A MITEL
PRODUCT
GUIDE

Unify OpenScape Business

myPortal for Teams

User Guide

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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
Presence and Connection Status on page 23	Updates
Settings on page 27	Settings changed position
myPortal for Teams overview on page 8	Updated functionality and UI screenshot
How to create a group on page 14	Different button
How to change presence status on page 24 How to set a duration for a presence status on page 24 How to set a callme number on page 25 How to set a status message on page 25 How to initiate a phone-controlled conference on page 20 Contact notes on page 22 How to start a phone call from Notes on page 18 How to select a preferred phone number for a favorite contact on page 15 How to send a call to voicemail on page 21 How to drop a conference participant on page 21 How to view the list of conference participants on page 21	New chapters

History of changes

Changes in V3R3

Impacted chapters	Change description
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Contacts on page 13	Support for contact avatars
Presence and Connection Status on page 23 How to email a contact on page 13	New sections

Changes in V3R2 FR1

Impacted chapters	Change description
myPortal for Teams overview on page 8	Support for Favorites, Dialpad
How to sign in on page 10	Added "Keep me signed in" checkbox
How to sign out on page 10 How to delete call history entries on page 12	Updated descriptions to reflect changes in the user interface
Call History on page 11 How to filter call history entries on page 12 How to delete call history entries on page 12 How to start a phone call from Call History on page 16	Renamed "Journal" to "Call history"
Contacts on page 13 How to start a phone call from Contacts on page 17	Renamed "Contact List" to "Contacts" Updated information about contacts

Impacted chapters	Change description
Favorites on page 14 How to add a contact in a group on page 15 How to create a group on page 14 How to delete a group on page 14 How to remove a contact from a group on page 15 How to rename a group on page 14 How to start a phone call from Favorites on page 17	Support for Favorites
How to start a phone call from Call Control on page 17	Support for Dialpad
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Impacted chapters	Change description
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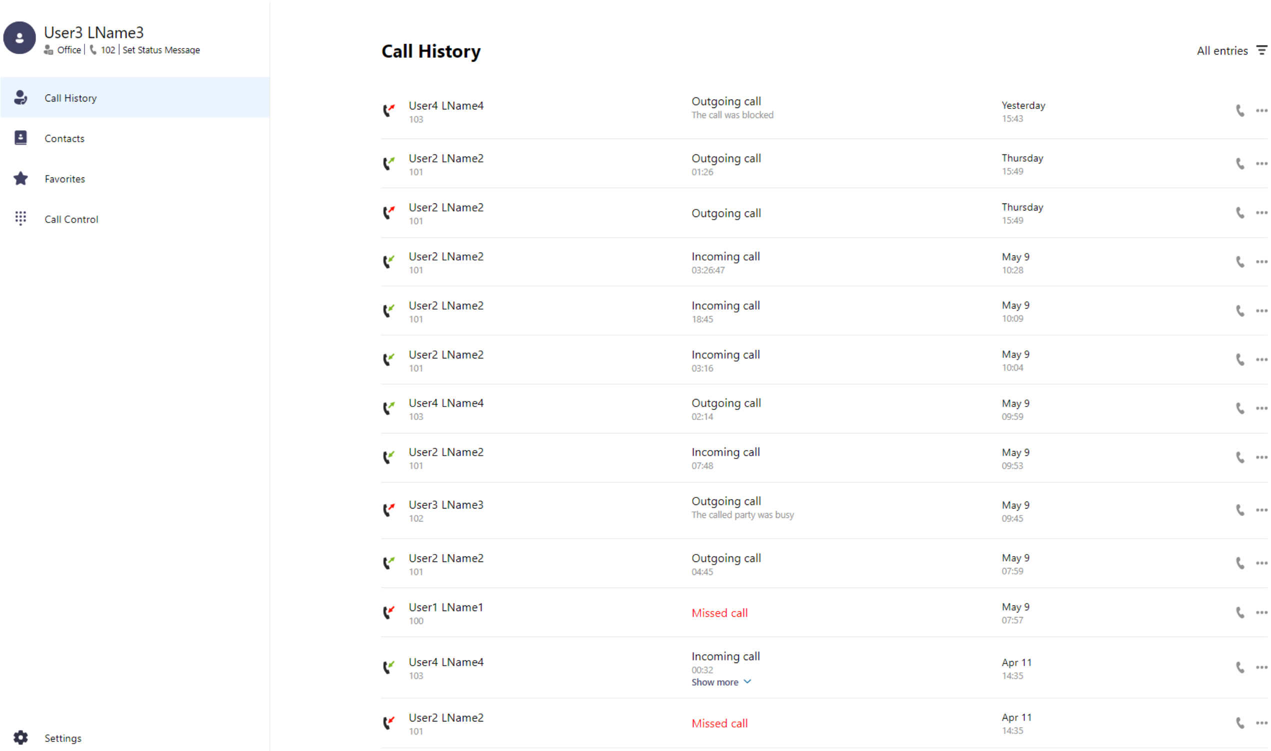
Contacts on page 13 Controlled devices on page 25 Calls	New sections due to restructuring of Chapter Unified Communications on page 11

2 Introduction

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

2.1 myPortal for Teams overview

myPortal for Teams plugin is used to integrate Microsoft Teams application with OpenScape Business.



With **myPortal for Teams** you can:

- Filter and manage your call history
- View and search contacts
- Keep and edit notes for contacts
- Organize contacts in favorite groups
- Email contacts
- Select your presence status
- Select a controlled device (available for MULAP users)
- Start a call
- Answer, reject, deflect or send a call to voicemail
- Place a call on hold
- Transfer a call
- Make a consultation call
- Alternate between calls
- Make an attended transfer
- Initiate a phone-controlled conference with multiple users

NOTICE: Searching for contacts in external directories for example with the Lightweight Directory Access Protocol (LDAP), is not supported.

NOTICE: Voice over IP (VoIP) is not supported.

3 How to access myPortal for Teams

3.1 How to add myPortal for Teams plugin to Microsoft Teams application

Prerequisites

myPortal for Teams must be uploaded to Microsoft Teams store by your system administrator.

Step by Step

1) Click on **Apps** in the left navigation bar of Microsoft Teams.
2) Click on **Company apps**.
3) Select **myPortal for Teams** and click on **Add**.

   myPortal for Teams plugin is displayed in the left navigation bar of the Microsoft Teams application. If the plugin is not displayed, click on ••• **More added apps**, select the **myPortal for Teams** plugin and pin it.

3.2 How to sign in

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Enter the **User Name** and the **Password** associated with your account.
3) Click on the **Keep me signed in** checkbox, if you want to save your sign in credentials.
4) Click on **Sign In**.

3.3 How to sign out

Step by Step

1) Click on **Settings** at the bottom left.
2) Click on **Sign Out** at the top right of the settings screen.

4 Unified Communications

4.1 Call History

Call History lists all your incoming and outgoing calls. You can use it to quickly call your contacts or to respond to a missed call.

Filter

You can filter the call history entries by the following call types:

- **All entries** - All incoming and outgoing calls
- **Missed calls** - All incoming calls that were not answered
- **Incoming calls** - All incoming calls, both answered and unanswered
- **Outgoing calls** - All outgoing calls, both answered and unanswered

Entries identification

You can identify the entries in your call history as follows:

Symbol	Description
	Incoming call - Answered
	Incoming call - No answer
	Incoming call to a group - Answered
	Incoming call to a group - Not accepted
	Incoming call - Redirected
	Outgoing call - Answered
	Outgoing call - No answer
	Outgoing call to a group - Answered
	Outgoing call to a group - No answer

New entries in **Call History** are indicated by a vertical red line to their left.

Calls details

Additional information shown in **Call History**

- Name of the caller / callee

  The name is displayed when it can be resolved (e.g. from contacts).
- Phone number of the caller / callee
- Call type
- Call duration (only for answered calls)
- Date and time of the call
- Additional call details (only in UC Smart mode), if available:

  For example: **The call was a secondary call**, **The called party was busy**, **Destination not obtainable**, **Call redirected to**, etc.
- Further phone numbers in case of forwarding or transferring or in case of a group call (only with the UC solution UC Smart).

4.1.1 How to filter call history entries

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.

2) Select the **Call History** tab.
All recent calls are listed in chronological order.

3) Click on ☰ above the call history list and choose one of the following filtering options:

- **All entries** (Default)
- **Missed calls**
- **Incoming calls**
- **Outgoing calls**

4.1.2 How to delete call history entries

You can delete calls from the call history list. This option is only available for the UC Smart users.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.

2) Select the **Call History** tab.
All recent calls are listed in chronological order.

3) Click on ☰ above the call history list and choose one of the following filtering options:

- All entries (Default)
- Missed calls
- Incoming calls
- Outgoing calls

4) Click on ••• next to the selected entry and then click on 🗑 **Delete Entry**.
The message **Call entry has been deleted** appears.

4.2 Contacts

Contacts shows all your personal contacts. You can use it to search, email or call your contacts.

Contacts details

- Avatar image of the contact or a generic image with the contacts initials
- Name of the contact
- Phone numbers of the contact
- Type of the phone number (extension, business, mobile)
- Directory used to retrieve the contact

If a contact has multiple numbers, you can choose which number to call by clicking on ••• and selecting the number.

If you have no Personal contacts, the tab will display a **Your Personal Directory is currently empty.** message.

Available contact directories

- Personal directory (default)
- Internal directory (extensions)
- External directory
- System directory (speed dials)

4.2.1 How to search for a contact

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.

2) Select the **Contacts** tab.

3) Type the name of the contact in the **Search a contact** box.
As you type in a list of suggested contacts is displayed to select from.

4.2.2 How to email a contact

Sending an email is possible if an email address is present for a contact.

Step by Step

You can choose to send an email to a contact from the following tabs:

- In Favorites tab click on a group to expand it and then click on next to the selected contact entry.
- In Contacts tab click on next to the selected contact entry. If required, click on **Search a contact** and enter the name of the contact.

The default mailing application on your computer opens with the email address of the contact prefilled.

4.3 Favorites

Favorites shows your contacts organized in favorites groups.

If you are working in UC Smart mode, you can create, rename and delete favorite groups. You can also add or remove contacts from groups and email or call your favorite contacts.

If you are working in UC Suite mode, you can only view your favorite groups and contacts and call a favorite contact.

4.3.1 How to create a group

Prerequisites

You are a UC Smart user.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Click on + at the top right.
4) Type a name for the group in the **Group Name** text field.
5) Click on **Create Group**.

4.3.2 How to rename a group

Prerequisites

You are a UC Smart user.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Hover over the name of the group you want to rename and click on .
4) Type a new name for the group.
5) Click on **Save**.

4.3.3 How to delete a group

Prerequisites

You are a UC Smart user.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Hover over the name of the group you want to delete and click on .
4) Click on **Delete Group** to confirm.

4.3.4 How to add a contact in a group

Prerequisites

You are a UC Smart user.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Click on a group to expand it.
4) Click on **Add a contact**.
5) Type the name of the contact in the **Search a contact** box.
   As you type in a list of suggested contacts is displayed to select from. Contacts who are already in the group are not listed.
6) Click on the checkbox next to the contact entry.
   You can add multiple contacts in the favorites group, by clicking on the corresponding checkboxes.
7) Click on **Add To Group**.

4.3.5 How to remove a contact from a group

Prerequisites

You are a UC Smart user.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Click on a group to expand it.
4) Locate the contact you want to remove, click on next to the entry and select **Remove**.

4.3.6 How to select a preferred phone number for a favorite contact

Prerequisites

The favorite contact has more than one numbers available.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
3) Click on a group to expand it.
4) Locate the contact you are interested and click ▼ to select a number.
5) From this point, when you click on 📞 next to the entry, the selected contact number will be called from your controlled device.

4.4 Call control

With myPortal for Teams you can control calls, e.g., transfer calls, connect calls, alternate between calls, make consultation calls, send calls to voicemail or make conference calls. You can call contacts by entering their number in Call Control or via the Call History, Contacts and Favorites tabs.

A red dot ● will appear next to the **Call Control** tab, when you are in an active call, and you navigate to another tab.

4.4.1 How to start a call

You can start a call from:

- Call History
- Contacts
- Favorites
- Call Control
- Notes

4.4.1.1 How to start a phone call from Call History

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Call History** tab.
   All recent calls are listed in chronological order.
3) Click on ☰ above the call history list and choose a one of the following filtering options:
   - All entries (Default)
   - Missed calls
   - Incoming calls
   - Outgoing calls

4) Locate the entry you are interested in and click on next to the selected entry.
The call is made through your controlled device.

4.4.1.2 How to start a phone call from Contacts

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Contacts** tab.
   Your contacts are displayed in the contacts list.
3) Optionally, click on **Search a contact** and enter the name of the contact.
4) Locate the entry you are interested in and click on next to the selected entry.

   The call is made through your controlled device. If the contact has more than one numbers, click on and select a number to call.

4.4.1.3 How to start a phone call from Favorites

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Favorites** tab.
   Your contacts organized in groups are shown.
3) Click on a group to expand it.
4) Locate the entry you are interested in and click on next to the selected entry.

   If the contact has more than one numbers, click on and select a number to call. If the contact has more than one numbers and you want to select a certain number as the preferred number for that contact, click on ▼ and select that number.

4.4.1.4 How to start a phone call from Call Control

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Select the **Call Control** tab.

3) Enter the phone number you want to call in the **Dial Phone Number** box, using your keyboard, the on-screen keypad or copy-paste the number.

   You can enter a number in the following formats:

   - Canonical numbers. Example: (+4989700712345; +49 (89) / 7007 - 12345)
   - Internal numbers. Example: (12345)

4) Click on or press `Enter`.

4.4.1.5 How to start a phone call from Notes

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.
2) Open the notes screen for a contact (see How to open and handle notes for contacts).
3) Click on at the top right of the notes screen.

   Alternatively, click on ••• and select the number you want to call from the **Call Numbers** menu.

4.4.2 How to answer a call

Incoming calls appear in the Call Control tab.

Step by Step

Click on in the incoming call window to answer the call.
You are in a call.

4.4.3 How to reject a call

Incoming calls appear in the Call Control tab.

Step by Step

Click on in the incoming call window to reject the call.
The call is rejected.

4.4.4 How to place a call on hold

While on an active call, you can place the call on hold to perform other tasks such as making or answering other calls.

Step by Step

1) Click on **Hold** to place the call on hold.
The other party is placed on hold until you reconnect or transfer the call.
2) Click on **Unhold** to resume the call.

4.4.5 How to transfer a call

You can transfer an active call or deflect an incoming call.

Step by Step

1) If you receive an incoming call, click on **Deflect**.
2) If you are on an active call, click on **Blind Transfer**.
3) Do one of the following:
   - In Call History, locate the entry you are interested in and click on .
   - Go to Favorites, locate the entry you are interested in and click on .
   - Go to Contacts, scroll through or search for a contact and click on .
   - Click on , enter the phone number of the contact you want to call in the **Dial Phone Number** box and click on .

4.4.6 How to make a consultation call

During a call, you can initiate a consultation call.

Step by Step

1) Click on **Consultation**.

> **NOTICE:** When all calls are on hold, or in other cases where all calls are shown in list view, the **Consultation** button is not available. Instead, you need to click on to make a consultation call.

2) Do one of the following:
   - In Call History, locate the entry you are interested in and click on .
   - Go to Favorites, locate the entry you are interested in and click on .
   - Go to Contacts, scroll through or search for a contact and click on .
   - Click on , enter the phone number of the contact you want to call in the **Dial Phone Number** box and click on .

   The active call goes on hold and the new call is initiated.

Next steps

Once the consultation call is established, you may choose to make an attended transfer, reconnect to a call on hold or alternate between a call on hold and the currently active call.

4.4.7 How to alternate between calls

You can alternate between a call on hold and an active call.

Step by Step

Click on ⇄ **Alternate** next to the call on hold.
The active call is placed on hold and the call on hold becomes the active call.

4.4.8 How to transfer a call after consultation

When you are in a consultation call, you can make an attended transfer.

Step by Step

Click on » **Attended Transfer** next to the call on hold to transfer the call.
The call on hold is transferred to the active call and you are disconnected.

4.4.9 How to reconnect to a call

When you have an active call and one or more calls on hold, you can reconnect to a call on hold, while dropping the active call.

Step by Step

Click on ▶ **Reconnect** next to the call on hold.
The active call drops and you reconnect back to the call on hold.

4.4.10 How to initiate a phone-controlled conference

When you are on two calls at the same time, you can add them to a conference room.

Step by Step

Click on ••• in the call screen and then select **Conference**.
The calls are merged into a conference and you can see the names or numbers of the conference participants on the call screen.

NOTICE: Phone controlled conference supports up to 7 participants.

4.4.11 How to drop a conference participant

You can drop a participant from a conference call when required (only if you have initiated the conference).

Prerequisites

You are in a conference call.

Step by Step

1) Locate the contact you want to remove in the **Participants** panel of the conference call window.
2) Click on **Drop** next to the selected contact.
   The contact is removed from the conference call.

4.4.12 How to view the list of conference participants

During a conference call you can view a list of all call participants.

Prerequisites

You are in a conference call.

Step by Step

Click on ⓘ at the top right of the Conference Call window.
The **Participants** list opens.

4.4.13 How to send a call to voicemail

You can transfer an incoming call to your voicemail.

Step by Step

Click on **Send to voicemail** in the incoming call window to send the call to your voicemail.

4.5 List view

While handling multiple calls, the application window can automatically switch to a list view of the calls.

- Calls are shown in a list view, if two or more calls are handled.
- Calls are shown in a list view, if the height of the screen is too small.
- While in a list view, if all calls are on hold, click on at the bottom right to make a new call.

4.6 Contact notes

User have a notes section with each of their contacts. You can add, search, or delete notes for your contacts as an easy way to keep a record of your calls, or follow-up items with your contacts. These notes are personal as they cannot be shared with others. You can add notes during a call or afterwards and revisit them at any time. To access and edit a contacts notes you can use the notes screen.

This screen is separated in two smaller sections. On the left, you can find a list containing the previous notes for a contact, while on the right, you can find an empty note, ready for editing. Additionally, the date that each note was created is displayed next to each note, in the notes list.

4.6.1 How to manage notes for a contact

How to access your notes

To access and edit your notes for each contact use the following tabs:

- In **Contacts** search for a contact, click on ••• and select **Notes**.
- In **Favorites** expand a group to locate the desired contact, click on ••• and select **Notes**.
- In **Call Control** while you are on a call with a contact, click on ••• and select **Notes**.

Add a new note

To add a new note either click on + or edit the empty note on the right section.

Each note has a predefined title that you may edit. To change the title of a note select the current title and replace it with your text.

To edit a note either click on the note's title or in the note's description and replace any text you want.

Delete a note

Select a note from the list of notes displayed on the left panel and click on at the top right.

Format a note

You can format your note's text in the following ways:

- Click on **> Title** to format text as title.
- Click on > **Body** to format text as body.
- Click on • **Bullet list** to mark lines as unordered list items.
- Click on **1. Numbered list** to mark lines as numbered list items.
- Click on **----- Divider** to place a straight line separating different note sections.
- Click on **B** **Bold** to make text bold.

- Click on *I* **Italics** to make text italics.
- Click on U **Underline** to underline text.

Search for a note

Type your text inside the **Search for a specific note** text field.

As you type, only notes matching your search term are displayed, in chronological order.

4.7 Presence and Connection Status

Presence status and connection status are shown only in the Favorites tab. Presence status indicates users availability, while connection status indicates OpenScape Business UC user device availability.

Presence statuses

Icon	Presence status	Availability	Default presence status duration
	Office	Available at the normal workplace.	Indefinite
	CallMe	Available	Indefinite
	Meeting	Busy, may not be able to respond.	1 hour
	Sick	Absent	Next day (07:00 a.m.)
	Break	Absent	15 minutes
	Gone Out	Absent	1 hour
	Vacation	Absent	Next day (07:00 a.m.)
	Lunch	Absent	1 hour
	At Home	Absent	Next day (07:00 a.m.)
	Do not Disturb	Do not disturb	1 hour

The **CallMe** functionality is only available in UC Suite mode.

The **Do not Disturb** option is not available for UC Smart in MULAP mode.

Connection status

Icon	Connection status	Availability
UL	**Green**	OpenScape Business UC user can make or receive calls.
UL	**Yellow**	OpenScape Business UC user device is ringing.

Icon	Connection status	Availability
	**Red**	OpenScape Business UC user is busy.

4.7.1 How to change presence status

You can see your presence status in the top left corner of the myPortal for Teams app, below your name. You can change your presence at any time as described below:

Step by Step

1) Click on myPortal for Teams in the left navigation bar of Microsoft Teams.

2) Click on your current active presence status at the top left.
The left pane now displays the list of available presence statuses (instead of the navigation bar). The main window is grayed out.

3) Select the desired presence status from the list.

4) To close the presence selection view, click on the grayed main window of myPortal for Teams.
The presence status is changed with a predefined duration (see Presence status and Connection status).

5) Alternatively, you can select the **Set Duration** button (see How to set duration for presence status) and select a presence status using the ▶ ▼ arrows.

4.7.2 How to set a duration for a presence status

You can set a duration for a presence status other than **Office**. Otherwise, a default presence status duration will be used and once that duration is over the presence status will be set back to **Office**.

Using the **Set Duration** button you can set custom values for a presence status duration (ie. **Vacation**), before returning to **Office**.

Step by Step

1) Click on myPortal for Teams in the left navigation bar of Microsoft Teams.

2) Click on your current active presence status at the top left.
The left pane now displays the list of available presence status (instead of the navigation bar). The main window is grayed out.

3) Click on the desired presence status.

4) Click on **Set Duration**.

5) Navigate with ▼ ▲ to select a month.

6) Click on the desired date in the calendar.

7) In the **Enter return time** field, select a number for hours and minutes in the corresponding drop-down lists.

8) Move the **AM - PM** slider to format the selected values.

9) Click **Apply**.

4.7.3 How to set a callme number

The CallMe service enables subscribers to define any phone at an alternative workplace as the CallMe destination at which they can be reached through their own internal phone numbers. This way the subscriber can use myPortal for Teams at an alternative workplace exactly as in the office.

Prerequisites

Your presence status is **Office**.

Step by Step

1) Click to change your presence status (see Change Presence Status).
2) Select **CallMe** from the presence status list.
3) Type the desired number in the **callme number** field.
4) Click on **Apply**.
   Calls you receive will be forwarded to the callme number set.

4.7.4 How to set a status message

When your presence status is other than **Office**, you can additionally set a status message that others can see in their **Favorites**.

Step by Step

1) Click on myPortal for Teams in the left navigation bar of Microsoft Teams.
2) Click on **Set Status Message** at the top left.
3) Type your message in the **Share something with your colleagues** text field.
4) Click on **Apply**.

4.8 Controlled devices

If you are in a Multiple Line Appearance (MULAP), you can view all the phone devices you control and select a device to use with myPortal for Teams.

4.8.1 How to select a controlled device

You can see the number of your currently active controlled device in the top left corner of the myPortal for Teams, just below you name. You can select a phone device to handle your calls.

Prerequisites

You are in a MULAP.

Step by Step

1) Click on **myPortal for Teams** in the left navigation bar of Microsoft Teams.

2) Click on the currently active controlled device at the top left.
The left pane now shows the list of available devices (instead of the navigation bar).

3) Select a device from the list.

This selection is valid for the specific computer device. If you log out from myPortal for Teams, the selection will change to the default one.

4) To close the list of the available devices and return to the previous view (where the left pane shows the navigation bar), click on the grayed main window of myPortal for Teams.

5 Settings

5.1 How to change language

myPortal for Teams is supported in 14 languages. You can change the user interface language at any time.

Step by Step

1) Click on **Settings** at the bottom left.
2) In the **General** tab under the **Language** section, select a language from the drop-down list.
   The user interface language of myPortal for Teams changes to the one that you have selected.

5.2 How to view the about page

In the About page, you can find information concerning the version of myPortal for Teams you are using and the address of the OpenScape Business system you are connected.

Step by Step

1) Click on **Settings** at the bottom left.
2) Select the **About** tab.
3) You can see the address of the system you are connected and your system version under **Connected to OpenScape Business** and **System Version** fields respectively.