

# Documentation

## myPortal for Desktop

User Guide

A31003-P3010-U102-15-7619

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# 1 About this Documentation

This section contains some introductory information on this documentation.

## 1.1 Types of Topics

The types of topics include concepts and tasks:

Concept	Task (operating instructions)
Explains the "What", e.g., <b>Configuring ...</b>	Describes task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts, e.g., <b>How to Configure ...</b>

---

### Related Topics

- [Display Conventions](#)

## 1.2 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 <b>OK</b> .
Menu sequence	>	<b>File &gt; Exit</b>
Special emphasis	Bold	<b>Do not delete</b> Name.
Cross-reference text	Italics	You will find more information in the topic <i>Network</i> .
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 Topics**

- [Types of Topics](#)

## 2 Introduction

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

### 2.1 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 be 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

### 2.2 User Interface Elements

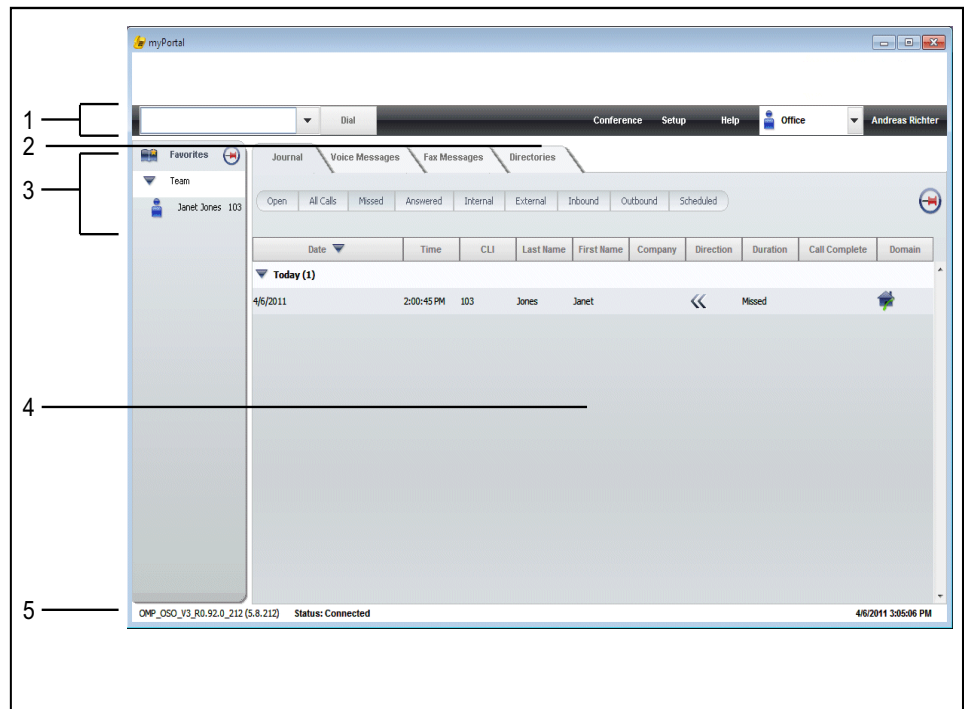
The user interface of myPortal for Desktop consists of the main window and various screen pops, depending on the situation.

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**

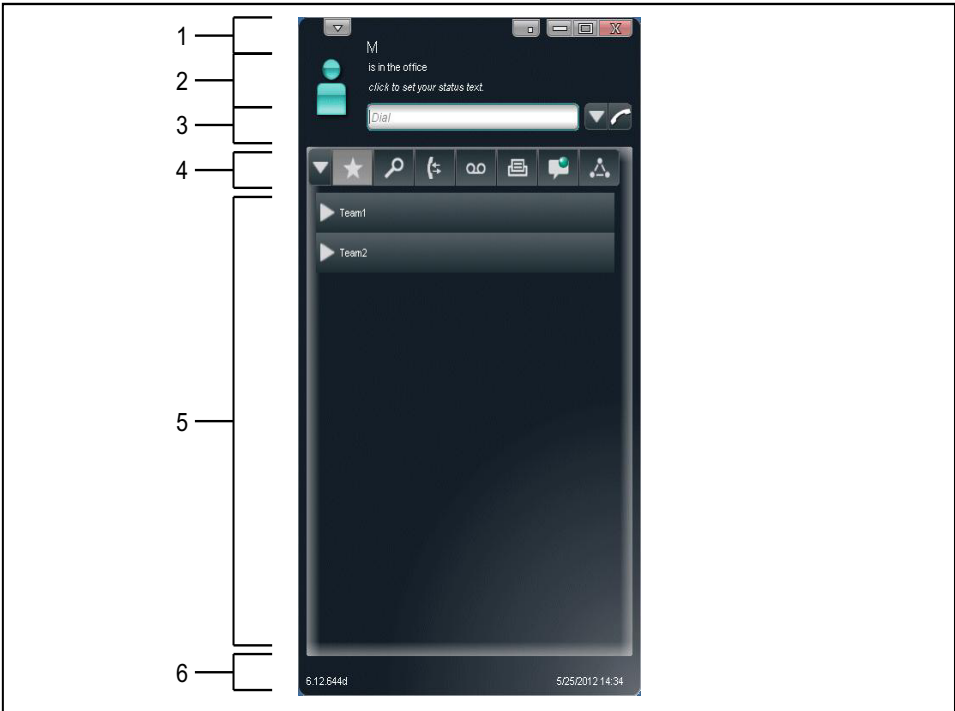
Symbol	Function
	Display in separate window
	Display in main window (also in the Favorites list with the <b>Hide to the right</b> or <b>Hide to the left</b> setting)

**Modern User Interface**

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

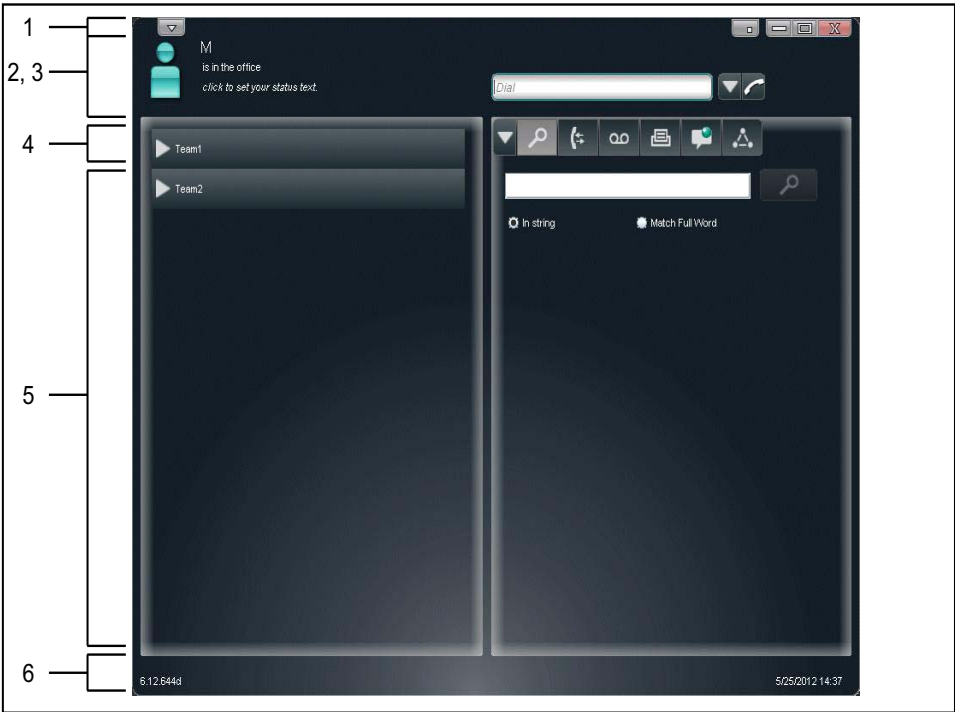
**Modern User Interface: Normal View**

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.



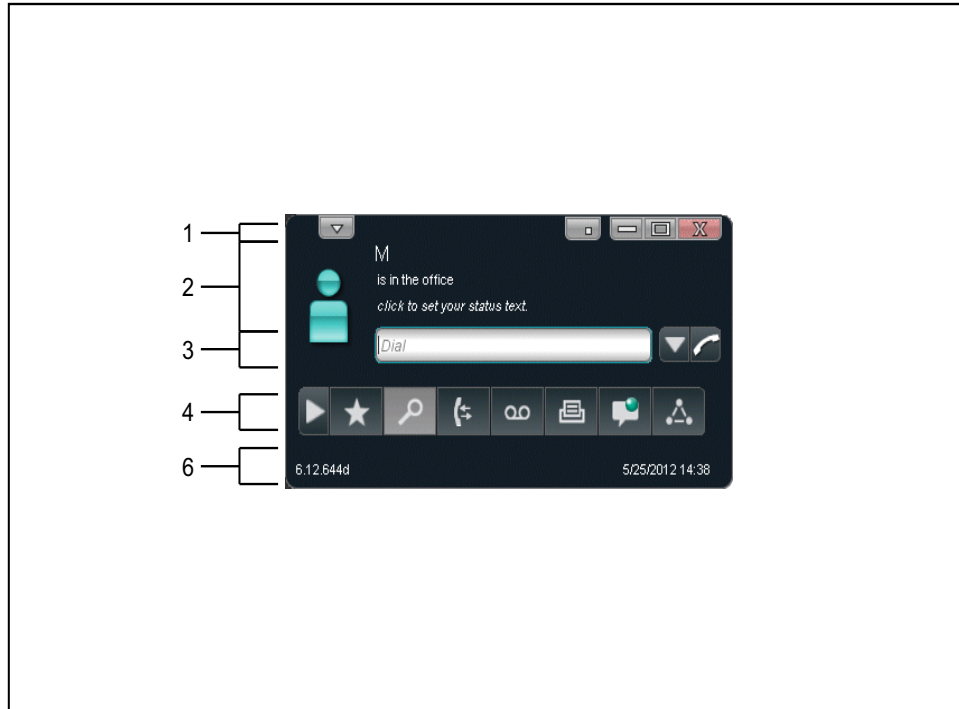
**Modern User Interface: Column View**

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 Topics

- [Favorites List](#)
- [How to Change the Width of the Favorites List](#)
- [How to Dial a Number Manually](#)
- [Screen Pops](#)
- [Conferences](#)
- [Presence Status](#)
- [Journal](#)
- [Directories](#)
- [Managing Voicemail](#)
- [Managing Fax Messages](#)
- [How to Select the User Interface Language](#)
- [How to Change the User Interface](#)
- [How to Enable or Disable Tabs](#)

- [How to Restore the Display](#)

## 2.3 Online Help

The integrated online help describes key concepts and operating instructions.

### **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



## 3 Installing and Starting myPortal for Desktop

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

### 3.1 How to Install myPortal for Desktop (Windows)

#### *Prerequisites*

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

---

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

---

#### *Step by Step*

- 1) Run the `CommunicationsClient.exe` program.
- 2) If the **User Account Control** window appears with the message `An unidentified program wants access to your computer`, click **Allow** or **Yes**.
- 3) Click on **Next** twice.
- 4) Click **Custom**.
- 5) Select the **myPortal for Desktop / myAttendant** feature to be installed.
- 6) Click **Next** as often as necessary and then click **Finish** to complete the installation process.

#### *Next steps*

Start myPortal for Desktop

---

#### **Related Topics**

- [How to Start myPortal for Desktop](#)
- [How to Uninstall myPortal for Desktop \(Windows\)](#)
- [How to Uninstall myPortal for Desktop \(Mac OS\)](#)
- [Upgrading to OpenScape Office V3](#)

## 3.2 How to Install myPortal for Desktop (Mac OS)

### *Prerequisites*

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

---

**INFO:** 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 > Programs**.
- 3) Click on **myPortal Installer**.
- 4) Click **Continue**.
- 5) Click **Install**.
- 6) Click **Close**.

The login screen of myPortal for Desktop appears.

### *Next steps*

Start myPortal for Desktop

---

### **Related Topics**

- [How to Start myPortal for Desktop](#)
- [How to Uninstall myPortal for Desktop \(Windows\)](#)
- [How to Uninstall myPortal for Desktop \(Mac OS\)](#)
- [Upgrading to OpenScape Office V3](#)

## 3.3 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 **Start > Program Files > Communication Clients > myPortal**.

---

**INFO:** 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 GuideNotes 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 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 Topics**

- [How to Install myPortal for Desktop \(Windows\)](#)
- [How to Install myPortal for Desktop \(Mac OS\)](#)
- [How to Change the Password](#)
- [How to Enable or Disable an Automatic Login](#)
- [How to Resolve the Problem: No Connection to the Communication System \(Windows\)](#)
- [How to Resolve the Problem: Some other Application Starts Instead of myPortal](#)

### 3.4 How to Exit myPortal for Desktop

Due to a current limitation in Java 1.6.x, it may be necessary to close myPortal for Desktop manually under 64-bit Microsoft Windows operating systems before shutting down the computer.

**Step by Step**

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

### 3.5 How to Uninstall myPortal for Desktop (Windows)

**Prerequisites**

- myAttendant is also no longer required.

**Step by Step**

- 1) Close myPortal for Desktop.

---

**INFO:** 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 Topics**

- [How to Install myPortal for Desktop \(Windows\)](#)
- [How to Install myPortal for Desktop \(Mac OS\)](#)

## 3.6 How to Uninstall myPortal for Desktop (Mac OS)

### *Step by Step*

- 1) Close myPortal for Desktop.

---

**INFO:** 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 Topics**

- [How to Install myPortal for Desktop \(Windows\)](#)
- [How to Install myPortal for Desktop \(Mac OS\)](#)

## 3.7 Automatic Updates

Automatic updates ensure that applications such as the clients, for example, are always kept up-to-date with the latest version.

When an application determines that there is a newer version than the one currently running, it is either updated automatically or the user is notified about the option to perform the update. If necessary, a message is displayed indicating that the user must exit the application or multiple applications in order to perform the automatic update.

---

**INFO:** We recommend that you always perform the automatic updates offered for our applications. This also applies to the software that is required for some of our applications such as Java and Adobe AIR, for example.

---

### 3.7.1 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.

### 3.7.2 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.

## 3.8 Upgrading to OpenScape Office V3

An upgrade to OpenScape Office V3 requires a different procedure to the usual updates.

---

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

---

All clients of OpenScape Office V2 must be uninstalled. The clients of the current version must then be installed. The procedure to be followed also depends on the operating system. For more information on upgrading to OpenScape Office V3, contact the administrator of your communication system.

#### **Custom Configuration**

Your custom configuration is retained for the most part, except for the following areas under **Setup**:

- **My Preferences > Presentation**
- **My Preferences > Notification**

- **My Preferences > Miscellaneous**

After the upgrade, you should check the configuration in these areas and edit them if required.

### **Improved Security Concept**

OpenScape Office V3 includes an improved security concept that ensures protection against unauthorized access to OpenScape Office clients and to the voicemail box. This optimizes the protection of your personal data and prevents toll fraud.

- **New password**

The new password must consist of at least six digits and applies to myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Mobile, myPortal for OpenStage, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.

After the upgrade, you will be prompted to change your password when you start an OpenScape Office PC client or access your voicemail via the phone for the first time.

- **Monitoring password entry attempts**

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

---

### **Related Topics**

- [How to Install myPortal for Desktop \(Windows\)](#)
- [How to Install myPortal for Desktop \(Mac OS\)](#)

## 4 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**:

---

**INFO:** You can record further announcements; see [Voicemail box](#).

---

### Specify your e-mail address

Enter your e-mail address so that the communication system can invite you to conferences by e-mail 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 Topics**

- [Voicemail box](#)

## **4.1 How to Select the User Interface Language**

### *Step by Step*

- 1) Click **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.

## **4.2 How to Select the Language of the Voicemail Box**

### *Step by Step*

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

## **4.3 How to Record your Name Announcement**

---

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

---

## First Steps

### How to Record your Personal Greeting

#### *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 Topics

- [How to Record your Personal Greeting](#)
- [Voicemail box](#)

## 4.4 How to Record your Personal Greeting

---

**INFO:** 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 VoiceMail Greeting**.
  - 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 Topics**

- [How to Record your Name Announcement](#)
- [Voicemail box](#)

## 4.5 How to Specify your E-Mail Address

*Prerequisites*

- The administrator of your communication system has configured the sending of e-mails.

*Step by Step*

- 1) Click **Setup**.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Enter your e-mail address under **E-mail**.
- 4) Click **Save**.

## 4.6 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 Topics**

- [Favorites List](#)

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

*Prerequisites*

- You are working under Windows.

## **First Steps**

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

### ***Step by Step***

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

## 5 Unified Communications

Unified Communications offers useful features such as presence and voicemail through the clients.

### 5.1 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.








#### 5.1.1 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.






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
	<b>Office</b> Only selectable if the Call-Me service is not active Otherwise, <b>Call-Me</b> appears here.	Available at the normal workplace
	<b>CallMe</b> Only selectable if the Call-Me service is active Otherwise, <b>Office</b> appears here.	Available at an alternative workplace
	<b>Meeting</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number

Symbol	Presence status	Availability
	<b>Sick</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Break</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Gone Out</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Vacation</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Lunch</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Gone Home</b>	absent - Redirected to voicemail or status-based call forwarding to another phone number
	<b>Do Not Disturb</b> (not available for Mobility Entry or MULAP)	absent - Redirected to voicemail or status-based call forwarding to another phone number

**Call-Me** 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

---

**INFO:** 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	Gone Out
Extended Away	Vacation

---

**INFO:** 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
Gone Out	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 **Call-Me** 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**

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

---



### Automatic Creation of Outlook Appointments when Absent)

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

- [User Interface Elements](#)
- [Directories](#)
- [Favorites List](#)
- [Journal](#)
- [How to Enable or Disable the Announcement of your Presence Status for External Callers](#)
- [How to Enable or Disable the Announcement of your Presence Status for Specific Callers](#)
- [CallMe Service](#)
- [Status-based Call Forwarding](#)
- [Rule-Based Call Forwarding](#)
- [Personal AutoAttendant](#)

## 5.1.1.1 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**.
- 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 Topics

- [How to Change the Presence Status to Office](#)
- [How to Enable or Disable Automatic Resetting of the Presence Status](#)
- [How to Enable the CallMe Service](#)

### 5.1.1.2 How to Change the Presence Status to Office

---

**INFO:** 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 Topics

- [How to Change the Presence Status to Absent](#)
- [How to Enable or Disable Automatic Resetting of the Presence Status](#)

### 5.1.1.3 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.

## 5.1.1.4 How to Enable or Disable Automatic Resetting of the Presence Status

### *Step by Step*

- 1) Click **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 Topics

- [How to Change the Presence Status to Absent](#)
- [How to Change the Presence Status to Office](#)
- [How to Enable the CallMe Service](#)

## 5.1.1.5 How to Change the Visibility of your Presence Status for Others

### *Step by Step*

- 1) Click **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 Topics

- [How to Enable or Disable the Announcement of your Presence Status for Specific Callers](#)
- [How to Enable or Disable the Announcement of your Presence Status for External Callers](#)

### 5.1.1.6 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 e-mail address in myPortal for Desktop.

#### *Step by Step*

- 1) Click **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 Topics**

- [How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent](#)
- [Presence Status Keywords for Appointments](#)
- [How to Specify your E-Mail Address](#)

### 5.1.1.7 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.

### Step by Step

- 1) Click **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 Topics

- [How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments](#)

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

### Step by Step

- 1) Click **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 Topics

- [Screen Pops](#)

## 5.1.2 CallMe Service

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

### **Inbound Calls**

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

### **Outbound Calls**

For outbound calls with myPortal for Desktop, the communication system sets up two connections. It first calls you at your Call-Me 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 Call-Me service is enabled, the message "Call-Me 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.

---

### **Related Topics**

- [Presence Status](#)

## **5.1.2.1 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 Call-Me 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.

---

**INFO:** Do not enter a group or a redirected phone as the Call-Me destination.

---

- 4) Click **OK**.

---

#### Related Topics

- [Call Number Formats](#)
- [How to Change the Presence Status to Absent](#)
- [How to Enable or Disable Automatic Resetting of the Presence Status](#)
- [How to Define an Additional Phone Number](#)

## 5.1.3 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 Topics

- [Presence Status](#)
- [How to Define an Additional Phone Number](#)
- [Rule-Based Call Forwarding](#)
- [How to Define an Additional Phone Number](#)

### 5.1.3.1 How to Configure Status-based Call Forwarding

#### *Prerequisites*

- You have configured at least one additional phone number.

#### *Step by Step*

- 1) Click **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**.

## 5.1.4 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 and 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, its name 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 Topics

- [Presence Status](#)



- [Status-based Call Forwarding](#)

### 5.1.4.1 How to Add a Call Forwarding Rule

#### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Click **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 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 Topics**

- [Call Number Formats](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Copy a Call Forwarding Rule](#)
- [How to Rename a Call Forwarding Rule](#)
- [How to Remove a Call Forwarding Rule](#)
- [How to Change the Order of Call Forwarding Rules](#)

## 5.1.4.2 How to Edit a Call Forwarding Rule

### *Step by Step*

- 1) Click **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 Topics**

- [Call Number Formats](#)
- [How to Add a Call Forwarding Rule](#)
- [How to Copy a Call Forwarding Rule](#)
- [How to Rename a Call Forwarding Rule](#)
- [How to Remove a Call Forwarding Rule](#)
- [How to Change the Order of Call Forwarding Rules](#)

### 5.1.4.3 How to Copy a Call Forwarding Rule

*Step by Step*

- 1) Click **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 Topics**

- [How to Add a Call Forwarding Rule](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Rename a Call Forwarding Rule](#)
- [How to Remove a Call Forwarding Rule](#)
- [How to Change the Order of Call Forwarding Rules](#)

### 5.1.4.4 How to Rename a Call Forwarding Rule

*Step by Step*

- 1) Click **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 Topics**

- [How to Add a Call Forwarding Rule](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Copy a Call Forwarding Rule](#)
- [How to Remove a Call Forwarding Rule](#)
- [How to Change the Order of Call Forwarding Rules](#)

### 5.1.4.5 How to Remove a Call Forwarding Rule

*Step by Step*

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

---

**Related Topics**

- [How to Add a Call Forwarding Rule](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Copy a Call Forwarding Rule](#)
- [How to Rename a Call Forwarding Rule](#)
- [How to Change the Order of Call Forwarding Rules](#)

### 5.1.4.6 How to Change the Order of Call Forwarding Rules

*Step by Step*

- 1) Click **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 Topics**

- [How to Add a Call Forwarding Rule](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Copy a Call Forwarding Rule](#)
- [How to Rename a Call Forwarding Rule](#)
- [How to Remove a Call Forwarding Rule](#)

## **5.2 Directories and Journal**





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

### **5.2.1 Directories**

Directories organize your contacts.

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

**Unified Communications**  
 Directories and Journal

Symbol	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites	Add to Conference
	<p>Personal directory:</p> <p>You can use the personal directory to either add, edit and delete your personal contacts individually or, when using Windows, to import your Outlook contacts on starting myPortal for Desktop. If you import the Outlook contacts, you cannot edit them in myPortal for Desktop.</p>	x	x	-	x	x
	<p>Internal directory (symbol for system phones in accordance with current Presence status)</p> <p>Contains internal subscribers with their Presence status (only system telephones) and possibly their additional phone numbers, provided the subscriber has made these numbers visible to others. When a subscriber is absent, you can see the scheduled time of return in the <b>Date / Time</b> column, provided that subscriber has allowed his or her Presence status to be visible to you. and any info text that may have been entered by the subscriber are also displayed.</p>	x	x	x	x	x
	<p>External directory:</p> <p>Contains contacts from a corporate directory and possibly from the public Exchange folder (not usable with Office 365) and must be configured by the administrator of the communication system.</p>	x	x	-	x	x
	<p>External Offline Directory (LDAP):</p> <p>Contains contacts from the LDAP corporate directory and must be configured by the administrator of the communication system. The external offline directory is only used for the search.</p>	x	x	-	x	x

---

**INFO:** Phone numbers in directories should always be entered in canonical format, if possible.

---

## 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., E-mail, 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. All 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 **E-mail** 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 Topics

- [User Interface Elements](#)
- [How to Pick up a Call for Another Subscriber](#)
- [How to Call from a Directory \(Classic User Interface\)](#)
- [How to Call from a Directory \(Modern User Interface\)](#)
- [How to Enable or Disable the Opening of the Main Window on Inbound Calls](#)
- [How to Send an Instant Message](#)
- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)
- [How to Add Contacts from the Journal to the Personal Directory](#)

- [How to Add Conference Participants](#)
- [Favorites List](#)
- [Screen Pops](#)
- [Presence Status](#)
- [Configuration](#)

### 5.2.1.1 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.
  - If you want to search for a part of a word, clear the **Match Full Word** check box.
- 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 Topics**

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add Conference Participants](#)



### 5.2.1.2 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 Topics**

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add Conference Participants](#)

### 5.2.1.3 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 Topics**

- [How to Zoom in on an Entry](#)

### 5.2.1.4 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.

## 5.2.1.5 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 Topics**

- [How to Sort a Directory](#)
- [Journal](#)
- [How to Sort the Journal](#)

## 5.2.1.6 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.

---

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

---

- 5) Click **Save**.

---

### **Related Topics**

- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)

- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)
- [How to Edit a Personal Contact](#)
- [How to Delete a Personal Contact](#)
- [How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup](#)

### 5.2.1.7 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.

---

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

---

- 6) Click **Save**.

---

#### **Related Topics**

- [How to Add a Personal Contact](#)
- [How to Delete a Personal Contact](#)
- [How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup](#)

### 5.2.1.8 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 Topics**

- [How to Add a Personal Contact](#)
- [How to Edit a Personal Contact](#)
- [How to Enable or Disable the Import of Outlook or Mac OS Contacts at Startup](#)

### 5.2.1.9 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 **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 Topics**

- [How to Add a Personal Contact](#)
- [How to Edit a Personal Contact](#)
- [How to Delete a Personal Contact](#)

## 5.2.2 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**.

---

#### Related Topics

- [User Interface Elements](#)
- [How to Pick up a Call for Another Subscriber](#)
- [How to Create a Favorites List](#)
- [Directories](#)
- [How to Make a Call from the Favorites List \(Classic User Interface\)](#)
- [How to Make a Call from the Favorites List \(Modern User Interface\)](#)
- [How to Add Conference Participants](#)
- [How to Send an Instant Message](#)
- [Presence Status](#)
- [Configuration](#)

### 5.2.2.1 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 Topics**

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)
- [How to Delete a Group from the Favorites List](#)
- [How to Rename a Group in the Favorites List](#)

## **5.2.2.2 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 Topics**

- [How to Add a Group to the Favorites List](#)
- [How to Delete a Group from the Favorites List](#)

## **5.2.2.3 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 Topics**

- [How to Add a Group to the Favorites List](#)
- [How to Rename a Group in the Favorites List](#)

#### 5.2.2.4 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 \(Classic User Interface\)](#) for details.
- 3) Drag the desired contact to the Favorites list.

---

**Related Topics**

- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)
- [Directories](#)
- [How to Search in Directories \(Classic User Interface\)](#)
- [How to Search in Directories \(Modern User Interface\)](#)
- [How to Specify a Default Number for a Favorite](#)
- [How to Add a Group to the Favorites List](#)
- [How to Delete a Contact from the Favorites List](#)

#### 5.2.2.5 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.

---

**INFO:** 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 Topics

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add a Personal Contact](#)
- [Directories](#)
- [How to Add a Personal Contact](#)
- [How to Specify a Default Number for a Favorite](#)
- [How to Add a Group to the Favorites List](#)
- [How to Delete a Contact from the Favorites List](#)

### 5.2.2.6 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 Topics

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)

### 5.2.2.7 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.

### 5.2.2.8 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 Topics**

- [How to Add a Contact to the Favorites List \(Classic User Interface\)](#)
- [How to Add a Contact to the Favorites List and Personal Contacts \(Modern User Interface\)](#)
- [How to Make a Call from the Favorites List \(Classic User Interface\)](#)
- [How to Make a Call from the Favorites List \(Modern User Interface\)](#)

### 5.2.2.9 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 Topics**

- [User Interface Elements](#)

## 5.2.2.10 How to Enable or Disable Automatic Hiding of the Favorites List

### *Prerequisites*

- You are working with the classic user interface.

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 myPortal, select **Do not hide**.
- 4) Click **Save**.

## 5.2.3 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.
- **All calls**
- **Missed**

---

**INFO:** 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.

**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.

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 automatic export is performed:

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

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

---

### Related Topics

- [User Interface Elements](#)
- [How to Make a Call from the Journal \(Classic User Interface\)](#)
- [How to Make a Call from the Journal \(Modern User Interface\)](#)
- [How to Zoom in on an Entry](#)
- [How to Enable or Disable the Closing of Screen Pops at the End of a Call](#)
- [Presence Status](#)

## 5.2.3.1 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 Topics**

- [How to Group Journal Entries](#)
- [How to Zoom in on an Entry](#)

## **5.2.3.2 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 Topics**

- [How to Sort the Journal](#)

### 5.2.3.3 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 Topics**

- [How to Change the Retention Period for Journal Entries](#)

### 5.2.3.4 How to Change the Retention Period for Journal Entries

#### *Step by Step*

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

---

#### **Related Topics**

- [How to Delete Journal Entries](#)

### 5.2.3.5 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 **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 **Save**.

---

**INFO:** Alternatively, you can also schedule a call for a party you cannot reach at the moment for a later point in time directly from the screen pop of the call.

---

---

#### **Related Topics**

- [How to Edit a Scheduled Call](#)
- [How to Clear a Scheduled Call](#)
- [Screen Pops](#)

### 5.2.3.6 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 **Save**.

---

**Related Topics**

- [How to Add a Scheduled Call](#)
- [How to Clear a Scheduled Call](#)

### 5.2.3.7 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 Topics**

- [How to Add a Scheduled Call](#)
- [How to Edit a Scheduled Call](#)

### 5.2.3.8 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.

---

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

---

- 7) Click **Save**.

---

#### Related Topics

- [Directories](#)

### 5.2.3.9 How to Configure the Journal Export

Use the following steps to

- specify the storage location for manually and automatically exported journal data
- control the automatic export of the journal

#### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Click **Browse**.
- 4) Select the desired folder and click **Save**.
- 5) Select one of the following options:
  - 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 **Save**.

### 5.2.3.10 How to Export the Journal Manually

#### *Prerequisites*

- You have specified a location for the exported journal data.

### Step by Step

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

## 5.3 Calls

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

### 5.3.1 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 phone, always with the trunk access code.	<ul style="list-style-type: none"><li>• 321 (internal)</li><li>• 0700798765 (own local network)</li><li>• 0089700798765 (external local network)</li><li>• 0004989700798765 (international)</li></ul>

---

**INFO:** If possible, you should always use the canonical call number format. This ensures that a phone number is always complete, unique and consistent in any situation, even in a network.

---

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 in clients.

When dialing an external phone number in dialable format from a directory (and when using the Desktop Dialer and Clipboard Dialer for certain 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.

---

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

---

---

#### Related Topics

- [How to Dial a Number Manually](#)
- [Desktop Dialer and Clipboard Dialer \(Windows\)](#)
- [How to Enable the CallMe Service](#)
- [How to Add a Call Forwarding Rule](#)
- [How to Edit a Call Forwarding Rule](#)
- [How to Edit a Profile for the Personal AutoAttendant](#)
- [How to Configure and Initiate an Ad-hoc Conference](#)
- [How to Configure a Scheduled Conference](#)
- [How to Configure a Permanent Conference](#)
- [How to Enable or Disable the Notification by Phone](#)
- [How to Define an Additional Phone Number](#)

## 5.3.2 Call Functions

You can control call functions with myPortal for Desktop, e.g., accept calls or pick up calls for another subscriber. You can also dial phone numbers directly from the Journal, the Favorites list or a directory. The call functions can be controlled both in screen pops and in the main window.

---

#### Related Topics

- [Desktop Dialer and Clipboard Dialer \(Windows\)](#)
- [Screen Pops](#)

### 5.3.2.1 How to Answer a Call

#### *Step by Step*

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

---

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

---

---

#### **Related Topics**

- [How to Enable or Disable Screen Pops on Inbound Calls](#)

### 5.3.2.2 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 Pickup** from the context menu.

---

#### **Related Topics**

- [Directories](#)
- [Favorites List](#)

### 5.3.2.3 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 Topics**

- [How to Enable or Disable Screen Pops on Inbound Calls](#)

- [Voicemail box](#)

### 5.3.2.4 How to Dial a Number 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 press the `Enter` key.
  - Select a phone number from the drop-down list for phone numbers and press the `Enter` key.

---

#### Related Topics

- [User Interface Elements](#)
- [Call Number Formats](#)

### 5.3.2.5 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 Topics

- [How to Call from a Directory \(Modern User Interface\)](#)
- [Directories](#)

### 5.3.2.6 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 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 Topics**

- [How to Call from a Directory \(Classic User Interface\)](#)
- [Directories](#)

### 5.3.2.7 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 Topics**

- [How to Make a Call from the Favorites List \(Modern User Interface\)](#)
- [Favorites List](#)
- [How to Specify a Default Number for a Favorite](#)

### 5.3.2.8 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 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 Topics**

- [How to Make a Call from the Favorites List \(Classic User Interface\)](#)
- [Favorites List](#)
- [How to Specify a Default Number for a Favorite](#)

### 5.3.2.9 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 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 Topics**

- [How to Make a Call from the Journal \(Modern User Interface\)](#)
- [Journal](#)

### 5.3.2.10 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 Topics**

- [How to Make a Call from the Journal \(Classic User Interface\)](#)

- [Journal](#)

### 5.3.2.11 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 Topics**

- [How to Enable or Disable Screen Pops on Inbound Calls](#)
- [How to Enable or Disable Screen Pops on Outbound Calls](#)
- [How to Configure the Transfer Method](#)

### 5.3.2.12 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 Topics**

- [How to Enable or Disable Screen Pops on Inbound Calls](#)
- [How to Enable or Disable Screen Pops on Outbound Calls](#)



### 5.3.2.13 How to Record a Call or a Conference

#### *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 Topics**

- [How to Enable or Disable Screen Pops on Inbound Calls](#)
- [How to Enable or Disable Screen Pops on Outbound Calls](#)
- [Ad-hoc Conference](#)
- [Scheduled Conference](#)

### 5.3.2.14 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 Topics**

- [Screen Pops](#)
- [Web Collaboration Integration](#)

### 5.3.2.15 How to End a Call

#### *Step by Step*

- › Select one of the following options:

---

**INFO:** 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 Topics

- [How to Enable or Disable Screen Pops on Inbound Calls](#)
- [How to Enable or Disable Screen Pops on Outbound Calls](#)

### 5.3.3 Desktop Dialer and Clipboard Dialer (Windows)

Using the Desktop Dialer and Clipboard Dialer, you can call a selected destination or a destination copied to the Windows clipboard from many Windows applications such as an editor or an Outlook e-mail.

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 containing letters is searched in the directories as a first name or company.

Windows applications that were implemented with standard Windows-compliant components usually support the Desktop Dialer and Clipboard Dialer, but 16-bit applications do not.

---

#### Related Topics

- [Call Number Formats](#)
- [Call Functions](#)

### 5.3.3.1 How to Make a Call via the Desktop Dialer or Clipboard Dialer

#### *Prerequisites*

- You are working under Windows.
- You have selected the desired string (Desktop Dialer) or the desired string is present in the Windows clipboard (Clipboard Dialer).

---

**INFO:** For applications that do not support the Desktop Dialer, such as Microsoft Office 2010 64-bit, you can try the Clipboard Dialer instead.

---

#### *Step by Step*

- 1) Select one of the following options:
  - If you want to use the Desktop Dialer, press the key/mouse combination configured for it (**Ctrl** + right mouse button by default). If the string is a phone number, it is dialed.
  - If you want to use the Clipboard Dialer, press the key combination configured for it (**Shift** + **Ctrl** + **D** by default). If the string is a phone number, it is dialed.

---

**INFO:** If you want to cancel the dialing of a number, click within five seconds in the **Desktop Dialing** screen pop on the **Close** symbol.

---

- 2) If the string contains letters, click in the Search results in the **Directories** window on the number to be dialed in the context menu of the desired contact.

---

#### **Related Topics**

- [How to Change the Key Combination for the Desktop Dialer or Clipboard Dialer](#)

### 5.3.3.2 How to Enable or Disable the Desktop Dialer or Clipboard Dialer

#### *Prerequisites*

- You are working under Windows.

#### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Select one of the following options:

- If you want to enable the Desktop Dialer, select the **Hot Key Enabled** check box for **via Desktop**.
  - If you want to disable the Desktop Dialer, clear the **Hot Key Enabled** check box for **via Desktop**.
- 4) Select one of the following options:
    - If you want to enable the Clipboard Dialer, select the **Hot Key Enabled** check box for **via Clipboard**.
    - If you want to disable the Clipboard Dialer, clear the **Hot Key Enabled** check box for **via Clipboard**.
  - 5) Click **Save**.

### 5.3.3.3 How to Change the Key Combination for the Desktop Dialer or Clipboard Dialer

#### *Prerequisites*

- You are working under Windows.

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

#### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Select one of the following options:
  - If you want to change the key combination for the Desktop Dialer, click in the rectangular box for **via Desktop**.
  - If you want to change the key combination for the Clipboard Dialer, click in the rectangular box for **via Clipboard**.
- 4) Select one of the following options:
  - If you want to change the key/mouse combination for the Desktop Dialer, hold down one or more of the **Shift**, **Ctrl** and **Alt** keys and then click the additional mouse button desired.
  - If you want to change the key combination for the Clipboard Dialer, hold down one or more of the **Shift**, **Ctrl** and **Alt** keys and then press the additional key desired for the key combination.
- 5) Click **Save**.

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

---

#### **Related Topics**

- [How to Make a Call via the Desktop Dialer or Clipboard Dialer](#)

## 5.3.4 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.

A screen pop appears in the lower right corner of the screen. You can enable or disable screen pops by different methods. Some buttons in the screen pops change, depending on the situation. You can control functions in screen pops via the keyboard (TAB or arrow keys and **Enter**). You can also minimize screen pops to an icon on the task bar.










---

**INFO:** 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 for Incoming Call

Screen pops show the caller's phone number and name (if the name details are available in a directory). The directories are searched in the following order: Personal Directory, Internal Directory, External Offline Directory and External Directory. The first hit, if found, is shown in the screen pop. The following functions are available:

Symbol	Function
	<ul style="list-style-type: none"> <li>During incoming call: <b>Accept (pick up)</b></li> <li>During ongoing call: <b>Hang Up</b></li> </ul>
	<b>Forward</b> to voicemail box
	During ongoing call: <b>Transfer</b> , after entering a number to be dialed or a name to be found
	<b>Place call on hold</b>
	<b>Record</b> (if enabled in the system)
	<b>E-mail</b> to the communication partner
	<b>XMPP</b> to the communication partner; the presence status of the communication partner is displayed if available
	Scheduled call
	<b>Web collaboration</b>

### Opening the Main Window on Inbound Calls









You can select whether myPortal for Desktop should automatically open the main window for an inbound call.

### Closing Screen Pops on Call Termination

You can have screen pops (also called tray pops) automatically closed at the end of a call. If you want to be notified about missed calls by a screen pop, deactivate this function. As soon as more than three screen pops are opened for calls, they are minimized and shown as icons on the task bar.

### Screen Pop for Outgoing Call

Screen pops show the caller's phone number and name (if the name details are available in a directory). The following functions are available:

Symbol	Function
	<b>Hang Up</b>
	During ongoing call: <b>Transfer</b> , after entering a number to be dialed or a name to be found
	<b>Place call on hold</b>
	<b>Record</b> , if enabled in the communication system
	<b>E-mail</b> to the communication partner
	<b>XMPP</b> to the communication partner; the presence status of the communication partner is displayed if available
	Scheduled call
	<b>Web collaboration</b>



### Screen Pop for New Voicemails

Screen pops show the caller's phone number and name (if the name details are available in a directory) as well as the date and time the call was received. This can only be activated collectively for voicemails and fax messages. The following functions are available:

- **Rewind** (Windows)
- **Play** (Through Speakers) and **Pause**
- **Stop**
- **Forward** (Windows)
- **E-mail**
- **Instant Messaging**
- **Play Through Phone**



### Screen Pop for new Fax Message

This screen pop shows the sender's phone number and name (if the name details are available in a directory) as well as the date and time the call was received. This can only be activated collectively for voicemails and fax messages. The following functions are available:

Symbol	Function
	View
	Close

### 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 myPortal for Desktop is open when sending fax messages. The following functions are available:

Symbol	Function
	View
	Close

### Screen Pop with Overview on Starting myPortal for Desktop (Classic User Interface)

This screen pop appears on starting myPortal for Desktop and shows an overview with the respective number of



- New voicemails
- New Fax messages
- Open calls

You can jump to the specific details by clicking on each item.

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
	Change the presence status to <b>Office</b>
	Close

---

**Related Topics**

- [User Interface Elements](#)
- [Call Functions](#)
- [Directories](#)
- [How to Add a Scheduled Call](#)
- [How to Enable or Disable Screen Pops on Changing the Presence Status](#)
- [Instant Messaging \(UC Suite\)](#)
- [Voicemail box](#)
- [Fax Box](#)
- [How to Start Web Collaboration During a Call](#)

### 5.3.4.1 How to Enable or Disable Screen Pops on Inbound Calls

*Step by Step*

- 1) Click **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 Topics**

- [How to Answer a Call](#)
- [How to Redirect a Call to your Voicemail Box](#)
- [How to Transfer a Call](#)
- [How to Place a Call on Hold](#)
- [How to Record a Call or a Conference](#)
- [How to End a Call](#)

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

*Step by Step*

- 1) Click **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 Topics**

- [Directories](#)

### 5.3.4.3 How to Enable or Disable Screen Pops on Outbound Calls

*Step by Step*

- 1) Click **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 Topics**

- [How to Transfer a Call](#)
- [How to Place a Call on Hold](#)
- [How to Record a Call or a Conference](#)
- [How to End a Call](#)

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

*Step by Step*

- 1) Click **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 Topics**

- [Journal](#)

### 5.3.4.5 How to Enable or Disable Screen Pops for New Voicemails

*Step by Step*

- 1) Click **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 Topics**

- [Voicemail box](#)
- [How to Enable or Disable the Opening of the Messages Window for New Voicemails](#)
- [Voicemail box](#)
- [Fax Box](#)

### 5.3.4.6 How to Enable or Disable Screen Pops for New Fax Messages

*Step by Step*

- 1) Click **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 Topics**

- [Fax Box](#)
- [How to Enable or Disable the Opening of the Messages Window for New Fax Messages](#)

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

*Step by Step*

- 1) Click **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 Topics**

- [How to Enable or Disable Screen Pops for New Voicemails](#)

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

*Step by Step*

- 1) Click **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 Topics**

- [How to Enable or Disable Screen Pops for New Fax Messages](#)

### 5.3.4.9 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 **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**.

## 5.4 Conferences

In a conference, multiple participants (including external parties) can communicate with one another at the same time. The Conference Management function of myPortal for Desktop 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	<ul style="list-style-type: none"> <li>Phone-controlled</li> <li>application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>application-controlled</li> </ul>
Start	<ul style="list-style-type: none"> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled</li> </ul>	<ul style="list-style-type: none"> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Manually</li> </ul>
End	<ul style="list-style-type: none"> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled</li> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Manually</li> </ul>
Duration of the reservation of conference channels	<ul style="list-style-type: none"> <li>1 hour by default</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled</li> </ul>	<ul style="list-style-type: none"> <li>Until the deactivation or deletion of the conference</li> </ul>	<ul style="list-style-type: none"> <li>Until the deactivation or deletion of the conference</li> </ul>
Extension	-	x	-	-
Recurrence	<ul style="list-style-type: none"> <li>Manually</li> </ul>	<ul style="list-style-type: none"> <li>Scheduled</li> </ul>	-	-
Direction of connection setup from the viewpoint of the system	<ul style="list-style-type: none"> <li>Outbound</li> </ul>	<ul style="list-style-type: none"> <li>Outbound</li> <li>Inbound</li> </ul>	<ul style="list-style-type: none"> <li>Inbound</li> </ul>	<ul style="list-style-type: none"> <li>Inbound</li> </ul>
Set of participants	<ul style="list-style-type: none"> <li>Fixed</li> </ul>	<ul style="list-style-type: none"> <li>Fixed</li> </ul>	<ul style="list-style-type: none"> <li>Fixed</li> </ul>	<ul style="list-style-type: none"> <li>Open</li> </ul>
Authentication of conference participants	-	<ul style="list-style-type: none"> <li>Individual conference ID (optional)</li> <li>Password (optional)</li> </ul>	<ul style="list-style-type: none"> <li>Individual conference ID (optional)</li> <li>Password (optional)</li> </ul>	<ul style="list-style-type: none"> <li>Shared conference ID (optional)</li> </ul>
Recording, if enabled in the system	<ul style="list-style-type: none"> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>
Invitation by E-mail with:	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> <li>Date and time of the start and end of the conference</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> </ul>
Outlook appointment as an e-mail 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. Conference Management requires the Comfort Plus User license.








### 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
 and  alternately	Communication system – Conference is being recorded

Symbol	Meaning
	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 E-mail and Outlook Appointment**

The system can automatically notify conference participants by e-mail 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 e-mails. In addition, an internal conference participant must have specified his or her e-mail address. For external conference participants, the initiator of the conference must enter their individual e-mail addresses.

---

**INFO:** For e-mail notifications, no return acknowledgments are obtained for failed deliveries or absence messages, since the e-mails 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, e.g., with OpenScape Personal Edition, must be terminated before participating in a conference.

---

### Related Topics

- [User Interface Elements](#)
- [Web Collaboration Integration](#)
- [How to Specify your E-Mail Address](#)

## 5.4.1 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.

---

#### Related Topics

- [How to Record a Call or a Conference](#)

## 5.4.1.1 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](#) 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 Topics

- [Call Number Formats](#)
- [How to End an Ad-hoc or Scheduled Conference](#)

- [How to Repeat an Ad-hoc Conference](#)
- [How to Delete an Ad-hoc Conference](#)
- [How to Add Conference Participants](#)

### 5.4.1.2 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 **View**.

### 5.4.1.3 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 \(Classic User Interface\)](#)) 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**, **Phone Number** in canonical or dialable format, and **E-mail** and then click **OK**.

---

#### Related Topics

- [Directories](#)
- [How to Search in Directories \(Classic User Interface\)](#)
- [How to Search in Directories \(Modern User Interface\)](#)
- [Favorites List](#)
- [How to Configure and Initiate an Ad-hoc Conference](#)
- [How to Configure a Scheduled Conference](#)
- [How to Configure a Permanent Conference](#)
- [How to Remove Conference Participants](#)
- [Scheduled Conference](#)
- [Permanent Conference](#)

### 5.4.1.4 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 Topics

- [How to Reconnect Conference Participants](#)
- [Scheduled Conference](#)

### 5.4.1.5 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 Topics**

- [How to Disconnect a Conference Participant](#)
- [Scheduled Conference](#)

### 5.4.1.6 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 Topics**

- [How to Add Conference Participants](#)
- [Scheduled Conference](#)
- [Permanent Conference](#)

### 5.4.1.7 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.

---

**INFO:** 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 Topics**

- [Scheduled Conference](#)
- [Permanent Conference](#)

### 5.4.1.8 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.

---

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

---

#### *Step by Step*

- 1) Click **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 Topics**

- [How to Configure and Initiate an Ad-hoc Conference](#)

- [Scheduled Conference](#)

### 5.4.1.9 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 **Start Conference**. The communication system now calls you and the conference participants.

---

#### **Related Topics**

- [How to Configure and Initiate an Ad-hoc Conference](#)

### 5.4.1.10 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 **Remove**. If the conference has already started, it is terminated.

---

#### **Related Topics**

- [How to Configure and Initiate an Ad-hoc Conference](#)

## 5.4.2 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).

---

**INFO:** 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 e-mail (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.

---

**INFO:** 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 e-mail. 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 Topics

- [How to Add Conference Participants](#)
- [How to Disconnect a Conference Participant](#)
- [How to Reconnect Conference Participants](#)
- [How to Remove Conference Participants](#)
- [How to Specify another Conference Controller](#)
- [How to Record a Call or a Conference](#)
- [How to End an Ad-hoc or Scheduled Conference](#)

## 5.4.2.1 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](#) 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 **Exceptions**.
  - b) Click **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 **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 **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 e-mail (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**.
- 
- INFO:** 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 e-mail 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 e-mail, enter this in the **Notes**.

24) Click **Save**.

25) Click **Send to all**. The invitation e-mails will now be sent.

---

#### Related Topics

- [Call Number Formats](#)
- [How to Add Conference Participants](#)
- [How to Delete a Scheduled or Open Conference](#)

### 5.4.2.2 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 Topics

- [How To Display a Scheduled, Permanent or Open Conference as the Conference Controller](#)

### 5.4.2.3 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.

---

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

---

#### *Step by Step*

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

---

#### **Related Topics**

- [Permanent Conference](#)

### 5.4.2.4 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.

---

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

---

#### *Step by Step*

- 1) Click **Conference**.
- 2) Click **Manage my conferences**.

- 3) Click on the **My Conferences** tab.
- 4) Click on a conference under **Conference Name**.
- 5) Click **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 Topics**

- [Permanent Conference](#)

### 5.4.2.5 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 **Edit**.
- 6) Click in the context menu of the relevant conference participant on **Properties**.
- 7) Enter the new **Password**.
- 8) Click **OK**.
- 9) Click **Save**.
- 10) Click **Close**.

---

**Related Topics**

- [Permanent Conference](#)

## 5.4.2.6 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 Topics**

- [How to Display your Own Scheduled Conference](#)
- [Permanent Conference](#)
- [How to Display your Own Permanent or Open Conference](#)

## 5.4.2.7 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**.

## 5.4.2.8 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 **Edit**.
- 6) Select a new **Start Date**.
- 7) Select a new **Start Time**.
- 8) Select a new **End Time**.
- 9) Click **Advanced**.
- 10) Select the **Automatically send email invitation to conference participants** check box.
- 11) Click **Save**.
- 12) Click **Close**.

## 5.4.2.9 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 Topics**

- [How to Configure a Scheduled Conference](#)

## 5.4.2.10 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 **Edit**.
- 6) Clear the **Recurring Conference** check box and select it again.
- 7) Click **Exceptions**.
- 8) Click **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 **OK**.
- 15) Click **Cancel**.
- 16) Click **OK**.
- 17) Click **Advanced**.
- 18) If you want to add some introductory text to the invitation e-mail, click in the **Notes** input field and enter the desired text.
- 19) Click **Save**.

## **5.4.2.11 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 **Edit**.
- 6) Clear the **Recurring Conference** check box and select it again.

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

### 5.4.3 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).

---

**INFO:** 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 e-mail (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 e-mail. The duration of the recording is only limited by the available storage capacity of the system.

---

### Related Topics

- [How to Add Conference Participants](#)
- [How to Remove Conference Participants](#)
- [How to Specify another Conference Controller](#)
- [How to Determine the Dial-in Number for a Scheduled, Permanent or Open Conference](#)
- [How to Determine the Conference ID for a Scheduled or Permanent Conference](#)
- [How to Change the Password for a Scheduled or Permanent Conference](#)
- [How To Display a Scheduled, Permanent or Open Conference as the Conference Controller](#)

## 5.4.3.1 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](#) 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 e-mail (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**.

---

**INFO:** 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 e-mail 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 e-mail, enter this in the **Notes**.
- 15) Click **Save**.
- 16) Click **Send to all**. The invitation e-mails will now be sent.

---

#### Related Topics

- [Call Number Formats](#)
- [How to Add Conference Participants](#)
- [How to Delete a Permanent Conference](#)

### 5.4.3.2 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 Topics**

- [How To Display a Scheduled, Permanent or Open Conference as the Conference Controller](#)

### **5.4.3.3 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 Topics**

- [How to Configure a Permanent Conference](#)

### **5.4.4 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).

---

**INFO:** 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 e-mail (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 e-mail. The duration of the recording is only limited by the available storage capacity of the system.

## 5.4.4.1 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 **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 **Cancel**.
- 10) 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 drop-down list.
  - d) Click on **Reschedule this recurrence**.
  - e) Select a **New scheduled date**.
  - f) Select a new **Start Time**.
  - g) Click **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 e-mail (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**.

---

**INFO:** 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**.

## 5.4.5 Web Collaboration Integration

Together with myPortal for Desktop (Windows) and myPortal for Outlook, the system also supports the convenient integration of the separate product OpenScope Web Collaboration for simultaneous multi-media collaboration during phone calls as well as phone-controlled and application-controlled teleconferences. This gives you 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.

### Supported Types of Connections

The Web Collaboration integration supports phone calls as well as the following types of application-controlled phone conferences of the system:

- Ad-hoc conference
- Scheduled conference
- Permanent conference

A web collaboration session can be started during a phone conversation (a conference) via the screen pop.

On initiating or configuring a telephone conference, the conference controller can start one Web Collaboration session for simultaneous use with the same participants. On rescheduling, deleting or ending a conference call, the related Web Collaboration session is also rescheduled or deleted automatically.



When the web collaboration session is started, the Web Collaboration Client opens. No local installation is required on the desktop for this purpose. More information can be found in the Web Collaboration product documentation.

---

**INFO:** In order to enable clients to start a Web Collaboration session automatically, proxy authentication must be disabled on the server.

---

### **Connecting to the Web Collaboration Session**

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 e-mail addresses receive an e-mail with an appropriate link to the Web Collaboration session.

---

**INFO:** Users of a Mac OS must copy the link for the Web Collaboration session into the web browser.

---

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.

### **Conference ID and Password**

The conference ID and password for a Web Collaboration session are identical to the conference ID and password of the associated phone 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 client do not appear in a Web Collaboration session of the same participant, and vice versa.

---

### **Related Topics**

- [How to Start Web Collaboration During a Call](#)
- [Conferences](#)

## **5.5 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.

## 5.5.1 Voicemail box

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

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.

---

**INFO:** 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.

---

**INFO:** 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.

---

**INFO:** 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
<b>Busy</b>	-	-	for <b>Busy</b> (if not recorded: general)
<b>No answer</b>	-	-	for <b>No Answer</b> (if not recorded: general)

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

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

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

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

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
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, you can bypass the password prompt. 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.

---

#### Related Topics

- [First Steps](#)
- [Screen Pops](#)
- [How to Enable or Disable Screen Pops for New Voicemails](#)
- [How to Redirect a Call to your Voicemail Box](#)
- [Personal AutoAttendant](#)
- [How to Record your Name Announcement](#)
- [How to Record your Personal Greeting](#)
- [How to Enable or Disable Screen Pops for New Voicemails](#)
- [Managing Voicemail](#)
- [Notification Service for Messages](#)
- [How to Define an Additional Phone Number](#)

## 5.5.1.1 How to Determine the Call Number for your Voicemail Box

### *Step by Step*

- 1) Click **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**.

## 5.5.1.2 How to Select Recording or Announcement Mode

### *Step by Step*

- 1) Click **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**.
- 4) Click **Save**.

### 5.5.1.3 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 Topics**

- [Personal AutoAttendant](#)
- [How to Edit a Profile for the Personal AutoAttendant](#)
- [How to Import an Announcement](#)
- [How to Delete an Announcement](#)

## 5.5.1.4 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**.

---

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

---

---

### Related Topics

- [Personal AutoAttendant](#)
- [How to Edit a Profile for the Personal AutoAttendant](#)
- [How to Record an Announcement](#)
- [How to Delete an Announcement](#)

## 5.5.1.5 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 Topics**

- [How to Record an Announcement](#)
- [How to Import an Announcement](#)

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

*Step by Step*

- 1) Click **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 Topics**

- [Presence Status](#)
- [How to Change the Visibility of your Presence Status for Others](#)
- [Personal AutoAttendant](#)
- [How to Enable or Disable the Announcement of your Presence Status for Specific Callers](#)

### 5.5.1.7 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 **Settings**.
- 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**.

---

**INFO:** 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 **Save**.

---

#### Related Topics

- [Presence Status](#)
- [How to Change the Visibility of your Presence Status for Others](#)
- [Personal AutoAttendant](#)
- [How to Enable or Disable the Announcement of your Presence Status for External Callers](#)

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

### Step by Step

- 1) Click **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 Topics**

- [Fax Box](#)

### 5.5.1.9 How to Activate or Deactivate the Password Prompt for the Voicemail Box

---

**NOTICE:** If you deactivate the password prompt for your voicemail box, unauthorized users could access your voicemail by phone and listen to your voice messages, for example, or call external destinations at your cost.

---

*Step by Step*

- 1) Click **Setup**.
- 2) Click on **Security and Access > Security and Access**.
- 3) Select one of the following options:
  - If you want to activate the password prompt on calling your voicemail box, clear the **Bypass password when calling voicemail** check box.
  - If you want to deactivate the password prompt on calling your voicemail box, enable the **Bypass password when calling voicemail** check box.
- 4) Click **Save**.

### 5.5.1.10 How to Select the Language of the Voicemail Box

*Step by Step*

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

## 5.5.2 Managing Voicemail

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

**Folders for Voicemail**




myPortal for Desktop organizes voice messages in the following folders:

- **Inbox**

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

### Displaying Voicemail Messages

The following symbols identify different types of voicemail:

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

The List view of voicemails shows the following details:

- Symbol for the type of voicemail
- **Date**
- **Time**
- **Group**, if available
- **Call number**, if available
- **Last Name**, if available  
For recorded conferences: conference name, if available; otherwise, Last Name of the second conference participant, if available
- **First Name**, if available
- **Company**, if available
- **Priority**  
Color coding: urgent (rot), private (blue), normal (black). When listening to the voicemail Inbox, an announcement notifies you of the number of messages per priority.
- **Duration**

### Retention Period for Voicemail

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

### Voicemail for Groups

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

### Listening to Voicemail

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

### Calling the Sender of a Voicemail

You can call the sender of a voice message.

### Forwarding a Voice Message

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

### Moving a Voice Message

You can move a voice message to another folder.

### Saving a Voice Message as a File

---

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

---

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

---

#### Related Topics

- [User Interface Elements](#)
- [Voicemail box](#)

## 5.5.2.1 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 Topics**

- [How to Listen to a Voice Message on the PC](#)

## **5.5.2.2 How to Listen to a Voice Message on the PC**

### **Prerequisites**

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

---

**INFO:** 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 Topics**

- [How to Listen to a Voice Message on the Phone](#)

### 5.5.2.3 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.

### 5.5.2.4 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 **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 **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 **Redirect**.

### 5.5.2.5 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 > ....**

### 5.5.2.6 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**.

### 5.5.2.7 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.

## **5.5.2.8 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.

## **5.5.3 Fax Box**

The Fax box saves Fax messages centrally. You can access these messages using myPortal for Desktop.

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 Topics

- [Screen Pops](#)
- [How to Enable or Disable Screen Pops for New Fax Messages](#)
- [How to Enable or Disable Screen Pops for New Voicemails](#)
- [Managing Fax Messages](#)
- [How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages](#)
- [Sending Fax Messages](#)
- [Notification Service for Messages](#)

### 5.5.3.1 How to Determine your own Fax Number

#### *Prerequisites*

- Your administrator has configured a Fax number for you.

#### *Step by Step*

- 1) Click **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**.

## 5.5.4 Managing Fax Messages

You can display or forward fax messages, for example, or move them to another folder, save them as 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 TIFF file in the file system of your PC to archive it permanently or send it 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 Topics

- [User Interface Elements](#)
- [Fax Box](#)

### 5.5.4.1 How to Display a Fax Message

#### *Prerequisites*

- TIFF files are associated with an application in which they can be viewed.

#### *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 the **View Fax** icon.

### 5.5.4.2 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.

### 5.5.4.3 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.

---

**INFO:** 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 **OK**.

#### 5.5.4.4 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 > ...**

#### 5.5.4.5 How to Save a Fax Message as a TIFF File

##### *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:  
Click on **Save as tiff** in the context menu.
  - Modern user interface:  
Click the **Save as tiff** icon.
- 5) Select a folder in the **Save** window, enter a file name of your choice in the input field, and click **Save**.

### 5.5.4.6 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.

### 5.5.4.7 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 Topics**

- [How to Display an Overview of Sent Fax Messages](#)
- [How to Cancel Sending a Fax Message](#)

### 5.5.4.8 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 Topics**

- [How to Display an Overview of Fax Messages in the Send Queue](#)

## 5.5.4.9 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 Topics**

- [How to Display an Overview of Fax Messages in the Send Queue](#)

## 5.5.4.10 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.

### 5.5.4.11 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.

### 5.5.4.12 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.

## 5.5.5 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 Topics

- [Fax Box](#)

## 5.5.6 Notification Service for 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 a defined value, it is not attached to the e-mail. This value can be changed by the administrator of the communication system; the default is 10 MB. 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 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 TIFF file exceeds a defined value, it is not attached to the e-mail. This value can be changed by the administrator of the communication system; the default is 10 MB. 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.	
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 Topics**

- [Voicemail box](#)
- [Fax Box](#)

### 5.5.6.1 How to Enable or Disable E-mail Notifications

***Prerequisites***

- The administrator of your communication system has configured the sending of e-mails.
- Your e-mail 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 Topics**

- [How to Specify your E-Mail Address](#)

### 5.5.6.2 How to Enable or Disable the Notification by Phone

***Step by Step***

- 1) Click **Setup**.
- 2) Click on **Communications > Voicemail Notifications**.

- 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 Topics**

- [Call Number Formats](#)

### 5.5.6.3 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**.

## 5.6 Instant Messaging (UC Suite)



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

### 5.6.1 Instant Messaging (UC Suite)

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.

Context menus with the menu item **Send Instant Message** indicate whether the relevant subscriber is logged in by a symbol on the left.

Symbol	Status
	Logged in
	Logged out

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

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

#### External Instant Messaging

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

#### Multi-user chat

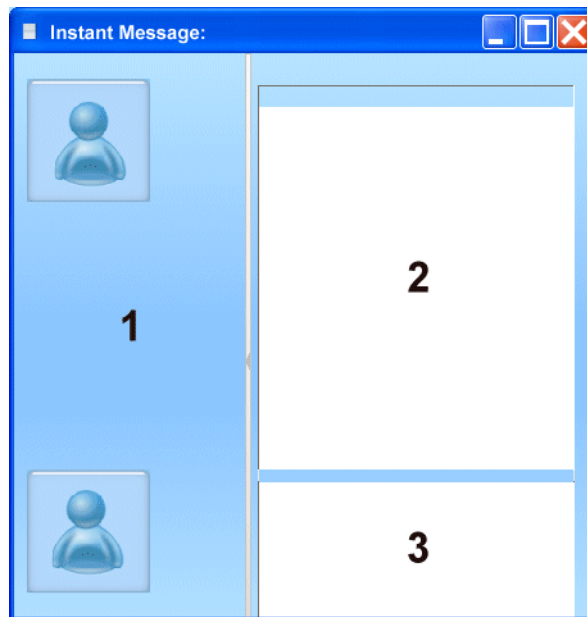
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external XMPP communication partner.

## 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** window in myPortal for Desktop with the classic user interface and in myPortal for Outlook 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 instant messages of all the chatting subscribers.
- 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 Topics

- [Screen Pops](#)

## 5.6.1.1 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) Select the recipient by one of the following methods:
  - Click on a contact or a group in the **Favorites** list.
  - Click on the **Directories** tab or window, then on **Internal Directory** or **External Directory**, and then on a contact.

---

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

---

- 2) Select **Send Instant Message** in the context menu.
- 3) If you want to add further communication partners the chat (to create a multi-user chat), drag them from **Favorites** or **Directories** to the **Instant Message** window.
- 4) If you want to remove a communication partner from the multi-user chat, select **Remove** in the **Instant Message** window in the user area from the context menu of the symbol or image representing the respective communication partner.
- 5) Enter the text in the **Instant Message** window in the input area.
- 6) If you want to insert an emoticon into the text, select one of the following options:
  - Click on the Smiley icon and then on the desired emoticon.
  - Enter the keyboard shortcut for the emoticon, e.g., :).
- 7) Click **Send**.
- 8) If you want to delete the previous history of the chat in the Message Center, click on the Trash icon.

---

### Related Topics

- [Directories](#)
- [Favorites List](#)
- [How to Define an XMPP Alias](#)

## 5.7 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.

### 5.7.1 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
No answer	-	-	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."

### 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 Topics

- [Presence Status](#)
- [Voicemail box](#)
- [How to Record an Announcement](#)
- [How to Import an Announcement](#)
- [How to Enable or Disable the Announcement of your Presence Status for External Callers](#)
- [How to Enable or Disable the Announcement of your Presence Status for Specific Callers](#)

## 5.7.1.1 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 Topics

- [Call Number Formats](#)
- [How to Record an Announcement](#)
- [How to Import an Announcement](#)

## 6 Configuration

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

### 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 Topics

- [Directories](#)

- [Favorites List](#)

## 6.1 How to Edit your own Name

### *Step by Step*

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

---

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

---

- 4) Click **Save**.

## 6.2 How to Specify your E-Mail Address

### *Prerequisites*

- The administrator of your communication system has configured the sending of e-mails.

### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Enter your e-mail address under **E-mail**.
- 4) Click **Save**.

---

### **Related Topics**

- [How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments](#)
- [Conferences](#)
- [How to Enable or Disable E-mail Notifications](#)

## 6.3 How to Define an Additional Phone Number

### *Step by Step*

- 1) Click **Setup**.
- 2) Click on **Personal Details > My Personal Details**.

## Configuration

### How to Define an XMPP Alias

- 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 Topics

- [Call Number Formats](#)
- [How to Enable the CallMe Service](#)
- [Status-based Call Forwarding](#)
- [Status-based Call Forwarding](#)
- [Voicemail box](#)

## 6.4 How to Define an XMPP Alias

### *Prerequisites*

- The administrator of your communication system has enabled XMPP.

### *Step by Step*

- 1) Click **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.

---

**INFO:** 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 Topics**

- [How to Send an Instant Message](#)

## 6.5 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 **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 Topics**

- [How to Delete your own Picture](#)

## 6.6 How to Delete your own Picture

***Step by Step***

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

---

**Related Topics**

- [How to Provide your own Picture](#)

## 6.7 Programming the Function Keys of the Telephone

You can customize the function keys of your telephone and any available key module or BLF module to suit your requirements with via an application in the web browser.

## Configuration

### Programming the Function Keys of the Telephone

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 , if available; otherwise, in English.

---

**INFO:** You cannot program the function keys of an analog phone with .

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.

## 6.7.1 How to Program the Function Keys of the Telephone

### Step by Step

- 1) Click **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.

---

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

---

- 7) Click **Save**.

- 8) If you selected a system phone with automatic key labeling (such as an optiPoint 420 Standard, for example), you can enter the text that should appear in the display of the function key in the **Labeling** column.
- 9) If you have programmed a function key as the **Shift Key**, select the check box **2. Level**. Enter the external phone numbers as described under steps 6 to 8.
- 10) If you want to program further function keys, repeat steps 4 to 9.
- 11) Close the web browser window for key programming.
- 12) Click in the **Setup** window of myPortal for Outlook on **Save**.

---

**Related Topics**

- [How to Resolve the Problem: Empty Browser Window for Key Programming](#)

## 6.8 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.

---

---

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

---

### *Step by Step*

- 1) Click **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. The password must not consist of only digits.

---

**INFO:** The password applies to myPortal for Desktop, myPortal for Outlook, Fax Printer Driver, myAttendant and myAgent, as well as phone access to your voicemail box.

---

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

---

**Related Topics**

- [How to Start myPortal for Desktop](#)

## 6.9 How to Change the Login Name

### *Step by Step*

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

---

**INFO:** The user name applies to myPortal for Desktop, myPortal for Outlook, Fax Printer Driver, myAttendant and myAgent.

---

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

## 6.10 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 **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 Topics**

- [How to Start myPortal for Desktop](#)



## 6.11 How to Select the User Interface Language

### *Step by Step*

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

### *Next steps*

Close myPortal for Desktop and restart the application.

---

#### **Related Topics**

- [User Interface Elements](#)

## 6.12 How to Change the User Interface

### *Step by Step*

- 1) Click **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 Topics**

- [User Interface Elements](#)

## 6.13 How to Enable or Disable Tabs

### *Prerequisites*

- You are working with the classic user interface.

---

**INFO:** At least one of the tabs always remains active.

---

### Step by Step

- 1) Click **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 Topics

- [User Interface Elements](#)

## 6.14 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 **Setup**.
- 2) Click on **My Preferences > Appearance**.

- 3) Click on **Reset Layout**.
- 4) Click **Save**.

---

**Related Topics**

- [User Interface Elements](#)

## 6.15 How to Activate or Deactivate a Hotkey

### *Prerequisites*

- You are working under Windows.

### *Step by Step*

- 1) Click **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 , 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**.

## 6.16 How to Change the Server Address

---

**INFO:** 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 **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**.

## 6.17 How to Configure the Transfer Method

### *Step by Step*

- 1) Click **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 use a blind (i.e., unscreened) transfer, select **Blind Transfer**.
  - If you want to use a consultation (i.e., screened) transfer, select **Consultation Transfer**.
- 4) Click **Save**.

---

### Related Topics

- [How to Transfer a Call](#)

## 6.18 Troubleshooting

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

### 6.18.1 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 Topics

- [How to Start myPortal for Desktop](#)

## 6.18.2 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 the Java Runtime Environment 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 Topics

- [How to Start myPortal for Desktop](#)

## 6.18.3 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 Topics

- [How to Program the Function Keys of the Telephone](#)

## 7 Appendix

The appendix contains additional information.

### 7.1 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	Break	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	Neuvottelusa	Sairaana	Tauolla	Matkoilla	Lomalla	Lounaalla	Poissa
French (France)	Bureau	Réunion	Maladie	Break	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	Break	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

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

---

#### Related Topics

- [How to Enable or Disable Automatic Updating of the Presence Status via Outlook/iCal Appointments](#)

## 7.2 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.

---

**INFO:** 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
  - Place call on hold
  - Alternate (Toggle/Connect)
  - Consultation
  - Disconnect

## Appendix

Features of the UC Clients that can be used with SIP Telephones

- Transfer
- Phone-oriented features:
  - Do Not Disturb
  - Call forwarding



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