

Documentation

OpenScape Office V3 myPortal for Desktop

User Guide

A31003-P1030-U102-5-7619

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1 Introduction

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

myPortal for Desktop can be used with the following communication systems:

- OpenScape Office V3

1.1 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
- Status-based call forwarding
- Personal AutoAttendant
- Conferencing (OpenScape Office V3 LX/MX only)
- Recording of calls, if activated in the communication system
- Recording conferences (OpenScape Office V3 LX/MX only), if enabled in the communication system
- Instant messaging
- Voice and fax messages

1.2 New Features

myPortal for Desktop for OpenScape Office V3 LX/MX offers a number of convenient new features.

Desktop Dialer

The Desktop Dialer enables you to call a marked destination from several Windows applications such as a text editor or an Outlook e-mail, for example, by using the appropriate key(s) plus mouse button combination.

Separate Window

You can have the favorites list and the **Journal**, **VoiceMail**, **Fax Messages** and **Directories** tabs optionally displayed within the main window or in separate windows.

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.

Mapping of the External XMPP Status Internally

The external XMPP status is mapped internally, so you can see the presence status of external XMPP communication partners in the Favorites list or in the external directory, for example.

Mapping of the Internal Presence Status Externally

External XMPP communication partners can see your XMPP status.

1.3 Types of Topics

The types of topics include concepts and operating instructions.

Type of topic	Contents	Title
Concept	Explains the "What".	Usually without a verb, e.g.: <i>Call Functions</i> .
Operating instructions	Describe task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts.	Starts with "How to" followed by a verb, for example: <i>How to Dial a Call Number</i> .

Related Topics

- [Display Conventions](#)

1.4 Display Conventions

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

Purpose	Presentation	Example
User interface elements	Bold	Click OK .
Menu sequence	>	File > Exit
Special emphasis	Bold	Do not delete Name.
Cross-reference text	Italics	You will find more information in the topic <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>
Work Steps and Substeps	Numbered and alphabetical lists	<ul style="list-style-type: none"> • Configure the DSL telephony stations with the associated DID phone numbers. <ul style="list-style-type: none"> – Click Add. – Enter the name of the Internet telephony station under Internet Telephony Station.
Alternative Work Steps	Enumeration	<ul style="list-style-type: none"> • If you want to output amounts, enable the check box Display amounts instead of units. • If you want to output units, clear the check box Display amounts instead of units.

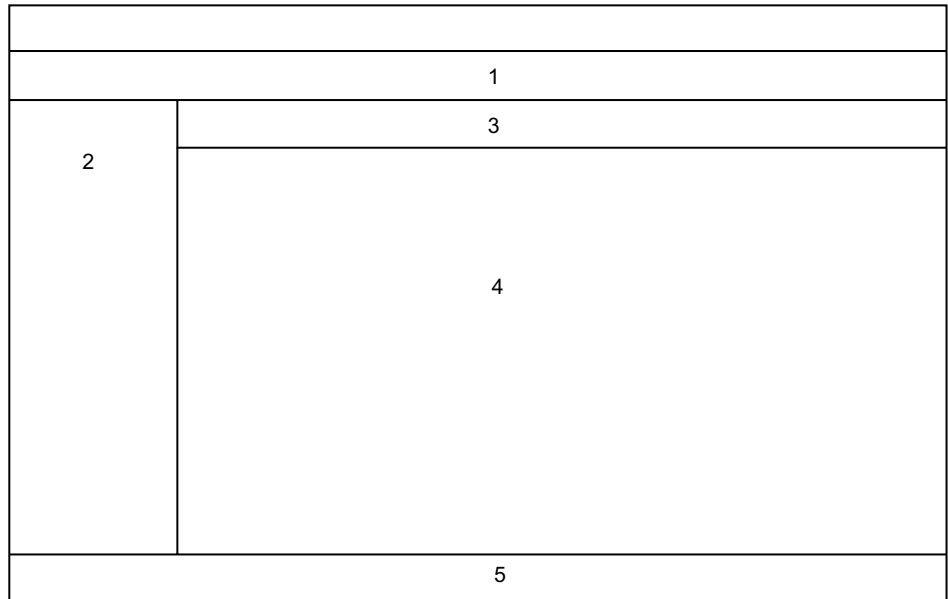
Related Topics

- [Types of Topics](#)

1.5 User Interface Elements

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

The main window consists of the following elements:





- Menu bar (1) with:
 - Drop-down list for call numbers with 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
If the **myPortal Setup** window does not show all tabs, you can scroll horizontally or vertically within it with the two triangular symbols.
 - **Help** menu
 - Drop-down list for Presence status
 - Name of the logged in user
- Favorites list (2)
- Tabs (3):
 - **Journal**
 - **Voice Mail**
 - **Fax messages**
 - **Directories**
- 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

Separate Window

The following elements can be optionally displayed within the main window or in separate windows:

- Favorites list
- **Journal**
- **Voice Mail**
- **Fax messages**
- **Directories**

Symbol	Function
	Display in separate window
	Display in main window

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 small windows with which myPortal for Desktop displays more information on specific objects of the graphical user interface, for example, on icons. A tooltip appears when you let the mouse pointer hover over the corresponding object for a brief period of time.

Related Topics

- [Favorites List](#)
- [How to Change the Width of the Favorites List](#)
- [How to Dial a Number](#)
- [Screen Pops](#)
- [Conferencing \(OpenScape Office MX/LX Only\)](#)
- [Presence Status](#)
- [Journal](#)
- [Directories](#)
- [Managing Voicemail](#)
- [Managing Fax Messages](#)
- [How to Select the User Interface Language](#)
- [How to Change Skin Colors](#)

1.6 Online Help

The integrated online help is context-sensitive, which means that you can directly invoke a suitable topic for the current processing situation.

Navigation

The buttons at the top left provide the following functions:

- **Contents** provides you with an overview of the structure.
- The **Index** allows you to directly access a topic using keywords.
- **Search** allows you to do a full-text search and selectively find all relevant topics.

2 Installing and Starting myPortal for Desktop

The installation of myPortal for Desktop is subject to specific hardware and software requirements.

2.1 Prerequisites for myPortal for Desktop

In order to use myPortal for Desktop, the client PC of the subscriber must be equipped with the appropriate hardware and software configurations. Depending on the configuration, administration rights are required for the installation and automatic updates. The available functionality depends on the communication system being used and, for OpenScape Office V3 LX/MX, also on the licenses being used.

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

Telephones

myPortal for Desktop can be used in combination with the following telephones:

- OpenStage HFA
- OpenStage T (HiPath 3000 only)
- optiPoint 410 HFA
- optiPoint 420 HFA
- optiPoint 500 (HiPath 3000 only)
- optiPoint WL2 professional HFA
- SIP Phone
- Analog telephone
- HiPath Cordless IP
- optiClient 130 HFA
- OpenScape Personal Edition HFA
- OpenScape Personal Edition SIP

INFO: For analog and DECT telephones, the Message Waiting Indication (MWI) is not supported, and only limited support is available for displaying information on the phone.

Operating System

- Microsoft Windows 7
- Microsoft Windows Vista SP2
- Microsoft Windows XP SP3

Installing and Starting myPortal for Desktop

Prerequisites for myPortal for Desktop

Local administration rights on the client PC are required for the installation, but not for automatic updates.

Web Browsers

for Programming the Function Keys of the Telephone:

- Microsoft Internet Explorer Version 7
- Microsoft Internet Explorer Version 8 in compatibility mode
- Mozilla Firefox Version 3.6.x

Additional Software

- Sun Java >= 1.6 (available via **Service Center > Download Center**)
- Access to Microsoft Exchange Server (for Outlook contacts and appointments)
- Microsoft .NET Framework >= 3.5

Windows Update

The PCs always require the latest version of all available patches.

Minimum Hardware Requirements

- 2 GHz CPU
- RAM: 2 GB
(Microsoft Windows XP SP3: 1 GB)
(Microsoft Windows 2003 Server SP2: 1 GB)
- 100 Mbps LAN
- XGA (1024x768) screen resolution

Microsoft Terminal Server, Citrix Server

myPortal for Desktop can be used in Terminal Server and Citrix Server environments under the following preconditions: In addition, project-specific releases are possible.

INFO: Terminal Server and Citrix Server environments, including hosted services and virtual environments are the responsibility of the customer.

Operating system:

- Microsoft Windows 2008 R2 Server (64 bit) with Citrix XenApp 6.0 Server
- Microsoft Windows 2008 R2 Server (64 bit) with Citrix XenApp 5.0 Server
- Microsoft Windows 2008 R2 Server (64 bit) as Microsoft Terminal Server
- Microsoft Windows 2008 Server SP2 as Microsoft Terminal Server

- Microsoft Windows 2003 Server SP2 as Microsoft Terminal Server

Hardware Prerequisites: The number of installable myPortal for Desktop clients depends on the server performance and on the amount of available memory. If the server is also being used for other applications, the memory capacity of the server must also be considered. Memory requirements for myPortal for Desktop clients: approx. 84 MB for each instance.

Additional contact folders, LDAP databases or integrated applications such as the Outlook Calendar Integration, for example, are not taken into account.

Installation Files

The following options are available for providing installation files to users:

- The administrator downloads the installation files from the **Download Center** and provides them to users via a network drive, for example.
- They can access the installation files directly via a network drive connected with \\<IP address of the communication system>\applications (User: hoome, Password: hoomesw). The installation files are located in the `install-common` folder.

Related Topics

- [Automatic Updates](#)
- [How to Install myPortal for Desktop](#)

2.2 How to Install myPortal for Desktop

- Prerequisites**
- Your PC meets the requirements described under [Prerequisites for myPortal for Desktop](#).
 - 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` 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**.
 3. Click on **Next** twice.
 4. Click on **Custom** twice.
 5. Select the **myPortal for Desktop / myAttendant** feature to be installed.
 6. Click **Next** and then click **Finish** to complete the installation process.

Next steps Start myPortal for Desktop.

Related Topics

- [Prerequisites for myPortal for Desktop](#)
- [How to Start myPortal for Desktop](#)
- [How to Uninstall myPortal for Desktop](#)
- [Upgrading to OpenScape Office V3](#)

2.3 How to Start myPortal for Desktop

Prerequisites • myPortal for Desktop is installed on your PC.

Step by Step 1. Click **Start > Program Files > Communication Clients > myPortal**.

INFO: The simultaneous use 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 *OpenScape Office V3, myAgent, User GuideNotes on Using OpenScape Office Clients Concurrently*).

2. Enter your **User Name** in the Login window. This is usually your call number. If you have any questions, please contact the administrator of your communication system.

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 OpenScape Office 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 myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Mobile, myPortal for OpenStage, myPortal for OutlookOpenScape Office Fax Printer as well as phone access to your voicemail box.

NOTICE: 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 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: Use the automatic login only if you are sure that no one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations by simply using the default password.

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 of the communication system.
7. Click **Login**.

Next steps Change your password if you have not already done this.

Related Topics

- [How to Install myPortal for Desktop](#)
- [How to Change your Password](#)
- [How to Enable or Disable an Automatic Login](#)
- [How to Resolve the Problem: No Connection to the Communication System](#)

- [How to Resolve the Problem: The Nokia Application Suite Starts Instead of myPortal](#)

2.4 How to Uninstall myPortal for Desktop

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 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.
6. If a message about deleting shared files appears, click on **No to all**.

Related Topics

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

2.5 Automatic Updates

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

When a OpenScape Office PC client determines that a newer version than the one currently running is available on the communication system, it displays a corresponding message. The automatic update is performed on exiting the client.

Related Topics

- [Prerequisites for myPortal for Desktop](#)

2.5.1 How to Perform Automatic Updates

- Prerequisites**
- Your PC meets the requirements described under [Prerequisites for myPortal for Desktop](#).
 - You have received a message such as: OpenScape Office 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.

2.6 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 file.

All clients of OpenScape Office V2 must be uninstalled. The clients of the current version must then be installed. All personal settings and data are retained. 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.

Improved Security Concept

OpenScape Office V3 includes an improved security concept that ensures protection against unauthorized access to the OpenScape Office clients and 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 OpenScape Office Fax Printer as well as well as phone access to your voicemail box.
After the upgrade, you will be prompted to change your password when you start a 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](#)

3 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.

First Steps

How to Select the User Interface Language

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 in myPortal for Desktop

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

Related Topics

- [Voicemail Box](#)

3.1 How to Select the User Interface Language

- Step by Step**
1. Click **Setup**.
 - 2.
 3. Click **Save**.

Next steps Exit myPortal for Desktop and restart the application.

3.2 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 **Close**.

3.3 How to Record your Name Announcement

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

- Step by Step**
1. Click **Setup**.
 2. Click **Profiles** and then on any profile.
 3. Click **Record**.
 4. Click on **My VoiceMail Name** in the list of announcements.
 5. Click **Record**. The voicemail box will now call you on your phone.
 6. Accept the call from the voicemail box.

7. Speak out your name after the tone.
8. Click **Stop**.
9. If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
10. If you want to record the announcement again, click on **Record** again.
11. Click on **Close**, followed by **Save**.

Related Topics

- [Voicemail Box](#)
- [Phone Menu of the Voicemail Box](#)

3.4 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 on **Close**, followed by **Save**.

Related Topics

- [Voicemail Box](#)
- [Phone Menu of the Voicemail Box](#)

3.5 How to Specify an E-Mail Address

- Prerequisites**
- The administrator of your communication system has configured e-mail forwarding.

- 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**.

3.6 How to Create a Favorites List

- Step by Step**
1. Right-click in a free area of the Favorites list to open the context menu and select **New Group**.
 2. Enter a **Group Name**.
 3. Click **OK**.
 4. Click on the **Directories** tab or in the corresponding window.
 5. Click on one of the directories: **Internal Directory**, **External Directory** or **Personal Directory**.
 6. Drag the desired contact to the group name in the Favorites list.

Related Topics

- [Favorites List](#)

3.7 How to Enable the Import of Outlook 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**.

4 Unified Communications

OpenScape Office offers numerous unified communications features with the myPortal for Desktop and myPortal for Outlook clients, including, for example, presence status, Call-Me, conferencing, voicemails and fax.

4.1 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 a flexibly configurable rule-based call forwarding to be implemented.








4.1.1 Presence Status

The Presence status indicates the availability of internal subscribers (including Mobility Entry subscriber) 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 **Call-Me**), you also define the scheduled time of your return to the **Office** or **Call-Me** status. In addition, you can add an info text for your Presence status to be displayed in the Favorites list, the internal directory and the virtual conference room.

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

Symbol	Presence status	Availability
	Office Only selectable if the Call-Me service is not active Otherwise, Call-Me appears here.	Available at the normal workplace
	Call-Me Only selectable if the Call-Me service is active Otherwise, Office appears here.	Available at an alternative workplace
	Meeting	Absent

Symbol	Presence status	Availability
	Sick	Absent
	Break	Absent
	Out of the Office	Absent
	Vacation	Absent
	Lunch	Absent
	Gone Home	Absent
	Do Not Disturb	Absent

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
	Subscriber receives or makes a call at or from his or her mobile number
	Subscriber is on the phone using his or her mobile number
	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

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 **Call-Me**, the communication system redirects calls to you to your voicemail box by default and notifies the callers via status-based announcements about the nature of your absence and the scheduled time for your return.

Automatic Reset of the Presence Status

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

Visibility of your Presence Status

For each subscriber in the internal directory, you can specify whether that subscriber can see your Presence status other than **Office** and **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 Appointments

You can automatically control your Presence status via Outlook appointments 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.

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.

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

Automatic Creation of Outlook Appointments when Absent

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

- [Phone Menu of the Voicemail Box](#)

4.1.1.1 How to Change the Presence Status Office or CallMe 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 of 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 Call-Me Service](#)

4.1.1.2 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 Office or CallMe to Absent](#)

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

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

4.1.1.4 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](#)

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

- Prerequisites**
- Your administrator has configured the Exchange Calendar Integration.
 - You have specified a valid MS Exchange 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 Outlook 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](#)
- [How to Specify an E-Mail Address](#)

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

- Prerequisites**
- Your administrator has configured the Exchange Calendar Integration.

- Step by Step**
1. Click **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 Appointments](#)

4.1.1.7 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](#)

4.1.2 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 Call-Me destination. Your internal phone number is displayed to the caller. Unanswered calls are forwarded to the voicemail box after 30 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.

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 Call-Me service manually. In addition, the Call-Me 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 Call-Me service remains active until your Presence status changes.

Related Topics

- [Presence Status](#)

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

4.1.3 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](#)

4.1.3.1 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**.

4.1.4 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](#)

4.1.4.1 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 dialable format or in canonical 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](#)

4.1.4.2 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 dialable format or in canonical 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](#)

4.1.4.3 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](#)

4.1.4.4 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](#)

4.1.4.5 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](#)

4.1.4.6 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](#)





4.2 Directories and Journal

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

4.2.1 Directories

Directories organize your contacts.

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

Symbol	Directory	Make Call	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 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
	<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 Date / Time column, provided that subscriber has allowed his or her Presence status to be visible to you.</p>	X	X	X	X
	<p>External directory:</p> <p>Contains contacts from a corporate directory and must be configured by the administrator of the communication system.</p>	X	-	X	X
	<p>External offline directory:</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

Contact Details

Depending on the directory involved, the List view of the contacts 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, Department, Site and Company.** The width of all columns is variable.

Simple Search

You can search the directories by **First Name, Last Name** or a call number. You can select which directories are to be included in the search. The 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.

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.

Zooming in on an Entry

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

Related Topics

- [User Interface Elements](#)
- [How to Pick up a Call for Another Subscriber](#)
- [How to Make a Call from the Directory](#)
- [How to Enable or Disable the Opening of Personal Contacts on Inbound Calls](#)
- [How to Send an Instant Message](#)
- [How to Add a Contact to the Favorites List](#)
- [How to Add Conference Participants](#)
- [Favorites List](#)
- [Screen Pops](#)
- [Presence Status](#)
- [Configuration](#)

4.2.1.1 How to Search in Directories

- 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. Select which directories are to be included in the search by enabling or clearing the **Internal Directory**, **Personal Directory**, **External Directory** and **External Offline Directory** check boxes as required.
6. If necessary, click on **Advanced** to switch between simple and advanced searches.
7. 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.
8. To abort an ongoing search, click **Stop**.
9. To delete the list of search terms used, click **Clear History**.
10. 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](#)
- [How to Add Conference Participants](#)

4.2.1.2 How to Sort a Directory

- 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](#)

4.2.1.3 How to Perform a Quick Search by Name

- Step by Step** › In the menu bar, in the drop-down list for phone numbers, enter a name as the search term and press the `Enter` key.

4.2.1.4 How to Zoom in on an Entry

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

- 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](#)

4.2.1.5 How to Add a Personal Contact

- Prerequisites**
- The importing of Outlook contacts at startup is disabled.

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

4.2.1.6 How to Edit a Personal Contact

Prerequisites • The importing of Outlook contacts at startup is disabled.

- 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 Contacts at Startup](#)

4.2.1.7 How to Delete a Personal Contact

Prerequisites • The importing of Outlook contacts at startup is disabled.

- 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 Contacts at Startup](#)

4.2.1.8 How to Enable or Disable the Import of Outlook Contacts at Startup

- 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](#)

4.2.2 Favorites List

The Favorites list provides you with a constant view of selected contacts. These contacts can also be called very easily directly from the Favorites list. All internal subscribers with system telephones and external 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.

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](#)
- [How to Add Conference Participants](#)
- [How to Send an Instant Message](#)
- [Presence Status](#)
- [Configuration](#)

4.2.2.1 How to Add a Group to the Favorites List

- Step by Step**
1. Right-click in a free area of the Favorites list to open the context menu and select **New 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](#)
- [How to Delete a Group from the Favorites List](#)
- [How to Rename a Group in the Favorites List](#)

4.2.2.2 How to Rename a Group in the Favorites List

- Step by Step**
1. Click on **Rename Group** in the context menu for 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](#)

4.2.2.3 How to Delete a Group from the Favorites List

- Step by Step**
- › Click on **Remove Group** in the context menu for the relevant group name in the Favorites list.

Related Topics

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

4.2.2.4 How to Add a Contact to the Favorites List

- Prerequisites**
- The Favorites list contains at least one group.

- 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](#) for details.
 3. Drag the desired contact to the group name in the Favorites list.

Related Topics

- [Directories](#)
- [How to Search in Directories](#)
- [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](#)

4.2.2.5 How to Delete a Contact from the Favorites List

- Step by Step**
- › Click on **Remove Favorite** in the context menu for the relevant contact in the Favorites list.

Related Topics

- [How to Add a Contact to the Favorites List](#)

4.2.2.6 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.

4.2.2.7 How to Specify a Default Number for a Favorite

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

Related Topics

- [How to Add a Contact to the Favorites List](#)
- [How to Make a Call from the Favorites List](#)

4.2.2.8 How to Change the Width of the Favorites List

- Prerequisites**
- 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](#)

4.2.3 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**
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.


- **Answered**
- **Internal**
- **External**
- **Inbound**
- **Outbound**
- **Scheduled**

Contains all the calls that you have scheduled for specific dates/times. The Scheduled Calls feature is not available to Contact Center agents. In order for the communication system to execute a scheduled call, myPortal for 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.

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. The width of all columns is variable.

Direction	Meaning
	Inbound
	outbound

Call Complete	Meaning
	The call was successful or was answered.

Grouping

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

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

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

Sorting

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

Zooming in on an Entry

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

Retention period

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

Related Topics

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

4.2.3.1 How to Sort the Journal

- 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](#)

4.2.3.2 How to Group Journal Entries

- 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](#)

4.2.3.3 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: **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:
 - Click on the relevant entry.
 - Mark the relevant entries.
 5. Select **Remove** in the context menu.
 6. Click **Yes**.

Related Topics

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

4.2.3.4 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](#)

4.2.3.5 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](#)

4.2.3.6 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](#)

4.2.3.7 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](#)

4.3 Calls

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

4.3.1 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 without the trunk access code.	<ul style="list-style-type: none">• 321 (internal)• 700798765 (own local network)• 089700798765 (external local network)• 004989700798765 (international)

You should preferably use the canonical call number format. This is the only way to ensure that the phone number is complete and unique world-wide, regardless of your own location.

Related Topics

- [How to Dial a Number](#)
- [Desktop Dialer](#)
- [How to Enable the Call-Me 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](#)

4.3.2 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 menu bar.

Related Topics

- [Desktop Dialer](#)
- [Screen Pops](#)

4.3.2.1 How to Answer a Call

Step by Step › Select one of the following options:

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

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

Related Topics

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

4.3.2.2 How to Pick up a Call for Another Subscriber

Step by Step › Select one of the following options:

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

Related Topics

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

4.3.2.3 How to Forward 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](#)

4.3.2.4 How to Dial a Number

Step by Step › Select one of the following options:

- Enter the phone number in dialable format or in canonical format in the drop-down list for phone numbers in the menu bar and press the `Enter` key.
- Select a phone number from the drop-down list for phone numbers in the menu bar and press the `Enter` key.

Related Topics

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

4.3.2.5 How to Make a Call from the Directory

- 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

- [Directories](#)

4.3.2.6 How to Make a Call from the Favorites List

- 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:
 - Double-click on the relevant station.
 - Click in the context menu of the relevant subscriber on the desired station number.

Related Topics

- [Favorites List](#)
- [How to Specify a Default Number for a Favorite](#)

4.3.2.7 How to Make a Call from the Journal

- 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:
 - Double-click on the relevant Journal entry.
 - Click in the context menu of the relevant Journal entry on the desired station number.

Related Topics

- [Journal](#)

4.3.2.8 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](#)

4.3.2.9 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](#)

4.3.2.10 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.

- 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](#)

4.3.2.11 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 menu bar.

Related Topics

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

4.3.3 Desktop Dialer

The Desktop Dialer enables you to call a marked destination from several Windows applications such as a text editor or an Outlook e-mail, for example, by using the appropriate key(s) plus mouse button combination.

Depending on the type of string used, the Desktop 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, but 16-bit applications do not.

Related Topics

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

4.3.3.1 How to Make a Call using the Desktop Dialer

- Step by Step**
1. Mark the desired string.
 2. Keep the defined key(s) pressed (`Ctrl` by default) and drag the mouse across the marked string while holding down the mouse button. (Default: right mouse button) 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.

3. 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 plus Mouse Button Combinations for the Desktop Dialer](#)

4.3.3.2 How to Enable or Disable the Desktop Dialer

- 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 **Desktop Dialing Enabled** check box.
 - If you want to disable the desktop dialer, clear the **Desktop Dialing Enabled** check box.
 4. Click **Save**.

4.3.3.3 How to Change the Key plus Mouse Button Combinations for the Desktop Dialer

- Step by Step**
1. Click **Setup**.
 2. Click on **My Preferences > Hot Keys**.
 3. Hold down one or more of the `Ctrl`, `Alt` and `Shift` keys and click with the left or right mouse button in the rectangular field below the **Desktop Dialing Enabled** check box.
 4. Click **Save**.

After this, the key(s) plus mouse button combination defined in step 3 can be used to start the Desktop Dialer.

Related Topics

- [How to Make a Call using the Desktop Dialer](#)

4.3.4 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"> • During incoming call: Answer (pick up) • During ongoing call: Hang Up
	Forward to voicemail box
	During ongoing call: Transfer , after entering a number to be dialed or a name to be found
	Hold








Symbol	Function
	Record , if enabled in the communication system
	E-mail to the communication partner
	Instant Messaging to the communication partner; the presence status of the communication partner is displayed if available

Open personal contact on incoming call

You can select whether myPortal for Desktop should open the appropriate personal contact for an inbound call.

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
	Hang Up
	During ongoing call: Transfer , after entering a number to be dialed or a name to be found
	Hold
	Record , if enabled in the communication system
	E-mail to the communication partner
	Instant Messaging to the communication partner; the presence status of the communication partner is displayed if available
	Scheduled call

Screen Pop for new Voicemail



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**
- **Play** (Through Speakers) and **Pause**
- **Stop**

- **Forward**
- **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

The 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

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.

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

4.3.4.1 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 Forward 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](#)

4.3.4.2 How to Enable or Disable the Opening of Personal Contacts 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 personal contacts on inbound calls, select the check box **Pop up application on inbound calls**.
 - If you want to disable the opening of personal contacts on inbound calls, clear the check box **Pop up application on inbound calls**.
 4. Click **Save**.

Related Topics

- [Directories](#)

4.3.4.3 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](#)

4.3.4.4 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](#)

4.3.4.5 How to Enable or Disable Screen Pops for New Voicemails or 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 for new voicemails, select the check box **Display tray pop on new voicemail**.
 - If you want to disable screen pops on new voicemails, clear the check box **Display tray pop on new voicemail**.
 4. Click **Save**.

Related Topics

- [Voicemail Box](#)
- [Fax box](#)
- [How to Enable or Disable the Automatic myPortal for Desktop Screen Pop on Receiving a New Voicemail](#)
- [Voicemail Box](#)
- [Fax box](#)

4.3.4.6 How to Enable or Disable the Automatic myPortal for Desktop Screen Pop on Receiving a New Voicemail

- Step by Step**
1. Click **Setup**.
 2. Click on **My Preferences > Notifications**.
 3. Select one of the following options:
 - If you want myPortal for Desktop to appear automatically in the foreground on receiving a voicemail, select the check box **Screenpop the messages window when I receive a new voicemail message**.
 - If you do not want myPortal for Desktop to appear automatically in the foreground on receiving a 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 or Fax Messages](#)

4.4 Conferencing (OpenScape Office MX/LX Only)

In a conference, multiple participants 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.

INFO: In myPortal for Desktop, you can only use application-controlled conferences initiated with myPortal for Desktop. Phone-controlled conferences can only be used with a phone.






Types of Conferences









The different types of conferences have the following features:

Feature	Ad-hoc	Scheduled	Permanent
Usage	Application-controlled or phone-controlled	application-controlled	application-controlled
Start	Manually, immediately	Automatically by schedule	Manually
End	Manually	Automatically by schedule or manually	Manually
Extension possible	-	x	-
Recurrence possible	Manually	Regularly by schedule	-
Direction of connection setup from the viewpoint of the communication system	Outbound	Outbound or Inbound	Inbound
Authentication of conference participants possible	-	x	x
Recording possible, if enabled in the communication system	Manually (On Demand Conference Recording)	automatically (Auto Conference Recording) or manually (On Demand Conference Recording)	automatically (Auto Conference Recording) or manually (On Demand Conference Recording)

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.

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

Symbol	Meaning
 and  alternately	Communication system – Conference is being recorded
	Communication system – Conference is being stopped
	Scheduled conference participant (symbol in accordance with current Presence status)
	Called conference participant
	Dial-in conference participant
	Authenticating conference participant
	Connected conference participant

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

- **Outbound:**
 The communication system calls the participant. Note that this applies to internal participants only if the subscriber has not enabled forwarding to voicemail.
- **Inbound:**
 The conference participants or conference controller dials into the conference using the dial-in number.

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

Dial-in Number for Virtual Conference Room

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

Conference Controller

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

- Add or remove conference participants:
Removed participants do not remain in the virtual conference room.
- Disconnect or reconnect conference participants:
Disconnected participants remain in the virtual conference room. 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 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). 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.

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.

Related Topics

- [User Interface Elements](#)
- [How to Specify an E-Mail Address](#)

4.4.1 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 communication system opens the window with the virtual conference room automatically for all conference participants, provided the participants have started myPortal for Desktop or myPortal for Outlook. The communication 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

The conference controller can record an ad-hoc conference manually in his or her voicemail box, provided the live recording of calls has been activated in the communication system. The duration of the recording is only limited by the available storage capacity of the communication system.

Ending the Conference

The conference controller can end the conference in the virtual conference room 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](#)

4.4.1.1 How to Configure and Initiate an Ad-hoc Conference

- Step by Step**
1. Click **Conference**.
 2. Click **Start new 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 communication system now calls you and the conference participants.

5. 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) Click on the **General Settings** tab and enter a name for the conference in the input field.
 - 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](#)

4.4.1.2 How to View an Ad-hoc Conference as a 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 **View**.

4.4.1.3 How to Add Conference Participants

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

- Step by Step**
- › Add the conference participants by one of the following methods:
 - From the Favorites list:
Using the mouse, drag one of the participants from the **Favorites** into the **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](#)) 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 dialable format or in canonical format and **E-mail** and then click **OK**.

Related Topics

- [Directories](#)
- [How to Search in Directories](#)
- [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](#)

4.4.1.4 How to Disconnect a Conference Participant

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

- Step by Step**
- › Click in the context menu of the relevant conference participant on **Disconnect > Disconnect Participant**.

The connection to the participant is cleared. The participant remains in the virtual conference room.

Related Topics

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

4.4.1.5 How to Reconnect Conference Participants

- Prerequisites** • An active conference with you as the conference controller has been started in the virtual conference room.

- Step by Step** › Click in the context menu of the relevant conference participant on **Reconnect Participant**.

Related Topics

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

4.4.1.6 How to Remove Conference Participants

- Prerequisites** • A conference with you as the conference controller has been started in the virtual conference room.

- Step by Step** › 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. The participant is removed from the virtual conference room.

Related Topics

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

4.4.1.7 How to Specify another Conference Controller

- Prerequisites** • A conference with you as the conference controller has been started in the virtual conference room.

- Step by Step**
1. Click in the **AdHoc Conference** window on **Conference Room > Save As**
 2. Click on the **Participants** tab.
 3. Click on the conference participant whom you want to set as the conference controller.
 4. Click in the area with the participant details on **Set as conference controller**.

5. Click **Save**.

Related Topics

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

4.4.1.8 How to End an Ad-hoc or Scheduled Conference

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

INFO: You can also end an ad-hoc conference 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](#)

4.4.1.9 How to Repeat an Ad-hoc Conference

- Prerequisites**
- 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 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](#)

4.4.1.10 How to Delete an Ad-hoc Conference

Prerequisites

- 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 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](#)

4.4.2 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 PIN 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 1234. The conference controller can change this for the conference participants individually.

- Language of announcements before the conference begins
- Direction for the connection setup for each conference participant (default: **outbound**).

Invitation

The conference controller must inform the participants about the details of the conference. This includes:

- Date and time of the start and end of the conference

- Participant's PIN (optional)
- Password (optional)
- Dial-in number (mandatory for conference participants for whom the direction of the connection setup is **Inbound**)

Starting the Conference

The communication system opens the window with the virtual conference room at the scheduled time automatically for all conference participants, provided the participants have started myPortal for Desktop or myPortal for Outlook. If the presence of the conference controller is required, the communication 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 communication system calls the conference participants or the participants can dial in themselves. The communication 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.

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 Desktop at any time.

Recording the Conference

The conference controller can record a scheduled conference automatically or manually in his or her voicemail box, provided the live recording of calls has been activated in the communication system. The duration of the recording is only limited by the available storage capacity of the communication 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 in the virtual conference room.

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](#)

4.4.2.1 How to Configure a Scheduled Conference

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

- Step by Step**
1. Click **Conference**.
 2. Click **Start new 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. Click on the **General Settings** tab and enter a name for the conference in the input field.
 6. Select one of the following options in the 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)**.
 7. Enable the check box **This conference is active**.
 8. 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**.

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

10. Select the desired **Conference Language** in which the announcements for the authentication of the conference participants is to occur.
11. Click on the **Schedule Time** tab and select the **Start Date**, **Start Time** and **End Time**.
12. If the conference is to occur recurrently, click on **Recurring Conference**.
 - a) Select an **End Date** for the last recurrence.
 - b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select the additional options desired for it in the details.
13. If you want to change the direction of the connection setup for a conference participant, click on the **Participants** tab.
 - a) Click in the context menu of the relevant conference participant on **Properties**.
 - b) Under **Direction**, then click on **Outbound** or **Inbound**.
14. Click **Save**.

Related Topics

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

4.4.2.2 How to Display a Scheduled Conference as 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. If you want to display the virtual conference room, click **View**.
 6. If you want to display the schedule of the conference, click on **Edit** and then on the **Schedule** tab.

7. If you want to display the general settings of the conference, click on **Edit** and then on the **General Settings** tab.

Related Topics

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

4.4.2.3 How to Determine the Dial-in Number for a Scheduled or Permanent Conference

- Prerequisites**
- 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 a conference under **Conference Name**.
 5. Click **Edit**.
 6. Click on the **General Settings** tab. The dial-in number can be found under **Conference DID**.
 7. Click **Close**.
 8. Click **Close**.

Related Topics

- [Permanent Conference](#)

4.4.2.4 How To Determine the PIN for a Scheduled or Permanent Conference

- Prerequisites**
- You are the conference controller.

INFO: As the conference controller, you can obtain the PIN 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.

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4. Click on a conference under **Conference Name**.
5. Click **Edit**.
6. Click on the **Participants** tab.
7. Click in the context menu of the relevant conference participant on **Properties**. The PIN can be found under **Identification Code**.
8. Click **Cancel**.
9. Click **Close**.

Related Topics

- [Permanent Conference](#)

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

Prerequisites • 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 on the **Participants** tab.
 7. Click in the context menu of the relevant conference participant on **Properties**.
 8. Enter the new **Password**.
 9. Click **OK**.
 10. Click **Save**.
 11. Click **Close**.

Related Topics

- [Permanent Conference](#)

4.4.2.6 How To Display a Scheduled or Permanent Conference as the Conference Controller

- 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 a Scheduled Conference as the Conference Controller](#)
- [Permanent Conference](#)
- [How to Display a Permanent Conference as the Conference Controller](#)

4.4.2.7 How to Extend a Scheduled Conference

- Prerequisites**
- 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**.

4.4.2.8 How to Delete a Scheduled Conference

- Prerequisites**
- You are the conference controller.
- Step by Step**
1. Click **Conference**.
 2. Click **Manage my conferences**.
 3. Click on the **My Conferences** tab.
 4. Click on a conference under **Conference Name**.
 5. Click on **Remove**, followed by **Close**.

Related Topics

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

4.4.3 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 scheduled 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 specify:

- whether the conference participants need to authenticate themselves by entering a PIN and password via the phone keypad when joining the conference.

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

The default password for conferences is 1234. The conference controller can change this for the conference participants individually.

- in which language the announcements before the start of then conference are to be made.

Invitation

The conference controller must inform the participants about the details of the conference. This includes:

- Participant's PIN (optional)
- Password (optional)
- Dial-in number

Starting the Conference

As soon as the first conference participant dials in, the communication system opens the virtual conference room for all internal conference participants. All conference participants dial in themselves. The communication system announces every participant who joins the conference by name, 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

The conference controller can record a permanent conference automatically or manually in the voicemail boxes of all connected conference participants, provided the live recording of calls has been activated in the communication system. The duration of the recording is only limited by the available storage capacity of the communication 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 or Permanent Conference](#)

- [How To Determine the PIN for a Scheduled or Permanent Conference](#)
- [How to Change the Password for a Scheduled or Permanent Conference](#)
- [How To Display a Scheduled or Permanent Conference as the Conference Controller](#)

4.4.3.1 How to Configure a Permanent Conference

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

- Step by Step**
1. Click **Conference**.
 2. Click **Start new 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. Click on the **General Settings** tab and enter a name for the conference in the input field.
 6. Enable the check box **This conference is active**.
 7. Select one of the following options in the 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** in which the announcements for the authentication of the participants is to occur.
 9. Click **Save**.

Related Topics

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

4.4.3.2 How to Display a Permanent Conference as 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. If you want to display the virtual conference room, click **View**.
6. If you want to display the general settings of the conference, click on **Edit** and then on the **General Settings** tab.

Related Topics

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

4.4.3.3 How to Delete a Permanent Conference

Prerequisites • You are the conference controller.

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

Related Topics

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

4.5 Voice Messages and Fax

The Voicemail and Fax services integrated in OpenScape Office V3 LX/MX enable subscribers to receive and manage voicemails and fax messages via myPortal for Desktop and myPortal for Outlook. Fax messages can be sent with OpenScape Office Fax Printer.

4.5.1 Voicemail Box

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

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, record your announcements and control the announcement of your Presence status.

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.

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.

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

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

Profile	Name announcement	Announcement of your Presence status	Personal greeting
Busy	-	-	for Busy (if not recorded: general)
No Answer	-	-	for No Answer (if not recorded: general)
Meeting	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 Dubois"	"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 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 or Fax Messages](#)
- [How to Forward 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 or Fax Messages](#)
- [Managing Voicemail](#)
- [Notification Service for Messages](#)
- [How to Define an Additional Phone Number](#)

4.5.1.1 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**.

Related Topics

- [How to Call a Voicemail Box from an Internal Phone](#)
- [How to Call a Voicemail Box from an External Phone](#)

4.5.1.2 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**.

4.5.1.3 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.
 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

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

4.5.1.4 How to Import an Announcement

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

- 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**.

Related Topics

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

4.5.1.5 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](#)

4.5.1.6 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](#)

4.5.1.7 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](#)

4.5.1.8 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](#)

4.5.1.9 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**.

4.5.1.10 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 **Close**.

4.5.2 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**

The width of all columns is variable.

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 Voice Message

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](#)

4.5.2.1 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. Click on **Play Message > Through Phone** in the context menu.

Next steps Accept the call from the voicemail box.

Related Topics

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

4.5.2.2 How to Listen to a Voice Message on the PC

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

- Step by Step**
1. Click on the **Voicemail** tab or in the corresponding window.
 2. Click on the desired folder, e.g., **Inbox**.
 3. Click on the desired voicemail.
 4. Click on **Play Message > Through Speakers** in the context menu.
 5. In the screen pop, click on the **Play** symbol.

Related Topics

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

4.5.2.3 How to Call 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. In the context menu, click **Dial**, and if the context menu offers several phone numbers for selection, click on the desired number.

4.5.2.4 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. Under **Select Recipients**, activate the check box for the desired recipient or recipients.
 6. Click **Close**.

4.5.2.5 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 > ...**.

4.5.2.6 How to Save a Voice Message as a WAV File

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

4.5.2.7 How to Sort Voice Messages

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

4.5.2.8 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.
 4. Select **Move Message to > Move to Deleted** in the context menu.
 5. If you want to delete the voicemail 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.

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

4.5.3.1 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**.

4.5.4 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**. The width of all columns is variable.

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.

Moving a Fax Message

You can move a fax message to another folder.

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.

Related Topics

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

4.5.4.1 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. Select **View Fax** in the context menu of the appropriate Fax message.

4.5.4.2 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. Click in the context menu on the item **Dial ...** with the appropriate phone number.

4.5.4.3 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 **Forward Message** in the context menu of the appropriate Fax message.
 4. Enable the check box for the desired recipient in the **Forward Fax Message** window and click **OK**.

4.5.4.4 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 > ...**.

4.5.4.5 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. Click on **Save as tiff** 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**.

4.5.4.6 How to Sort Fax Messages

- 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.

4.5.4.7 How to Display Fax Messages in the Send Queue

- Step by Step**
1. Click on the **Fax Messages** tab or in the corresponding window.
 2. Click on the **Sending Items** folder.
 3. 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.
 4. If you want to reverse the sort order, click again on column header.

Related Topics

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

4.5.4.8 How to Cancel Sending a Fax Message

- 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 Fax Messages in the Send Queue](#)

4.5.4.9 How to Display Sent fax Messages

- 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 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.
 4. If you want to reverse the sort order, click again on column header.

Related Topics

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

4.5.4.10 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 **Move Message to > Move to Deleted** in the context menu.

5. If you want to delete the voicemail 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.

4.5.5 Sending Fax Messages

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

Details on sending fax messages can be found in OpenScape OfficeOpenScape Office Fax Printer User Guide.

Related Topics

- [Fax box](#)

4.5.6 Notification Service for Messages

The communication system can optionally notify you about a new message 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 "Importance: High".	You receive an e-mail with the message as a PDF file, the date and time it was received, the number of pages and, if available, the phone number and name of the sender. If the size of the PDF 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.
by phone	Your voicemail box calls you at the number you have specified and plays back the message to you.	-
SMS	You receive an SMS about the received message at the phone number defined by you.	You receive an SMS about the received message at the phone number defined by 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](#)

4.5.6.1 How to Enable or Disable E-mail Notifications

- Prerequisites**
- The administrator of your communication system has configured e-mail forwarding, and 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 an E-Mail Address](#)

4.5.6.2 How to Enable or Disable the Notification by Phone

- Step by Step**
1. Click **Setup**.
 2. Click on **Communications > VM Notification**.
 3. Select one of the options below in the **Outbound** row for each column with one of the following Presence statuses: **Office, Meeting, Sick, Break, Out of the Office, Vacation, Lunch, Home** or **Do Not Disturb**:
 - If you want to activate the notification for a Presence status, enable the corresponding check box.
 - If you want to deactivate the notification for a Presence status, clear the corresponding check box.

4. Choose one the following options in the **Outbound Notification Times** area:
 - If you want to be notified only during business hours, click on **During Business Hours Only**.
 - If you want to be notified at any time, click on **24 Hours a Day**.
5. Enter the desired phone number in the **Outbound Number** field in dialable format or in canonical 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](#)
- [Phone Menu of the Voicemail Box](#)

4.5.6.3 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**.

4.5.7 Phone Menu of the Voicemail Box

You can access your voicemail box, change your Presence status and also use other functions from a phone.

The password for accessing your voicemail box is the same as for myPortal for Desktop. Selections are made in the phone menu by entering digits at the phone. You can also enter a digit during an announcement to speed up operations.

Main Menu

The main menu is the first menu you hear on reaching the voicemail box. Depending on your choices, you are then taken to further menus or functions.

Digit	Function
1	Mailbox
1	New
1	Replay
2	Call back
3	Next message
4	Save
5	Save as new
6	Delete
7	Copy to other voicemail box
0	Date and Time
2	Played
	(same functions as those under New)
3	Saved
	(same functions as those under New)
4	Deleted
	(same functions as those under New)
2	Change Status
1	Office
2	Meeting
3	Sick
4	Break
5	Gone Out
6	Vacation
7	Lunch
8	Gone Home
3	Record announcements
1	Name
2	Default Greeting
3	Presence-based greetings

Digit	Function
0	Busy
1	No Answer
2	Meeting
3	Sick
4	Break
5	Gone Out
6	Vacation
7	Lunch
8	Gone Home
4	CLI Recognition
4	Change Password
5	Leave message for extension
6	Connect to extension
9 / 0	Connect to Attendant Console

General Functions

The following functions are available under different menu items:

Digit	Function
1	Confirm
2	Edit
*	Enter the station number
#	Up one level

Related Topics

- [Presence Status](#)
- [How to Record your Name Announcement](#)
- [How to Record your Personal Greeting](#)
- [How to Enable or Disable the Notification by Phone](#)
- [How to Change your Password](#)

4.5.7.1 How to Call a Voicemail Box from an Internal Phone

- Step by Step** › Dial the phone number of the voicemail box.
You will hear the phone menu of the voicemail box.

Related Topics

- [How to Determine the Call Number for your Voicemail Box](#)
- [How to Call a Voicemail Box from an External Phone](#)

4.5.7.2 How to Call a Voicemail Box from an External Phone

- Step by Step**
1. Dial the phone number of the voicemail box with the area code and phone number of the communication system.
 2. Enter your office number followed by #.
 3. Enter your password.
You will hear the phone menu of the voicemail box.

Related Topics

- [How to Determine the Call Number for your Voicemail Box](#)
- [How to Call a Voicemail Box from an Internal Phone](#)

4.6 Instant Messaging



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

4.6.1 Instant Messaging

Instant Messaging enables you to chat with other peers. The communication system also supports instant messaging with an external communication partner via XMPP and multi-user chats, as well as both in combination.

Sent and received instant messages are displayed to you and your communication partners as a dialog in the **Instant Message** window.

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

INFO: If your communication partner has logged out, the instant message will be displayed at his or her next login.

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 Message Window

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



- User area (1)
This area shows every participating communication partner as a symbol or with a picture, if available.

- Message area (2)
This area shows the instant messages of all the chatting subscribers.
- Input area (3)
This area contains the input field for the instant messages.

Related Topics

- [Screen Pops](#)

4.6.1.1 How to Send an Instant Message

- Prerequisites**
- 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 in the **Favorites** list.
 - Click on the **Directories** tab or window, then on **Internal Directory** or **External Directory**, and then on a contact.

INFO: The 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 and click **Send**.

Related Topics

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

4.7 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.

4.7.1 Central AutoAttendant

The central AutoAttendant is the system AutoAttendant, which can be configured by the administrator.

As an administrator, you can do the following for any station numbers:

- Record or import announcements for the central AutoAttendant.
By default, announcements for the central AutoAttendant are available in all languages. Consequently, if you change these announcements, please take all languages into account.
- Configure profiles for the central AutoAttendant
- Configure the central AutoAttendant for specific times and on the basis of rules by using schedules Schedules also make it possible to offer advanced selection options such as dialing by name, for example.

4.7.2 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			

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](#)

4.7.2.1 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](#)

5 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
- Call-Me 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 Windows user accounts.

Hotkeys

You can use the F1-F12 function keys, 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)

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](#)

5.1 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**.

5.2 How to Specify an E-Mail Address

- Prerequisites**
- The administrator of your communication system has configured e-mail forwarding.

- 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 Appointments](#)
- [Conferencing \(OpenScape Office MX/LX Only\)](#)
- [How to Enable or Disable E-mail Notifications](#)

5.3 How to Define an Additional Phone Number

- Step by Step**
1. Click **Setup**.
 2. Click on **Personal Details > My Personal Details**.
 3. Enter an additional phone number in dialable format or in 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.

Configuration

How to Define an XMPP Alias

- 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 Call-Me Service](#)
- [Status-based Call Forwarding](#)
- [Status-based Call Forwarding](#)
- [Voicemail Box](#)

5.4 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](#)

5.5 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](#)

5.6 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](#)

5.7 Programming the Function Keys of the Telephone (OpenScape Office MX/LX Only)

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

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 myPortal for Desktop, if available; otherwise, in English.

INFO: You cannot program the function keys of an analog phone with myPortal for Desktop.

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.

5.7.1 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](#)

5.8 How to Change your Password

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

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, OpenScape Office 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](#)
- [Phone Menu of the Voicemail Box](#)

5.9 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, OpenScape Office Fax Printer Driver, myAttendant and myAgent.

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

5.10 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 Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

- 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](#)

5.11 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](#)

5.12 How to Change Skin Colors

- Step by Step**
1. Click **Setup**.
 2. Click on **My Preferences > Appearance**.
 3. Select the option with the desired appearance in the **Skin** area.

4. Click **Save**.

Next steps Close myPortal for Desktop and restart the application.

Related Topics

- [User Interface Elements](#)

5.13 How to Activate or Deactivate a Hotkey

- 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 press one of the F1-F12 keys, possibly together with **Ctrl** or **Alt** and the **Shift** key. If the pressed key or key combination can be used for myPortal for Desktop, this is displayed. Then select the **Hot Key Enabled** check box next to it.
 - If you want to deactivate a hotkey, clear the **Hot Key Enabled** check box next to that key.
 4. Click **Save**.

5.14 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 of the communication system in the **Server Address** field.
 4. Click **Save**.

5.15 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](#)

5.16 Troubleshooting

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

5.16.1 How to Resolve the Problem: No Connection to the Communication System

The Windows/Vista Personal 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](#)

5.16.2 How to Resolve the Problem: The Nokia Application Suite Starts Instead of myPortal

If the Nokia Application Suite is installed on your PC, Java applications with the .jar extension such as myPortal for Desktop, for example, are automatically associated with that application. Note that the Nokia Application Suite will automatically become the default application for .jar files when it is reinstalled.

- 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, enter the following property values for the myPortal desktop shortcut:

Target:

C:\WINDOWS\system32\javaw.exe -jar "C:\Documents and Settings\All Users\Application Data\myPortal\myPortal.jar"

Start in:

"C:\Documents and Settings\All Users\Application Data\myPortal\"

Related Topics

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

5.16.3 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](#)

6 Appendix

The appendix contains additional information.

6.1 Features of the Integrated Applications that can be used with SIP Telephones

The following features of the integrated applications 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 features was performed with OpenStage 15.

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

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