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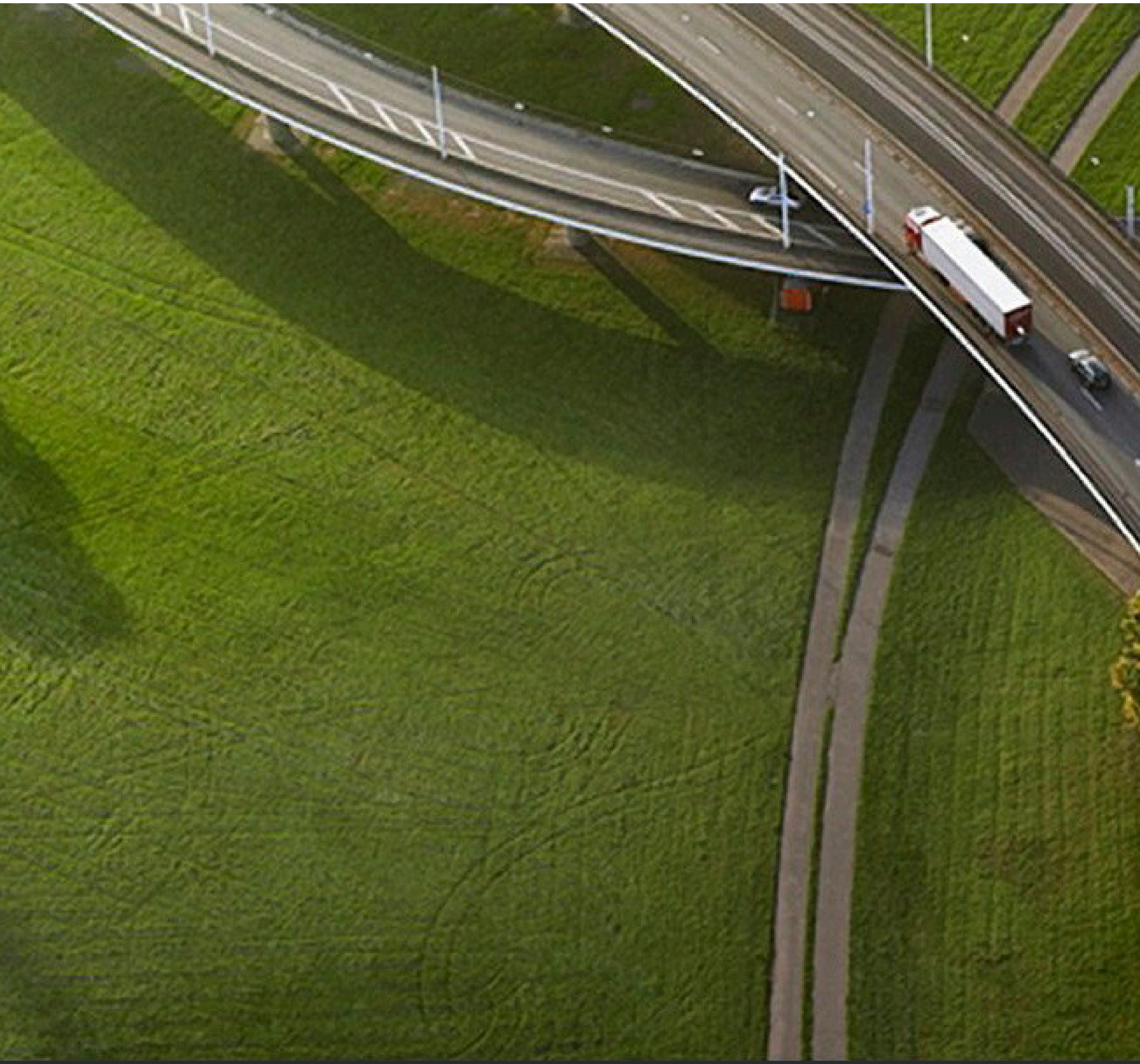

myPortal for Desktop

User Guide

A31003-P3030-U110-02-7619

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Contents

1 History of changes

Changes mentioned in the following list are cumulative.

Changes in V2R7

Impacted chapters	Change description
How to Install myPortal for Desktop (Windows)	Updated the installation procedure
How to Save a Fax Message	Added possibility to save multiple fax messages
Instant Messaging	Updated with new chat window

Changes in V2R6

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

1.1 History of improvements/fixes

Changes mentioned in this chapter are cumulative.

Changes in V3R1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000053323	31 May 2021	Added note for deflected calls	Journal on page 55

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 9

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 9

3 Introduction

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

3.1 myPortal for Desktop

myPortal for Desktop is an application for unified communications. Besides convenient dialing aids via phone directories and favorites and information on the presence status of other subscribers, the application can, for example, also used to access voicemails and fax messages.

myPortal for Desktop 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

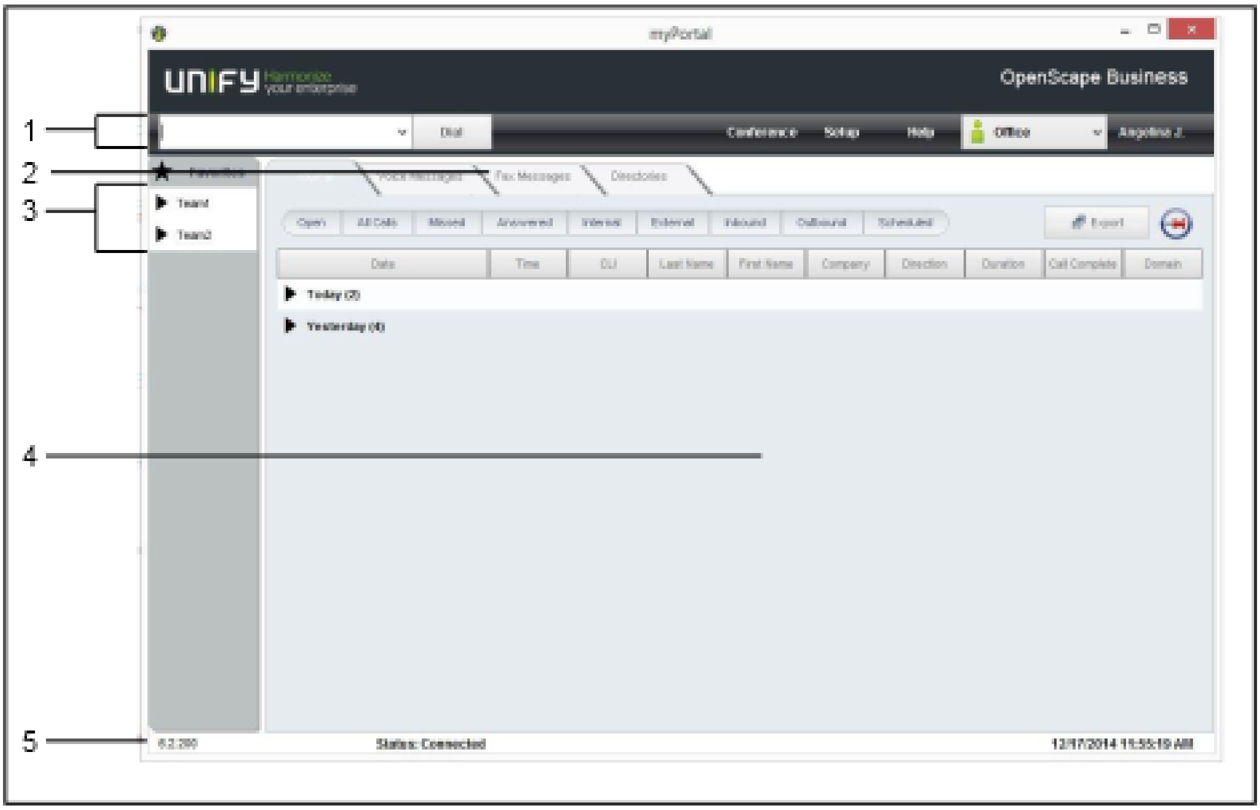
The user interface of myPortal for Desktop consists of the main window and various screen pops, depending on the situation.

You can configure the following types of interfaces:

- Classic user interface
- Modern user interface

This documentation primarily describes the operation of the classic user interface and points out important differences in the modern user interface.

Classic User Interface



The classic interface offers a large main window with the following elements:

- Menu bar (1) with:
  - Drop-down list for call numbers and the **Dial** button (**Answer** during an incoming call or **Hang Up** during an ongoing call).

    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.
  - **Conference** menu
  - **Setup** menu
  - **Help** menu
  - Symbol and also drop-down list for your presence status
  - Name of the logged in user
- Tabs (2)

  You can enable or disable the following tabs individually, but at least one must be active:

  - **Journal**

    possibly with the number of open calls next to it in parentheses
  - **Voicemails**

    possibly with the number of new voicemails next to it in parentheses
  - **Fax Messages**

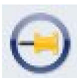
    possibly with the number of new fax messages next to it in parentheses
  - **Directories**
- Favorites list (3)

- Workspace (4):

  The information and actions available in the workspace depend on the selected tab.
- Status bar (5) with:
  - Status of myPortal for Desktop, e.g., **Connected**
  - Date and Time
  - Version information on the communication system, myPortal for Desktop and Java

With the classic user interface, the following elements can each be displayed in either the main window or in separate windows:

- **Journal**
- **Voicemails**
- **Fax Messages**
- **Directories**

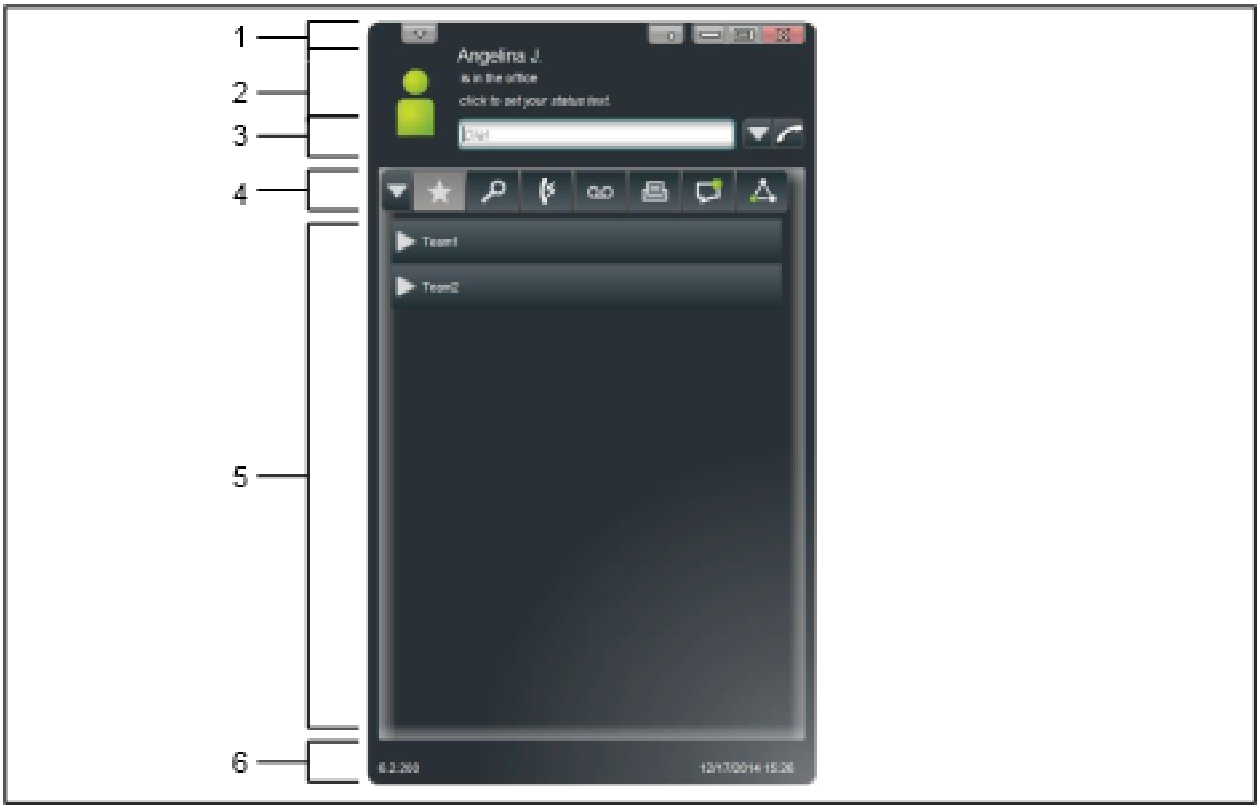
Symbol	Function
	Display in separate window
	Display in main window (also in the Favorites list with the **Hide to the right** or **Hide to the left** setting)

Modern User Interface

The modern user interface offers a main window with a small footprint in different views.

Modern User Interface: Normal View

The Normal view is activated by reducing the window width below a certain value in the Column view or by clicking on the triangle icon to the left of the symbol for the Favorites list in the Compact view, or by clicking a tab in the Compact view.



Modern User Interface: Column View

The Column view shows information about your presence on the left, with the Favorites list always displayed in the workspace on the left. The remaining elements are contained in the right column. The Column view is activated by increasing the window width above a certain value.

Modern User Interface: Compact View

In the Compact view, the workspace is hidden. The Compact view is activated by clicking on the triangle icon to the left of the symbol for the Favorites list.

The modern user interface offers the following elements in the main window:

- Title bar (1) with the following elements (from left to right):
  - Drop-down list for **Setup**, **Logout**, **Disconnect** and **Help**
  - **Minimize** button
  - **Minimize to tray pop symbol** button
  - **Maximize** button
  - **Close** button
- Information about your presence status (2) with the following elements:
  - Symbol and also drop-down list for your presence status
  - Text with your presence status
  - Info text for your presence status

    This text box becomes an input field when clicked.
- Drop-down list for call numbers (3) and the **Dial** button (**Answer** during an incoming call or **Hang Up** during an ongoing call).

  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.
- Tabs (4) with the following symbols:
  - Favorites list
  - **Directories** / **Search**
  - **Journal**
  - **Voicemails**
  - **Fax Messages**
  - **Instant messages**

    The tab flashes when new instant messages are received.
  - **Conferencing**

    The tab will flash at the beginning of a conference if another tab is active.

  The Journal, Voice Messages, Fax Messages, Instant Message, and Conferences tabs always display a red icon with an exclamation mark whenever any new items are available for them.
- Workspace (5):

  The information and actions available in the workspace depend on the selected tab. Clicking on a list entry in the Favorites list, directories, journals, voicemails, fax messages or conferences open it in the Detail view. The Details view enables further actions via context-sensitive buttons and the context menu.
- Status bar (6) with:
  - Version Information
  - Date and Time

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.

Tooltips

Tooltips are tiny windows in which myPortal for Desktop displays more information on 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.

Related concepts

Favorites List on page 49
Screen Pops on page 72
Conferences on page 83
Presence Status on page 27
Journal on page 55
Directories on page 41
Managing Voicemail on page 118
Managing Fax Messages on page 124

Related tasks

How to Change the Width of the Favorites List on page 54
How to Initiate a Call Manually on page 65
How to Select the User Interface Language on page 146
How to Change the User Interface on page 146
How to Enable or Disable Tabs on page 147
How to Restore the Display on page 147

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 Desktop

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

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

4.1 How to Install myPortal for Desktop (Windows)

Prerequisites

The administrator of your communication system has made the installation file or the link to the file 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 provided by your administrator and click **Next**.
4) After validation of IP address, the installer will check if .NET 4.5 is available and install it if not.
5) Click on **myPortal for Desktop** to mark it for installation.

   Clicking on an application will cycle between actions:

Symbol	Function
	**Install**
	**Repair**
	**Remove**

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

Related tasks

How to Start myPortal for Desktop on page 18
How to Uninstall myPortal for Desktop (Windows) on page 20
How to Uninstall myPortal for Desktop (Mac OS) on page 21

4.2 How to Install myPortal for Desktop (Mac OS)

Prerequisites

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

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

Step by Step

1) Run `myPortal.dmg`.
2) Click in **Finder** on **Devices** > **myPortal**.
3) Keep the **Ctrl** key pressed and click on **myPortal Installer**.
4) Select **Open** in the context menu.
5) Click on **Continue**.
6) Click on **Open**.
7) Click on **Install**.
8) Click on **Close**.

The login screen of myPortal for Desktop appears.

Next steps

Start myPortal for Desktop

Related tasks

How to Start myPortal for Desktop on page 18
How to Uninstall myPortal for Desktop (Windows) on page 20
How to Uninstall myPortal for Desktop (Mac OS) on page 21

4.3 How to Start myPortal for Desktop

Prerequisites

myPortal for Desktop is installed on your PC.

If you are working under a Mac OS: the secondary mouse button is activated (to use context menus).

Step by Step

1) Select one of the following options:

- Mac OS: click on **Programs** > **myPortal**.
- Windows: Click on **Start** > **Program Files** > **Communication Clients** > **myPortal**.

> **NOTICE:** The concurrent usage of myPortal for Desktop with myPortal for Outlook 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 Desktop 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 you are also a user of myAttendant, select **myPortal** in the drop-down list.

6) If the **Server IP** is displayed, enter the IP address or the name of the communication system or UC server in that field.
7) Click **Login**.

Related tasks

How to Install myPortal for Desktop (Windows) on page 17
How to Install myPortal for Desktop (Mac OS) on page 18
How to Change the Password on page 144
How to Enable or Disable an Automatic Login on page 145
How to Resolve the Problem: No Connection to the Communication System (Windows) on page 150
How to Resolve the Problem: Some other Application Starts Instead of myPortal on page 150

4.4 How to Exit myPortal for Desktop

On 64-bit Microsoft Windows operating systems, it may be necessary to manually close myPortal for Desktop before shutting down the PC.

Step by Step

1) Click on the **Close** icon in the title bar of the myPortal for Desktop window.
2) Click on **Yes**.

4.5 How to Uninstall myPortal for Desktop (Windows)

Prerequisites

myAttendant is also no longer required.

Step by Step

1) Close myPortal for Desktop.

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

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

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

      Click in the **Control Panel** on **Programs and Features**.
3) Click on **Edit** in the context menu of the **CommunicationsClients** entry.
4) Click **Modify**.
5) Select the **myPortal for Desktop / myAttendant** feature to be uninstalled.

Related tasks

How to Install myPortal for Desktop (Windows) on page 17
How to Install myPortal for Desktop (Mac OS) on page 18

4.6 How to Uninstall myPortal for Desktop (Mac OS)

Step by Step

1) Close myPortal for Desktop.

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

2) Click in **Finder** on **Programs**.

3) Drag **myPortal** to the **Recycle Bin**.

Related tasks

How to Install myPortal for Desktop (Windows) on page 17
How to Install myPortal for Desktop (Mac OS) on page 18

4.7 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.

4.7.1 How to Perform Automatic Updates (Windows)

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 the named programs.

Next steps

Restart myPortal for Desktop after the automatic update.

4.7.2 How to Perform Automatic Updates (MAC OS)

Prerequisites

You have received a message about a pending update.

Step by Step

Click **OK**.

Next steps

myPortal for Desktop restarts 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 Desktop
- 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 111.

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.

Importing Outlook Contacts into myPortal for Desktop (Windows)

You can have your Outlook contacts imported into the personal directory of myPortal for Desktop automatically on starting. You can then call them conveniently by using myPortal for Desktop, for example.

Related concepts

Voicemail Box on page 111

5.1 How to Select the User Interface Language

Step by Step

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

Next steps

Exit myPortal for Desktop and restart the application.

5.2 How to Select the Language of the Voicemail Box

Step by Step

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

5.3 How to Record your Name Announcement

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

Step by Step

1) Click **Setup**.
2) Click **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 111

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

     > **NOTICE:** The maximum recording length of Voicemail Greeting is limited to 1 minute.

   - If you want to record the personal greeting for **Busy**, click on **Busy**.
   - If you want to record the personal greeting for **No Answer**, click on **No Answer**.
5) Click **Record**. The voicemail box will now call you on your phone.
6) Accept the call from the voicemail box.
7) Speak out your personal greeting after the tone.
8) Click **Stop**.
9) If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10) If you want to record the announcement again, click on **Record**.
11) Click **Save**.

Related concepts

Voicemail Box on page 111

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

5.6 How to Create a Favorites List

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on one of the directories: **Internal Directory**, **External Directory** or **Personal Directory**.
3) Drag the desired contact to the Favorites list.

Related concepts

Favorites List on page 49

5.7 How to Enable the Import of Outlook or Mac OS Contacts at Startup

Prerequisites

You are working under Windows.

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Outlook Connectivity**.
3) Enable the **Import Outlook Contacts on Startup** check box.
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 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 Desktop 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:

Symbol	Presence status	Availability
	**Office** Only selectable if the CallMe service is not active Otherwise, **CallMe** appears here.	Available at the normal workplace
	**CallMe** Only selectable if the CallMe service is active Otherwise, **Office** appears here.	Available at an alternative workplace
	**Meeting**	absent - Redirected to voicemail or status-based call forwarding to another phone number

Symbol	Presence status	Availability
	**Sick**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Break**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Gone Out**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Vacation**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Lunch**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Gone Home**	absent - Redirected to voicemail or status-based call forwarding to another phone number
	**Do Not Disturb**	absent - Redirected to voicemail or status-based call forwarding to another phone number

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:

Symbol	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: 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.

Mapping of the External XMPP Status Internally (Classic User Interface)

The external XMPP status is mapped internally, so you can see the presence status of external XMPP communication partners in the Favorites list or the external directory, for example, provided XMPP has been configured. The following mappings apply (from left to right):

XMPP status	Represented as presence status
Online	Office
DND	Meeting
Away	Out of the Office
Extended Away	Vacation

NOTICE: Outlook contacts must include the XMPP ID In the IM address in accordance with the following pattern: `xmpp:john.public@oso.example-for-a-domain`.

Mapping of the Internal Presence Status Externally

External XMPP communication partners can see your XMPP status, provided XMPP has been configured. The following mappings apply (from left to right):

Presence status	Represented as XMPP status
Office	Online
Meeting	DND
Sick	Away
Break	Away
Out of the Office	Away
Lunch	Away
Gone Home	Away
Vacation	Extended Away

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 / iCal Appointments

You can automatically control your Presence status via 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 Desktop to have been started on your PC.
- iCal calendar

You can use the following keywords:

- **Meeting**
- **Sick**
- **Break**
- **Gone Out**
- **Vacation**
- **Lunch**
- **Gone Home**

> **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 fist takes effect. When this function is enabled, your Presence status changes automatically at the start and end time of the relevant appointment. The check for calendar appointments occurs at 30-second intervals.

> **NOTICE:** When enabling this function, please bear in mind that any appointments with these keywords in the Subject line could lead to undesirable changes in your Presence status. Consequently, you may nee 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 Desktop. The end time of the Outlook appointment remains unchanged in the event of a possibly delayed return. The Outlook appointments are created in your local pst file, regardless of whether or not your Outlook is open.

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 10
Directories on page 41
Favorites List on page 49
Journal on page 55
CallMe Service on page 35
Status-based Call Forwarding on page 36
Rule-Based Call Forwarding on page 37
Personal AutoAttendant on page 135

Related tasks

How to Enable or Disable the Announcement of your Presence Status for External Callers on page 116
How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 117

6.1.1.1 How to Change the Presence Status to Absent

Step by Step

1) Select one of the following options in the drop-down list for the Presence status: **Meeting**, **Sick**, **Break**, **Out of the Office**, **Vacation**, **Lunch**, **Gone 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, select one of the following options:

- Enter the info text in the **Notes** drop-down list.
- Select one of the previously used info texts shown in the **Notes** drop-down list.

4) Click **OK**.

Related tasks

How to Change the Presence Status to Office on page 32
How to Enable or Disable Automatic Resetting of the Presence Status on page 32
How to Enable the CallMe Service on page 36

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) Select **Office** in the drop-down list for the Presence status.
2) Click on the option **Return to the office**.
3) If you want to specify an info text for the Presence status, select one of the following options:
   - Enter the info text in the **Notes** drop-down list.
   - Select one of the previously used info texts shown in the **Notes** drop-down list.
4) Click **OK**.

Related tasks

How to Change the Presence Status to Absent on page 31
How to Enable or Disable Automatic Resetting of the Presence Status on page 32

6.1.1.3 How to Add an Info Text for your Presence Status

Prerequisites

You are working with the modern user interface.

Follow these steps if you want to add an info text without changing your presence.

Step by Step

1) Click in the text field for the info text about your presence status.
2) Enter the desired info text.

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

Step by Step

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

3) Select one of the following options:

- If you want to enable automatic resetting of the Presence status to **Office**, select the **Auto back to office** check box.
- If you want to disable automatic resetting of the Presence status to **Office**, clear **Auto back to office** check box.

4) Click **Save**.

Related tasks

How to Change the Presence Status to Absent on page 31
How to Change the Presence Status to Office on page 32
How to Enable the CallMe Service on page 36

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

Step by Step

1) Click on **Setup**.
2) Click on **Sensitivity** > **Presence Visibility**.
3) 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 117
How to Enable or Disable the Announcement of your Presence Status for External Callers on page 116

6.1.1.6 How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments

Prerequisites

You are working under Windows.

For Outlook appointments: your administrator has configured the Exchange Calendar Integration.

For Outlook appointments: you have specified a valid MS Exchange email address in myPortal for Desktop.

Step by Step

1) Click on **Setup**.

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** in the drop-down list.
   - If you want to enable automatic updating of the Presence status via Outlook appointments from the Outlook calendar, select the item **Outlook Calendar Integration** in the drop-down list.
   - If you want to disable automatic updating of the Presence status via appointments, select the item **No Calendar Integration** in the drop-down list.
4) Click **Save**.

Related concepts

Presence Status Keywords for Appointments on page 152

Related tasks

How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent on page 34

How to Specify your Email Address on page 141

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

Prerequisites

You are working under Windows.

Your administrator has configured the Exchange Calendar Integration.

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

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Outlook Connectivity**.
3) Choose one the following options in the **Outlook** area:
   - 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) Click **Save**.

Related tasks

How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments on page 33

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

Step by Step

1) Click on **Setup**.

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

3) Select one of the following options:

- If you want to enable screen pops on changing the Presence status, select the check box **Display tray pop on change of presence**.
- If you want to disable screen pops on changing the Presence status, clear the check box **Display tray pop on change of presence**.

4) Click **Save**.

Related concepts

Screen Pops on page 72

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) Select **Office** in the drop-down list for the Presence status.
2) Click on the option **Enable CallMe service**.
3) 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.
4) Click **OK**.

Related concepts

Call Number Formats on page 63

Related tasks

How to Change the Presence Status to Absent on page 31

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

How to Define an Additional Phone Number on page 141

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 vacation, to your representative.

Related concepts

Presence Status on page 27

Rule-Based Call Forwarding on page 37

Related tasks

How to Define an Additional Phone Number on page 141

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 **Setup**.

2) Click on **Call Rules** > **Forwarding Destinations**.

3) Choose one of the following destinations from the drop-down list in the row with the appropriate Presence status: **None**, **Mobile**, **Assistant**, **External 1**, **External 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, personal directory or from any station number)
- (except) when transferred to you from certain people (in the internal directory, external directory, personal directory 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 36

6.1.4.1 How to Add a Call Forwarding Rule

Step by Step

1) Click on **Setup**.

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

3) Click on **New**.

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

5) 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**.

6) Click **Destination**.

7) Enter the phone number in canonical or dialable format and click **OK**.

8) Click **Next**.

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

10) Click **Next**.

11) 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**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.

12) Click **Next** followed by **Finish**.

13) Click **Save**.

Related concepts

Call Number Formats on page 63

Related tasks

How to Edit a Call Forwarding Rule on page 39
How to Copy a Call Forwarding Rule on page 40
How to Rename a Call Forwarding Rule on page 40
How to Remove a Call Forwarding Rule on page 40
How to Change the Order of Call Forwarding Rules on page 41

6.1.4.2 How to Edit a Call Forwarding Rule

Step by Step

1) Click on **Setup**.
2) Click on **Call Rules** > **Rules Engine**.
3) Click on the relevant rule and then on **Edit**.
4) 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, clear the check box **This rule is active**.
5) If you want to change the phone number, click in the lower area on the underlined phone number and then enter the desired phone number in canonical or dialable format and click **OK.**
6) Click **Next**.
7) Select one of the following options:
    - If you want to add a condition, enable the check box **When ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays**, **transfer people** or **Presence Status**) to specify the condition more precisely in the next dialog.
    - If you want to edit a condition, click in the lower area on the appropriate underlined detail (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays**, **transfer people** or **Presence**) to specify the exception more precisely in the next dialog.
    - If you want to remove a condition, clear the **When …** check box in the appropriate row.
8) Click **Next**.
9) Select one of the following options:
    - 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**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.
    - If you want to edit an exception, click in the lower area on the appropriate underlined detail (**Start Date**, **End Date**, **Start Time**, **End Time**, **People**, **Type**, **Date Values**, **Weekdays** or **Presence Status**) to specify the exception more precisely in the next dialog.
    - If you want to remove an exception, clear the **Except when …** check box in the appropriate row.
10) Click **Next** followed by **Finish**.
11) Click **Save**.

Related concepts

Call Number Formats on page 63

Related tasks

How to Add a Call Forwarding Rule on page 38
How to Copy a Call Forwarding Rule on page 40
How to Rename a Call Forwarding Rule on page 40

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

6.1.4.3 How to Copy a Call Forwarding Rule

Step by Step

1) Click on **Setup**.
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 38
How to Edit a Call Forwarding Rule on page 39
How to Rename a Call Forwarding Rule on page 40
How to Remove a Call Forwarding Rule on page 40
How to Change the Order of Call Forwarding Rules on page 41

6.1.4.4 How to Rename a Call Forwarding Rule

Step by Step

1) Click on **Setup**.
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 38
How to Edit a Call Forwarding Rule on page 39
How to Copy a Call Forwarding Rule on page 40
How to Remove a Call Forwarding Rule on page 40
How to Change the Order of Call Forwarding Rules on page 41

6.1.4.5 How to Remove a Call Forwarding Rule

Step by Step

1) Click on **Setup**.
2) Click on **Call Rules** > **Rules Engine**.
3) Click on the relevant rule and then on **Remove**.
4) Click **Save**.

Related tasks

How to Add a Call Forwarding Rule on page 38
How to Edit a Call Forwarding Rule on page 39
How to Copy a Call Forwarding Rule on page 40
How to Rename a Call Forwarding Rule on page 40
How to Change the Order of Call Forwarding Rules on page 41

6.1.4.6 How to Change the Order of Call Forwarding Rules

Step by Step

1) Click on **Setup**.
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 38
How to Edit a Call Forwarding Rule on page 39
How to Copy a Call Forwarding Rule on page 40
How to Rename a Call Forwarding Rule on page 40
How to Remove a Call Forwarding Rule on page 40

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 Desktop provides the following directories, which support the functions shown below:

Sym-bol	Directory	Make Call	Look up caller names	Send Instant Message	Add to Fa-vorites	Add to Con-ference
D	Personal directory: You can use the personal directory to either add, edit and delete your per-sonal contacts individually or, when using Windows, to import your Out-look contacts on starting myPortal-for Desktop. If you import the Out-look contacts, you cannot edit them in myPortal for Desktop.	x	x	-	x	x
i	Internal directory (symbol for system phones in accordance with current Presence status) Contains internal subscribers and MULAP groups for which the display is activated in the system together with their presence status (only sys-tem telephones). When a subscriber is absent, you can see the scheduled time of return in the **Date / Time** col-umn, provided that subscriber has al-lowed his or her Presence status to be visible to you. Any info text that may have been entered by the sub-scriber is also displayed. Internal directory contains as well any additional non-UC phone num-bers, provided the subscriber has made this information visible to other internal subscribers. These numbers don’t have a presence status. Internal directory contains also groups and virtual stations that are marked with the icon . By activating the **Show Users only** check box, Internal Directory shows only users with basic license activat-ed, and hides groups and virtual sta-tions.	x	x	x	x	x

Symbol	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites	Add to Conference
	External directory: Contains contacts that are created or imported by the administrator of the communication system.	x	x	-	x	x
	External Offline Directory (LDAP): 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
	System Directory Contains all system numbers, UC and non UC users. Non UC users include stations with no UC licenses and virtual stations, like Fax, AutoAttendant.	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 contacts in the classic interface shows different details from among those listed below: **Extension**, **Date / Time**, **Last Name**, **First Name**, **Mobile Ph.**, **Assistant Ph.**, **External**, **Home Ph. 1**, **Business Ph. 1**, **Business Ph. 2**, **Fax Ph.**, **Email**, **XMPP ID**, **Department**, **Site**, **Company** and **Customer ID**.

Simple Search

You can search the directories 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. Al search terms used are saved. You can optionally delete the list of search terms used.

Advanced Search

You can selectively search in the **Title**, **First Name**, **Last Name**, **Company**, **Extension**, **Company Ph.**, **Business Ph. 1**, **Business Ph. 2**, **Home Ph. 1**, **Home Ph. 2**, **Mobile Number** and **Email** fields and limit the maximum number of hits. The modern interface of myPortal for Desktop does not support the advanced search.

Sorting

You can sort the contacts of a directory by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order. The modern interface of myPortal for Desktop does not support sorting.

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. The modern interface of myPortal for Desktop does not support zooming in on an entry.

Related concepts
User Interface Elements on page 10
Favorites List on page 49
Screen Pops on page 72
Presence Status on page 27
Configuration on page 140
Related tasks
How to Pick up a Call for Another Subscriber on page 64
How to Call from a Directory (Classic User Interface) on page 66
How to Call from a Directory (Modern User Interface) on page 66
How to Enable or Disable the Opening of the Main Window on Inbound Calls on page 79
How to Send an Instant Message on page 134
How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52
How to Add Contacts from the Journal to the Personal Directory on page 61
How to Add Conference Participants on page 90

6.2.1.1 How to Search in Directories (Classic User Interface)

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on **Search** to open the Search mask.
3) If necessary, click on **Options** to display the Search options.

4) 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**.

5) If necessary, click on **Advanced** to switch between simple and advanced searches.
6) Select one of the following options:
   - If you want to perform a simple search, enter a search term in the drop-down list and click **Search**. If your search returns a result, myPortal-for Desktop will display a hit list.
   - If you want to perform an advanced search, click on **Advanced**, enter a search term in the appropriate field and click **Search**. If your search returns a result, myPortal for Desktop will display a hit list.
7) To abort an ongoing search, click **Stop**.
8) To delete the list of search terms used, click **Clear History**.
9) To return from the hit list to the directory, click on the desired directory.

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add Conference Participants on page 90

6.2.1.2 How to Search in Directories (Modern User Interface)

Step by Step

1) Click on the **Directories** / **Search** tab.
2) Enter a search term in the input field.
3) Select one of the following Search options:
   - If you want to search for a full word, select the **Match Full Word** option.
   - If you want to search for a part of a word, select **In string**.
4) Click on the **Search** button.

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add Conference Participants on page 90

6.2.1.3 How to Sort a Directory

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on the desired directory, e.g., **Internal Directory**.
3) Click on one of the column titles, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.
5) 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 46

6.2.1.4 How to Perform a Quick Search by Name

Step by Step

Enter a name as the search term in the drop-down list for phone numbers and press the `Enter` key.

6.2.1.5 How to Zoom in on an Entry

Prerequisites

You are working with the classic user interface.

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

Step by Step

1) Click on any item in the list.
2) Enter the first character of the desired hit.

Related concepts

Journal on page 55

Related tasks

How to Sort a Directory on page 46
How to Sort the Journal on page 57

6.2.1.6 How to Add a Personal Contact

Prerequisites

The importing of Outlook or Mac OS contacts at startup is disabled.

You are working with the classic user interface.

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on **Personal Directory**.
3) Click **Add**.
4) Enter the contact data in the **Personal Contact** window.

> **NOTICE:** Any **XMPP ID** that may be specified must match the pattern `xmpp:john.public@oso.example-domain.com`.

5) Click **Save**.

Related tasks

How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52
How to Edit a Personal Contact on page 47
How to Delete a Personal Contact on page 48
How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup on page 48

6.2.1.7 How to Edit a Personal Contact

Prerequisites

The importing of Outlook or Mac OS contacts at startup is disabled.

You are working with the classic user interface.

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on **Personal Directory**.
3) Click on the relevant personal contact.
4) Click **Edit**.
5) Edit the contact data in the **Personal Contact** window.

> **NOTICE:** Any **XMPP ID** that may be specified must match the pattern `xmpp:john.public@oso.example-domain.com`.

6) Click **Save**.

Related tasks

How to Add a Personal Contact on page 46
How to Delete a Personal Contact on page 48
How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup on page 48

6.2.1.8 How to Delete a Personal Contact

Prerequisites

The importing of Outlook or Mac OS contacts at startup is disabled.

You are working with the classic user interface.

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on **Personal Directory**.
3) Select one of the following options:
   - Click on the relevant personal contact.
   - Mark the relevant personal contacts.
4) Click on **Remove**, followed by **Yes**.

Related tasks

How to Add a Personal Contact on page 46
How to Edit a Personal Contact on page 47
How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup on page 48

6.2.1.9 How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup

Prerequisites

You are working under Windows.

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Outlook Connectivity**.
3) Choose one the following options in the **Outlook** area:
   - If you want to enable the importing of Outlook contacts on starting myPortal for Desktop, select the **Import Outlook Contacts on Startup** check box.
   - If you want to disable the importing of Outlook contacts on starting myPortal for Desktop, clear the **Import Outlook Contacts on Startup** check box.
4) Click **Save**.

Related tasks

How to Add a Personal Contact on page 46
How to Edit a Personal Contact on page 47
How to Delete a Personal Contact on page 48

6.2.1.10 How to Export a Personal Directory

You can export your personal directory including all contact details in a .CSV file with ";" as field delimiter.

IMPORTANT: The **Export** functionality includes only System contacts. Imported Outlook contacts, that are showing under **Personal Directory** view, are not included in the exported CSV file.

Step by Step

1) Click on the **Directories** tab.
2) Click on **Personal Directory**.
3) Click **Export.**
4) Select the directory in which the CSV file will be stored and click **Save**.

6.2.1.11 How to Import a Personal Directory

You can import a CSV or XML file into myPortal for Desktop. The imported contact details will be displayed in the personal directory. You can later edit the imported contacts details.

Prerequisites

You have exported the existing personal directory by clicking on **Export** under **Directories> Personal Directories** and saving the exported file.

You have included the contact details in the exported personal directory at the existing format, with ";" as field delimiter.

You are working with the classic user interface.

NOTICE: After importing the contact details, you can switch to the modern user interface if needed.

NOTICE: The import will overwite the existing contacts in the personal directory.

Step by Step

1) Click on the **Directories** tab.
2) Click on **Personal Directory**.
3) Click **Import.**

   A pop up is displayed, indicating that the import will overwrite the existing personal directory.
4) Select the CSV file including your personal directory and click **Open**.

   The personal directory is uploaded to the system.

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, with the classic user interface also external XMPP communication partners, are shown together with their Presence status and can be contacted via instant messaging.

You can add contacts from all directories 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 Favorites list manages contacts in 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.

For each entry in the Favorites list, the modern user interface additionally displays the image and info text on the presence status of the user in the overview, to the extent that this is available. The Details view includes, among other things, the standard phone number and context-sensitive buttons, e.g., for **Make Call**, **Take Call**, **Send Instant Message** and **Add to Conference**.

> **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.

Related concepts

User Interface Elements on page 10

Directories on page 41

Presence Status on page 27

Configuration on page 140

Related tasks

How to Pick up a Call for Another Subscriber on page 64

How to Create a Favorites List on page 26

How to Make a Call from the Favorites List (Classic User Interface) on page 66

How to Make a Call from the Favorites List (Modern User Interface) on page 67

How to Add Conference Participants on page 90

How to Send an Instant Message on page 134

6.2.2.1 How to Add a Group to the Favorites List

Step by Step

1) Select one of the following options:
   - Classic user interface:

     Right-click in a free area of the Favorites list to open the context menu and select **New Group**.
   - Modern user interface:

     Click on the Favorites list icon, and then click in a free area of the Favorites list to open the context menu and select **Add Group**.
2) Enter a **Group Name**.
3) Click **OK**.

Next steps

Add contacts to the Favorites list.

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52
How to Delete a Group from the Favorites List on page 51
How to Rename a Group in the Favorites List on page 51

6.2.2.2 How to Rename a Group in the Favorites List

Step by Step

1) Select one of the following options:
   - Classic user interface:

     Click on **Rename Group** in the context menu for the relevant group name in the Favorites list.
   - Modern user interface:

     Click on the Favorites list icon and then on **Rename Group** in the context menu of the relevant group name in the Favorites list.
2) Enter a **Group Name**.
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 51

6.2.2.3 How to Delete a Group from the Favorites List

Step by Step

Select one of the following options:

- Classic user interface:

  Click on **Remove Group** in the context menu for the relevant group name in the Favorites list.
- Modern user interface:

  Click on the Favorites list icon and then on **Remove Group** in the context menu of the Favorites list.

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

6.2.2.4 How to Add a Contact to the Favorites List (Classic User Interface)

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Select one of the following options:
   - Click on one of the directories: **Internal Directory**, **External Directory** or **Personal Directory**.
   - Search the directories; see How to Search in Directories (Classic User Interface) on page 44 for details.
3) Drag the desired contact to the Favorites list.

Related concepts

Directories on page 41

Related tasks

How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52
How to Search in Directories (Classic User Interface) on page 44
How to Search in Directories (Modern User Interface) on page 45
How to Specify a Default Number for a Favorite on page 54
How to Add a Group to the Favorites List on page 51
How to Delete a Contact from the Favorites List on page 53

6.2.2.5 How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface)

Step by Step

1) Click on the Favorites list icon.
2) In the context menu of the Favorites list, click on **Add Favorites**.
3) Click on **New Contact**.
4) Enter the contact data.

NOTICE: Any **XMPP ID** that may be specified must match the pattern `xmpp:john.public@oso.example-domain.com`.

---

5) If you want to include the contact via the entered **XMPP ID**, click on **Subscribe for IM**.
6) Click **Add**.

Related concepts

Directories on page 41

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add a Personal Contact on page 46
How to Specify a Default Number for a Favorite on page 54
How to Add a Group to the Favorites List on page 51
How to Delete a Contact from the Favorites List on page 53

6.2.2.6 How to Delete a Contact from the Favorites List

Step by Step

Select one of the following options:

- Classic user interface:

  Click on **Remove Favorite** in the context menu for the relevant contact in the Favorites list.
- Modern user interface:

  Click on the Favorites list icon, and then on **Remove Favorite** in the context menu of the relevant contact in the Favorites list.

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52
How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52

6.2.2.7 How to Change the Sorting of the Favorites List

Step by Step

Right-click in a free area of the Favorites list to open the context menu and select one of the following entries:

- **Sort By First Name**
- **Sort By Last Name**
- **Sort By User Define** for the original sorting order.

6.2.2.8 How to Specify a Default Number for a Favorite

Step by Step

1) Select one of the following options:

- Classic user interface:

  Click on **Select Phone Number** in the context menu for the relevant contact in the Favorites list.
- Modern user interface:

  Click on the Favorites list icon and then on **Select Phone Number** in the context menu of 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 **OK**.

Related tasks

How to Add a Contact to the Favorites List (Classic User Interface) on page 52

How to Add a Contact to the Favorites List and Personal Contacts (Modern User Interface) on page 52

How to Make a Call from the Favorites List (Classic User Interface) on page 66

How to Make a Call from the Favorites List (Modern User Interface) on page 67

6.2.2.9 How to Change the Width of the Favorites List

Prerequisites

You are working with the classic user interface.

The Favorites list is located in the main window of myPortal for Desktop.

Step by Step

Move the right edge of the Favorites list with the mouse in the desired direction.

Related concepts

User Interface Elements on page 10

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

Prerequisites

You are working with the classic user interface.

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

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 **Favorites** drop-down list:
   - If you want the Favorites list to be displayed at the edge of the screen and automatically hidden, select **Hide to the left** or **Hide to the right**.
   - If you do want the Favorites list to be displayed in the main window of my-Portal, select **Do not hide**.
4) Click on **Save**.

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** (classic user interface)

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

  > **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 calls**
- **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.

- **Accepted**
- **Internal** (classic user interface)
- **External** (classic user interface)
- **Inbound** (classic user interface)
- **Outbound** (classic user interface)
- **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 Desktop 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 Desktop informs you of any pending scheduled calls on exiting the program. On starting the application, myPortal for Desktop 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.

Not all folders for call types are available in the modern user interface myPortal for Desktop.

On starting the modern user interface myPortal for Desktop, only 100 journal entries are loaded. After that and when new calls come in, the number in call history will exceed 100 records.

Grouped by time period (classic user interface)

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

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

The number of Journal entries contained in the group is displayed on the right of the group designation in parentheses. The grouping by time period is not available in the modern user interface of myPortal for Desktop.

Call Details

Every call is shown with the date and time and, if available, with the **call number**. If a directory contains further details on the call number such as the **Last Name**, **First Name** and **Company**, then this information is also shown. In addition, the **Direction**, **Duration** and **Call Complete** columns are also displayed in most folders. Not all call details are available in the modern user interface of myPortal for desktop.

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

Direction	Meaning
	Inbound
	Outbound

Call Complete	Meaning
	The call was successful or was answered.

Sorting (classic user interface)

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. Sorting is not available in the modern user interface of myPortal for Desktop.

Zooming in on an entry (classic user interface)

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. Zooming in on an entry is not available in the modern user interface of myPortal for Desktop.

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 10

Presence Status on page 27

Related tasks

How to Make a Call from the Journal (Classic User Interface) on page 67

How to Make a Call from the Journal (Modern User Interface) on page 68

How to Zoom in on an Entry on page 46

How to Enable or Disable the Closing of Screen Pops at the End of a Call on page 80

6.2.3.1 How to Sort the Journal

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.
2) Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound** or **Scheduled**.
3) If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.

4) Click on one of the column titles, e.g., **Last Name**, to sort the Journal entries by this criterion in ascending alphanumeric order.
5) If you want to reverse the sort order, click again on column header.

Related tasks

How to Group Journal Entries on page 58
How to Zoom in on an Entry on page 46

6.2.3.2 How to Group Journal Entries

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.
2) Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound** or **Outbound**.
3) Select one of the following options in the context menu of any column header:
   - **Group By:Date**
   - **Group By:Phone Number**
   - **Group By:Last Name, First Name**
   - **Group By:First Name, Last Name**
   - **Group By:Company**
4) Double-click on the triangle on the left of the relevant group to expand the associated Journal entries.

Related tasks

How to Sort the Journal on page 57

6.2.3.3 How to Delete Journal Entries

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) If you are working with the classic user interface, double-click on the triangle on the left of the relevant group to expand the associated Journal entries if required.
4) Select one of the following options:
   - If you want to delete an entry, 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 **Remove** in the context menu.
6) Click **Yes**.

Related tasks
How to Change the Retention Period for Journal Entries on page 59

6.2.3.4 How to Change the Retention Period for Journal Entries

Step by Step

1) Click on **Setup**.
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 58

6.2.3.5 How to Add a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.
2) Click on the **Scheduled** group.
3) Click on **Add**.
4) Select one of the following options:
   - Enter the phone number in dialable format or in canonical format in the **Phone Number** drop-down list.
   - Select a phone number from the **Phone Number** drop-down list and press the `Enter` key.
5) Under **Schedule Time**, select the time from the list box and the date from calendar control.
6) If you want to add a text to the scheduled call, enter it in the **Notes** field.
7) Click on **Save**.

> **NOTICE:** Alternatively, you can add a scheduled call to a party you cannot reach at the moment from the screen pop of the call. The schedule call window will remain open, even if the screen pop of the call is closed.

Related concepts

Screen Pops on page 72

Related tasks

How to Edit a Scheduled Call on page 60
How to Clear a Scheduled Call on page 60

6.2.3.6 How to Edit a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.

2) Click on the **Scheduled** group.

3) Click on the relevant entry.

4) Click **Edit**.

5) Select one of the following options:

- Enter the phone number in dialable format or in canonical format in the **Phone Number** drop-down list.
- Select a phone number from the **Phone Number** drop-down list and press the `Enter` key.

6) Under **Schedule Time**, select the time from the list box and the date from calendar control.

7) If you want to add a text to the scheduled call, enter it in the **Notes** field.

8) Click on **Save**.

Related tasks

How to Add a Scheduled Call on page 59
How to Clear a Scheduled Call on page 60

6.2.3.7 How to Clear a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.

2) Click on the **Scheduled** group.

3) Click on the relevant entry.

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

Related tasks

How to Add a Scheduled Call on page 59
How to Edit a Scheduled Call on page 60

6.2.3.8 How to Add Contacts from the Journal to the Personal Directory

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Journal** tab or in the corresponding window.

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

3) If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.

4) Click on the relevant entry.

5) Select **Copy to personal** in the context menu.

6) Enter the contact data in the **Personal Contact** window.

> **NOTICE:** Any XMPP ID that may be specified must match the pattern xmpp:john.public@oso.example-domain.com.

7) Click **Save**.

Related concepts

Directories on page 41

6.2.3.9 How to Configure the Journal Export

Use the following steps to

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

Step by Step

1) Click on **Setup**.

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

3) In the **Journal** area, under **Export path**, click on **Search**.

4) Select the desired storage location for the CSV file and click **Save**.

5) Enable or disable the automatic export of journal data:

- If you want to activate the automatic export, select the **Enable export** check box.
- If you want to deactivate the automatic export, clear the **Enable export** check box.

6) Click on **Save**.

6.2.3.10 How to Export the Journal Manually

Prerequisites

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

Step by Step

1) Click on the **Journal** tab or in the corresponding window.
2) Click on **Export**.

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

6.2.3.11 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.

   The contact data of the caller is transferred to the email text. The email recipient (To... :) field is not prefilled.

This option is supported only in classic mode.

6.2.3.12 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.

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.	• 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.

Related concepts

Desktop Dialer on page 71

Related tasks

How to Initiate a Call Manually on page 65
How to Enable the CallMe Service on page 36
How to Add a Call Forwarding Rule on page 38
How to Edit a Call Forwarding Rule on page 39
How to Edit a Profile for the Personal AutoAttendant on page 138
How to Configure and Initiate an Ad-hoc Conference on page 89
How to Configure a Scheduled Conference on page 96
How to Configure a Permanent Conference on page 104
How to Enable or Disable the Notification by Phone on page 131
How to Define an Additional Phone Number on page 141

6.3.2 Call Functions

You can control call functions with myPortal for Desktop, e.g., accept calls or pick up calls for another subscriber. You can call subscribers directly by entering their phone number or their name or through entries from the journal, the favorites list or a directory. You can control the call functions in screen pops as well as the main window.

Related concepts

Desktop Dialer on page 71
Screen Pops on page 72

6.3.2.1 How to Answer a Call

Step by Step

Click in the **Inbound Call** screen pop on the **Answer** symbol.

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

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79

6.3.2.2 How to Pick up a Call for Another Subscriber

Step by Step

Select one of the following options:

- Classic user interface:

  Click on the **Directories** tab or window, then on **Internal Directory** and on the subscriber being called, and then select **Call Pickup** from the context menu.
- Modern user interface:

  Click in the Favorites list on the subscriber being called and select **Call Pick-up** from the context menu.

Related concepts

Directories on page 41
Favorites List on page 49

6.3.2.3 How to Redirect a Call to your Voicemail Box

Prerequisites

Screen pops for inbound calls have been activated.

Step by Step

Click in the **Inbound Call** screen pop on the **Forward** symbol.

Related concepts

Voicemail Box on page 111

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79

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 **Dial** or press the `Enter` key.
- Enter the first few letters of a name (at least 3 characters) in the drop-down list for phone numbers. All names starting with the entered letters are displayed in a list. Select the desired name and click on **Dial** or press the `Enter` key.
- Select a phone number or a name from the drop-down list for phone numbers and click **Dial** or press the `Enter` key.

Related concepts

User Interface Elements on page 10
Call Number Formats on page 63

6.3.2.5 How to Call from a Directory (Classic User Interface)

Step by Step

1) Click on the **Directories** tab or in the corresponding window.
2) Click on one of the directories: **Personal Directory**, **External Directory** or **Internal Directory**.
3) Select one of the following options:
   - Double-click in the relevant directory entry on the desired station number.
   - Click in the context menu of the relevant directory entry on the desired station number.

Related concepts

Directories on page 41

Related tasks

How to Call from a Directory (Modern User Interface) on page 66

6.3.2.6 How to Call from a Directory (Modern User Interface)

Step by Step

1) Click on **Directories** / **Search**.
2) Enter a search term in the input field.
3) Click on the **Search** button.
4) Click on the relevant directory entry.
5) Select one of the following options:
   - If you want to use the standard phone number of the contact, click on **Make Call**.
   - If you want to use any other number of the contact, click in the context menu on the desired number.

Related concepts

Directories on page 41

Related tasks

How to Call from a Directory (Classic User Interface) on page 66

6.3.2.7 How to Make a Call from the Favorites List (Classic User Interface)

Step by Step

1) If required, double-click on the triangle on the left of the relevant group to expand the associated entries in the Favorites list.
2) Select one of the following options:
   - If you want to use the standard phone number of the Favorites, double-click on the relevant subscriber.
   - If you want to use any other number of the Favorites, click in the context menu of the relevant subscriber on the desired station number.

Related concepts

Favorites List on page 49

Related tasks

How to Make a Call from the Favorites List (Modern User Interface) on page 67

How to Specify a Default Number for a Favorite on page 54

6.3.2.8 How to Make a Call from the Favorites List (Modern User Interface)

Step by Step

1) Click on the Favorites list icon.
2) Click on the relevant contact.
3) Select one of the following options:
   - If you want to use the standard phone number of the contact, click on Make Call.
   - If you want to use any other number of the contact, click in the context menu on the desired number.

Related concepts

Favorites List on page 49

Related tasks

How to Make a Call from the Favorites List (Classic User Interface) on page 66

How to Specify a Default Number for a Favorite on page 54

6.3.2.9 How to Make a Call from the Journal (Classic User Interface)

Step by Step

1) Click on the **Journal** tab or in the corresponding window.
2) Click on one of the folders: **Open**, **All Calls**, **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 use the standard phone number of the contact, double-click on the relevant journal entry.
   - If you want to use any other number of the contact, click in the context menu of the relevant journal entry on the desired number.

Related concepts

Journal on page 55

Related tasks

How to Make a Call from the Journal (Modern User Interface) on page 68

6.3.2.10 How to Make a Call from the Journal (Modern User Interface)

Step by Step

1) Click **Journal**.
2) Click on one of the folders: **All Calls**, **Missed**, etc.
3) Click on the relevant journal entry.
4) Select one of the following options:
   - If you want to use the standard phone number, click **Make Call**.
   - If you want to use any other available number of the contact, click in the context menu on the desired number.

Related concepts

Journal on page 55

Related tasks

How to Make a Call from the Journal (Classic User Interface) on page 67

6.3.2.11 How to Transfer a Call

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

1) Click on **Transfer** in the **Inbound Call** and **Outbound Call to …** screen pops.
2) Click on the desired subscriber in the subscriber list and then on **Transfer**.
3) If you receive a window with the prompt: `Does the other party wish to accept this call?`, click **Yes**.

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79
How to Enable or Disable Screen Pops on Outbound Calls on page 80
How to Configure a Call Transfer on page 148

6.3.2.12 How to Place a Call on Hold

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

1) Click on the **Hold** symbol in the **Inbound Call** and **Outbound Call to …** screen pops.
2) When you want to resume (unhold) the call, click on the **Reconnect** symbol.

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79

How to Enable or Disable Screen Pops on Outbound Calls on page 80

6.3.2.13 How to Record a Call

Prerequisites

Live recording is enabled in the communication system.

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 **Record** symbol in the **Inbound Call** and **Outbound Call to …** screen pops.
2) If you want to stop the recording before the call ends, click on the **Stop Live Recording** symbol.

Related concepts

Ad-hoc Conference on page 88

Scheduled Conference on page 94

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79

How to Enable or Disable Screen Pops on Outbound Calls on page 80

6.3.2.14 How to Record a Conference

Prerequisites

Live recording is enabled in the communication system.

You are currently participating in a conference as a conference controller.

Step by Step

1) Right click on the conference symbol in the conference window and then click on **Record**.
2) If you want to stop the recording before the conference ends, right click on the conference symbol and select **Stop Rec**.

6.3.2.15 How to Start Web Collaboration During a Call

Prerequisites

You are working under Windows.

Screen pops for inbound and outbound calls have been activated.

Step by Step

Click on the **Web Collaboration** symbol in the **Inbound Call** and **Outbound Call to …** screen pops.

Related concepts

Screen Pops on page 72
Web Collaboration on page 108

6.3.2.16 How to Contact Unavailable Subscribers by E-mail (not possible with OpenScape Office)

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**.

6.3.2.17 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**.

6.3.2.18 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.

- Click on the **Hang Up** symbol in the **Inbound Call** and **Outbound Call to …** screen pops.
- Click on **Hang Up** in the main window.

Related tasks

How to Enable or Disable Screen Pops on Inbound Calls on page 79
How to Enable or Disable Screen Pops on Outbound Calls on page 80

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 of letters 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 63
Call Functions on page 64

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

Prerequisites

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

Step by Step

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

- 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 **Setup**.

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

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

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

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

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

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

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

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

6) Click on **Save**.

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

6.3.4 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.

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

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

You can define the following settings for the screen pops:

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

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

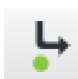
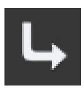
The user interface includes also a field called **Forwarded from:**. This field is displayed in the screen pop when the inbound call is forwarded by another extension. In this way, you can see the original caller and the person who forwarded the call to you. Only for modern skin.

If multiple screen pops are open, they can be expanded and collapsed. The new user interface is not available with OpenScape Office.

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

Screen Pop on Inbound Calls

The following functions are available:

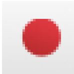
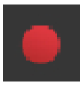
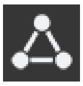
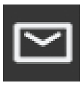
Symbol		**Function**
Classic	**New**	
		**Answer**
		**Forwarding** Forwards the call to the voicemail box

Symbol		Function
Classic	**New**	
		Answer with message Email to the caller. Example: You cannot accept the call and want to notify the caller (e.g., will"call right back"). The email recipient (To:) field is prefilled with the email address of the caller, 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 caller to that subscriber. The email recipient (To... :) field is not prefilled. The contact data of the caller is transferred to the email text. Not possible with OpenScape Office.
		Instant Messaging Message to the caller.
		Schedule Callback Configure the date and time as well as an info text to call the caller again.

Screen Pop During the Call

The following functions are available:

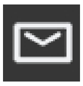
Symbol		Function
Classic	**New**	
		Hang Up
		Transfer Transfers the call after the input of a number to be dialed or a name to be found.
		Hold The communication partner is placed on hold so that you can consult with someone in the room or call some other subscriber. The caller on hold cannot hear your conversations.

Symbol		Function
Classic	New	
		**Record** (if enabled in the system)
		**Conferencing** The call can be expanded to an ad-hoc conference and further participants can be added. Not possible with OpenScape Office.
		**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. Not possible with OpenScape Office.
		**Instant Messaging** Message to the communication partner.
		**Schedule Callback** Configure the date and time as well as an info text to call the communication partner again.
		**Start Collaboration** Starts the separate Web Collaboration product for access to features such as desktop and application sharing, file sharing, and video chat.

Symbol		Function
Classic	New	
 	 	**Transfer / Search** If a phone number is entered in the field in front of the arrow, clicking on the arrow will transfer the call to that phone number. When the initial letters of a name are entered in the field in front of the arrow, 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

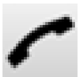
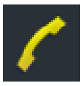
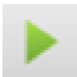
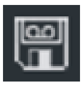
The following functions are available:

Symbol		Function
Classic	New	
		**Hang Up**
		**Answer with message** Email to the called party. Example: You do not reach the called party and want to notify him or her by email about some relevant issue. The email recipient (To:) field is prefilled with the email address of the called party, 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 called party to that subscriber. Example: You do not reach the called party and want to notify a colleague about this. The email recipient (To... :) field is not prefilled. The contact data of the called party is transferred to the email text. Not possible with OpenScape Office.

Symbol		Function
Classic	New	
		**Instant Messaging** Message to the called party.
		**Schedule Callback** Configure the date and time as well as an info text to call the called party again.

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
Classic	New	
		**Play**
		**Play through speakers**
not installed		**Save**
not installed		**Forward VoiceMail**

Screen Pop for new Fax Message

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

Symbol		Function
Classic	New	
		**View Fax**
not installed		**Save**
not installed		**Forward Fax**

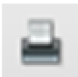
Screen Pop after Sending a Fax Message

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
Classic	New	
		**View**

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
Classic	New	
		**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:

Symbol		Function
Classic	New	
not installed		Change the presence status to **Office**.

Related concepts

User Interface Elements on page 10
Call Functions on page 64
Directories on page 41
Instant Messaging on page 133

Voicemail Box on page 111
Fax Box on page 123

Related tasks

How to Add a Scheduled Call on page 59
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

6.3.4.1 How to Enable or Disable Screen Pops on Inbound Calls

Step by Step

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

Related tasks

How to Answer a Call on page 64
How to Redirect a Call to your Voicemail Box on page 65
How to Transfer a Call on page 68
How to Place a Call on Hold on page 68
How to Record a Call on page 69
How to End a Call on page 70

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

Step by Step

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

Related concepts

Directories on page 41

6.3.4.3 How to Enable or Disable Screen Pops on Outbound Calls

Step by Step

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

Related tasks

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

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

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Notifications**.
3) Select one of the following options:
   - If you want to enable the closing of screen pops at the end of a call, select the check box **Close 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 55

6.3.4.5 How to Enable or Disable Screen Pops for New Voicemails

Step by Step

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

Related concepts

Voicemail Box on page 111
Fax Box on page 123

Related tasks

How to Enable or Disable the Opening of the Messages Window for New Voicemails on page 82

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

Step by Step

1) Click on **Setup**.

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

3) Select one of the following options:

- If you want to enable screen pops on receiving 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 123

Related tasks

How to Enable or Disable the Opening of the Messages Window for New Fax Messages on page 82

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

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

Prerequisites

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

Step by Step

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

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

3) Enter the desired hot key in the **Display Overview Traypop** field, and then select the **Hot Key Enable** check box next to it.

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.

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

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Notifications**.
3) Select one of the following options:
   - If you want to enable 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 80

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

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Notifications**.
3) Select one of the following options:
   - If you want to enable 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 81

6.3.4.10 How to Enable or Disable the Screen Pop with an Overview on Starting myPortal for Desktop

Prerequisites

You are working with the classic user interface.

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

Step by Step

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

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

Step by Step

1) Click on **Setup**.
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**.

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:

	Ad-hoc	Scheduled	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	-	-

	Ad-hoc	Scheduled	Permanent	Open
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)
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 or myPortal for Outlook. A license is required for the use of Conference Management.

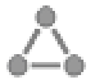
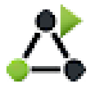
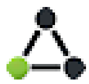
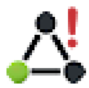
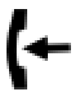
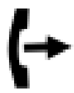
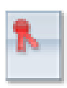
Phone-controlled Conference

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. The virtual conference room is only available in the classic user interface. Corresponding functions are available in the workspace of the modern user interface.

Symbol	Meaning
	Conference controller
	Communication system – Conference is stopped
	Communication system – Conference is being started
	Communication system – Conference has started
	Communication system – Conference is being recorded
	Communication system – Conference is being stopped
	Scheduled conference participant (symbol in accordance with current presence status)
	Called conference participant
	Dial-in conference participant
	Authenticating conference participant
	Connected conference participant

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 (scheduled 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 scheduled 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 10
Web Collaboration on page 108

Related tasks

How to Specify your Email Address on page 141

6.4.1 Ad-hoc Conference

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

Starting the Conference

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

Recording the Conference

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

Ending the Conference

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

Expanding a Call to a Conference

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

This feature is not available with OpenScape Office.

Related tasks

How to Record a Call on page 69

6.4.1.1 How to Configure and Initiate an Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click **Conference**.
2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
3) Add any conference participants as needed; see How to Add Conference Participants on page 90 for details.
4) Click in the **AdHoc Conference** window on **Conference Room** > **Start**. The system now calls you and all other conference participants.
5) If you want to use OpenScape Web Collaboration in this conference, click on **Collaboration** > **Start Collaboration**.
6) If you want to repeat the ad-hoc conference with the same set of participants later, you can now save it. To do this:
   a) Click on **Conference Room** > **Save As**.
   b) Enter the **Conference Name**.
   c) Click **Save**.

Related concepts

Call Number Formats on page 63

Related tasks

How to End an Ad-hoc or Scheduled Conference on page 93
How to Repeat an Ad-hoc Conference on page 94
How to Delete an Ad-hoc Conference on page 94
How to Add Conference Participants on page 90

6.4.1.2 How to Display your Own Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

You have saved an ad-hoc conference.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **View**.

6.4.1.3 How to Add Conference Participants

Prerequisites

You are working with the classic user interface.

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 **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.
- From a directory:

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

  Search the directories (see How to Search in Directories (Classic User Interface) on page 44) and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.
- Any participant:

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

Related concepts

Directories on page 41

Favorites List on page 49

Scheduled Conference on page 94

Permanent Conference on page 103

Related tasks

How to Search in Directories (Classic User Interface) on page 44

How to Search in Directories (Modern User Interface) on page 45

How to Configure and Initiate an Ad-hoc Conference on page 89

How to Configure a Scheduled Conference on page 96

How to Configure a Permanent Conference on page 104

How to Remove Conference Participants on page 91

6.4.1.4 How to Disconnect a Conference Participant

Prerequisites

You are working with the classic user interface.

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

Step by Step

Click in the context menu of the relevant conference participant on **Disconnect** > **Disconnect Participant**.

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

Related concepts

Scheduled Conference on page 94

Related tasks

How to Reconnect Conference Participants on page 91

6.4.1.5 How to Reconnect Conference Participants

Prerequisites

You are working with the classic user interface.

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

Step by Step

Click in the context menu of the relevant conference participant on **Reconnect Participant**.

Related concepts

Scheduled Conference on page 94

Related tasks

How to Disconnect a Conference Participant on page 91

6.4.1.6 How to Remove Conference Participants

Prerequisites

You are working with the classic user interface.

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

Step by Step

Select one of the following options in the context menu of the relevant conference participant:

- If the conference participant is currently active, click **Remove**.
- If the conference participant is not currently active in the conference, click on **Disconnect** > **Disconnect and Remove Participant**.

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

Related concepts

Scheduled Conference on page 94
Permanent Conference on page 103

Related tasks

How to Add Conference Participants on page 90

6.4.1.7 How to Expand a Call into an Ad-hoc Conference (not possible with OpenScape Office)

Prerequisites

You are working with the classic user interface.

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 **AdHoc Conference** 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 **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.
    - From a directory:

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

      Search the directories (see How to Search in Directories (Classic User Interface) on page 44) and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.
    - Any participant:

      Click in the **AdHoc Conference** window on **Participants** > **Add Participant**. Enter the following details for the participant in the **Add Partici-**

pants window: **Name** and **Phone Number** in canonical or dialable format, and then click **OK**.

6.4.1.8 How to Specify another Conference Controller

Prerequisites

You are working with the classic user interface.

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 in the virtual conference room on **Properties** in the context menu of the conference participant that you want to set as the conference controller.
2) Click on **Set as conference controller**.
3) Click **Save**.

Related concepts

Scheduled Conference on page 94
Permanent Conference on page 103

6.4.1.9 How to End an Ad-hoc or Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

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

Step by Step

1) Click on **Conference Room** > **Stop**.
2) Under **End In**, enter the waiting time in seconds until the conference is to be terminated and then click **OK**.

Related concepts

Scheduled Conference on page 94

Related tasks

How to Configure and Initiate an Ad-hoc Conference on page 89

6.4.1.10 How to Repeat an Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on a conference under **Conference Name**.
5) Click on **Start Conference**. The communication system now calls you and the conference participants.

Related tasks

How to Configure and Initiate an Ad-hoc Conference on page 89

6.4.1.11 How to Delete an Ad-hoc Conference

Prerequisites

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

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on a conference under **Conference Name**.
5) Click on **Remove**. If the conference has already started, it is terminated.

Related tasks

How to Configure and Initiate an Ad-hoc Conference on page 89

6.4.2 Scheduled Conference

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

Options for Configuring a Scheduled 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 classic 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 conference you have scheduled 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 90
How to Disconnect a Conference Participant on page 91
How to Reconnect Conference Participants on page 91
How to Remove Conference Participants on page 91
How to Specify another Conference Controller on page 93
How to Record a Call on page 69
How to End an Ad-hoc or Scheduled Conference on page 93

6.4.2.1 How to Configure a Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

1) Click **Conference**.

2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.

3) Add any conference participants as needed; see How to Add Conference Participants on page 90 for details.

4) If you want to change the direction of the connection setup for a conference participant, proceed in the following steps:

   a) Click in the context menu of the relevant conference participant on **Properties**.

   b) Under **Direction**, click on **Outbound** or **Inbound** to change the direction.

5) In the **AdHoc Conference** window, click on **File** > **Save**.

6) Enter the **Conference Name**.

7) Enter a **Start Date**.

8) Enter a **Start Time**.

9) Enter the **End Time**.

10) If the conference is to occur repeatedly, select the **Recurring Conference** check box.
    a) Select an **End Date** for the conference series.
    b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select any additional options from the details on the right-hand side.
11) If you want to delete a conference appointment time for a conference series, perform the following steps:
    a) Click on **Exceptions**.
    b) Click on **Add**.
    c) Select the relevant date in the **Original Date/Time** drop-down list.
    d) Click on **Remove this recurrence**.
    e) Click **OK**.
    f) Click on **Cancel**.
12) If you want to reschedule a conference appointment for a conference series, perform the following steps:
    a) Click **Exceptions**.
    b) Click **Add**.
    c) Select the relevant date in the **Original Date/Time** drop-down list.
    d) Click on **Reschedule this recurrence**.
    e) Select a **New scheduled date**.
    f) Select a new **Start Time**.
    g) Click on **OK**.
    h) Click **Cancel**.
13) Click **OK**.
14) Click **Advanced**.
15) Select one of the following options in the **Conference Type** drop-down list:
    - If you want to mandate the authentication of the conference participants using passwords, select **Meet-Me Conference**.
    - If you want to waive the authentication requirement for the conference participants using passwords, select **Meet-Me Conference (No Password)**.
16) Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
17) Enable the check box **This conference is active**.
18) If you want the conference to occur only when the conference controller is present, enable the check box **This conference requires the controller to be present**.
19) If you want to force the conference participants to authenticate by pressing the * (star) key, select the check box **Force called participant to enter "*" (star) to join the conference**.

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

20) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
21) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
22) If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
23) If you want to add some introductory text to the invitation email, enter this in the **Notes**.
24) Click **Save**.
25) Click **Send to all**. The invitation emails will now be sent.

Related concepts

Call Number Formats on page 63

Related tasks

How to Add Conference Participants on page 90
How to Delete a Scheduled or Open Conference on page 101

6.4.2.2 How to Display your Own Scheduled Conference

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) If you want to display the virtual conference room, click **View**.
6) Select one of the following options:
   - If you want to view the schedule of the conference, click on **Edit**.
   - If you want to view the general settings of the conference, click on **Edit** and then on **Advanced**.

Related tasks

How To Display a Scheduled, Permanent or Open Conference as the Conference Controller on page 100

6.4.2.3 How to Determine the Dial-in Number for a Scheduled, Permanent or Open Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

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

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Edit**.
6) The dial-in number can be found under **Conference DID**.
7) Click on **Cancel**.
8) Click on **Close**.

Related concepts

Permanent Conference on page 103

6.4.2.4 How to Determine the Conference ID for a Scheduled or Permanent Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

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

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on a conference under **Conference Name**.
5) Click on **Edit**.
6) Click in the context menu of the relevant conference participant on **Properties**. The **Conference ID** is displayed.
7) Click **Cancel**.
8) Click **Close**.

Related concepts

Permanent Conference on page 103

6.4.2.5 How to Change the Password for a Scheduled or Permanent Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on a conference under **Conference Name**.
5) Click on **Edit**.
6) Click in the context menu of the relevant conference participant on **Properties**.
7) Enter the new **Password**.
8) Click on **OK**.
9) Click on **Save**.
10) Click on **Close**.

Related concepts

Permanent Conference on page 103

6.4.2.6 How To Display a Scheduled, Permanent or Open Conference as the Conference Controller

Prerequisites

You are working with the classic user interface.

Step by Step

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

Related concepts

Permanent Conference on page 103

Related tasks

How to Display your Own Scheduled Conference on page 98
How to Display your Own Permanent or Open Conference on page 105

6.4.2.7 How to Extend a Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

Under **Conference Room** > **Extend Conference**, select one of the following methods:

- Click on one of the entries **10 minutes**, **20 minutes**, **30 minutes** or **1 hour**.
- Then click on **More**, enter the desired time period for the extension under **Extend by** in minutes, and click **OK**.

6.4.2.8 How to Reschedule a Scheduled Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Edit**.
6) Select a new **Start Date**.
7) Select a new **Start Time**.
8) Select a new **End Time**.
9) Click on **Advanced**.
10) Select the **Automatically send email invitation to conference participants** check box.
11) Click on **Save**.
12) Click on **Close**.

6.4.2.9 How to Delete a Scheduled or Open Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Remove**, followed by **Close**.

Related tasks

How to Configure a Scheduled Conference on page 96

6.4.2.10 How to Reschedule a Conference Appointment for a Conference Series

Prerequisites

You are working with the classic user interface.

You are the conference controller of the scheduled conference.

Step by Step

1) Click on the **Conference** symbol.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Edit**.
6) Clear the **Recurring Conference** check box and select it again.
7) Click on **Exceptions**.
8) Click on **Add**.
9) Select the relevant conference appointment in the **Original Date/Time** drop-down list.
10) Click on **Reschedule this recurrence**.
11) Click **OK**.
12) Select a **New scheduled date**.
13) Select a new **Start Time**.
14) Click on **OK**.
15) Click on **Cancel**.
16) Click on **OK**.
17) Click on **Advanced**.
18) If you want to add some introductory text to the invitation email, click in the **Notes** input field and enter the desired text.
19) Click on **Save**.

6.4.2.11 How to Delete a Conference Appointment for a Conference Series

Prerequisites

You are working with the classic user interface.

You are the conference controller of the scheduled conference.

Step by Step

1) Click on the **Conference** symbol.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Edit**.

6) Clear the **Recurring Conference** check box and select it again.
7) Click on **Exceptions**.
8) Click on **Add**.
9) Select the relevant conference appointment in the **Original Date/Time** drop-down list.
10) Click on **Remove this recurrence**.
11) Click on **OK**.
12) Click on **Cancel**.
13) Click on **OK**.
14) Click on **Advanced**.
15) If you want to add some introductory text to the invitation email, click in the **Notes** input field and enter the desired text.
16) Click on **Save**.

6.4.3 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).

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 90
How to Remove Conference Participants on page 91
How to Specify another Conference Controller on page 93
How to Determine the Dial-in Number for a Scheduled, Permanent or Open Conference on page 98
How to Determine the Conference ID for a Scheduled or Permanent Conference on page 99
How to Change the Password for a Scheduled or Permanent Conference on page 100
How To Display a Scheduled, Permanent or Open Conference as the Conference Controller on page 100

6.4.3.1 How to Configure a Permanent Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

1) Click **Conference**.
2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
3) Add any conference participants as needed; see How to Add Conference Participants on page 90 for details.
4) In the **AdHoc Conference** window, click on **File** > **Save**.
5) Enter the **Conference Name**.
6) Click **Advanced**.
7) Select one of the following options in the **Conference Type** drop-down list:
   - If you want to mandate the authentication of conference participants using passwords, select **Permanent Conference**.
   - If you want to waive the authentication requirement for the conference participants using passwords, select **Permanent Conference (No Password)**.
8) Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
9) Enable the check box **This conference is active**.

10) If you want to force the conference participants to authenticate by pressing the * (star) key, select the check box **Force called participant to enter "*" (star) to join the conference**.

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

11) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.

12) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.

13) If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.

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

15) Click **Save**.

16) Click **Send to all**. The invitation emails will now be sent.

Related concepts

Call Number Formats on page 63

Related tasks

How to Add Conference Participants on page 90
How to Delete a Permanent Conference on page 106

6.4.3.2 How to Display your Own Permanent or Open Conference

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click **Conference**.

2) Click **Manage my conferences**.

3) Click on the **My Conferences** tab.

4) Click on the relevant conference under **Conference Name**.

5) Select one of the following options:

- If you want to display the virtual conference room, click **View**.
- If you want to view the general settings of the conference, click on **Edit**.

Related tasks

How To Display a Scheduled, Permanent or Open Conference as the Conference Controller on page 100

6.4.3.3 How to Delete a Permanent Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

1) Click **Conference**.
2) Click **Manage my conferences**.
3) Click on the **My Conferences** tab.
4) Click on the relevant conference under **Conference Name**.
5) Click on **Remove**, followed by **Close**.

Related tasks

How to Configure a Permanent Conference on page 104

6.4.4 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 an 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 an Open Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

1) Click **Conference**.

2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.

3) In the **AdHoc Conference** window, click on **File** > **Save**.

4) Enter the **Conference Name**.

5) Enter a **Start Date**.

6) Enter a **Start Time**.

7) Enter the **End Time**.

8) If the conference is to occur repeatedly, click on **Recurring Conference**.

   a) Select an **End Date** for the conference series.

   b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select the additional options desired for it in the details.

9) If you want to delete a conference appointment time for a conference series, perform the following steps:

   a) Click on **Exceptions**.

   b) Click **Add**.

   c) Select the relevant date in the drop-down list.

   d) Click on **Remove this recurrence**.

   e) Click **OK**.

   f) Click on **Cancel**.

10) If you want to reschedule a conference appointment for a conference series, perform the following steps:

   a) Click on **Exceptions**.

   b) Click **Add**.

   c) Select the relevant date in the drop-down list.

   d) Click on **Reschedule this recurrence**.

   e) Select a **New scheduled date**.

   f) Select a new **Start Time**.

   g) Click on **OK**.

   h) Click **Cancel**.

11) Click **OK**.

12) Click **Advanced**.

13) Select the item **Open Conference** in the **Conference Type** drop-down list.

14) Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).

15) Enable the check box **This conference is active**.

16) If you want to force the conference participants to authenticate by pressing the * (star) key, select the check box **Force called participant to enter "*" (star) to join the conference**.

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

17) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.

18) If you want to define the conference ID yourself, proceed in the following steps:

a) Select the **Create your own conference ID** check box.

b) Enter the desired **Conference ID** (4-8 characters) in the input field.

19) Select the maximum number of conference participants under **Number of Channels**

20) Click **Save**.

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, a direct connection to internet (no proxy) is needed.

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 83

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)
Meeting **Sick** **Break** **Gone Out** **Vacation** **Lunch** **Gone Home**	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
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
Gone Out	-	-	"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 72
Personal AutoAttendant on page 135
Managing Voicemail on page 118
Notification Service for New Messages on page 130

Related tasks

How to Enable or Disable Screen Pops for New Voicemails on page 80
How to Redirect a Call to your Voicemail Box on page 65
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 141

6.6.1.1 How to Determine the Call Number for your Voicemail Box

Step by Step

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

6.6.1.2 How to Select Recording or Announcement Mode

Step by Step

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

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

4) Click **Save**.

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 138

6.6.1.3 How to Record an Announcement

Step by Step

1) Click **Setup**.
2) Click **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 **Save**.

Related concepts

Personal AutoAttendant on page 135

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 138
How to Import an Announcement on page 115
How to Delete an Announcement on page 116

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 **Setup**.
2) Click **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 **OK**.

8) Click on **Close**, followed by **Save**.

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

Related concepts

Personal AutoAttendant on page 135

Related tasks

How to Edit a Profile for the Personal AutoAttendant on page 138
How to Record an Announcement on page 115
How to Delete an Announcement on page 116

6.6.1.5 How to Delete an Announcement

Step by Step

1) Click **Setup**.
2) Click **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 **Remove**.
6) Click on **Close**, followed by **Save**.

Related tasks

How to Record an Announcement on page 115
How to Import an Announcement on page 115

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

Step by Step

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

Related concepts

Presence Status on page 27
Personal AutoAttendant on page 135

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 117

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 **Setup**.

2) Click on **Sensitivity** > **VoiceMail Presence**.

3) Select one of the following options:

- If you want to suppress the voicemail box announcement of your Presence status for a specific number, click **Add**, enter the desired number in the input field, and click **OK**.

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

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

4) Click on **Save**.

Related concepts

Presence Status on page 27
Personal AutoAttendant on page 135

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 116

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

Step by Step

1) Click on **Setup**.

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

3) Select one of the following options:

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

4) Click **Save**.

Related concepts

Fax Box on page 123

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

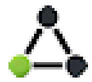
myPortal for Desktop organizes voice messages in the following folders:

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

Displaying Voicemail Messages

The following symbols identify different types of voicemail:

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

Symbol	Type of voicemail
	Recorded conference

The List view of voicemails shows the following details:

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

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

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

Retention Period for Voicemail

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

Voicemail for Groups

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

Listening to Voicemail

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

Calling the Sender of a Voicemail

You can call the sender of a voice message.

Forwarding a Voice Message

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

Moving a Voice Message

You can move a voice message to another folder.

Saving a Voice Message as a File

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

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

Related concepts

User Interface Elements on page 10
Voicemail Box on page 111

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 the **Voicemail** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Inbox**.
3) Click on the desired voicemail.
4) Select one of the following options:

- Classic user interface:

  Click on **Play Message** > **Through Phone** in the context menu.
- Modern user interface:

  Click on the **Play through phone** symbol.

Next steps

Accept the call from the voicemail box.

Related tasks

How to Listen to a Voice Message on the PC on page 120

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.

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

Step by Step

1) Click on the **Voicemail** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Inbox**.
3) Click on the desired voicemail.
4) Select one of the following options:
   - Classic user interface:

     Click on **Play Message** > **Through Speakers** in the context menu.
   - Modern user interface:

     Click on the **Play through speakers** symbol.
5) In the screen pop, click on the **Play** symbol.

Related tasks

How to Listen to a Voice Message on the Phone on page 120

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 the **Voicemail** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Select one of the following options:
   - Classic user interface:

     In the context menu, click **Dial**, and if the context menu offers several phone numbers for selection, click on the desired number.
   - Modern user interface:

     Click on the **Call Sender** icon, and if several phone numbers are offered for selection, click on the desired number.

6.6.2.4 How to Forward a Voicemail Message

Step by Step

1) Click on the **Voicemail** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Played**.
3) Click on the desired voicemail.
4) Click on **Forward Message**, in the context menu.
5) To sort the list of recipients, click on the column headers **Extension** or **Name** to sort by that criterion in alphanumeric ascending order.

6) If you want to reverse the sort order of the list of recipients, click again on the column header.
7) Activate the check box for the desired recipient or recipients.
8) If you want to add a comment, proceed in the following steps:
   a) Click on **Comment**.
   b) Click on **Start**. The voicemail box will now call you on your phone.
   c) Accept the call from the voicemail box.
   d) Speak out the text of your comment after the tone.
   e) Click on **Stop**.
   f) If you want to listen to the comment on the phone, click on **Listen**. To exit the playback loop, click on **Stop**.
   g) If you want to record the comment again, click on **Record** again.
9) Click on **Redirect**.

6.6.2.5 How to Move a Voice Message

Step by Step

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

6.6.2.6 How to Save a Voice Message as a WAV File

Prerequisites

You are working with the classic user interface.

Step by Step

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

6.6.2.7 How to Sort Voice Messages

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Voicemail** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Played**.

3) Click on one of the column titles: **Type**, **Date**, **Time**, **Group Name**, **Call no**, **Last Name**, **First Name**, **Company Name**, **Priority** or **Duration** to sort the voicemails by this criterion in ascending alphanumeric order.
4) If you want to reverse the sort order, click again on column header.

6.6.2.8 How to Delete a Voicemail

Step by Step

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

6.6.3 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 72
Managing Fax Messages on page 124
Sending Fax Messages on page 130
Notification Service for New Messages on page 130

Related tasks

How to Enable or Disable Screen Pops for New Fax Messages on page 81
How to Enable or Disable Screen Pops for New Voicemails on page 80
How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages on page 117

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 **Setup**.
2) Click on **Personal Details** > **My Personal Details**.
3) You will find your fax number in the **Fax Number** field.
4) Click on **Close**, followed by **OK**.

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 Desktop 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**, **Call number**, **Last Name**, **First Name**, **Company**, **Fax Group**, **Pages**, **Status**, **Destination** 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 (not possible with OpenScape Office).

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 10
Fax Box on page 123

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 the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Inbox**.
3) Click on the relevant fax message.

4) Select one of the following options:
   - Classic user interface:

     Select **View Fax** in the context menu.
   - Modern user interface:

     Click on the **View Fax** icon.

6.6.4.2 How to Call the Sender of a Fax Message

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.
4) Select one of the following options:
   - Classic user interface:

     In the context menu, click **Dial**, and if the context menu offers several phone numbers for selection, click on the desired number.
   - Modern user interface:

     Click on the **Call Sender** icon, and if several phone numbers are offered for selection, click on the desired number.

6.6.4.3 How to Forward a Fax Message

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Read**.
3) Select one of the following options:
   - Classic user interface:

     Click on **Forward Message** in the context menu.
   - Modern user interface:

     Click on the **Forward Message** symbol.
4) Enter the fax number of the recipient in canonical or dialable format in the **Forward Message** window.
5) Click on **+** to add this recipient to the fax message.
6) 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.

7) If you want to remove a recipient, proceed in the following steps:
   a) Click in the list of **Recipients** on the desired entry.
   b) Press the `Del` key.
8) Click on **OK**.

6.6.4.4 How to Move a Fax Message

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.
4) Select the desired folder in the context menu under **Move Message to** > **…**.

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 the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Read**.
3) Click on the desired fax message.

   If you select more than one fax messages, go to Step 6
4) Select one of the following options:
   - Classic user interface:

     Click in the context menu on **Save as tiff** or **Save as PDF**.
   - Modern user interface:

     Click on the **Save as tiff** or **Save as PDF** symbol.
5) Select a folder in the **Save** window, enter a file name of your choice in the input field, and click **Save**.
6) If you have selected multiple fax messages, a dialog appears.
   a) Enter the save path in the **To** field.
   b) Select the file type to be exported.
   c) Click **Save** to save all selected fax messages.

6.6.4.6 How to Sort Fax Messages

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the desired folder, e.g., **Read**.
3) Click on one of the column titles: **Date**, **Time**, **Call no**, **Last Name**, **First Name**, **Company Name**, **Fax Group** 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.

6.6.4.7 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 the **Fax Messages** tab or in the corresponding window.
2) Click on the **Sending Items** folder.
3) If you are working with the classic user interface, click on one of the column titles: **Date**, **Fax Group**, **Last Name**, **First Name**, **Company**, **Destination** or **Pages** to sort the fax messages by this criterion in ascending alphanumeric order. 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 128
How to Cancel Sending a Fax Message on page 128

6.6.4.8 How to Cancel Sending a Fax Message

Prerequisites

You are working with the classic user interface.

You have sent a fax message with Fax Printer.

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the **Sending Items** folder.
3) Select **Remove** in the context menu of the appropriate Fax message.
4) Click **OK**.

Related tasks

How to Display an Overview of Fax Messages in the Send Queue on page 128

6.6.4.9 How to Display an Overview of Sent Fax Messages

Prerequisites

You have sent fax messages with Fax Printer.

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the **Sent Items** folder.
3) If you are working with the classic user interface, click on one of the column titles: **Date**, **Fax Group**, **Pages**, **Status**, **Last Name**, **First Name**, **Company** or **Destination** to sort the fax messages by this criterion in ascending alphanumeric order. 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 128

6.6.4.10 How to Resend a Fax Message

Prerequisites

You are working with the classic user interface.

Step by Step

1) Click on the **Fax Messages** tab or in the corresponding window.
2) Click on the **Sent Items** folder.
3) Click on the relevant fax message.
4) Click on **Resend** in the context menu.

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 the **Fax Messages** tab or in the corresponding window.
2) Click on the **Sent Items** folder.
3) Click on the relevant fax message.
4) Select one of the following options:
   - Classic user interface:

     Click **Properties** in the context menu and then on **Fax Transmission Report**.
   - Modern user interface:

     Click on the **Fax Transmission Report** symbol.

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 the **Fax Messages** tab or in the corresponding window.
2) Click on one of the folders: **Inbox**, **Read**, **Sent Items** or **Sending Items**.
3) Select one of the following options:
   - Click on the desired fax message.
   - Mark the desired Fax messages.

4) Select one of the following options:

- Classic user interface:

  Select **Move Message to** > **Move to Deleted** in the context menu.
- Modern user interface:

  Click on the **Delete** symbol.

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

a) Click 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 123

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	for voicemail	for 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.
SMS	You receive an SMS about the received message at the phone number defined by you.	

Notification	for voicemail	for fax message
by 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 111
Fax Box on page 123

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 **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 **Email** row for each column with one of the following Presence statuses: **Office**, **Meeting**, **Sick**, **Break**, **Out of the Office**, **Vacation**, **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 141

6.6.6.2 How to Enable or Disable the Notification by Phone

Step by Step

1) Click on **Setup**.

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 the Office**, **Vacation**, **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) 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**.
5) Enter the desired phone number in the **Outbound Number** field in canonical or dialable format
6) Enter the desired time interval and the number of attempts to be made when repeating the notification if required in the **Attempts** area.
7) Click **Save**.

Related concepts

Call Number Formats on page 63

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**, **Vacation**, **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 Messaging

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

6.7.1 Instant Messaging

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 via XMPP 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
online	Logged in
offline	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 XMPP communication partner (e.g., a Google Talk user).

Multi-user chat

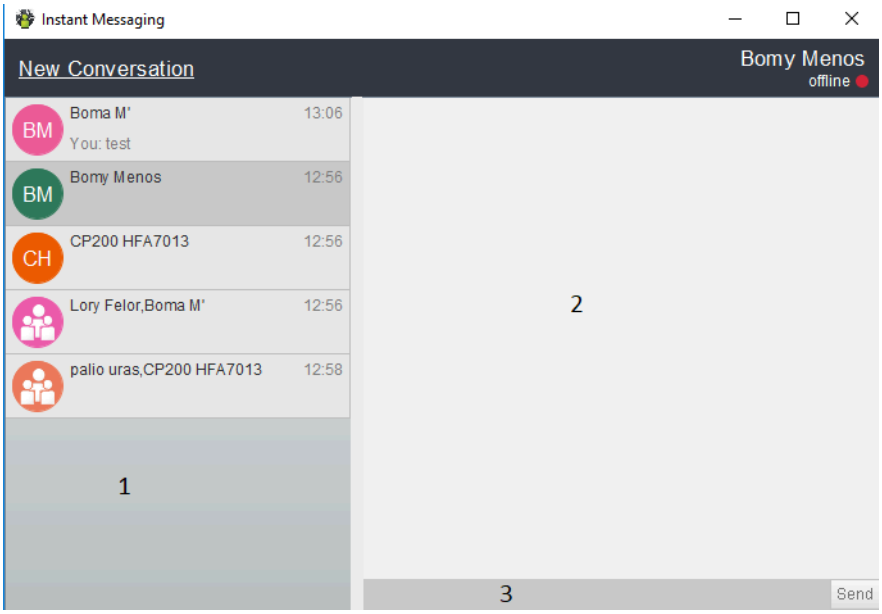
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external XMPP communication partner.

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 (1)

  This area shows every participating communication partner as a symbol or with a picture, if available.
- Message area (2)

  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 XMPP communication partner is displayed only if you have explicitly requested this from the external XMPP communication partner via the context menu by using the subscription feature, and your request was granted.
- Input area (3)

  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 72

6.7.1.1 How to Send an Instant Message

Prerequisites

You are working with the classic user interface.

Instant Messaging is enabled in the system.

Your XMPP alias is defined (if you want to chat with an external communication partner).

Step by Step

1) Click on **IMs**.

   The **Instant Messaging** 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 to the chat (to create a group 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) Click on **Send**.

Related concepts

Directories on page 41
Favorites List on page 49

Related tasks

How to Define an XMPP Alias on page 142

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 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			
Gone Out			
Vacation			
Lunch			
Gone 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
Gone Out	-	-	"I am currently out of the office. To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3."

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

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

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

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

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

Actions

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

- **Record**

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

  The caller is redirected to a destination defined by you.

- **- None -**

  The announcements for this profile are repeated.

Related concepts

Presence Status on page 27
Voicemail Box on page 111

Related tasks

How to Record an Announcement on page 115
How to Import an Announcement on page 115
How to Enable or Disable the Announcement of your Presence Status for External Callers on page 116
How to Enable or Disable the Announcement of your Presence Status for Specific Callers on page 117

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 **Setup**.
2) Click **Profiles** and then on the profile for the corresponding status.
3) In the row with the appropriate digit, select one of the following options for the desired **Action**:
   - If the callers are to be redirected to the voicemail box on entering this digit, select **Record**.
   - If the callers are to be transferred to another destination on entering this digit, select **Transfer**.
   - If no action is to be taken on entering this digit, select **# None #**.
4) If you have selected **Transfer**, enter the phone number in dialable format or in canonical format in the **Destination** 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 63

Related tasks

How to Record an Announcement on page 115
How to Import an Announcement on page 115

How to Select Recording or Announcement Mode on page 114

7 Configuration

You can configure myPortal for Desktop 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 (Windows)

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)
- **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 41
Favorites List on page 49

7.1 How to Edit your own Name

Step by Step

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

Related concepts
Conferences on page 83
Related tasks
How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments on page 33
How to Enable or Disable Email Notifications on page 131

7.3 How to Define an Additional Phone Number

Step by Step

1) Click on **Setup**.
2) Click on **Personal Details** > **My Personal Details**.
3) Enter an additional phone number in dialable or canonical format in one of the following fields: **Mobile Number**, **External Number 1**, **External Number 2**, **Private Number** or **Assistant Number**.

4) Select one of the following options:
   - If you do not want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, clear the **Visibility** check box next to the phone number.
   - If you want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, select the **Visibility** check box next to the phone number.
5) Click **Save**.

Related concepts

Call Number Formats on page 63
Status-based Call Forwarding on page 36
Voicemail Box on page 111

Related tasks

How to Enable the CallMe Service on page 36

7.4 How to Define an XMPP Alias

Prerequisites

The administrator of your communication system has enabled XMPP.

Step by Step

1) Click on **Setup**.
2) Click on **Personal Details** > **My Personal Details**.
3) Enter your XMPP alias under **XMPP-ID**. Your XMPP alias is the left portion (e.g., `john.public`) of your complete XMPP-ID (e.g., `john.public@oso.example-domain.com`), without the domain name. The XMPP alias must be unique within the domain.

   > **NOTICE:** You should provide other XMPP communication partners with your full XMPP ID (e.g., `xmpp:john.public@oso.example-domain.com`), i.e., including the domain name. If required, ask the administrator of your communication system for the domain name.

4) Click **Save**.

Related tasks

How to Send an Instant Message on page 134

7.5 How to Provide your own Picture

Prerequisites

You have an image file with your picture in one of the following file formats: BMP, GIF, JPG.

Step by Step

1) Click on **Setup**.

2) Click on **Personal Details** > **My Picture**.
3) Click **Select**.
4) Choose a folder and the desired file and click **Open**.
5) Click **Save**.

Related tasks

How to Delete your own Picture on page 143

7.6 How to Delete your own Picture

Step by Step

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

Related tasks

How to Provide your own Picture on page 142

7.7 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.

7.7.1 How to Program the Function Keys of the Telephone

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Miscellaneous**.
3) Click on **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 **Save** in the **Setup** window.

Related tasks

How to Resolve the Problem: Empty Browser Window for Key Programming on page 150

7.8 How to Change the Password

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

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

Step by Step

1) Click on **Setup**.
2) Click on **Personal Details** > **My Personal Details**.
3) Under **Password**, click on **Change**.
4) Enter your current password in the **Current** field.
5) Enter your new password in the **New** and **Confirm** fields.
   a) 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 Desktop on page 18

7.9 How to Change the Login Name

Step by Step

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

   NOTICE: This selected user name applies to all UC Suite clients.

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

7.10 How to Enable or Disable an Automatic Login

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

Step by Step

1) Click on **Setup**.
2) Click on **Sensitivity** > **Security and Access**.
3) Select one of the following options:
   - If you want to enable the automatic login, select the check box **Remember my password and automatically log me into myPortal**.
   - If you want to disable the automatic login, clear the check box **Remember my password and automatically log me into myPortal**.
4) Click **Save**.

Related tasks

How to Start myPortal for Desktop on page 18

7.11 How to Select the User Interface Language

Step by Step

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

Next steps

Close and restart the client.

Related concepts

User Interface Elements on page 10

7.12 How to Change the User Interface

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Appearance**.
3) Select the user interface with the desired appearance in the **Skin** area.
4) Click **Save**.

Next steps

Close and restart the client.

Related concepts

User Interface Elements on page 10

7.13 How to Enable or Disable Tabs

Prerequisites

You are working with the classic user interface.

NOTICE: At least one of the tabs always remains active.

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Appearance**.
3) Select one of the following options:
   - If you want to display the **Journal** tab, select the check box **Show Call History**.
   - If you do not want to display the **Journal** tab, clear the check box **Show Call History**.
4) Select one of the following options:
   - If you want to display the **Voicemail** tab, select the check box **Show Voicemail**.
   - If you do not want to display the **Voicemail** tab, clear the check box **Show Voicemail**.
5) Select one of the following options:
   - If you want to display the **Fax Messages** tab, select the check box **Show Faxes**.
   - If you do not want to display the **Fax Messages** tab, clear the check box **Show Faxes**.
6) Select one of the following options:
   - If you want to display the **Directories** tab, select the check box **Show Directories**.
   - If you do not want to display the **Directories** tab, clear the check box **Show Directories**.
7) Click **Save**.

Related concepts

User Interface Elements on page 10

7.14 How to Restore the Display

Prerequisites

You are working with the classic user interface.

To restore the default appearance of the classic user interface, proceed as follows: All tabs in the main window will then be enabled.

Step by Step

1) Click on **Setup**.

2) Click on **My Preferences** > **Appearance**.
3) Click on **Reset Layout**.
4) Click **Save**.

Related concepts
User Interface Elements on page 10

7.15 How to Activate or Deactivate a Hotkey

Prerequisites

You are working under Windows.

Step by Step

1) Click on **Setup**.
2) Click on **My Preferences** > **Hot Keys**.
3) Select one of the following options:
   - If you want to 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 myPortal- for Outlook, this is displayed. Then select the **Hot Key Enabled** check box next to it.
   - If you want to disable a hotkey, clear the **Hot Key Enabled** check box next to that key.
4) Click **Save**.

7.16 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 **Setup**.
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**.

7.17 How to Configure a Call Transfer

Step by Step

1) Click on **Setup**.

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

3) Select one of the following options in the **Transfer Method** drop-down list:

- If you want to transfer the call directly to a subscriber without first speaking to that subscriber, select **Blind Transfer**.
- If you want to speak to the subscriber before transferring the call to that subscriber, select **Consultation Transfer**.

4) Click on **Save**.

Related tasks

How to Transfer a Call on page 68

7.18 How to Enable or Disable Dialing by Entering a Name

Step by Step

1) Click on **Setup**.

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

3) Select one of the following options:

- If you want to enable dialing by entering a name, select the **Enable live search** check box.
- If you want to disable dialing by entering a name, clear the**Enable live search** check box.

4) Select one of the following options:

- If you want the LDAP contacts to also be included in the live search when dialing by entering a name, select the **Include LDAP contacts in live search** check box.
- If you do not want the LDAP contacts to be included in the live search when dialing by entering a name, clear the **Include LDAP contacts in live search** check box.

5) Click **Save**.

7.19 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**.

7.20 Troubleshooting

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

7.20.1 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 Desktop on page 18

7.20.2 How to Resolve the Problem: Some other Application Starts Instead of myPortal

If the Nokia Application Suite is installed on your PC, for example, Java applications such as `myPortal.jar` will be erroneously associated automatically with that application.

Step by Step

Select one of the following options:

- If you want to resolve the problem for myPortal for Desktop and all other .jar files, re-install Oracle Java or OpenJDK on the respective PC.
- If you want to resolve the problem for myPortal for Desktop only, correct the corresponding string under Target in the properties of your desktop shortcut for myPortal for Desktop with the correct path details for `javaw.exe` and `myPortal.jar`, e.g.: `C:\WINDOWS\system32\javaw.exe -jar "C:\Documents and Settings\All Users\Application Data\myPortal\myPortal.jar"`

Related tasks

How to Start myPortal for Desktop on page 18

7.20.3 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 144

8 Appendix

The appendix contains additional information.

8.1 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	Vacation	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
Slovenian (Slovenia)	Pisarna	Sestanek	Bolniška	Odmor	Odsoten	Dopust	Kosilo	Doma

Language	Presence status keyword							
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/iCal Appointments on page 33

8.2 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, DND can be activated in the communication system.

> **NOTICE:** The full functionality of the features depends on the SIP phone used and cannot be guaranteed.
>
> A successful test of the following features was performed with OpenStage 15 S.

- Connection-/call-oriented features:
  - Make Call
  - Redirect call
  - Resume call
  - Application-controlled conference
  - Hold
  - Toggle/Connect
  - Consultation
  - Disconnect
  - Transfer
- Phone-oriented features:
  - Do Not Disturb
  - Call forwarding

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