

Specify your email address

Enter your email address so that the communication system can invite you to conferences by email and notify you about new voice and Fax messages.

Create your Favorites list

Your Favorites list will provide you with a constant view of your most important contacts and enable you to call them with one click.

Related concepts

Voicemail Box on page 103

5.1 How to Select the User Interface Language

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Appearance**.
3) Select the **Language** from the drop-down list.
4) Click **Save**.

Next steps

Exit Outlook and restart myPortal for Outlook.

5.2 How to Select the Language of the Voicemail Box

Step by Step

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

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 on the **Setup** symbol.
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**.

Related concepts

Voicemail Box on page 103

Related tasks

How to Record your Personal Greeting on page 25

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 on the **Setup** symbol.
2) Click **VoiceMail Profiles** and then on any profile.
3) Click **Record**.
4) Select one of the following options in the list of announcements:
   - 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 on **Close**, followed by **Save**.

Related concepts

Voicemail Box on page 103

Related tasks

How to Record your Name Announcement on page 24

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 the **Setup** symbol.
2) Click on **Personal Details** > **My Personal Details**.
3) Enter your email address under **Email Adress**.
4) Click **Save**.

5.6 How to Create a Favorites List

Step by Step

1) Click on the **Contacts** folder in Outlook.
2) Drag the desired contact to the Favorites list.

Related concepts
Favorites List on page 49
Related tasks
How to Enable or Disable the Favorites List Display on page 50
How to Enable or Disable Automatic Hiding of the Favorites List on page 54
How to Enable or Disable the "Always on Top" Setting of the Favorites List on page 54
How to Enable or Disable the Dimming of Unused Favorites on Exiting on page 55

5.7 How to Undock the Toolbar

myPortal for Outlook toolbar can be undocked and placed on the top of your Windows user interface. The toolbar automatically hides. It is displayed by moving your mouse to the top of the screen.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences> Appearance**.
3) Select **Floating** from the **Display Toolbar** drop-down list.
4) Click **Save**.

6 Unified Communications

Unified Communications is a generic term that refers to the integration of different communication systems, media, devices and applications within an environment (e.g., telephony, presence, voicemail and instant messaging).

6.1 Presence Status and CallMe Service

The Presence status and CallMe service display and optimize the availability of subscribers. The Presence status enables simple status-based call forwarding as well as rule-based call forwarding, which can be flexibly configured with myPortal for Desktop or myPortal for Outlook.

6.1.1 Presence status

The Presence or Presence status indicates the availability of internal subscribers (including mobile subscribers) in the Favorites list, the internal directory, the virtual conference room and via voicemail announcements. In addition, the Presence status controls the availability of internal subscribers with status-based call forwarding, rule-based call forwarding and the personal AutoAttendant.

NOTICE: MyPortal to go is not managed by VSL. Therefore, the present status will always be shown offline.

You can change your Presence status in myPortal for Outlook and also in the Phone menu of the voicemail box. Deactivating call forwarding at the telephone returns you to the **Office** presence status. For every change in the Presence status (except for **Office** and **CallMe**), you also define the scheduled time of your return to the **Office** or **CallMe** status.

The drop-down list for the Presence status includes the following symbols:

Icon	Presence status	Availability
	**Office** Only selectable if the CallMe service is not active otherwise, **CallMe** appears here.	Available at the normal workplace

Icon	Presence status	Availability
	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
	Do not Disturb	Do not disturb

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

CallMe is shown in the Favorites list and in the internal directory as **Office**. The following additional symbols are available there:

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

NOTICE: Changing the Presence status to CallMe during an active call is not supported.

NOTICE: For subscribers without system telephones (e.g., ISDN or analog), the Favorites list and the internal directory do not indicate any presence, but only the connection status.

Call Forwarding to the Voicemail Box

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

Info Text

You can enter any info text for your current presence status, e.g., "I am in Room No. ..." when attending a meeting. The info text is displayed in the Favorites list, in the internal directory and in the virtual conference room. The info text is deleted when you change your presence status.

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.

Automatic Update of Presence Status via Outlook Appointments

You can automatically control your Presence status via Outlook appointments (but not for those that have been proposed or declined) by using specific keywords in the Subject line. You can choose between the following calendars:

- Exchange calendar (on the Exchange Server)

  The automatic update of the presence status via Outlook appointments occurs independently, regardless of whether or not your PC is running. The administrator must configure the Exchange Calendar Integration for this function.
- Outlook calendar

  The automatic update of the presence status via Outlook appointments requires myPortal for Outlook to have been started on your PC.

You can use the following keywords:

- **Meeting**
- **Sick**

- **Break**
- **Out of Office**
- **Holiday**
- **Lunch**
- **Home**
- **Do not Disturb**

NOTICE: If the administrator has disabled "sick" presence status, then the presence status is not updated automatically when you use the sick keyword.

The keywords depend on the language set for the user interface. The keywords may be located anywhere in the Subject line. If the Subject line contains more than one such keyword, only the first takes effect. When this function is enabled, your Presence status changes automatically at the start and at the end of the relevant appointment.

When a calendar appointment with a keyword is created the presence status is automatically adjusted. If the user decides to extend or reduce the appointment duration, the precense will also adjust in order to reflect the change. Holiday and Sick presences are not altered by any other presence status during their duration. Busy status is read automatically of a calendar entry and the user presence is changed to Meeting (Busy) or Out of Office.

In order this option to take place no keyword must be inserted in the subject of the appointment, the appointment must be configured to be shown as "Busy" or "Out of Office" and the following flag must be enabled:

Setup > **My Preferences** > **Outlook Connectivity** > **Change my presence if appointment is marked as ’busy’ or ’out of office’**

The check for calendar appointments occurs at 30-second intervals.

NOTICE: When enabling this function, please bear in mind that any Outlook appointments with these keywords in the Subject line could lead to undesirable changes in your Presence status. Consequently, you may need to change the Subject line if needed.

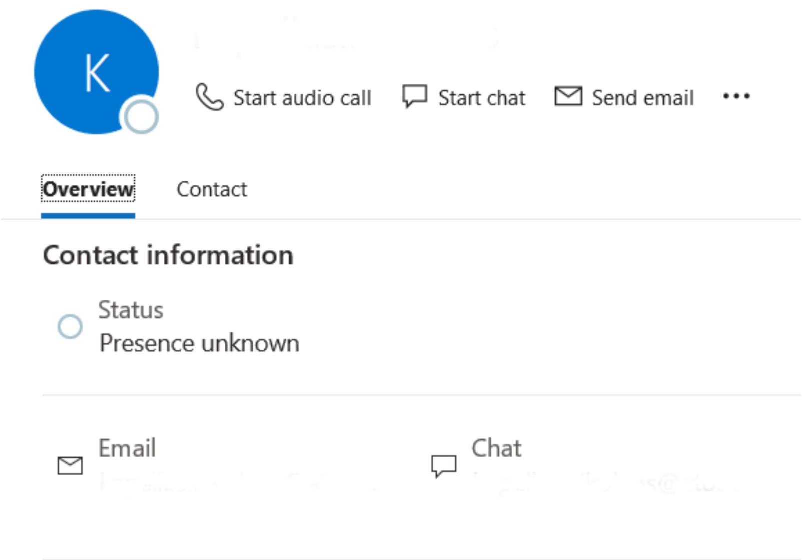
Automatic Creation of Outlook Appointments when Absent

You can have appropriate Outlook appointments created automatically when you are absent by a change in your Presence status. The Subject line of the corresponding Outlook appointment consists of your Presence status and the text "(Auto)", for example: "Meeting (Auto)". The start and end times for the appointment involved correspond to your entries in myPortal for Outlook. The end time of the Outlook appointment remains unchanged in the event of a possibly delayed return.

You can define whether the Outlook appointments should be stored in the local PST file or on the Exchange server. If you are using a local PST file, your Outlook must be open when creating the Outlook appointments. If you are using a PST file on the Exchange server, the Outlook appointments are created, regardless of whether or not your Outlook is open.

Presence Status in Contact Card

The color of the presence status (green, yellow, red or grey depending on the current presence status) for any contact is visible in the contact card and also next to the contact name at "To" and "CC" fields when sending an e-mail.



Additionally, it is possible to call a contact directly from the contact card:

- When the dial button in a contact card is clicked, Microsoft Outlook will always dial the extension of a user associated with that specific email address.
- Clicking on other phone numbers, Miscrosoft Outlook will always dial the phone number displayed.
- The only way to directly call a contact, especially if the Presence Status integration is not enabled, is to right-click on the contact or email and click **myPortal**.

In order for these options to take place two flags must be enabled:

- **Setup** > **My Preferences** > **Outlook Connectivity** > **Display presence status next to names in Microsoft Office**

  Microsoft supports only one client using this interface. If myPortal for Outlook is disabled or uninstalled, this flag should be disabled first, otherwise no other client can use this interface.
- In Outlook **File** > **Options** > **People** > **Online status and photographs** > **Display online status next to name**

OpenScape Business is responsible for updating and displaying Presence status only for the Outlook application.

For Presence status to appear in the contact cards, you have to configure an email address for the contact. Otherwise presence status is not available

Screen Pops on Changing the Presence Status

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

Related concepts

User Interface Elements on page 15
Directories on page 43
Favorites List on page 49
Journal on page 57
CallMe Service on page 37
Status-based Call Forwarding on page 38
Rule-Based Call Forwarding on page 39
Personal AutoAttendant on page 129

Related tasks

How to Enable or Disable the Announcement of your Presence Status for External Callers on page 109
How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 109

6.1.1.1 How to Change the Presence Status to Absent

Step by Step

1) Click on the presence status symbol, and then click on one of the following presence statuses: **Meeting**, **Sick**, **Break**, **Out of Office**, **Holiday**, **Lunch**, **Home** or **Do Not Disturb**.

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

2) Select one of the following options to specify the time of your return:

- Click on one the four buttons with the desired time duration.
- Select a time and a date in the calendar control.

3) If you want to specify an info text for the Presence status, enter it in the input field.

4) Click on **OK**.

Related tasks

How to Change the Presence Status to Office on page 33
How to Enable or Disable Automatic Resetting of the Presence Status on page 33
How to Enable the CallMe Service on page 38

6.1.1.2 How to Change the Presence Status to Office

NOTICE: You can also return to the **Office** presence status by deactivating the call forwarding at the telephone.

Step by Step

1) Click on the symbol for the presence status, followed by **Office**.
2) Click on the option **Return to the office**.
3) If you want to specify an info text for the Presence status, enter it in the input field.
4) Click on **OK**.

Related tasks

How to Change the Presence Status to Absent on page 32
How to Enable or Disable Automatic Resetting of the Presence Status on page 33

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

Step by Step

1) Click on the **Setup** symbol.
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 **Auto back to office** check box.
   - If you want to disable automatic resetting of the Presence status to **Office**, clear the **Auto back to office** check box.
4) Click **Save**.

Related tasks

How to Change the Presence Status to Absent on page 32
How to Change the Presence Status to Office on page 33
How to Enable the CallMe Service on page 38

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

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Sensitivity** > **Presence Visibility**.

3) Select one of the following options:

- 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**.

Related tasks

How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 109
How to Enable or Disable the Announcement of your Presence Status for External Callers on page 109

6.1.1.5 How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments

Prerequisites

Your administrator has configured the Exchange Calendar Integration.

You have specified a valid MS Exchange email address in myPortal for Outlook.

Step by Step

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

2) Click on **My Preferences** > **Outlook Connectivity**.

3) Select one of the following options:

- If you want to enable automatic updating of the Presence status via Outlook appointments from the Exchange calendar, select the item **Exchange Calendar Integration**.
- If you want to enable automatic updating of the Presence status via Outlook appointments from the Outlook calendar, select the item **Outlook Calendar Integration**.
- If you want to disable automatic updating of the Presence status via Outlook appointments, select the item **No Calendar Integration**.

4) Click **Save**.

Related concepts

Presence Status Keywords for Appointments on page 160

Related tasks

How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent on page 35
How to Specify your Email Address on page 134

6.1.1.6 How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent

Prerequisites

Your administrator has configured the Exchange Calendar Integration.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Outlook Connectivity**.
3) Select one of the following options:
   - If you want to enable the automatic creation of Outlook appointments when you are absent, select the check box **Automatically generate calendar appointments from my presence changes.**.
   - If you want to disable the automatic creation of Outlook appointments when you are absent, clear the check box **Automatically generate calendar appointments from my presence changes.**.
4) If you have enabled updating of the Outlook calendar by a change in your Presence status, select one of the following options in the drop-down list:
   - If you want the appointments to be saved in the local PST file, select **Local PST**.
   - If you want the appointments to be saved on the Exchange server, select **Exchange PST**.
5) Click **Save**.

Related tasks

How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments on page 34

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

Step by Step

1) Click on the **Setup** symbol.
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 when I change my presence**.
   - If you want to disable screen pops on changing the Presence status, clear the check box **Display tray pop when I change my presence**.
4) Click **Save**.

Related concepts
Screen Pops on page 140

6.1.1.8 How to Enable Away From Keyboard indicators

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Presence**.
3) Select one of the following options:
   - If you want to see the Away From Keyboard indicators next to the presence icon in Favorites, directories and so on, select **Show users 'away from keyboard' with their presence icons.** check box.
   - If you want to set yourself as Away From Keyboard, select **Set myself as 'away from keyboard' after** check box and set after how many minutes you want to enable it.
4) Click on **Save**.

The user will be marked as being back to keyboard, if the keyboard or mouse is used or an outbound call is starded form the device.

NOTICE: This feature is supported in Network-wide environment.

6.1.1.9 How to Enable Automatic Change of the Presence Status

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Presence**.
3) Select one of the following options:
   - If you want to enable the automatic change of Presence Status to Office when you start Outlook, select **Change my presence to ’Office’ when I start Outlook** check box.
   - If you want to enable the automatic change of Presence Status when you shutdown or logout the PC:

     - Select **Change my presence when I shutdown or logout of my PC.**

     - Choose one of the following options in the drop-down list for the Presence Status: **Meeting, Sick, Break, Out of Office, Holiday, Lunch, Home.**

     -Choose one of the following options in the drop-down list for the duration of Presence Status you want to set for: **Minutes, Hours, Days, Weeks.**

     When the specified period of time ends the presence status switches back to Office.

4) Click **Save**.

6.1.2 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.

Related concepts

Presence status on page 27

6.1.2.1 How to Enable the CallMe Service

Step by Step

1) Click on the symbol for the presence status and then click **Office**.

2) Click on the option **Enable CallMe service**.

3) Click on **<No Number Selected>**.

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**.

Related concepts

Call Number Formats on page 65

Related tasks

How to Change the Presence Status to Absent on page 32

How to Enable or Disable Automatic Resetting of the Presence Status on page 33

How to Define an Additional Phone Number on page 135

6.1.3 Status-based Call Forwarding

Status-based call forwarding enables you to forward calls based on your Presence status to one of your additional phone numbers or your voicemail box.

You can configure status-based call forwarding for every Presence status except **Office**, **CallMe** and **Do Not Disturb**. When you change your Presence status, the communication system activates call forwarding to the destination defined by you for this purpose. For example, if you are away from the office, to your mobile phone or if you are on holiday, to your representative.

Related concepts

Presence status on page 27

Rule-Based Call Forwarding on page 39

Related tasks

How to Define an Additional Phone Number on page 135

6.1.3.1 How to Configure Status-based Call Forwarding

Prerequisites

You have configured at least one additional phone number.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Call Rules** > **Forwarding Destinations**.
3) Choose one of the following destinations in the column with the appropriate Presence status in the drop-down list: **None**, **Mobile**, **Assistant**, **Ext. 1**, **Ext. 2**, **Home** or **Voicemail**.
4) Click **Save**.

6.1.4 Rule-Based Call Forwarding

Rules-based call forwarding enables you to forward calls based on numerous conditions and exceptions even more flexibly than with status-based call forwarding, e.g., to forward calls from unknown contacts to your voicemail box.

In addition, rule-based call forwarding also supports:

- Any destinations
- Presence status **Office**, **CallMe** and **Do Not Disturb**

You can define rules are activate or deactivate them at any time by using the Rules wizard. A rule can only be active if your phone has not been forwarded. Status-based call forwarding (except to the voicemail box) overrides rule-based call forwarding.

When a call forwarding rule is active, "**rule active**" appears on the display of your telephone.

When an inbound call is received, the communication system checks the applicability of the active rule in accordance with its sequential order in the Rules wizard. Only the first applicable rule is executed. In this case, your phone will ring once, and the communication system will then forward your call to the defined destination.

You can define several types of conditions and exceptions (except when ...) in one rule. However, you cannot define a condition with an exception of the same type. For example, it is not possible to define a condition of the type "On certain weekdays" together with an exception of the type "Except on certain weekdays".

Types of Conditions and Exceptions

- (except) for certain Presence status
- (except) from certain people (in the internal directory, external directory, Outlook contacts or from any station number)
- (except) when transferred to you from certain people (in the internal directory, external directory, Outlook contacts or from any station number)
- (except) from a certain type, i.e., **internal**, **external** or **Unknown Contact**

- (except) on a certain date (also on multiple dates)
- (except) on certain weekdays
- (except) between a certain Start and End date
- (except) between a certain Start and End time

Related concepts

Presence status on page 27
Status-based Call Forwarding on page 38

6.1.4.1 How to Add a Call Forwarding Rule

Step by Step

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

2) Click on **Call Rules** > **Rules Engine**.

3) Click on **New**.

4) To add a condition, enable the check box **When ...** in the appropriate row and click in the lower area on the desired underlined details: (**Date Values**, **Weekdays**, **Type**, **People**, **Start Date**, **End Date**, **Start Time**, **End Time** or **Presence Status**) to specify the condition more precisely in the next dialog.

5) Click **Next**.

6) If you want to add an exception, enable the check box **Except when ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Date Values**, **Start Time**, **End Time**, **Weekdays**, **People**, **Presence Status** or **Type**) to specify the exception more precisely in the next dialog.

7) Click **Next**.

8) Enter a name for the rule under **Name for rule** (max. 15 characters).

9) Select one of the following options:

- If you want the rule to take effect immediately, enable the check box **This rule is active**.
- If you do not want the rule to take effect yet, clear the check box **This rule is active**.

10) Click on **Save** to save the rule.

11) Click on **Save** to apply the changes.

Related concepts

Call Number Formats on page 65

Related tasks

How to Edit a Call Forwarding Rule on page 41
How to Copy a Call Forwarding Rule on page 41
How to Rename a Call Forwarding Rule on page 41
How to Remove a Call Forwarding Rule on page 42
How to Change the Order of Call Forwarding Rules on page 42

6.1.4.2 How to Edit a Call Forwarding Rule

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Call Rules** > **Rules Engine**.
3) Click on the relevant rule and then on **Edit**.
4) Edit the value of the rule parameter.
5) Click **Save**.
6) Click **Save**.

Related concepts

Call Number Formats on page 65

Related tasks

How to Add a Call Forwarding Rule on page 40
How to Copy a Call Forwarding Rule on page 41
How to Rename a Call Forwarding Rule on page 41
How to Remove a Call Forwarding Rule on page 42
How to Change the Order of Call Forwarding Rules on page 42

6.1.4.3 How to Copy a Call Forwarding Rule

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Call Rules** > **Rules Engine**.
3) Click on the relevant rule and then on **Copy**.
4) Enter a name for the new rule (max. 15 characters) and click **OK**.
5) Click **Save**.

Related tasks

How to Add a Call Forwarding Rule on page 40
How to Edit a Call Forwarding Rule on page 41
How to Rename a Call Forwarding Rule on page 41
How to Remove a Call Forwarding Rule on page 42
How to Change the Order of Call Forwarding Rules on page 42

6.1.4.4 How to Rename a Call Forwarding Rule

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Call Rules** > **Rules Engine**.
3) Click on the relevant rule and then on **Rename**.
4) Enter a new name for the new rule (max. 15 characters) and click **OK**.
5) Click **Save**.

Related tasks

How to Add a Call Forwarding Rule on page 40
How to Edit a Call Forwarding Rule on page 41
How to Copy a Call Forwarding Rule on page 41
How to Remove a Call Forwarding Rule on page 42
How to Change the Order of Call Forwarding Rules on page 42

6.1.4.5 How to Remove a Call Forwarding Rule

Step by Step

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

2) Click on **Call Rules** > **Rules Engine**.

3) Click on the relevant rule and then on **Remove**.

4) Click on **Yes**, followed by **OK**.

5) Click **Save**.

Related tasks

How to Add a Call Forwarding Rule on page 40
How to Edit a Call Forwarding Rule on page 41
How to Copy a Call Forwarding Rule on page 41
How to Rename a Call Forwarding Rule on page 41
How to Change the Order of Call Forwarding Rules on page 42

6.1.4.6 How to Change the Order of Call Forwarding Rules

Step by Step

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

2) Click on **Call Rules** > **Rules Engine**.

3) Click on the rule that you want to move.

4) Select one of the following options:

- If you want to move the rule up by one position in the order, click on **Move Up**.
- If you want to move the rule down by one position in the order, click on **Move Down**.

5) Click **Save**.

Related tasks

How to Add a Call Forwarding Rule on page 40
How to Edit a Call Forwarding Rule on page 41
How to Copy a Call Forwarding Rule on page 41
How to Rename a Call Forwarding Rule on page 41
How to Remove a Call Forwarding Rule on page 42

6.2 Directories and Journal

Directories, the Favorites List and the Journal organize contacts and calls.

6.2.1 Directories

Directories organize your contacts.

myPortal for Outlook provides the following directories, which support the following functions:

Icon	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites List	Add to Conference
	Outlook Contacts	x	x	x	x	x

Icon	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites List	Add to Conference
i	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.	x	x	x	x	x
	External directory Contains contacts that are created or imported by the administrator of the communication system.	x	x	-	x	x
	External offline directory (LDAP and Exchange) Contains contacts from the LDAP corporate directory and must be configured by the administrator of the communication system. The external offline directory is used for the search and name resolution.	x	x	-	x	x

Icon	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites List	Add to Conference
	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.	x	x	-	-	-

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: **Title**, **Last Name**, **First Name**, **Company Name**, **Extension**, **Business 1**, **Business 2**, **Company Ph.**, **Home 1**, **Home 2**, **Mobile**, **Fax**, **Email Address**, **City**, **Postal Address**.

Simple Search

You can search the directories, including your Outlook contacts, by **First Name**, **Last Name** or a call number. The directories are searched in the order shown in the table above. 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.

Note that the simple (quick) search dialog decides whether it should use a full word or partial word matching, based on the setting in the main search window. For both scenarios, *OR* is used as an operator for the queries; If *any* of the keywords (delimited with a space ' ') is found in a contact field, it is a match and the result is returned.

Advanced Search

You can selectively search in the **Title**, **First Name**, **Last Name**, **Company**, **Extension**, **Company Ph.**, **Business 1**, **Business 2**, **Home 1**, **Home 2**, **Mobile**, **Fax**, **City**, **Postal Address** and **Email** fields and limit the maximum number of hits.

Sorting

You can sort the contacts of a directory by any column in ascending or descending alphanumeric order. The sorting of a directory is retained even after the directory is closed.

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.

Related concepts

User Interface Elements on page 15
Favorites List on page 49
Screen Pops on page 140
Presence status on page 27
Configuration on page 133

Related tasks

How to Pick up a Call for Another Subscriber on page 67
How to Make a Call from the Directory on page 67
How to Enable or Disable the Opening of Outlook Contacts on Inbound Calls on page 146
How to Send an Instant Message on page 127
How to Add a Contact to the Favorites List on page 52
How to Add Contacts from the Journal to Outlook Contacts on page 62
How to Add Conference Participants on page 79

6.2.1.1 How to Search in Directories

Step by Step

1) Under **Directories**, click on **Search**.
2) If necessary, click on **Options** to display the Search options.
3) Select the directories you want to search in.
   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) 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 seach term must not contain any space character.

   - 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 **surname**.

6) If necessary, click on **Advanced** to switch between simple and advanced searches.

Related tasks

How to Add a Contact to the Favorites List on page 52

6.2.1.2 How to Perform a Quick Search by Using a Hotkey

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences > Hot Keys**.
3) Enter the desired hotkey in the **Quick Search** field, and then select the **Hot Key Enable** check box next to it.

   The hotkey F8 is preselected by default. If you want to use a different hotkey you will have to press the modifiers and the hotkey, e.g. SHIFT+ F1.

   Only F8 can be used without modifiers, all other F-keys can only be used with modifiers.
4) Click on **Save**.

If you select a phone number and then press the specified hotkey, a pop-up window is shown which displays information about the contact.

If you select a name and then press the specified hotkey, a pop-up window is shown with a list of contacts which contain the name you have searched.

You can click on the desired contact to display more information. You can start a call or send an email by clicking on the number or on the email.

6.2.1.3 How to Sort a Directory

Step by Step

1) Click on **Internal Directory** or on **External Directory**.
2) Click on one of the column titles, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.
3) If you want to reverse the sort order, click again on column header.
4) To jump to the first entry in the sorted column that begins with a specific character, click on any contact in the directory and enter the desired character.

Related tasks

How to Zoom in on an Entry on page 48

6.2.1.4 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 ⚙ at the bottom of the window to display the filter options.

3) Select one or more of the following:

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

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

The directory is updated to match your selection.

6.2.1.5 How to Zoom in on an Entry

Prerequisites

The list is sorted by the column containing an item that you want to "zoom in" on.

You can use this function in a directory or in the journal, for example.

Step by Step

Enter the first character of the desired hit.

Related concepts

Journal on page 57

Related tasks

How to Sort a Directory on page 47
How to Sort the Journal on page 60

6.2.1.6 How to Enable or Disable Searching for Caller Names in Outlook Contacts

Prerequisites

You are working under Windows.

Your administrator has configured the Exchange Calendar Integration.

You have specified a valid MS Exchange email address in myPortal for Outlook.

Step by Step

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

2) Click on **My Preferences** > **Outlook Connectivity**.

3) Select one of the following options:

- If you want to enable the search for caller names in Outlook contacts, select the check box under **The following outlook storage locations will be used when searching for caller information** and enter the folder name with the desired contacts on the right, e.g., `\\Mailbox - Dubios, Natalie \Contacts`.
- If you want to disable the search for caller names in Outlook contacts, clear the check box under **The following outlook storage locations will be used when searching for caller information**.

4) Click **Save**.

6.2.2 Favorites List

The Favorites list provides you with a constant view of selected contacts. These contacts can also be called very easily directly from the Favorites list. All internal subscribers with system telephones and external communication partners are shown together with their Presence status and can be contacted via instant messaging.

You can add contacts from all directories as well as the Outlook contacts to the Favorites list. For favorites that do not come from the internal directory, instead of the symbol for the Presence status, the symbol for the source of the contact is displayed.

The administrator has the option to assign Favorite groups to your profile. You can add or remove contacts from these groups, if it is enabled by the administrator.

The Favorites list manages contacts in groups. Groups may, in turn, contain further groups. The contacts in all groups can be sorted by First Name, Last Name or their original sorting order.

When an internal subscriber is absent, you can determine the scheduled time of his or her return by positioning the mouse pointer over the entry for that subscriber, provided the subscriber has allowed his or her Presence status to be visible to you.

For favorites with multiple phone numbers, you can specify a default number with which the contact is to be called. The default phone number of a favorite can be determined in the context menu from the symbol with the activated check box.

The Favorites list appears in the upper left corner of the screen by default. In a minimized state, it is displayed as "my Favorites" in the task bar.

The Favorites list provides several display options. These options can be set via the context menu of the icon in the top left corner of the Favorites list.

NOTICE: The chat, mail, and call icons do not appear on the bottom of the favorites list when scrolling is needed. Right mouse click on the last contact of favorites list can be used as a workaround solution.

Displaying the Favorites List

You can enable or disable the display of the Favorites list at any time.

Always On Top

You can optionally choose to have the Favorites list permanently displayed in the foreground, i.e., Always On Top, and then hide it by simply minimizing the window and show it again via the tray icon. The tray icon of Favorites list contains a context menu.

Auto Hide

Alternatively, you can also use the auto-hide feature to make the Favorites list disappear and appear automatically as soon as you move the mouse pointer away from it or return the mouse pointer to the vertical edge of the hidden Favorites list on the screen. When you use this feature, the Favorites list is docked to the left or right edge of the screen. In addition, the option **Favorites are always on top** is automatically enabled. For multiple displays, the function is only available on the primary display.

Transparency

You can also have the Favorites list dimmed to a half-transparent state and subsequently displayed again normally as soon as you move the mouse pointer away from it or return the mouse pointer to it.

Related concepts
User Interface Elements on page 15
Directories on page 43
Presence status on page 27
Configuration on page 133
Related tasks
How to Pick up a Call for Another Subscriber on page 67
How to Create a Favorites List on page 26
How to Make a Call from the Favorites List on page 68
How to Add Conference Participants on page 79
How to Send an Instant Message on page 127

6.2.2.1 How to Enable or Disable the Favorites List Display

Step by Step

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

2) Click on **My Preferences** > **Appearance**.

3) Select one of the following options:
- If you want the Favorites list to be displayed, enable the **Display Favorites** check box.
- If you do not want the Favorites list tom be displayed, clear the **Display Favorites** check box.

4) Click **Save**.

Related tasks

How to Create a Favorites List on page 26
How to Enable or Disable Automatic Hiding of the Favorites List on page 54
How to Enable or Disable the "Always on Top" Setting of the Favorites List on page 54
How to Enable or Disable the Dimming of Unused Favorites on Exiting on page 55

6.2.2.2 How to Add a Group to the Favorites List

Step by Step

1) Right-click in a free area of the Favorites list to open the context menu and select **Add Favorite Group**.
2) Enter the desired name for the group in the input field.
3) Click **OK**.

Next steps

Add contacts to the Favorites list.

Related tasks

How to Add a Contact to the Favorites List on page 52
How to Delete a Group from the Favorites List on page 52
How to Rename a Group in the Favorites List on page 51

6.2.2.3 How to Rename a Group in the Favorites List

Step by Step

1) Right-click on the group in the Favorites list.
2) Click **Rename Group**.
3) Click **OK**.

Related tasks

How to Add a Group to the Favorites List on page 51
How to Delete a Group from the Favorites List on page 52

6.2.2.4 How to Delete a Group from the Favorites List

Step by Step

1) Right-click on the group in the Favorites list.
2) Click **Remove Favorite Group**.

Related tasks

How to Add a Group to the Favorites List on page 51
How to Rename a Group in the Favorites List on page 51

6.2.2.5 How to Add a Contact to the Favorites List

Prerequisites

The Favorites list contains at least one group.

Step by Step

1) Click on a directory to search for a contact and select the contact.
2) Drag and drop the contact to the Favorites Group.
3) Alternatively you can right-click on the Favorite Group you want to add the contact.
4) Click **Add Favorite**.
5) Search for the contact you want to add.
6) Select the contact and click **OK**.

Related concepts

Directories on page 43

Related tasks

How to Search in Directories on page 46
How to Specify a Default Number for a Favorite Contact on page 53
How to Add a Group to the Favorites List on page 51
How to Delete a Contact from the Favorites List on page 52

6.2.2.6 How to Delete a Contact from the Favorites List

Step by Step

1) Select the contact from the Favorites Group.
2) Right-click and select **Remove Favorite**.

Related tasks

How to Add a Contact to the Favorites List on page 52

6.2.2.7 How to Change the Sorting of the Favorites List

Step by Step

1) Click **Setup** > **My Preferences** > **Appearance**.
2) In the **Sort Favorites** drop-down menu select one of the following: **First name**, **Last name**, **Sort by user define**.

6.2.2.8 How to Specify a Default Number for a Favorite Contact

Step by Step

1) Click on **Default** in the context menu for the relevant contact in the Favorites list.
2) Select the phone number that you want to use as the default number for this favorite from the drop-down list.
3) Click on **OK**.

   You can also select an email address as default for a contact.

Related tasks

How to Add a Contact to the Favorites List on page 52
How to Make a Call from the Favorites List on page 68

6.2.2.9 How to Enable or Disable the Favorites List Display

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Appearance**.
3) Select one of the following options:
   - If you want the Favorites list to be displayed, enable the **Display Favorites** check box.
   - If you do not want the Favorites list tom be displayed, clear the **Display Favorites** check box.
4) Click **Save**.

Related tasks

How to Create a Favorites List on page 26
How to Enable or Disable Automatic Hiding of the Favorites List on page 54
How to Enable or Disable the "Always on Top" Setting of the Favorites List on page 54
How to Enable or Disable the Dimming of Unused Favorites on Exiting on page 55

6.2.2.10 How to Enable or Disable Automatic Hiding of the Favorites List

Automatic hiding of the Favorites list should not be enabled on a Citrix client, since the client UI will otherwise also be hidden.

Step by Step

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

2) Click on **My Preferences** > **Appearance**.

3) Select one of the following options in the **Auto Hide** drop-down list:

- If you want the Favorites list to be automatically hidden, select **Hide to the left** or **Hide to the right**.
- If you do not want the Favorites list to be automatically hidden, select **Do not hide**.

4) Click **Save**.

Related tasks

How to Create a Favorites List on page 26
How to Enable or Disable the Favorites List Display on page 50
How to Enable or Disable the "Always on Top" Setting of the Favorites List on page 54
How to Enable or Disable the Dimming of Unused Favorites on Exiting on page 55

6.2.2.11 How to Enable or Disable the "Always on Top" Setting of the Favorites List

Step by Step

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

2) Click on **My Preferences** > **Appearance**.

3) Select one of the following options:

- If you want the Favorites list to be always displayed in the foreground, enable the check box **Always On Top**.
- If you do not want the Favorites list to be always displayed in the foreground, clear the check box **Always On Top**.

4) Click **Save**.

Related tasks

How to Create a Favorites List on page 26
How to Enable or Disable the Favorites List Display on page 50
How to Enable or Disable Automatic Hiding of the Favorites List on page 54
How to Enable or Disable the Dimming of Unused Favorites on Exiting on page 55

6.2.2.12 How to Enable or Disable the Dimming of Unused Favorites on Exiting

Step by Step

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

2) Click on **My Preferences** > **Appearance**.

3) Select one of the following options:

- If you want to dim the unused Favorites list, enable the check box **Fade Favorites Away**.
- If you do not want to dim the unused Favorites list, clear the check box **Fade Favorites Away**.

4) Click **Save**.

Related tasks

How to Create a Favorites List on page 26
How to Enable or Disable the Favorites List Display on page 50
How to Enable or Disable Automatic Hiding of the Favorites List on page 54
How to Enable or Disable the "Always on Top" Setting of the Favorites List on page 54

6.2.2.13 How to Display the Favorites List in Outlook

You have the option to view your Favorites List in Outlook.

Step by Step

1) Click on **Setup** .

2) Click on **My Preferences > Appearance**.

3) Enable the **Show in Outlook** checkbox.

4) Select **Docked Left** or **Docked Right** from the drop-down menu.

5) Click **Save**.

6.2.2.14 How to Call a Contact from the Favorites List

You can quickly call a contact who is in your Favorites List.

Prerequisites

The contact’s phone number must be available in the directory.

Step by Step

1) Move your mouse over the corresponding contact.
You see additional options.

2) Click on **Dial**.

The contact is being called.

6.2.2.15 How to View a Contact’s Phone Number in the Favorites List

You can view a contact’s phone numbers via the Favorites List.

Prerequisites

The contact’s phone number must be available in the directory.

Step by Step

1) Move your mouse over the corresponding contact.

You see additional options.

2) Click on to view the contact’s phone numbers.

The contact’s phone numbers are displayed.

6.2.2.16 How to E-mail a Contact from the Favorites List

You can quickly e-mail a contact via the Favorites List.

Prerequisites

The contact’s e-mail address must be available in the directory.

Step by Step

1) Move your mouse over the corresponding contact.

You see additional options.

2) Select to send an e-mail to the selected contact.

6.2.2.17 How to Chat with a Contact from the Favorites List

You can quickly chat with a contact via the Favorites List.

Prerequisites

The contact must have activated instant messaging.

Step by Step

1) Move your mouse over the corresponding contact.

You see additional options.

2) Select to send an instant message to the selected contact.

6.2.2.18 How to Display Recent Contacts in the Favorites List

You can view the last contacts or teams you communicated with in the Favorites List. Up to ten entries of inbound and outbound calls including internal and external calls are displayed.

Prerequisites

The checkbox **Show 'Recent Contacts' in Favorites** must be enabled (**Setup > Preferences> Appearance > Show recent contacts in Favorites).**

Step by Step

1) Click on **Setup** > **Preferences** > **Appearence**.
2) Click on **Show 'Recent Contacts' in Favorites** check box.

   The ten most recent contacts or teams are displayed.

> **NOTICE:** Recent contacts are always displayed in chronological order and they cannot be sorted by user.

6.2.2.19 How to View a Contact’s Presence in the Favorites List

You can view a contact’s presence in the Favorites List.

Step by Step

Move your mouse over the corresponding contact.

The contact’s presence is displayed in a tooltip.

6.2.3 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 Calls**

  Contains the unanswered missed calls. As soon as you answer one of these calls, all associated entries with that call number are dropped from the list.

  > **NOTICE:** If call is ringing on user device before the call is deflected to 3rd party then there will be an open call entry. If the call is deflected before reaching user device then there will not be an open call entry.

- **All**

- **Missed**

  - Outgoing (Rightwards Arrow)

  - Incoming (Leftwards Arrow)

  NOTICE: If you want to be notified about missed calls via screen pops, disable the "close tray pop on call termination" function.

- **Answered**
- **Internal**
- **External**
- **Inbound**

  NOTICE: In case of CT (Call Transfer) service is used instead of SST (Single-Step Transfer), two CSTA CalliDs are created with respectively two call history records. Therefore, Inbound calls will be shown twice in myPortal for Outlook journal.

- **Outbound**
- **Scheduled**

  Contains all the calls that you have scheduled for specific dates/ times. The Scheduled Calls feature is not available to Contact Center agents. In order for the communication system to execute a scheduled call, myPortal for Outlook must be open at the scheduled time; your presence status must be **Office** or **CallMe**, and you must confirm the execution of the call in a dialog. If you are busy at the time the scheduled call is to be made, the communication system defers the scheduled call until you are free again. myPortal for Outlook informs you of any pending scheduled calls on exiting the program. On starting the application, myPortal for Outlook notifies you about any scheduled calls for which the scheduled time has elapsed. You can then either delete such calls or save them with a new scheduled time.

Grouped by time period

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

- Date (for example: **Today**, **Yesterday**, etc., **Last Week**, **2 Weeks Ago**, **3 Weeks Ago**, **Last Month** and **Older**)
- Phone number
- Last Name,First Name
- First Name, Last Name
- Company

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

Call Details

Every call is shown with the **Start Date**, the **Start Time** and, if available, the **CLI** (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 **Call Complete**, **Domain** and **Call Info** columns are also displayed in most folders. Missed calls, forwarded calls and group calls are also displayed together with user pick up information.

NOTICE: **Call complete** function is not supported while a group is involved.

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

NOTICE: If you have activated a rule based call forwarding , in case of an incoming call, the call will be shown in the journal as a missed call and no further information will be displayed.

Direction	Meaning
	Inbound
	Outbound
	The call was successful or was answered.
	External
	Internal
	Missed call forwarded to user
	Missed call picked by user
	Group call answered by user
	Group call by caller to user
	Voicemail

Sorting

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. The sorting of the Journal is retained even after it is closed.

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.

Export

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:

- on exiting myPortal for Outlook
- at midnight, provided myPortal for Outlook is active

The file is named according to the scheme <phone number>-<yyyymmdd>.csv. If the file already exists, it will be overwritten. 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**.

Related concepts

User Interface Elements on page 15

Presence status on page 27

Related tasks

How to Make a Call from the Journal on page 68

How to Zoom in on an Entry on page 48

How to Enable or Disable the Closing of Screen Pops at the End of a Call on page 147

6.2.3.1 How to Sort the Journal

Step by Step

1) Click on **Journal**.

2) Click on one of the groups: **Open Calls**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound**.

3) If required, 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.

Related tasks

How to Group Journal Entries on page 61
How to Zoom in on an Entry on page 48

6.2.3.2 How to Group Journal Entries

Step by Step

1) Click on the **Journal** symbol.
2) Click on one of the groups: **Open Calls**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3) Right-click in any column header 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) Click on the triangle on the left of the relevant group to expand the associated Journal entries.

Related tasks

How to Sort the Journal on page 60

6.2.3.3 How to Delete Journal Entries

Step by Step

1) Click on **Journal**.
2) Click on one of the groups: **Open Calls**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **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:
   - If you want to delete an entry, right-click on the relevant entry.
   - If you want to delete multiple entries in a group, select the relevant entries.
   - If you want to delete all entries in a group, click on the relevant group.
   - If you want to delete all entries in multiple groups, select the relevant groups.
   - If you want to delete all entries in all groups, select all groups.
5) Select **Delete** in the context menu.
6) Click **Yes**.

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

Related tasks
How to Change the Retention Period for Journal Entries on page 62

6.2.3.4 How to Change the Retention Period for Journal Entries

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Miscellaneous**.
3) Enter the desired retention period in days in the **Keep call history for** field.

> **NOTICE:** The maximum value which is displayed in clients is 30 days. To see more, it is needed to use reports.

4) Click **Save**.

Related tasks
How to Delete Journal Entries on page 61

6.2.3.5 How to Add Contacts from the Journal to Outlook Contacts

Step by Step

1) Click on the **Journal** symbol.
2) Click on one of the groups: **Open Calls**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound Call** or **Outbound Call**.
3) If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4) Right-click on the relevant entry.
5) Select **Copy to Outlook** in the context menu.
6) Edit the contact details in the pop-up window and click **Save & Close**.

Next steps

Save the contact in Outlook.

Related concepts
Directories on page 43

6.2.3.6 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 the **Setup** symbol.
2) Click on **My Preferences** > **Miscellaneous**.
3) Click on **Enable Journal Exporting**.
4) Click on **...** to browse your device and click **OK**.
5) Click **Save**.

6.2.3.7 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** symbol.
2) Click on **Export**.

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

6.2.3.8 How to Call back a Contact from the Journal

It is possible to call back a journal entry by double-clicking on it.

Step by Step

1) Click on the **Journal** symbol.
2) Click on one of the groups: **Open**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound Call** or **Outbound Call**.
3) If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
4) Double-click on the required journal entry.

   The selected contact is being called.

6.2.3.9 How to Search Journal Entries

Step by Step

1) Click on the **Journal** symbol.
2) Click on one of the groups: **Open**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound Call** or **Outbound Call**.

3) Enter the last four digits of the required number (CLI) or a keyword in the available search field.

> **NOTICE:** Should you need to search for a number, you may enter from four up to eight digits according to the configuration set by the system administrator.

4) The search results will be displayed underneath.

> **NOTICE:** The system retrieves results from all journal sections.

6.2.3.10 How to Send a Caller Notice from Journal

You can send an email to a subscriber to forward the data of the contact to a subscriber.

Step by Step

1) Click on the **Journal** tab
2) Locate the journal entry from the user you want to forward the data and right click on the entry.
3) Click on **Callback Required** option.
4) Enter the email of the address and click **Send**.

6.2.3.11 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.

6.3 Calls

For calls, convenient features such as a desktop dialer, screen pops and the option to record calls and conferences are available to subscribers.

6.3.1 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
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.

NOTICE: Phone numbers that are stored in local Outlook contacts should not have any non-digital characters in the last 4 digits and the minimum number of digits for extensions entry must be 4, otherwise the Exchange server will not be able to search the phone number and match the contact you are searching.

Related concepts
Desktop Dialer on page 71
Related tasks
How to Enable the CallMe Service on page 38
How to Add a Call Forwarding Rule on page 40
How to Edit a Call Forwarding Rule on page 41
How to Edit a Profile for the Personal AutoAttendant on page 131
How to Configure an AdHoc Conference on page 78
How to Configure a Meet me Conference on page 84
How to Configure a Permanent Conference on page 89
How to Enable or Disable the Notification by Phone on page 124
How to Define an Additional Phone Number on page 135

6.3.2 Call Functions

You can control call functions with myPortal for Outlook, e.g., accept calls or pick up calls for another subscriber. You can call subscribers directly by entering their phone number or name or via the entries from the journal, the favorites list, a directory, an Outlook contact or the Outlook Inbox. The call functions can be controlled both in screen pops and in the menu bar of myPortal for Outlook.

Related concepts
Desktop Dialer on page 71
Screen Pops on page 140

6.3.2.1 How to Answer a Call

Step by Step

Select one of the following options:

NOTICE: In the case of an analog or DECT phone, you must lift the handset.

- In the screen pop, click on the **Answer** symbol.

- Click on **Answer** in the tool bar of myPortal for Outlook.

Related tasks
How to Enable or Disable Screen Pops on Inbound Calls on page 146

6.3.2.2 How to Pick up a Call for Another Subscriber

Step by Step

1) Click on **Internal Directory** and select the subscriber being called.
2) Click on **Call Pickup** from the context menu.

Related concepts
Directories on page 43
Favorites List on page 49

6.3.2.3 How to Redirect a Call to your Voicemail Box

Step by Step

Select one of the following options:

- In the screen pop, click on the **Forward** symbol.
- In the toolbar of myPortal for Outlook, click on **Forward**.

Related concepts
Voicemail Box on page 103
Related tasks
How to Enable or Disable Screen Pops on Inbound Calls on page 146

6.3.2.4 How to Initiate a Call Manually

Step by Step

Select one of the following options:

- Enter the phone number in canonical or dialable format in the drop-down list for phone numbers and click on the **Dial** symbol.
- Select a phone number or a name from the drop-down list for phone numbers and click on the **Dial** symbol.

6.3.2.5 How to Make a Call from the Directory

Step by Step

1) Click on **Internal Directory** or **External Directory** or **Search**.
2) Search or select the contact you want to call.
3) Click on the **Dial** symbol.

Related concepts
Directories on page 43

6.3.2.6 How to Make a Call from the Favorites List

Step by Step

1) If required, click on the triangle on the left of the relevant group to expand the associated entries in the Favorites list.
2) Move your mouse over the contact and click on the **Dial** symbol.

Related concepts
Favorites List on page 49
Related tasks
How to Specify a Default Number for a Favorite Contact on page 53

6.3.2.7 How to Make a Call from the Journal

Step by Step

1) Click on the **Journal** symbol.
2) Click on one of the folders: **Open**, **All**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3) If required, click on the triangle on the left of the relevant group to expand the associated Journal entries.
4) Right-click on the selected entry and click on **Extension:** followed by contact's number.

Related concepts
Journal on page 57

6.3.2.8 How to Transfer a Call

Step by Step

1) Click on **Transfer** in the tool bar of myPortal for Outlook.
2) In the **Call Transfer** window, click to highlight the number to which you want to transfer the call.
3) You can also type the user name in the **Phone Number** field to search for a specific user.
4) Click on **Transfer** to transfer the call to the highlighted number.

Related tasks
How to Enable or Disable Screen Pops on Outbound Calls on page 147
How to Configure a Call Transfer on page 152

6.3.2.9 How to Place a Call on Hold

Step by Step

1) In the toolbar of myPortal for Outlook, click on the **Hold** symbol.

2) When you want to resume (unhold) the call, click on the **Reconnect** symbol.

Related tasks

How to Enable or Disable Screen Pops on Outbound Calls on page 147

6.3.2.10 How to Record a Call or a Conference

Prerequisites

Live recording is enabled in the communication system.

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

Step by Step

1) In the screen pop, click on the **Record** symbol.

2) If you want to stop the recording before the call ends, click on the **Stop Live Recording** symbol.

Related concepts

AdHoc Conference on page 77
Meet Me Conference on page 82

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 146
How to Enable or Disable Screen Pops on Outbound Calls on page 147

6.3.2.11 How to Start Web Collaboration During a Call

Step by Step

In the screen pop, click on the **Web Collaboration** symbol.

Related concepts

Screen Pops on page 140
Web Collaboration on page 100

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

Prerequisites

Screen pops for inbound and outbound calls have been activated.

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**.

6.3.2.13 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**.

6.3.2.14 How to End a Call

Step by Step

Select one of the following options:

> **NOTICE:** In the case of an analog or DECT phone, you must hang up the handset.

- Only when conducting an incoming call:

  Click on the **Hang Up** symbol in the **Inbound Call** screen pop.
- In the toolbar of myPortal for Outlook, click on the **Hang Up** symbol.

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 146
How to Enable or Disable Screen Pops on Outbound Calls on page 147

6.3.3 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 the 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.

Related concepts

Call Number Formats on page 65
Call Functions on page 66

6.3.3.1 How to Make a Call via the Clipboard or Dialer

NOTICE: If you are working under a MAC OS, make sure that **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:

- If you want to use the 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.

- If you want to use the 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.

6.3.3.2 How to Configure the Desktop Dialer and Clipboard Dialer

Step by Step

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

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.

6.4 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)
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)

	AdHoc	Meet Me	Permanent	Permanent Open
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

Symbol	Meaning
	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)
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.

Related concepts

User Interface Elements on page 15
Web Collaboration on page 100

Related tasks

How to Specify your Email Address on page 134

6.4.1 AdHoc Conference

A new conference occurs spontaneously and is started manually by the conference controller.

Starting the Conference

The system opens the window with the virtual conference room automatically for all internal conference participants. 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.

Related tasks

How to Record a Call or a Conference on page 69

6.4.1.1 How to Configure an AdHoc Conference

Step by Step

1) Click on **myMeetings**.
2) Click on the + symbol.
   The **myMeetings** window opens with you set as call scheduler.
3) Select **I would like to start a call now** from the drop-down list.
4) Add any conference participants as needed; see How to Add Conference Participants on page 79 for details.
5) Click on **OK**. The system now calls all the conference participants.
6) If you want to use OpenScape Web Collaboration in this conference, click on **Start Collaboration**.

Related concepts

Call Number Formats on page 65

Related tasks

How to Stop a Conference on page 81
How to Repeat a Conference on page 81
How to Delete a Conference on page 82
How to Add Conference Participants on page 79

6.4.1.2 How to Display information about your Meet Me Conference

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.
3) Click on **Participants**, **Information** or **Edit** to view information about the conference.

6.4.1.3 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

Add the conference participants by one of the following methods:

- From the Favorites list:

  Using the mouse, drag one of the participants from the **Favorites** into the **myMeetings** conference window.
- From a directory:

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

  In the **myMeetings** window click on **Participants**. Search for a participant and press **Enter**.

Related concepts
Directories on page 43
Favorites List on page 49
Meet Me Conference on page 82
Permanent Conference on page 88
Related tasks
How to Configure an AdHoc Conference on page 78
How to Configure a Meet me Conference on page 84
How to Configure a Permanent Conference on page 89

6.4.1.4 How to Remove a Conference Participant

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 the relevant conference in the **myMeetings** window.

3) In the **myMeetings** window click on **Participants**.

4) Click on **Remove Participant** next to the participant you want to remove.

6.4.1.5 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

1) Click on **myMeetings**.

2) Click on the relevant conference in the **myMeetings** window.

3) In the **myMeetings** window click on **Participants**.

4) Click on **Reconnect Participant** next to the participant you want to reconnect.

6.4.1.6 How to Expand a Call into a 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** or **Outbound Call to ...** screen pop on the **Conference** symbol. The **myMeetings** window opens with you set as the conference controller.

2) Add the conference participants by one of the following methods:

- From the Favorites list:

  Using the mouse, drag one of the participants from the **Favorites** into the **myMeetings** conference window.
- From a directory:

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

  In the **myMeetings** window click on **Participants**. Search for a participant and press **Enter**.

6.4.1.7 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) Select the conference from the **myMeetings** window.

3) Click on **Edit**.

4) In the **myMeetings** window click on the participant to be set as a conference controller.

5) Click on **Set as conference controller**.

6) Click on **Save**.

Related concepts

Meet Me Conference on page 82
Permanent Conference on page 88

6.4.1.8 How to Stop a Conference

Prerequisites

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

NOTICE: You can also end a conference by hanging up.

Step by Step

1) Click on **myMeetings**.

2) Click on the relevant conference in the **myMeetings** window.

3) Click on **Stop** and select one of the following options:

- To immediatly stop the conference, toggle the **I would like to stop this conference now** option and click on **Stop**.
- To extend conference time, untoggle the **I would like to stop this conference now** option, set the conference time extension and click on **Stop**.

Related concepts

Meet Me Conference on page 82

Related tasks

How to Configure an AdHoc Conference on page 78

6.4.1.9 How to Repeat a Conference

Step by Step

1) Click on **myMeetings**.

2) Select the conference you want to repeat and click on **Edit**.
3) Set new **Date** and **Time** for the conference.
4) Click on **OK**.

Related tasks
How to Configure an AdHoc Conference on page 78

6.4.1.10 How to Delete a Conference

Step by Step

1) Click on **myMeetings**.
2) Select the conference you want to delete and click on **Information**.
3) Click on **Delete** next to the name of the conference.
4) Click on **Yes** to confirm the action.

Related tasks
How to Configure an AdHoc Conference on page 78

6.4.2 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.

Related tasks

How to Add Conference Participants on page 79
How to Specify another Conference Controller on page 80
How to Record a Call or a Conference on page 69
How to Stop a Conference on page 81

6.4.2.1 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 the + symbol.
   The **myMeetings** window opens with you set as call scheduler.
3) Select **I would like a call to be started automatically** from the drop-down list.
4) Enter a **Conference Name**.
5) Add any conference participants as needed; see How to Add Conference Participants on page 79 for details.
6) Enter a **Conference Name**.
7) Select an occurence from the following options: **Occurs only once**, **Occurs on a daily basis**, **Occurs on a weekly basis**, **Occurs on a monthly basis**.
8) Enter a **Date**.
9) Enter a **Start Time**.
10) Enter the **End Time**.
11) Click on **OK**.

Related concepts

Call Number Formats on page 65

Related tasks

How to Add Conference Participants on page 79

6.4.2.2 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

Add the conference participants by one of the following methods:

- From the Favorites list:

  Using the mouse, drag one of the participants from the **Favorites** into the **myMeetings** conference window.
- From a directory:

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

  In the **myMeetings** window click on **Participants**. Search for a participant and press **Enter**.

Related concepts
Directories on page 43
Favorites List on page 49
Meet Me Conference on page 82
Permanent Conference on page 88
Related tasks
How to Configure an AdHoc Conference on page 78
How to Configure a Meet me Conference on page 84
How to Configure a Permanent Conference on page 89

6.4.2.3 How to Display information about your Meet Me Conference

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.
3) Click on **Participants**, **Information** or **Edit** to view information about the conference.

6.4.2.4 How to Determine the Dial-in Number for a Conference

Prerequisites

You are the conference controller.

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

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.
3) Click on **Information**.
4) The dial-in number can be found next to **Conference DID**.

Related concepts

Permanent Conference on page 88

6.4.2.5 How to Determine the Conference ID for a Conference

Prerequisites

You are the conference controller.

> **NOTICE:** As the conference controller, you can obtain the conference ID from the e-mail with the invitation to the conference.

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.
3) Click on **Information**.
4) The dial-in number can be found next to **Conference ID**.

Related concepts

Permanent Conference on page 88

6.4.2.6 How to Change a Participant's Conference Password

Prerequisites

You are the conference controller and a password is required for participants to connect.

Step by Step

1) Click on **myMeetings**.
2) Select a conference in the **myMeetings** window.
3) Click on **Edit**.
4) In the **myMeetings** window, click on the participant for whom you want to change the password.
5) Type a new password in the **Password** field.
6) Click on **Save**.

Related concepts

Permanent Conference on page 88

6.4.2.7 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 the relevant conference.
3) Click on **Edit**.
4) Set the desired **End time**.
5) Click on **OK**.

6.4.2.8 How to Remove a Conference Appointment for a Conference Series

Prerequisites

You are the conference controller of the scheduled conference.

Step by Step

1) Click on **myMeetings**.
2) Select the conference and click on **Edit**.
3) Click on **Edit** next to the configured occurrence period.
4) Click on **Add Exception**.
5) Select the occurrence from the drop-down list.
6) If required, click on **Remove this occurrence** checkbox to enable this option.
7) Click on **OK**.
8) Click on **OK** to apply the changes.

6.4.2.9 How to Reschedule a Conference Appointment for a Conference Series

Prerequisites

You are the conference controller of the scheduled conference.

Step by Step

1) Click on **myMeetings**.
2) Select the conference and click on **Edit**.
3) Click on **Edit** next to the configured occurrence period.
4) Click on **Add Exception**.
5) Click on **Remove this occurrence** checkbox to disable this option.
6) Edit the **New scheduled date** details.
7) Click on **OK**.

8) Click on **OK** to apply the changes.

6.4.3 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).

Invitation by Email

The communication system can invite conference participants automatically by email. 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. The email includes the corresponding Outlook appointment (.ics) as an attachment.

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.

Related tasks

How to Add Conference Participants on page 79
How to Specify another Conference Controller on page 80
How to Determine the Dial-in Number for a Conference on page 85
How to Determine the Conference ID for a Conference on page 86
How to Change a Participant's Conference Password on page 86

6.4.3.1 How to Configure a Permanent Conference

Prerequisites

Step by Step

1) Click on **myMeetings**.
2) Click on the + symbol.
   The **myMeetings** window opens with you set as call scheduler.
3) Select **I would like to create a conference room that is always available** from the drop-down list.
4) Add any conference participants as needed; see How to Add Conference Participants on page 79 for details.
5) Click on **OK**. The system now calls all the conference participants.
6) If you want to use OpenScape Web Collaboration in this conference, click on **Start Collaboration**.

Related concepts

Call Number Formats on page 65

Related tasks

How to Add Conference Participants on page 79

6.4.3.2 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

Add the conference participants by one of the following methods:

- From the Favorites list:

  Using the mouse, drag one of the participants from the **Favorites** into the **myMeetings** conference window.
- From a directory:

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

  In the **myMeetings** window click on **Participants**. Search for a participant and press **Enter**.

Related concepts

Directories on page 43
Favorites List on page 49
Meet Me Conference on page 82
Permanent Conference on page 88

Related tasks

How to Configure an AdHoc Conference on page 78
How to Configure a Meet me Conference on page 84
How to Configure a Permanent Conference on page 89

6.4.3.3 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) Select the conference from the **myMeetings** window.

3) Click on **Edit**.

4) In the **myMeetings** window click on the participant to be set as a conference controller.

5) Click on **Set as conference controller**.

6) Click on **Save**.

Related concepts

Meet Me Conference on page 82
Permanent Conference on page 88

6.4.3.4 How to Determine the Dial-in Number for a Conference

Prerequisites

You are the conference controller.

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

Step by Step

1) Click on **myMeetings**.

2) Click on the relevant conference in the **myMeetings** window.

3) Click on **Information**.

4) The dial-in number can be found next to **Conference DID**.

Related concepts

Permanent Conference on page 88

6.4.3.5 How to Determine the Conference ID for a Conference

Prerequisites

You are the conference controller.

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

Step by Step

1) Click on **myMeetings**.

2) Click on the relevant conference in the **myMeetings** window.

3) Click on **Information**.

4) The dial-in number can be found next to **Conference ID**.

Related concepts

Permanent Conference on page 88

6.4.3.6 How to Change a Participant's Conference Password

Prerequisites

You are the conference controller and a password is required for participants to connect.

Step by Step

1) Click on **myMeetings**.
2) Select a conference in the **myMeetings** window.
3) Click on **Edit**.
4) In the **myMeetings** window, click on the participant for whom you want to change the password.
5) Type a new password in the **Password** field.
6) Click on **Save**.

Related concepts

Permanent Conference on page 88

6.4.4 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.

6.4.4.1 How to Configure a Permanent Open Conference

Prerequisites

Step by Step

1) Click on **myMeetings**.
2) Click on the **+** symbol.
   The **myMeetings** window opens with you set as call scheduler.
3) Select **I would like to create a conference room that is always available** from the drop-down list.
4) Add any conference participants as needed; see How to Add Conference Participants on page 79 for details.
5) Click on **OK**. The system now calls all the conference participants.
6) If you want to use OpenScape Web Collaboration in this conference, click on **Start Collaboration**.

6.4.4.2 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

Add the conference participants by one of the following methods:

- From the Favorites list:

  Using the mouse, drag one of the participants from the **Favorites** into the **myMeetings** conference window.
- From a directory:

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

  In the **myMeetings** window click on **Participants**. Search for a participant and press **Enter**.

Related concepts

Directories on page 43

Favorites List on page 49

Meet Me Conference on page 82
Permanent Conference on page 88

Related tasks

How to Configure an AdHoc Conference on page 78
How to Configure a Meet me Conference on page 84
How to Configure a Permanent Conference on page 89

6.4.4.3 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) Select the conference from the **myMeetings** window.
3) Click on **Edit**.
4) In the **myMeetings** window click on the participant to be set as a conference controller.
5) Click on **Set as conference controller**.
6) Click on **Save**.

Related concepts

Meet Me Conference on page 82
Permanent Conference on page 88

6.4.4.4 How to Determine the Dial-in Number for a Conference

Prerequisites

You are the conference controller.

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

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.

3) Click on **Information**.
4) The dial-in number can be found next to **Conference DID**.

Related concepts
Permanent Conference on page 88

6.4.4.5 How to Determine the Conference ID for a Conference

Prerequisites

You are the conference controller.

> **NOTICE:** As the conference controller, you can obtain the conference ID from the e-mail with the invitation to the conference.

Step by Step

1) Click on **myMeetings**.
2) Click on the relevant conference in the **myMeetings** window.
3) Click on **Information**.
4) The dial-in number can be found next to **Conference ID**.

Related concepts
Permanent Conference on page 88

6.4.4.6 How to Change a Participant's Conference Password

Prerequisites

You are the conference controller and a password is required for participants to connect.

Step by Step

1) Click on **myMeetings**.
2) Select a conference in the **myMeetings** window.
3) Click on **Edit**.
4) In the **myMeetings** window, click on the participant for whom you want to change the password.
5) Type a new password in the **Password** field.
6) Click on **Save**.

Related concepts
Permanent Conference on page 88

6.4.5 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

Scheduled 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.

6.4.5.1 How to Configure a Scheduled Outbound Call

Step by Step

1) Click on **myMeetings**.

2) Click on the + symbol.
The **myMeetings** window opens with you set as call scheduler.

3) Add a single call participant.

4) Select in the **myMeetings** window, the **I would like to be reminded to start a call later** from the drop-down list.

5) Enter a **Reminder Date**.

6) Enter a **Reminder Time**.

7) If you want to add some introductory text to the invitation email or the **Information** tab, enter this in the **Notes**.

8) 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 schedules 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. Otherwise the scheduled outbound call is initiated.

6.4.5.2 How to Configure a Scheduled Outbound Call for a Contact from the Favorites List

Step by Step

1) Click on **Schedule Outbound Call** in the context menu for the relevant contact in the Favorites list.
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.

2) Enter a **Reminder Date**.

3) Enter a **Reminder Time**.

4) If you want to add some introductory text to the invitation email, enter this in the **Notes**.

5) Click on **Save**.

6) 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.

6.4.5.3 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: **All Calls**, **Missed**, etc.
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 on **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.

6.4.5.4 How to Display your Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1) Click on **myMeetings**.
2) Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.
3) Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.
4) If you want to view the general settings of the scheduled outbound call , click on **Edit** symbol.

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

Step by Step

1) Click on **myMeetings**.

2) Under the **myMeetings** tab, you can see your own scheduled outbound calls.

3) Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.

4) 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.

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

Step by Step

1) Click on **myMeetings**.

2) Under the **myMeetings** tab, you can see your own scheduled outbound calls.

3) Click on the relevant conference under **myMeetings** tab, in order to be displayed on screen.

4) 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.

6.4.5.7 How to Reschedule a Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1) Click on **myMeetings**.

2) Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.

3) Click on the relevant scheduled outbound call under **myMeetings** tab, in order to be displayed on screen.

4) Click on **Edit** symbol.

5) Select a new **Reminder Date**.

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

6.4.5.8 How to Delete a Scheduled Outbound Call

Prerequisites

You are the call scheduler.

Step by Step

1) Click on **myMeetings**.
2) Under the **myMeetings** tab, you can see your own Scheduled Outbound Calls.
3) Click on the scheduled outbound call that you want to delete.
4) Select the call you want to delete and click on **Information** symbol.
5) Click on **Delete** symbol and then click on **Yes**.

6.5 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.

Related concepts

Conferences on page 72

Related tasks

How to Start Web Collaboration During a Call on page 69

6.5.1 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.

6.5.2 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.

6.6 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.

6.6.1 Voicemail Box

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

You can view or edit the 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. On importing 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.

NOTICE: Information on the Phone menu can be found in the Quick Reference Guide documentation of the UC Suite Telephone User Interface (TUI).

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 (i.e., when no custom profiles of the personal AutoAttendant are enabled) on reaching your voicemail box. For example: "I am unfortunately unable to take your call at this 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			
Holiday			
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.

Voicemail handling

If an incoming call is answerd by the the voicemail box and the caller records a message, the call will be visible in the Voicemail inbox as a voicemail entry.

If an incoming call is answerd by the the voicemail box and the caller does not record a message, the call will be visible in the Journal as a missed call.

Related concepts
First Steps on page 23
Screen Pops on page 140
Personal AutoAttendant on page 129
Managing Voicemail on page 111
Notification Service for New Messages on page 122
Related tasks
How to Enable or Disable Screen Pops for New Voicemails on page 148
How to Redirect a Call to your Voicemail Box on page 67
How to Record your Name Announcement on page 24
How to Record your Personal Greeting on page 25
How to Define an Additional Phone Number on page 135

6.6.1.1 How to Determine the Call Number for your Voicemail Box

Step by Step

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

2) Click on **Personal Details** > **My Personal Details**.

3) The call number for the voicemail box can be found in the **Voicemail** field.

4) Click **Close**.

6.6.1.2 How to Select Recording or Announcement Mode

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Communications** > **VoiceMail Settings**.
3) For each presence status, select one of the following values from the drop-down list:
   - 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 **Recording** is set to **Inactive**.
4) Click **Save**.

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 131

6.6.1.3 How to Record an Announcement

Step by Step

1) Click on the **Setup** symbol.
2) Click **VoiceMail Profiles** and then on any profile.
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 on **Close**, followed by **Save**.

Related concepts

Personal AutoAttendant on page 129

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 131

How to Import an Announcement on page 108
How to Delete an Announcement on page 108

6.6.1.4 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 on the **Setup** symbol.
2) Click **VoiceMail Profiles** and then on any profile.
3) Click **Record**.
4) Click **Upload**.
5) Select the desired file and click **Open**.
6) Click on **OK** in the **Warning** window.
7) 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.

Related concepts

Personal AutoAttendant on page 129

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 131
How to Record an Announcement on page 107
How to Delete an Announcement on page 108

6.6.1.5 How to Delete an Announcement

Step by Step

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

Related tasks

How to Record an Announcement on page 107
How to Import an Announcement on page 108

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

Step by Step

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

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**.

Related concepts

Presence status on page 27
Personal AutoAttendant on page 129

Related tasks

How to Change the Visibility of your Presence Status for Others on page 33
How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 109

6.6.1.7 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 the **Setup** symbol.

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**.

Related concepts

Presence status on page 27

Personal AutoAttendant on page 129

Related tasks

How to Change the Visibility of your Presence Status for Others on page 33

How to Enable or Disable the Announcement of your Presence Status for External Callers on page 109

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

Step by Step

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

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**.

Related concepts

Fax Box on page 116

6.6.1.9 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**.

6.6.2 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 Outlook 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 Name**, 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 message as a WAV file in the file system of your PC to archive it permanently.

Sending Voice Messages as Emails

You can send a voice message as a WAV file by email to any recipient. If available, the email includes the call number and name of the calling party.

Voicemail Management Menu Accessibility

To access and manage voicemail messages through your client application, it is essential to have a personal voicemail license assigned directly to your account. Please note that mere membership in a voicemail group does not confer the necessary permissions for listening to or managing voicemails within the application. This feature is exclusively available to individual users who have been granted a personal voicemail license.

Related concepts
User Interface Elements on page 15
Voicemail Box on page 103

6.6.2.1 How to Listen to a Voice Message on the Phone

Prerequisites

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

Step by Step

1) Click on **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Inbox**.
3) Click on the desired voicemail.
4) Click on **Play through phone** in the context menu.

Next steps

Accept the call from the voicemail box.

Related tasks
How to Listen to a Voice Message on the PC on page 113

6.6.2.2 How to Listen to a Voice Message on the PC

Prerequisites

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

Step by Step

1) Click on **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Inbox**.
3) Click on the desired voicemail.
4) Click on **Play through speakers** in the context menu.

Related tasks
How to Listen to a Voice Message on the Phone on page 113

6.6.2.3 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 **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) In the context menu of the item click **Dial** with the appropriate phone number.

6.6.2.4 How to Forward a Voicemail Message

Step by Step

1) Click on **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click on **Forward Message**, in the context menu.
5) Activate the check box for the desired recipient or recipients.
6) Click **OK**.

6.6.2.5 How to Move a Voice Message

Step by Step

1) Click on **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click **Folder** in the context menu and select the folder to move the message.

6.6.2.6 How to Save a Voice Message as a WAV File

Step by Step

1) Click on **Voicemail Messages**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click on **Save** in the context menu.
5) Select a folder to save the message, enter a **File Name** and click **Save**.

6.6.2.7 How to Send a Voice Message as an E-mail

Step by Step

1) Click on **Voicemail**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click on **Send in Email** in the context menu.

Next steps

Send the e-mail with the attached WAV file to the desired recipient in Outlook.

6.6.2.8 How to Create an Outlook Contact from the Sender of a Voice Message

Step by Step

1) Click on **Voicemail**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click on **Copy to Outlook** in the context menu.

Next steps

Save the contact in Outlook.

6.6.2.9 How to Sort Voice Messages

Step by Step

1) Click on **Voicemail**.
2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
3) Click on the **Date** column to sort the voicemails by ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.

6.6.2.10 How to Delete a Voicemail

Step by Step

1) Click on **Voicemail Messages**.
2) Click on one of the following folders under **VoiceMail**: **Inbox**, **Played** or **Saved**.
3) Select one of the following options:
   - Click on the desired voicemail.
   - Mark the desired voicemails.
4) Select **Move Message** > **Deleted** in the context menu.
5) If you want to delete the messages permanently:
   a) Click under **Voice Messages** on the **Deleted** folder.
   b) Select the desired voice message(s).
   c) Select **Move Message** > **Permanently Delete Message** in the context menu.

6.6.3 Fax Box

The Fax box saves Fax messages centrally. You can access these messages via the UC client.

You can view or edit the following settings of your Fax box:

Determining your own Fax Number

You can determine under which fax number you can be reached.

Retrieving Fax Messages through the Attendant

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

Related concepts

Screen Pops on page 140
Managing Fax Messages on page 116
Sending Fax Messages on page 122
Notification Service for New Messages on page 122

Related tasks

How to Enable or Disable Screen Pops for New Fax Messages on page 148
How to Enable or Disable Screen Pops for New Voicemails on page 148
How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages on page 110

6.6.3.1 How to Determine your own Fax Number

Prerequisites

Your administrator has configured a Fax number for you.

Step by Step

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

2) Click on the tab **Personal Details** > **My Personal Details**.

3) You will find your fax number in the **Fax Number** field.

4) Click **Close**.

6.6.4 Managing Fax Messages

You can display or forward fax messages, for example, or move them to another folder, save them as PDF or TIFF files and even call the sender.

Folder for Fax Messages

myPortal for Outlook organizes fax messages in the following folders:

- **Inbox**
- **Read**
- **Deleted**
- **Sent Items**:

  Contains the fax messages already sent by the communication system
- **Sending Items**

  Contains queued fax messages that have not yet been sent. The communication system tries to transmit a fax message up to 5 times within 25 minutes. The **Progress** of each fax message being sent is indicated by a progress bar.

Details of Fax Messages

Depending on the folder involved, the List view of the fax messages shows different combinations of the following details: **Date / Time**, **Fax Group**, **Call number**, **Last Name**, **First Name**, **Company**, **Pages**, **Notes**, **Destination**, **Status** and **Progress**.

Retention Period for Fax Messages

The communication system automatically deletes fax messages for which the following retention periods are exceeded:

Fax message	Retention period (days)
New	120
Read	365
Sent	365
Deleted	60

Fax Messages for Groups

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

Calling the Sender of a Fax Message

You can call the sender of a fax message.

Forwarding a Fax Message

You can forward a fax message to other internal subscribers.

Saving a Fax Message as a File

You can save a fax message as a PDF or TIFF file in the file system of your PC to archive it permanently.

Your administrator can configure whether the fax message is stored as a PDF or a TIFF file on a is stored basis.

Sending Fax Messages as E-Mails

You can send a fax message as a PDF or TIFF file by e-mail to any recipient.

Displaying Fax Messages

When a new fax message is viewed for the first time, the communication system moves it automatically from the **Inbox** folder to the **Read** folder.

Fax Transmission Report

You can display the transmission report of a fax message in the web browser.

Related concepts

User Interface Elements on page 15
Fax Box on page 116

6.6.4.1 How to Display a Fax Message

Prerequisites

Fax messages are stored as either PDF or TIFF files (configurable by the administrator on a system-wide basis) The selected file type must be associated with an application that can display this file.

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax messages**, click on the desired folder, e.g., **Inbox**.
3) Select **View** in the context menu.

   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.

6.6.4.2 How to Call the Sender of a Fax Message

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.
4) Click **Dial** in the context menu, with the appropriate phone number.

6.6.4.3 How to Forward a Fax Message

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.

3) Select **Forward Fax** in the context menu of the appropriate Fax message.
4) Enter the fax number of the recipient anc click **Search**.
5) Select the fax recipient and click **Add**.
6) Click **OK**.
7) If you want to send the fax to further recipients, click in the input field and repeat steps 4 through 5 accordingly.

> **NOTICE:** You can also add further recipients by searching in a directory.

8) If you want to remove a recipient, proceed in the following steps:
   a) Select the recipient and click **Remove**.
9) Click on **OK**.

6.6.4.4 How to Move a Fax Message

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.
4) Click **Folder** in the context menu and select the folder to move the fax message.

6.6.4.5 How to Save a Fax Message

Prerequisites

Your administrator has configured whether the fax message should be saved as a PDF or a TIFF file on a system-wide basis.

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
3) Click **Save** in the context menu.
4) If required rename the .tif file and click **Save**.

6.6.4.6 How to Send a Fax Message as an E-mail

Step by Step

1) Click on **Fax Messages**.
2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.
4) Click on **Send in Email** in the context menu.

Next steps

Send the e-mail with the attached TIFF file in Outlook.

6.6.4.7 How to Sort Fax Messages

Step by Step

1) Click on **Fax Messages**.
2) Under Fax Messages, click on the desired folder, e.g., **Read**.
3) Click on one of the column titles: **Date**, **Group Name**, **Phone Number**, **Last Name**, **First Name**, **Company Name**, **Pages** or **Notes** to sort the fax messages by this criterion in ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.

6.6.4.8 How to Display an Overview of Fax Messages in the Send Queue

Prerequisites

You have sent fax messages with Fax Printer.

Step by Step

1) Click on **Fax Messages**.
2) Click on the **Sending Items** folder under **Outbox**.
3) Click on one of the column titles: **Date**, **Group Name**, **Last Name**, **First Name**, **Company Name**, **Destination** or **Pages** to sort the fax messages by this criterion in ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.

Related tasks

How to Display an Overview of Sent Fax Messages on page 121
How to Cancel Sending a Fax Message on page 120

6.6.4.9 How to Cancel Sending a Fax Message

Prerequisites

You have sent a fax message with Fax Printer.

Step by Step

1) Click on **Fax Messages**.
2) Click on the **Sending Items** folder under **Outbox**.
3) Select **Delete** in the context menu of the appropriate fax message.
4) Click on **Yes**.

Related tasks

How to Display an Overview of Fax Messages in the Send Queue on page 120

6.6.4.10 How to Display an Overview of Sent Fax Messages

Prerequisites

You have sent fax messages with Fax Printer.

Step by Step

1) Click on **Fax Messages**.
2) Under **Outbox**, click on the **Sent Items** folder.
3) Click on one of the column titles: **Date**, **Group Name**, **Last Name**, **First Name**, **Company Name**, **Destination** or **Pages** or **Status** to sort the fax messages by this criterion in ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.

Related tasks

How to Display an Overview of Fax Messages in the Send Queue on page 120

6.6.4.11 How to Display a Fax Transmission Report

Prerequisites

You have sent a fax message with Fax Printer.

Step by Step

1) Click on **Fax Messages**.
2) Under **Outbox**, click on the **Sent Items** folder.
3) Click on the relevant fax message.
4) Click on **Transmission report** in the context menu.

The transmission report of the relevant fax message is displayed in the web browser.

6.6.4.12 How to Delete a Fax Message

Step by Step

1) Click on **Fax Messages**.
2) Click under **Fax Messages** on either the **Inbox** or **Read** folder or under **Outbox** on either the **Sent Items** or **Sending Items** folder.

3) Select one of the following options:

- Click on the desired fax message.
- Mark the desired Fax messages.

4) Select **Move Message to** > **Deleted** in the context menu.

5) If you want to delete the Fax messages permanently:

a) Click under **Fax Messages** on the **Deleted** folder.
b) Select the desired Fax message(s).
c) Select **Move Message to** > **Permanently Delete Message** in the context menu.

6.6.5 Sending Fax Messages

You can use Fax Printer to send fax messages under Windows.

Details on sending fax messages can be found in the Fax Printer User Guide.

Related concepts

Fax Box on page 116

6.6.6 Notification Service for New Messages

The communication system can optionally notify you about new voice and fax messages by e-mail, by phone or with an SMS.

The Notification Service works as follows:

Notification	Voicemail	Fax Message
E-mail	You receive an e-mail with the message as a WAV file, the date and time it was received, the duration of the message and, if available, the phone number and name of the sender. If the size of the WAV file exceeds 10 MB (average 1MB/ min), it is not attached to the e-mail. Voicemails with "urgent" priority are flagged as e-mails with "High" importance. E-mails with a voicemail have a separate symbol in Outlook. If you are using an IMAP mailbox that shows only the e-mail headers, the usual e-mail icon will appear instead.	You receive an e-mail with the message as a PDF or TIFF file, the date and time it was received, the number of pages and, if available, the phone number and name of the sender. If the size of the PDF or TIFF file exceeds 10 MB, it is not attached to the e-mail. E-mails with a Fax message have a separate symbol in Outlook. If you are using an IMAP mailbox that shows only the e-mail headers, the usual e-mail icon will appear instead.

Notification	Voicemail	Fax Message
SMS	You receive an SMS about the received message at the phone number defined by you.	
Phone	Your voicemail box calls you at the number you have specified and plays back the message to you.	-

You can enable or disable every type of notification for each Presence status individually.

The notification by phone can be restricted to the business hours configured by your administrator. You can define the number and intervals for the repeated attempts for the notification by phone.

Related concepts

Voicemail Box on page 103
Fax Box on page 116

6.6.6.1 How to Enable or Disable Email Notifications

Prerequisites

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

Your email address is specified under **Personal Details**.

Step by Step

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

2) Select one of the following options:

- If you want to enable or disable the notification for voice messages, click on **Communications** > **VM Notification**.
- If you want to enable or disable the notification for fax messages, click on **Communications** > **Fax Notification**.

3) Select one of the options below in the **Email** row for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **Out of Office**, **Holiday**, **Lunch**, **Home** or **Do Not Disturb**:

- If you want to activate the notification for a Presence status, enable the corresponding check box.
- If you want to deactivate the notification for a Presence status, clear the corresponding check box.

4) Click **Save**.

Related tasks

How to Specify your Email Address on page 134

6.6.6.2 How to Enable or Disable the Notification by Phone

Step by Step

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

2) Click on **Communications** > **VM Notification**.

3) Select one of the options below in the **Outbound** row for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **Out of Office**, **Holiday**, **Lunch**, **Home** or **Do Not Disturb**:

- If you want to activate the notification for a Presence status, enable the corresponding check box.
- If you want to deactivate the notification for a Presence status, clear the corresponding check box.

4) Enter the desired phone number in the **Outbound Number** field in canonical or dialable format

5) Choose one the following options in the **Outbound Notification Times** area:

- If you want to be notified only during business hours, click on **During Business Hours Only**.
- If you want to be notified at any time, click on **24 Hours a Day**.

6) Enter the desired time interval and the number of attempts to be made when repeating the notification.

7) Click **Save**.

Related concepts

Call Number Formats on page 65

6.6.6.3 How to Enable or Disable SMS Notification

Prerequisites

The administrator of your communication system has defined an appropriate SMS template for you.

Step by Step

1) Click **Setup**.

2) Select one of the following options:

- If you want to enable or disable the notification for voice messages, click on **Communication** > **VM Notification**.
- If you want to enable or disable the notification for fax messages, click on **Communication** > **Fax Notification**.

3) Select one of the options below in the **SMS** row of the **Notification** table for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **SMS of the Office**, **Holiday**, **Lunch**, **Home** or **Do Not Disturb**:

- If you want to activate the notification for a Presence status, enable the corresponding check box.

- If you want to deactivate the notification for a Presence status, clear the corresponding check box.

4) Click **Save**.

6.7 Instant Message

Instant Messaging refers to communicating with instant messages (usually called a chat).

6.7.1 Instant Message

Instant Messaging enables you to chat with other peers. The communication system supports instant messaging with users of UC Suite as well as external communication partners and multi-user chats (or a combination of both).

Sent and received instant 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 Messaging** window.

Symbol	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 Messaging

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

Multi-user chat

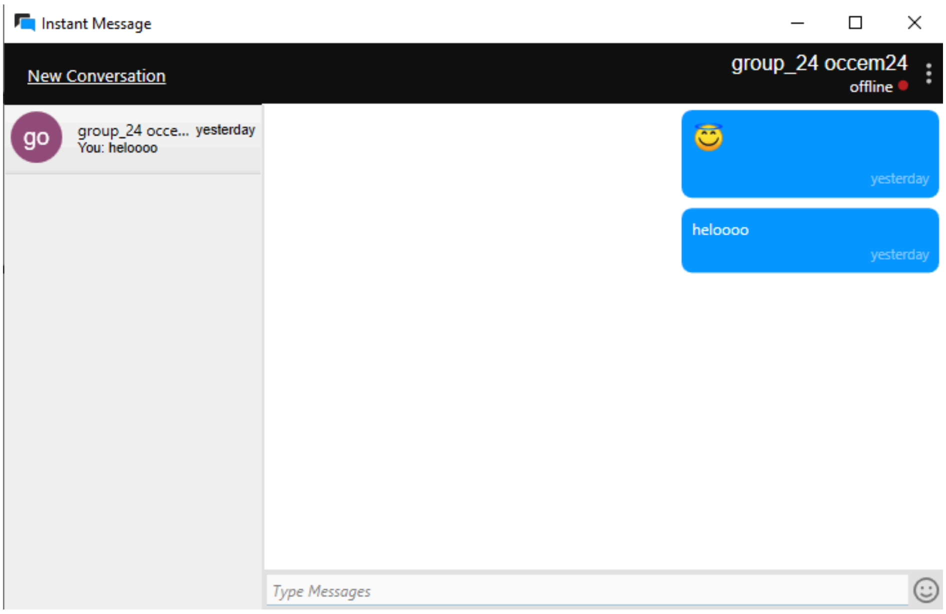
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external communication partner.

Instant 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 client do not appear in a Web Collaboration session of the same participant, and vice versa.

Instant Message Window

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



- User area

  This area shows every participating communication partner as a symbol or with a picture, if available.
- Message area

  This area 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 contains the input field for the instant messages.

myPortal for Desktop with modern user interface shows instant messages in the workspace of the main window.

Related concepts
Screen Pops on page 140

6.7.1.1 How to Send an Instant Message

Prerequisites

Instant Messaging is enabled in the system.

Step by Step

1) Click on **Instant Message** button.

   The **Instant Message** window appears.

   NOTICE: A current communication partner can alternatively also be contacted via an instant message from the screen pop of the call.

2) On the **Instant Messaging** Window, select **New Conversation** and select the user you want to chat with.
3) If you want to add further communication partners the chat (to create a multi-user chat), drag them from **Favorites** or **Directories** to the **Instant Messaging** window.
4) Enter the text in the **Instant Message** window in the input area.
5) Press `Enter`.

Related concepts
Directories on page 43
Favorites List on page 49

6.7.1.2 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 **Intsant Message**.

   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 ✖ button.

The message is deleted for all participants.

b) To delete all your messages in the conversation, click on the ⋮ button 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 conversation in the conversation list.

6.7.1.3 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 **Instant Message**.

The **Instant Message** window appears.

2) Select the conversation you want to leave, click on the ⋮ button and select **Leave**.

A pop-up window appears.

3) If the conversation is with only one person, click on **Yes**.

4) If the conversation is with multiple people, do one of the following:

a) Click on **Yes**, 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.

6.8 AutoAttendant

Depending on the presence status of the called party, the AutoAttendant offers callers options to route voice calls to fixed numbers or their voicemail box. Callers signal their choice by entering digits at the phone.

6.8.1 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):

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

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

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Out of Office	-	-	"I am currently out of 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.

Related concepts

Presence status on page 27
Voicemail Box on page 103

Related tasks

How to Record an Announcement on page 107
How to Import an Announcement on page 108
How to Enable or Disable the Announcement of your Presence Status for External Callers on page 109
How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 109

6.8.1.1 How to Edit a Profile for the Personal AutoAttendant

Prerequisites

You have recorded an announcement for the relevant status.

Step by Step

1) Click on the **Setup** symbol.
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 canonical or dialable format in the **Target** field.

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 concepts

Call Number Formats on page 65

Related tasks

How to Record an Announcement on page 107
How to Import an Announcement on page 108
How to Select Recording or Announcement Mode on page 107

7 Configuration

You can configure myPortal for Outlook to suit your requirements by editing your personal data or the program settings, for example.

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.

Defining Additional Phone Numbers

Additional phone numbers are typically used for:

- Status-based call forwarding
- CallMe Service

You can individually configure whether or not your mobile number, external number 1, external number 2 and private number are to be displayed in the internal directory. The remaining phone numbers are always displayed in the internal directory.

Providing your own Picture

If you provide your own picture, it will be shown to other subscribers when they position their mouse pointers over your entry in the internal directory (**Extension** column) or in the Favorites list. You can use an image of any file size. The communication system saves a copy with a width and height restricted to 200 pixels.

Automatic Login

If you use an automatic login, the Login window is not displayed. For security reasons, you should avoid using the automatic login if you have shared user accounts.

Hotkeys

You can use any key, possibly in combination with `Ctrl` or `Alt` and the `Shift` key, as hotkeys for the following functions:

- **Answer/Disconnect call**
- **Forward/Transfer call**
- **Task bar icon for call**

  (Screen pop for calls)
- **Display / Hide favorites**
- **Desktop Dialing**

The only precondition is that the key or key combination is not already being used by another application.

User name

You can change the user name for your login.

Related concepts
Directories on page 43
Favorites List on page 49

7.1 How to Edit your own Name

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Personal Details** > **My Personal Details**.
3) Enter your name in the fields **First Name** and **Last Name**.

   NOTICE: All Latin1 characters (ISO-8859-1, Western European) are allowed.

   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) Click **Save**.

7.2 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 the **Setup** symbol.
2) Click on **Personal Details** > **My Personal Details**.
3) Enter your email address under **Email Address**.
4) Click **Save**.

Related concepts
Conferences on page 72
Related tasks
How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments on page 34
How to Enable or Disable Email Notifications on page 123

7.3 How to Define an Additional Phone Number

Step by Step

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

Related concepts

Call Number Formats on page 65
Status-based Call Forwarding on page 38
Voicemail Box on page 103

Related tasks

How to Enable the CallMe Service on page 38

7.4 How to Provide 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 on the **Setup** symbol.
2) Click on **Personal Details** > **My Picture**.
3) Click **Select**.
4) Choose a folder and the desired file and click **Open**.

Related tasks

How to Delete your own Picture on page 135

7.5 How to Delete your own Picture

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Personal Details** > **My Picture**.
3) Click on **Clear**.
4) Click **Save**.

Related tasks
How to Provide your own Picture on page 135

7.6 Programming the Function Keys of the Telephone

You can customize the function keys of your telephone and any available key module or Busy Lamp Field (BLF) to suit your requirements via the UC client with a web application.

This applies to both the predefined function keys and the other function keys, but not the local application keys (**Local App.**). The user interface for key programming is opened in the same language as the UC client, if available; otherwise, in English.

> **NOTICE:** The function keys of a SIP phone, an ISDN phone or an analog phone cannot be programmed with the UC Client.
>
> 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.

7.6.1 How to Program the Function Keys of the Telephone

Step by Step

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

2) Click on **My Preferences** > **Miscellaneous**.

3) Click on **Program Phone Keys**. A window for programming the function keys of the telephone is opened in the web 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.

   a) If you want to display details on the current function of a key, move the mouse pointer over the label field to the left of the key.

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.

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

7) Click on **Save**.

8) If you selected a system phone with automatic key labeling, 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 phone numbers as described under steps 6 to 8.

10) If you want to program further function keys, repeat steps 4 through 9.

11) Close the web browser window for key programming.

12) Click in the **Setup** window of myPortal for Outlook on **Save**.

Related tasks

How to Resolve the Problem: Empty Browser Window for Key Programming on page 154

7.7 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 the **Setup** symbol.

2) Click on **Personal Details** > **My Personal Details**.

3) Under **Password**, click on **Change**.

4) Enter your current password in the **Old password** field.

5) Enter your new password in the **New password** and **Confirm password** fields.
   a) a. The password must not consist of only 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.

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

Related tasks
How to Start myPortal for Outlook on page 19

7.8 How to Deactivate the Automatic Login

NOTICE: You should use the automatic login only if you are certain that no-one else has access to your 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.

NOTICE: To activate the automatic login, you must use the corresponding option on starting myPortal for Outlook.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **Sensitivity** > **Security and Access**.
3) Clear the **Remember my password and automatically log me into Outlook** check box.
4) Click **Save**.

Related tasks
How to Start myPortal for Outlook on page 19

7.9 How to Change the Login Name

Step by Step

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

> **NOTICE:** The user name is valid for all UC Suite clients.

4) Click on **OK**, followed by **Save**.

7.10 How to Select the User Interface Language

Step by Step

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

Next steps

Close Outlook and restart myPortal for Outlook.

Related concepts
User Interface Elements on page 15

7.11 How to Change Skin for the User Interface

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Appearance**.
3) Click on the desired skin for the user interface.
4) Click **Save**.

Next steps

Close Outlook and restart myPortal for Outlook.

Related concepts
User Interface Elements on page 15

7.12 How to Change between Classic and Modern traypop

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Appearance**.

3) Change between classic and modern traypop.

- To use the modern traypop unselect the checkbox next to **Use classic traypop**.
- To use the classic traypop select the checkbox next to **Use classic traypop**.

4) Click **Save**.

Next steps

Close Outlook and restart myPortal for Outlook.

NOTICE: The modern traypop is a Windows toast notification so it is based on the Windows Theme and not on the UI theme. As a result, it uses the Windows colors.

7.13 How to Activate or Deactivate a Hotkey

Step by Step

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

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

3) Select one of the following options:

- Select the **Hot Key Enabled** check box. To activate a hotkey, click in the rectangular field next to the relevant function and hold down one or more of the `Shift`, `Ctrl` and `Alt` keys while pressing the additional key desired for the key combination. If the pressed key or key combination can be used for the UC client, this is displayed.
- If you want to disable a hotkey, clear the **Hot Key Enabled** check box next to that key.

4) Click **Save**.

NOTICE: Configured hotkeys must be unique and function globally across all applications, such as myPortal for Desktop, myPortal for Outlook, and myAgent. The first application to claim the hotkey will retain exclusive access; any subsequent applications attempting to use the same configured hotkey will fail to bind it. To prioritize a different application for the hotkey, restart all relevant applications, ensuring the preferred one starts first. Alternatively, close the conflicting application, reopen the setup, and click 'save' to refresh the hotkey services.

7.14 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, for example.

A screen pop appears in the lower right corner of the screen and additional pop-ups, if required, appear above it. You can enable or disable screen pops by different methods. Some 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`). You can also minimize screen pops to an icon on the task bar.

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 Outlook contact on inbound 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 screen pop when your presence is changed.
- Open screen pop on new instant message.
- Open summary (overview) on starting the UC client

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

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

Opening Outlook Contacts for Incoming Calls

You can select whether myPortal for Outlook should open the appropriate Outlook contact for an inbound call. If there is no Outlook contact for the call number involved, a new Outlook contact with this call number is created. You can then add further details to this contact and save it.

> **NOTICE:** In order for an Outlook contact to be opened for an incoming call, the number contained in it must not have any other character in the last three digits.

Screen Pop on Inbound Calls

The following functions are available:

Icon	Function
	**Answer**

Icon	Function
	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.
	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 Message 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 Message 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 Message Message to the communication partner.
	Rewind
	Fast 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**.

Related concepts
User Interface Elements on page 15
Call Functions on page 66
Directories on page 43
Instant Message on page 125
Voicemail Box on page 103
Fax Box on page 116
Related tasks
How to Enable or Disable Screen Pops on Changing the Presence Status on page 35
How to Start Web Collaboration During a Call on page 69

7.14.1 How to Enable or Disable Screen Pops on Inbound Calls

Step by Step

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

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**.

Related tasks
How to Answer a Call on page 66
How to Redirect a Call to your Voicemail Box on page 67
How to Record a Call or a Conference on page 69
How to End a Call on page 70

7.14.2 How to Enable or Disable the Opening of Outlook Contacts on Inbound Calls

Step by Step

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

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

3) Select one of the following options:

- If you want to enable the opening of Outlook contacts on inbound calls, select the check box **Display tray pop on inbound calls**.
- If you want to disable the opening of Outlook contacts on inbound calls, clear the check box **Display tray pop on inbound calls**.

> **NOTICE:** In case of internal calls, no pop up windows appear.

4) Click **Save**.

Related concepts

Directories on page 43

7.14.3 How to Enable or Disable Screen Pops on Outbound Calls

Step by Step

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

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 outbound calls**.

4) Click **Save**.

Related tasks

How to Transfer a Call on page 68
How to Place a Call on Hold on page 69
How to Record a Call or a Conference on page 69
How to End a Call on page 70

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

Step by Step

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

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 tray 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 tray pop on call termination**.

4) Click **Save**.

Related concepts

Journal on page 57

7.14.5 How to Enable or Disable Screen Pops for New Voicemails

Step by Step

1) Click on the **Setup** symbol.
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 VoiceMail**.
   - If you want to disable screen pops on new voicemails, clear the check box **Display tray pop on new VoiceMail**.
4) Click **Save**.

Related concepts

Voicemail Box on page 103
Fax Box on page 116

Related tasks

How to Enable or Disable the Opening of the Messages Window for New Voicemails on page 150

7.14.6 How to Enable or Disable Screen Pops for New Fax Messages

Step by Step

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

Related concepts

Fax Box on page 116

Related tasks

How to Enable or Disable the Opening of the Messages Window for New Fax Messages on page 150

7.14.7 How to Enable or Disable Screen Pops on Received Instant Messages

Step by Step

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

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

3) Select one of the following options:

- If you want to enable screen pops on received instant 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 is displayed on the taskbar.
- If you want to disable screen pops on received instant 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**.

7.14.8 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) Click on **Hot Key Enable** and enter the desired hot key in the **Display Overview Traypop** field.

The hot key CTRL+L is preselected by default. If you want to use a different hotkey you will have to press the modifiers and the hot key, e.g. SHIFT+F1.

4) Click on **Save**.

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

7.14.9 How to Enable or Disable the Opening of the Messages Window for New Voicemails

Step by Step

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

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

3) Select one of the following options:

- If you want to enable the opening of the messages window on receiving a new voicemail, select the check box **Screenpop the messages window when I receive a new voicemail message**.
- If you want to disable the opening of the messages window on receiving a new voicemail, clear the check box **Screenpop the messages window when I receive a new voicemail message**.

4) Click **Save**.

Related tasks

How to Enable or Disable Screen Pops for New Voicemails on page 148

7.14.10 How to Enable or Disable the Opening of the Messages Window for New Fax Messages

Step by Step

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

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

3) Select one of the following options:

- If you want to enable the opening of the messages window on receiving a new fax message, select the check box **Open the messages window when I receive a new fax message**.
- If you want to disable the opening of the messages window on receiving a new fax message, clear the check box **Open the messages window when I receive a new fax message**.

4) Click **Save**.

Related tasks

How to Enable or Disable Screen Pops for New Fax Messages on page 148

7.14.11 How to Enable or Disable the Screen Pop with an Overview on Starting myPortal for Outlook

Follow these steps to enable or disable the screen pop that appears on starting myPortal for Outlook with an overview of the relevant number of new voice messages, new fax messages, open calls, and an indication of any absence.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Notifications**.
3) Select one of the following options:
   - If you want to enable the screen pop that appears with an overview on starting myPortal for Outlook, select the check box **Display the 'Overview' when the application starts up**.
   - If you want to disable the screen pop that appears with an overview on starting myPortal for Outlook, clear the check box **Display the 'Overview' when the application starts up**.
4) Click **Save**.

7.14.12 How to Enable or Disable the New User Interface with Screen Pops

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Appearance**.
3) Select one of the following options:
   - If you want to enable the new interface for screen pops, clear the **Use classic traypop** check box.
   - If you want to enable the classic interface for screen pops, select the **Use classic traypop** check box.
4) Click **Save**.

7.15 How to Change the Server Address

NOTICE: Do not change the server address unless you are instructed to do so by the administrator of your communication system. You cannot use myPortal for Desktop with an invalid server address.

Step by Step

1) Click on the **Setup** symbol.
2) Click on **My Preferences** > **Miscellaneous**.
3) Enter the IP address or the name of the communication system or the UC server in the **Server Address** field.
4) Click **Save**.

7.16 How to Configure a Call Transfer

Step by Step

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

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 **Transfer**.
- If you want to speak to the subscriber before transferring the call to that subscriber, select **Supervised Transfer**.

4) Click on **Save**.

> **NOTICE:** If you double-click any phone number on the client while you are already on a call, a blind transfer will be performed.

Related tasks

How to Transfer a Call on page 68

7.17 How to Enable or Disable Dialing by Entering a Name

Step by Step

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

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) Click **Save**.

7.18 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**.

7.19 Troubleshooting

Help on known issues can be found under *Troubleshooting*.

7.19.1 How to Resolve the Problem: No Connection to the Communication System (Windows)

The Windows Firewall is enabled by default on installing Windows. The firewall prevents the connection of your application with the communication system. Contact your network administrator or the administrator of your communication system to have the following steps performed:

Step by Step

Add the application to the list of exceptions in the Windows Firewall settings in the Control Panel.

Related tasks

How to Start myPortal for Outlook on page 19

7.19.2 How to Resolve the Problem: myPortal for Outlook is not Loading

Step by Step

1) Click on the **File** tab.
2) Click on the menu item **Options**.
3) In the **Outlook Options** window, click on the menu item **Add-Ins**.
4) In the **Manage** drop-down list, select the entry **Disabled Items** and click on the **Go To...** button.
5) In the **Disabled Items** window, select the possibly listed entries **OLI2010** and **Redemption (VSL)** and then click on **Enable**.
6) Exit the window with **Close**. This will return you to the **Basic Configuration** window.
7) In the **Manage** drop-down list, select the entry **COM-Add-Ins** and click on the **Go To...** button.
8) In the **COM-Add-Ins** window, select the entries for **OLI2010** and **Redemption (VSL)** and confirm this with **OK**.

   With auto-login set, the myPortal for Outlook plugin will be immediately loaded. Otherwise, the login window of myPortal for Outlook appears, and myPortal for Outlook is loaded after a successful login.

7.19.3 How to Resolve the Problem: Empty Browser Window for Key Programming

On clicking the **Program Phone Keys** link, your Browser opens with only an empty window.

Step by Step

1) Disable the proxy server temporarily in the Connection settings of your web browser.

2) Refresh the page for programming function keys in your web browser and complete the key programming.

Next steps

Then reactivate the proxy server in your web browser.

Related tasks

How to Program the Function Keys of the Telephone on page 136

8 myContacts

The myContacts Outlook Addin is an optional add-on for UC Smart and UC Suite users which works with personal contacts in Outlook. In case of a UC Smart configuration, a myPortal @work license has to be assigned to the user before he can login to the UC Smart server. In case of UC Suite, a UC user or UC groupware license is required.

8.1 Introduction

The Addin allows synchronizing personal Outlook contacts with the UC server manually or as a scheduled auto-synchronization task. By synchronizing, the following clients will gain access to the user's personal Outlook contacts for phonebook access and caller identification:

- System phones
- myPortal to go clients (Android, iOS and Web Edition)
- other clients using the Web Services Interface (WSI), including third party applications

NOTICE: The classic UC Suite desktop clients are not affected as they access Outlook contacts locally on the client PC.

8.1.1 Minimum requirements

The Outlook addin will be provided for:

- OpenScape Business V2R1 or later with active UC Smart or UC Suite.
- Desktop environments running Microsoft Windows 7, Windows 8.x and Windows 10 (x86 and x64 architectures).
- Outlook versions: Outlook 2016 or later (32bit or 64bit).

8.2 How to Install myContacts

Prerequisites

The administrator of your communication system has made the installation file(s) or the link to the file(s) available to you.

Step by Step

1) Close Outlook
2) Run the `myContactsforOutlook.exe` program.
3) If the **User Account Control** window appears, click **Allow** or **Yes**.
4) Check the **I agree to the license terms and conditions** checkbox.
5) Click **Install**.

6) Wait for the **myContacts** addin to be installed.
7) Click **Finish** to complete the installation process.

Next steps

Start Outlook.

8.3 How to Uninstall myContacts

Step by Step

1) Close Outlook.
2) Click in the **Control Panel** on **Programs and Features**.
3) Click on **Change** in the context menu of **myContacts**.
4) Click **Uninstall**.
5) Select the **myContacts** addin to be uninstalled.

8.4 Automatic Updates

The Outlook Addin includes an update mechanism which checks if a newer version of the software is available on the OpenScape Business server for download and installation.

In case that an update is available, the user is guided through the download and installation process. If necessary, a message is displayed indicating that one or more applications must be closed to perform the update.

> **NOTICE:** We recommend that you always perform the updates offered. This also applies to software that is required for certain UC clients.

8.4.1 How to Perform Automatic Updates

Prerequisites

You have received a message such as: `A new vesion of myContacts is available` followed by the Release Notes.

Step by Step

Select one of the following options:

a) **Skip this version**

The existing version remains installed.

b) Remind me later

Anew pop up window appears with the following options:

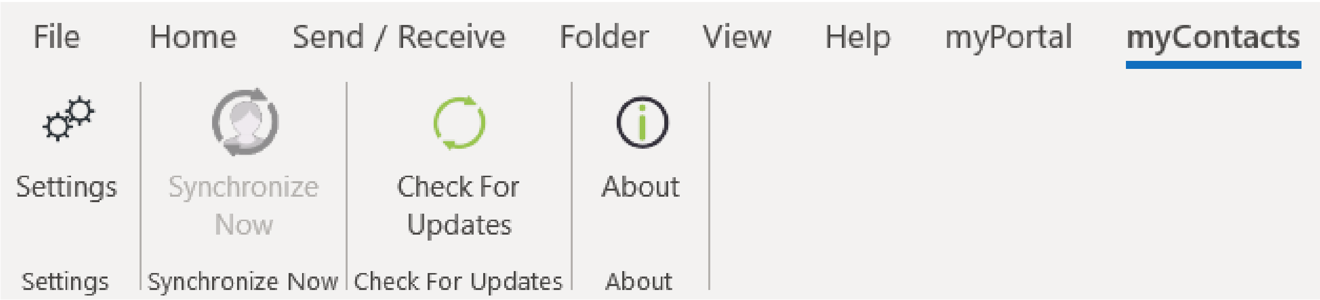
- **Yes, please remind me later** and a drop down list in to select the time before the next reminder.
- **No, download updates now (recommended)**

c) **Update**

The installation of the latest version starts automatically.

8.5 User Interface

The **myContacts** tab is available in the main menu area of Outlook when the Addin is installed and active.



The interface contains:

- the **Settings** menu button,
- the **Synchronize Now** button,
- the **Check for Updates** button,
- the **About** button.

8.5.1 Settings menu

The Settings menu contains:

- the submenu for the server connectivity,
- the submenu for synchronization of Outlook contacts with the UC server,
- the advanced submenu for maintenance purposes

8.5.1.1 How to Configure Connectivity Settings for the UC Server

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Settings** menu button.

3) Click on **UC Server** submenu button.

4) Fill in the **IP Address** under the **UC Server IP Address** area.

5) Fill in the **Username** and **Password** under the **UC Server Account details** area.

6) Click on **Apply** to complete the connectivity settings configuration.

> **NOTICE:** The first time Outlook is opened after the installation, this menu opens automatically and the configuration should be done in order to proceed with any other action.

8.5.1.2 How to Synchronize Contacts

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.
2) Click on **Settings** menu button.
3) Click on **Synchronize Contacts** submenu button.
4) The number of contacts in Outlook appears under Sync outlook contacts settings. Check or uncheck the **Do not import contacts without phone numbers** and **Import profile pictures** checkboxes.
5) Select the **sync interval** period to sync contacts from the drop down list.
6) Click on **Start Sync Now** to synchronize your Outlook contacts.

Alternatively, you can click on the **Synchronize Now** button without entering the **Settings** menu

> **NOTICE:** Contact phone numbers should always be entered in canonical format (e.g., +4989700798765) whenever possible.

8.5.1.3 How to Configure the Advanced Settings

In case of technical problems, you may be asked to provide a trace file of myContacts for further analysis by the support team.

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.
2) Click on **Settings** menu button.
3) Click on **Advanced** submenu button.
4) Check or uncheck the **Enable Logging** checkbox to select whether a log file is written.
5) Select the **Log Level** from the drop down list.

6) Click on **Apply** to complete the advanced settings configuration.

> **NOTICE:** If you have increased the trace level, please do not forget to decrease it again after you have finished the trace creation.

8.5.2 Check for Updates

Except for the automatic update mechanism, the user can check manually for an updated version of the myContacts addin.

8.5.2.1 How to Check for Updates

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Check for Updates** button.

If a new version is available, a window informing about the available version appears.

If there are no updates you will get the message **There is no update available please try again later.**

3) Click on **Yes** to update the application.

9 Appendix

The appendix contains additional information.

9.1 Presence Status Keywords for Appointments

Certain keywords in appointments enable automatic updating of the presence status. The keywords are dependent on the language of the user interface.

Language	Presence status keyword							
Croatian (Croatia)	Ured	Sastanak	Bolovanje	Pauza	Odsutan	Odmor	Ručak	Kuća
Czech (Czech Republic)	Kancelář	Porada	Nemoc	Přestávka	Mimo kancelář	Dovolená	Oběd	Domů
Danish (Denmark)	Kontoret	Møde	Syg	Pause	Ikke på kontoret	Ferie	Frokost	Gået for i dag
Dutch (Netherlands)	Kantoor	Bespreking	Ziek	Pauze	Niet op kantoor	Vakantie	Lunch	Thuis
English (United Kingdom)	Office	Meeting	Sick	Break	Out of Office	Holiday	Lunch	Home
English (United States)	Office	Meeting	Sick	Break	Out of Office	Holiday	Lunch	Home
Finnish (Finland)	Paikalla	Neuvottelussa	Sairaana	Tauolla	Matkoilla	Lomalla	Lounaalla	Poissa
French (France)	Bureau	Réunion	Maladie	Pause	Déplacement	Congé	Déjeuner	Domicile
German (Germany)	Büro	Besprechung	Krank	Pause	Außer Haus	Urlaub	Mittagspause	Zu Hause
Hungarian (Hungary)	Iroda	Találkozó	Beteg	Szünet	Házon kívül van	Szünidő	Ebédidő	Otthon
Italian (Italy)	Ufficio	Riunione	Malattia	Pausa	Fuori sede	Vacanza	Pranzo	A casa
Norwegian, Bokmål (Norway)	Kontor	Møte	Syk	Pause	ikke på kontoret	Ferie	Lunsj	Startside
Polish (Poland)	Biuro	Spotkanie	Chorobowe	Przerwa	Wyszedł	Urlop	Lunch	Dom
Portuguese (Portugal)	Escritório	Reunião	Doente	Pausa	Fora	Férias	Hora do almoço	Em casa
Russian (Russia)	В офисе	На совещании	Болен	На перерыве	Ушел	Выходной	Обед	Дома

Language	Presence status keyword							
Slovenian (Slovenia)	Pisarna	Sestanek	Bolniška	Odmor	Odsoten	Dopust	Kosilo	Doma
Spanish (Spain)	Oficina	Reunión	Enfermo	Pausa	Fuera de oficina	Vacaciones	Pausa de mediodía	Domicilio
Swedish (Sweden)	Kontor	Möte	Sjuk	Rast	borta från kontoret	Semester	Lunch	Hemma
Turkish (Turkey)	Ofis	Toplantı	Hasta	Mola	Ofis Dışında	Tatil	Öğle yemeği	Ev

Related tasks

How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments on page 34

9.2 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, Do not Disturb 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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