

# Documentation

## OpenScape Office V3 myPortal for Outlook

User Guide

A31003-P1030-U105-13-7619

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# Contents

<b>1 Introduction</b>	<b>8</b>
1.1 myPortal for Outlook	8
1.2 New Features	8
1.3 Types of Topics	9
1.4 Display Conventions	9
1.5 User Interface Elements	10
1.6 Online Help	12
<b>2 Installing and Starting myPortal for Outlook</b>	<b>13</b>
2.1 Prerequisites for UC PC Clients	13
2.2 How to Install myPortal for Outlook	16
2.3 How to Start myPortal for Outlook	17
2.4 How to Uninstall myPortal for Outlook	19
2.5 Automatic Updates	19
2.5.1 How to Perform Automatic Updates	20
2.6 Upgrading to OpenScope Office V3	20
<b>3 First Steps</b>	<b>22</b>
3.1 How to Select the User Interface Language	23
3.2 How to Select the Language of the Voicemail Box	23
3.3 How to Record your Name Announcement	23
3.4 How to Record your Personal Greeting	24
3.5 How to Specify an E-Mail Address	25
3.6 How to Create a Favorites List	25
<b>4 Unified Communications</b>	<b>27</b>
4.1 Presence Status and CallMe Service	27
4.1.1 Presence Status	27
4.1.1.1 How to Change the Presence Status to Absent	31
4.1.1.2 How to Change the Presence Status to Office	32
4.1.1.3 How to Enable or Disable Automatic Resetting of the Presence Status	32
4.1.1.4 How to Change the Visibility of your Presence Status for Others	33
4.1.1.5 How to Enable or Disable Automatic Updating of the Presence Status via Outlook Appointments	33
4.1.1.6 How to Enable or Disable the Automatic Creation of Outlook Appointments when Absent	34
4.1.1.7 How to Enable or Disable Screen Pops on Changing the Presence Status	35
4.1.2 CallMe Service	35
4.1.2.1 How to Enable the Call-Me Service	36
4.1.3 Status-based Call Forwarding	37
4.1.3.1 How to Configure Status-based Call Forwarding	37
4.1.4 Rule-Based Call Forwarding	37
4.1.4.1 How to Add a Call Forwarding Rule	38
4.1.4.2 How to Edit a Call Forwarding Rule	39
4.1.4.3 How to Copy a Call Forwarding Rule	41
4.1.4.4 How to Rename a Call Forwarding Rule	41
4.1.4.5 How to Remove a Call Forwarding Rule	42
4.1.4.6 How to Change the Order of Call Forwarding Rules	42
4.2 Directories and Journal	43
4.2.1 Directories	43

## Contents

4.2.1.1	How to Search in Directories	45
4.2.1.2	How to Perform a Quick Search by Name	46
4.2.1.3	How to Sort a Directory	46
4.2.1.4	How to Zoom in on an Entry	47
4.2.1.5	How to Enable or Disable Searching for Caller Names in Outlook Contacts	47
4.2.2	Favorites List	48
4.2.2.1	How to Add a Group to the Favorites List	49
4.2.2.2	How to Rename a Group in the Favorites List	50
4.2.2.3	How to Delete a Group from the Favorites List	50
4.2.2.4	How to Add a Contact to the Favorites List	50
4.2.2.5	How to Delete a Contact from the Favorites List	51
4.2.2.6	How to Change the Sorting of the Favorites List	51
4.2.2.7	How to Specify a Default Number for a Favorite	51
4.2.2.8	How to Enable or Disable the Favorites List Display	52
4.2.2.9	How to Enable or Disable Automatic Hiding of the Favorites List	52
4.2.2.10	How to Enable or Disable the "Always on Top" Setting of the Favorites List	53
4.2.2.11	How to Enable or Disable the Dimming of Unused Favorites on Exiting	53
4.2.3	Journal	54
4.2.3.1	How to Sort the Journal	56
4.2.3.2	How to Group Journal Entries	56
4.2.3.3	How to Delete Journal Entries	57
4.2.3.4	How to Change the Retention Period for Journal Entries	57
4.2.3.5	How to Add a Scheduled Call	58
4.2.3.6	How to Edit a Scheduled Call	58
4.2.3.7	How to Clear a Scheduled Call	59
4.2.3.8	How to Add Contacts from the Journal to Outlook Contacts	59
4.2.3.9	How to Configure the Journal Export	60
4.2.3.10	How to Export the Journal Manually	60
4.3	Calls	61
4.3.1	Call Number Formats	61
4.3.2	Call Functions	62
4.3.2.1	How to Answer a Call	62
4.3.2.2	How to Pick up a Call for Another Subscriber	63
4.3.2.3	How to Redirect a Call to your Voicemail Box	63
4.3.2.4	How to Dial a Number Manually	63
4.3.2.5	How to Call from a Directory	64
4.3.2.6	How to Make a Call from the Favorites List	64
4.3.2.7	How to Make a Call from the Journal	65
4.3.2.8	How to Call an Outlook Contact	65
4.3.2.9	How to Place a Call on Hold	66
4.3.2.10	How to Record a Call or a Conference	66
4.3.2.11	How to Start Web Collaboration During a Call	66
4.3.2.12	How to End a Call	67
4.3.3	Desktop Dialer and Clipboard Dialer (Windows)	67
4.3.3.1	How to Make a Call via the Desktop Dialer or Clipboard Dialer	68
4.3.3.2	How to Enable or Disable the Desktop Dialer or Clipboard Dialer	68
4.3.3.3	How to Change the Key Combination for the Desktop Dialer or Clipboard Dialer	69
4.3.4	Screen Pops	69
4.3.4.1	How to Enable or Disable Screen Pops on Inbound Calls	72
4.3.4.2	How to Enable or Disable the Opening of Outlook Contacts on Inbound Calls	73
4.3.4.3	How to Enable or Disable Screen Pops on Outbound Calls	73
4.3.4.4	How to Enable or Disable the Closing of Screen Pops at the End of a Call	74

- 4.3.4.5 How to Enable or Disable Screen Pops for New Voicemails . . . . . 74
- 4.3.4.6 How to Enable or Disable Screen Pops for New Fax Messages . . . . . 75
- 4.3.4.7 How to Enable or Disable the Opening of the Messages Window for New Voicemails . . . . . 75
- 4.3.4.8 How to Enable or Disable the Opening of the Messages Window for New Fax Messages . . . . . 76
- 4.3.4.9 How to Enable or Disable the Screen Pop with an Overview on Starting myPortal for Outlook . . 76
- 4.4 Conferencing (not with OpenScape Office HX) . . . . . 77
  - 4.4.1 Ad-hoc Conference . . . . . 82
    - 4.4.1.1 How to Configure and Initiate an Ad-hoc Conference . . . . . 82
    - 4.4.1.2 How to Display your Own Ad-hoc Conference . . . . . 83
    - 4.4.1.3 How to Add Conference Participants . . . . . 83
    - 4.4.1.4 How to Disconnect a Conference Participant . . . . . 84
    - 4.4.1.5 How to Reconnect Conference Participants . . . . . 85
    - 4.4.1.6 How to Remove Conference Participants . . . . . 85
    - 4.4.1.7 How to Specify another Conference Controller . . . . . 86
    - 4.4.1.8 How to End an Ad-hoc or Scheduled Conference . . . . . 86
    - 4.4.1.9 How to Repeat an Ad-hoc Conference . . . . . 87
    - 4.4.1.10 How to Delete an Ad-hoc Conference . . . . . 87
  - 4.4.2 Scheduled Conference . . . . . 87
    - 4.4.2.1 How to Configure a Scheduled Conference . . . . . 90
    - 4.4.2.2 How to Display your Own Scheduled Conference . . . . . 92
    - 4.4.2.3 How to Determine the Dial-in Number for a Scheduled, Permanent or Open Conference . . . . . 93
    - 4.4.2.4 How to Determine the Conference ID for a Scheduled or Permanent Conference . . . . . 93
    - 4.4.2.5 How to Change the Password for a Scheduled or Permanent Conference . . . . . 94
    - 4.4.2.6 How To Display a Scheduled, Permanent or Open Conference as the Conference Controller . . 95
    - 4.4.2.7 How to Extend a Scheduled Conference . . . . . 95
    - 4.4.2.8 How to Reschedule a Scheduled Conference . . . . . 95
    - 4.4.2.9 How to Delete a Scheduled or Open Conference . . . . . 96
    - 4.4.2.10 How to Reschedule a Conference Appointment for a Conference Series . . . . . 96
    - 4.4.2.11 How to Delete a Conference Appointment for a Conference Series . . . . . 97
  - 4.4.3 Permanent Conference . . . . . 98
    - 4.4.3.1 How to Configure a Permanent Conference . . . . . 99
    - 4.4.3.2 How to Display your Own Permanent or Open Conference . . . . . 100
    - 4.4.3.3 How to Delete a Permanent Conference . . . . . 101
  - 4.4.4 Open Conference . . . . . 101
    - 4.4.4.1 How to Configure an Open Conference . . . . . 102
  - 4.4.5 Web Collaboration Integration . . . . . 104
- 4.5 Voice and Fax Messages . . . . . 105
  - 4.5.1 Voicemail Box . . . . . 105
    - 4.5.1.1 How to Determine the Call Number for your Voicemail Box . . . . . 108
    - 4.5.1.2 How to Select Recording or Announcement Mode . . . . . 109
    - 4.5.1.3 How to Record an Announcement . . . . . 109
    - 4.5.1.4 How to Import an Announcement . . . . . 110
    - 4.5.1.5 How to Delete an Announcement . . . . . 110
    - 4.5.1.6 How to Enable or Disable the Announcement of your Presence Status for External Callers . . . 111
    - 4.5.1.7 How to Enable or Disable the Announcement of your Presence Status for Specific Callers . . . 111
    - 4.5.1.8 How to Grant or Deny the Attendant Permission to Retrieve Voicemail and Fax Messages . . . 112
    - 4.5.1.9 How to Activate or Deactivate the Password Prompt for the Voicemail Box . . . . . 113
    - 4.5.1.10 How to Select the Language of the Voicemail Box . . . . . 113
  - 4.5.2 Managing Voicemail . . . . . 113
    - 4.5.2.1 How to Listen to a Voice Message on the Phone . . . . . 115
    - 4.5.2.2 How to Listen to a Voice Message on the PC . . . . . 116
    - 4.5.2.3 How to Call the Sender of a Voice Message . . . . . 116

## Contents

4.5.2.4	How to Forward a Voicemail Message	117
4.5.2.5	How to Move a Voice Message	117
4.5.2.6	How to Save a Voice Message as a WAV File	117
4.5.2.7	How to Send a Voice Message as an E-mail	118
4.5.2.8	How to Create an Outlook Contact from the Sender of a Voice Message	118
4.5.2.9	How to Sort Voice Messages	118
4.5.2.10	How to Delete a Voicemail	119
4.5.3	Fax Box	119
4.5.3.1	How to Determine your own Fax Number	120
4.5.4	Managing Fax Messages	120
4.5.4.1	How to Display a Fax Message	122
4.5.4.2	How to Call the Sender of a Fax Message	122
4.5.4.3	How to Forward a Fax Message	122
4.5.4.4	How to Move a Fax Message	123
4.5.4.5	How to Save a Fax Message as a TIFF File	123
4.5.4.6	How to Send a Fax Message as an E-mail	123
4.5.4.7	How to Sort Fax Messages	123
4.5.4.8	How to Display an Overview of Fax Messages in the Send Queue	124
4.5.4.9	How to Cancel Sending a Fax Message	124
4.5.4.10	How to Display an Overview of Sent Fax Messages	125
4.5.4.11	How to Resend a Fax Message	125
4.5.4.12	How to Display a Fax Transmission Report	125
4.5.4.13	How to Delete a Fax Message	126
4.5.5	Sending Fax Messages	126
4.5.6	Notification Service for Messages	126
4.5.6.1	How to Enable or Disable E-mail Notifications	127
4.5.6.2	How to Enable or Disable the Notification by Phone	128
4.5.6.3	How to Enable or Disable SMS Notification	129
4.5.7	Phone Menu of the Voicemail Box	129
4.5.7.1	How to Call a Voicemail Box from an Internal Phone	131
4.5.7.2	How to Call a Voicemail Box from an External Phone	132
4.6	Instant Messaging	132
4.6.1	Instant Messaging	132
4.6.1.1	How to Send an Instant Message	134
4.7	AutoAttendant	135
4.7.1	Central AutoAttendant	135
4.7.2	Personal AutoAttendant	136
4.7.2.1	How to Edit a Profile for the Personal AutoAttendant	138
<b>5</b>	<b>Configuration</b>	<b>140</b>
5.1	How to Edit your own Name	141
5.2	How to Specify an E-Mail Address	141
5.3	How to Define an Additional Phone Number	142
5.4	How to Define an XMPP Alias	142
5.5	How to Provide your own Picture	143
5.6	How to Delete your own Picture	143
5.7	Programming the Function Keys of the Telephone (not for OpenScape Office HX)	144
5.7.1	How to Program the Function Keys of the Telephone	144
5.8	How to Change the Password	145
5.9	How to Deactivate the Automatic Login	146
5.10	How to Change the Login Name	147
5.11	How to Select the User Interface Language	147

5.12 How to Change the User Interface . . . . . 147

5.13 How to Activate or Deactivate a Hotkey . . . . . 148

5.14 How to Change the Server Address . . . . . 148

5.15 How to Configure the Transfer Method . . . . . 149

5.16 Troubleshooting . . . . . 149

    5.16.1 How to Resolve the Problem: No Connection to the Communication System . . . . . 149

    5.16.2 How to Resolve the Problem: myPortal for Outlook is not Loading (Outlook 2003) . . . . . 150

    5.16.3 How to Resolve the Problem: myPortal for Outlook is not Loading (Outlook 2007) . . . . . 150

    5.16.4 How to Resolve the Problem: myPortal for Outlook is not Loading (Office 2007) . . . . . 150

    5.16.5 How to Resolve the Problem: Empty Browser Window for Key Programming . . . . . 151

**6 Appendix . . . . . 152**

6.1 Presence Status Keywords for Outlook Appointments . . . . . 152

6.2 Features of the UC Clients that can be used with SIP Telephones . . . . . 153

**Index . . . . . 155**

# 1 Introduction

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

## 1.1 myPortal for Outlook

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

myPortal for Outlook provides the following features:

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

## 1.2 New Features

myPortal for Outlook for OpenScape Office V3 offers several convenient new features.

### **Web Collaboration**

You can start Web Collaboration for multi-media collaboration during a phone call or conference.



### 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.

### Making Calls from the Outlook Inbox

You can call the sender of an e-mail.

## 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	Appearance	Sample
User Interface Elements	Bold	Click <b>OK</b> .
Menu sequence	>	<b>File &gt; Exit</b>
Special emphasis	Bold	<b>Do not delete</b> Name.
Cross-reference text	Italics	You will find more information in the topic <i>Network</i> .
Output	Monospace font, e.g., Courier	Command not found.
Input	Monospace font, e.g., Courier	Enter LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>
Work Steps and Substeps	Numbered and alphabetical lists	<ul style="list-style-type: none"> <li>• Configure the DSL telephony stations with the associated DID phone numbers. <ul style="list-style-type: none"> <li>– Click <b>Add</b>.</li> <li>– Enter the name of the Internet telephony station under <b>Internet Telephony Station</b>.</li> </ul> </li> </ul>
Alternative Work Steps	Enumeration	<ul style="list-style-type: none"> <li>• If you want to output amounts, enable the check box <b>Display amounts instead of units</b>.</li> <li>• If you want to output units, clear the check box <b>Display amounts instead of units</b>.</li> </ul>

---

**Related Topics**

- [Types of Topics](#)

## 1.5 User Interface Elements













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

By default, the tool bar of myPortal for Outlook is located below the menu bar and the tool bar of Outlook (Outlook 2003, Outlook 2007):



In Outlook 2010, you will find the icons of myPortal for Outlook in the **myPortal** ribbon tab.

Items in the tool bar of myPortal for Outlook:

Symbol	Function
	Drop-down list for call numbers The drop-down list contains up to ten previously dialed numbers and serves as an input field for numbers to be dialed or names to be found.
	<ul style="list-style-type: none"> <li>• <b>Dial</b></li> <li>• During incoming call: <b>Accept (pick up)</b></li> <li>• During ongoing call: <b>Hang Up</b></li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Forward</b></li> <li>• During ongoing call: <b>Transfer</b></li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Hold</b></li> <li>• While on Hold: <b>Reconnect</b></li> </ul>
	<b>Conferencing</b>
	<ul style="list-style-type: none"> <li>• <b>Record</b></li> <li>• While recording: <b>Stop Rec.</b></li> </ul>
	Symbol and drop-down list for Presence status (with additional symbols)
	<b>Messages</b> possibly with the number of new messages next to it in parentheses
	<b>Journal</b> possibly with the number of open calls next to it in parentheses
	<b>Directories</b>
	<b>Setup</b>
	<b>Help</b>

---

**INFO:** The tool bar of myPortal for Outlook can also be found in every Outlook contact, but with reduced functionality.

---

### Context menus

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

### Tooltips

Tooltips are tiny windows in which myPortal for Desktop displays more information on certain objects of the graphical user interface such as icons, input fields or buttons, for example. ... at the end of a label indicates "incomplete due to lack of space". The appropriate tool tip appears when you let the mouse pointer hover over that element for a brief period of time.

---

### Related Topics

- [How to Dial a Number Manually](#)
- [How to Call an Outlook Contact](#)
- [Favorites List](#)
- [Screen Pops](#)
- [Conferencing \(not with OpenScape Office HX\)](#)
- [Presence Status](#)
- [Journal](#)
- [Directories](#)
- [Managing Voicemail](#)
- [Managing Fax Messages](#)
- [How to Select the User Interface Language](#)
- [How to Change the User Interface](#)

## 1.6 Online Help

The integrated online help describes key concepts and operating instructions.

### Navigation

The buttons in the online help provide the following functions:

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

## 2 Installing and Starting myPortal for Outlook

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

### 2.1 Prerequisites for UC PC Clients

In order to use UC PC clients, the client PC 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 licenses being used.

---

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

---

#### Telephones

myPortal for Desktop, myAttendant and myPortal for Outlook can be used in combination with the following telephones:

- OpenStage HFA
- OpenStage T (HX)
- optiPoint 410 HFA
- optiPoint 420 HFA
- optiPoint 500 (HX)
- optiPoint WL2 professional HFA
- SIP Phone
- Analog telephone
- HiPath Cordless IP
- HiPath Cordless Office (HX)
- 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

myPortal for Desktop, myAttendant, myPortal for Outlook and Fax Printer can be used in combination with the following web browsers:

- Microsoft Windows 7

**Installing and Starting myPortal for Outlook**  
Prerequisites for UC PC Clients

- Microsoft Windows Vista
- Microsoft Windows XP

Local administration rights on a client PC are required for the installation, but not for automatic updates. The Russian and Chinese user interfaces of myPortal for Outlook require a Windows installation in the same language.

myPortal for Desktop can also be used with the following operating systems:

- Apple Mac OS X v10.7 Lion

**Windows Update**

The PCs always need the current status of all available updates, including Service Packs.

**Web Browsers**

myPortal for Desktop, myPortal for Outlook and Fax Printer can be used in combination with the following web browsers:

- Microsoft Internet Explorer Version 7
- Microsoft Internet Explorer Version 8 in compatibility mode
- Microsoft Internet Explorer Version 9
- Mozilla Firefox Version 4 or later

**Additional Software**

Additional Software	myPortal for Desktop	myAttendant	myPortal for Outlook
Java >= 1.6.031 (see <b>Service Center &gt; Download Center</b> )	X	X	
Microsoft Office 2010 or Microsoft Office 2007(32 bit) with installed .NET components for Outlook or Microsoft Office 2003 (32 bit) Microsoft Office 365			X
Access to Microsoft Exchange Server or Outlook 365 (for Outlook contacts and appointments)	X		X
Microsoft .NET Framework >= 3.5 (>= 4.0 with Microsoft Office 2010)			X

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**INFO:** In order to use the Exchange Calendar integration with Microsoft Small Business Server, FBA (Form Based Authentication) may need to be disabled there under some circumstances.

---

### Minimum Hardware Requirements

- 2 GHz CPU
- RAM: 2 GB  
(Microsoft Windows XP: 1 GB)  
(Microsoft Windows 2003 Server: 1 GB)
- 100 Mbps LAN
- XGA (1024x768) screen resolution, myPortal for Outlook: SVGA (800x600) screen resolution

### Microsoft Terminal Server, Citrix Server

myAttendant, myPortal for Desktop, myPortal for Outlook and Fax Printer can be used in Microsoft Terminal Server and Citrix Server environments under the following preconditions:

---

**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 (Desktop Mode)
- Microsoft Windows 2008 R2 Server (64 bit) with Citrix XenApp 5.0 Server (Desktop Mode)
- Microsoft Windows 2008 R2 Server (64 bit) as Microsoft Terminal Server
- Microsoft Windows 2008 Server as Microsoft Terminal Server
- Microsoft Windows 2003 Server as Microsoft Terminal Server

Office applications:

- Microsoft Office 2010
- Microsoft Office 2007 (32 bit)
- Microsoft Office 2003 (32 bit)

Hardware Prerequisites: The number of installable clients depends on the server performance and on the amount of available memory. If the server is also being used for other applications, their memory requirements must also be taken into account. More information on the configuration of Citrix XenApp Server can be found under:

[http://wiki.siemens-enterprise.com/wiki/OpenScape\\_Office](http://wiki.siemens-enterprise.com/wiki/OpenScape_Office)

### 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 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 Outlook](#)

## 2.2 How to Install myPortal for Outlook

### *Prerequisites*

- Your PC meets the [Prerequisites for UC PC Clients](#) relevant for myPortal for Outlook.
- The administrator of your communication system has made the installation file(s) available to you.

---

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

---

### *Step by Step*

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

### *Next steps*

Start myPortal for Outlook.

---

**Related Topics**

- [Prerequisites for UC PC Clients](#)



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

## 2.3 How to Start myPortal for Outlook

### *Prerequisites*

- myPortal for Outlook is installed on your PC.

### *Step by Step*

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

---

**INFO:** If you want to start Outlook without myPortal for Outlook, click in the Login window on **Work Offline**. You can then use myPortal for Outlook only after restarting Outlook.

You can start Outlook without myPortal for Outlook only if the automatic login has not been enabled.

---

---

**INFO:** The concurrent usage of myPortal for Outlook with myPortal for Desktop or with myAttendant under the same user name is not supported.

The concurrent usage of myPortal for Desktop with myAgent under the same user name can lead to restrictions (see *OpenScape Office V3, myAgent, User Guide Notes on Using OpenScape Office Clients Concurrently*).

---

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

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

---

**INFO:** When you start a PC client for the first time, you will be prompted to change your password, provided you have not already changed it via the phone menu of the voicemail box.

Enter your previous password in the **Old password** field.

Enter your new password, which must consist of only digits and include at least six digits, in the **New password** and **Confirm password** fields.

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

---

---

**NOTICE:** If the wrong password is entered five times, your access to all 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 Outlook with an automatic login in the future, enable the check box **Save Password**. The Login window will then no longer be displayed. You can change this option at any time.

---

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

---

- 5) If the **Server IP** is displayed, enter the IP address of the communication system.
- 6) Click **Login**.

### **Next steps**

Change your password if you have not already done this.

---

### **Related Topics**

- [How to Install myPortal for Outlook](#)
- [How to Change the Password](#)
- [How to Deactivate the Automatic Login](#)
- [How to Resolve the Problem: No Connection to the Communication System](#)
- [How to Resolve the Problem: myPortal for Outlook is not Loading \(Outlook 2003\)](#)

- [How to Resolve the Problem: myPortal for Outlook is not Loading \(Outlook 2007\)](#)

## 2.4 How to Uninstall myPortal for Outlook

### Step by Step

- 1) Close Outlook.

---

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

---

- 2) Select one of the following options:
  - Windows XP:  
Click in the **Control Panel** on **Software**.
  - Windows Vista:  
Click in the **Control Panel** on **Programs and Features**.
- 3) Click on **Change** in the context menu of **myPortal for Outlook**.
- 4) Click **Modify**.
- 5) Select the **myPortal for Outlook** feature to be uninstalled.

---

### Related Topics

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

## 2.5 Automatic Updates

Automatic updates keep Windows applications (e.g., UC clients, Application Launcher) up to date.

If an application determines that there is a newer version than the one currently running, it is automatically updated. If required, a message that the application must be exited in order to to perform the automatic update appears.

---

### Related Topics

- [Prerequisites for UC PC Clients](#)

## 2.5.1 How to Perform Automatic Updates

### Prerequisites

- Your PC meets the *Prerequisites for UC PC Clients* relevant for myPortal for Outlook.
- 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 Outlook.

### Next steps

Restart myPortal for Outlook 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.rtf` file.

---

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

### Custom Configuration

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

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

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

### Improved Security Concept

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

- **New Password**  
The new password must consist of at least six digits and applies to myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Mobile, myPortal for OpenStage, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.  
After the upgrade, you will be prompted to change your password when you start an OpenScape Office PC client or access your voicemail via the phone for the first time.
- **Monitoring password entry attempts**  
If the wrong password is entered five times, your access to all OpenScape Office clients will be locked. Unlocking is only possible by the administrator of the communication system.

---

#### **Related Topics**

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

## 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 user interface language for myPortal for Outlook and, separately, also the language to be used by the voicemail box to play back the menu and internal system announcements.

### Select the language settings

Select the respective language for:

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

### Record your name announcement

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

- when your voicemail box notifies callers about your Presence status
- for conferences where you are the inviter, as a greeting to the participants:  
"... has invited you to participate in a conference"
- for conferences, to inform participants that you have joined:  
"... has joined the conference."

### Record your personal greeting

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

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

---

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

---

### **Specify your e-mail address**

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

### **Create your Favorites list**

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

---

#### **Related Topics**

- [Voicemail Box](#)

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

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

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

### ***Next steps***

Exit Outlook and restart myPortal for Outlook.

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

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

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

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

---

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

---

## First Steps

### How to Record your Personal Greeting

#### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.
- 4) Click on **My VoiceMail Name** in the list of announcements.
- 5) Click **Record**. The voicemail box will now call you on your phone.
- 6) Accept the call from the voicemail box.
- 7) Speak out your name after the tone.
- 8) Click **Stop**.
- 9) If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
- 10) If you want to record the announcement again, click on **Record** again.
- 11) Click on **Close**, followed by **Save**.

---

#### **Related Topics**

- [How to Record your Personal Greeting](#)
- [How to Call a Voicemail Box from an External Phone](#)
- [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 on the **Setup** symbol.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.
- 4) Select one of the following options in the list of announcements:
  - If you want to record the general personal greeting, click on **My VoiceMail Greeting**.
  - 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**

- [How to Call a Voicemail Box from an External Phone](#)
- [How to Record your Name Announcement](#)
- [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 the sending of e-mails.

***Step by Step***

- 1) Click on the **Setup** symbol.
- 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) Select one of the following options:
  - Click on the **Directories** symbol and then on **Internal** or **External**.
  - Click on the **Contacts** folder in Outlook.
- 2) Drag the desired contact to the Favorites list.

---

**Related Topics**

- [How to Enable or Disable the Favorites List Display](#)
- [How to Enable or Disable Automatic Hiding of the Favorites List](#)

## **First Steps**

### How to Create a Favorites List

- [How to Enable or Disable the "Always on Top" Setting of the Favorites List](#)
- [How to Enable or Disable the Dimming of Unused Favorites on Exiting](#)
- [Favorites List](#)

## 4 Unified Communications

Unified Communications offers various features such as presence status and voicemails with the myPortal for Desktop, myPortal for Outlook, myPortal for Zimbra und myPortal for Mobile clients.

### 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 rule-based call forwarding, which can be flexibly configured with myPortal for Desktop or myPortal for Outlook.








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

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

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

Symbol	Presence status	Availability
	<b>Sick</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Break</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Gone out</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Vacation</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Lunch</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Gone Home</b>	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number
	<b>Do not disturb</b> (not available for Mobility Entry or MULAP)	Absent - Call forwarding to the voicemail box or status-based call forwarding to another call number

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

Symbol	Presence or connection status
	Subscriber receives a call
	Subscriber is calling
	The subscriber is on the phone
	Presence status is not visible
	Phone is not connected

---

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

---

### Mapping of the External XMPP Status Internally

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

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

---

**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
Out of the Office	Away
Lunch	Away
Gone Home	Away
Vacation	Extended Away

### Call Forwarding to the Voicemail Box

If your Presence status is not **Office** or **CallMe**, the communication system redirects 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.

### Info Text

You can enter any info text for your current presence status, e.g., "I am in Room No. ..." when attending a meeting. The info text is displayed in the Favorites list, in the internal directory and in the virtual conference room (not with OpenScape Office HX). The info text is deleted when you change your presence status.

### Automatic Reset of the Presence Status

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

### Visibility of your Presence Status

For each subscriber in the internal directory, you can specify whether that subscriber can see your Presence status other than **Office** and **Call-Me** as well as the scheduled time of your return and any info text you may have entered.

### Automatic Update of Presence Status via Outlook 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 Outlook 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 Outlook. The end time of the Outlook appointment remains unchanged in the event of a possibly delayed return. You can define whether the Outlook appointments should be stored in the local PST file or on the Exchange server. If you are using a local PST

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

### 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 to Absent

### *Step by Step*

- 1) In the toolbar of myPortal for Outlook, click on the presence status symbol, and then click on one of the following presence statuses: **Meeting, Sick, Break, Out of the Office, Vacation, Lunch, Gone Home** or **Do Not Disturb**.
- 2) Select one of the following options to specify the time of your return:
  - Click on one the four buttons with the desired time duration.
  - Select a time and a date in the calendar control.
- 3) If you want to specify an info text for the Presence status, enter it in the input field.
- 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) In the tool bar of myPortal for Outlook, click on the symbol for the presence status and then click on **Office**.
- 2) Click on the option **Return to the office**.
- 3) If you want to specify an info text for the Presence status, enter it in the input field.
- 4) Click **OK**.

---

#### **Related Topics**

- [How to Change the Presence Status 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 on the **Setup** symbol.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Select one of the following options:
  - If you want to enable automatic resetting of the Presence status to **Office**, select the **Auto back to office** check box.
  - If you want to disable automatic resetting of the Presence status to **Office**, clear the **Auto back to office** check box.
- 4) Click **Save**.

---

#### **Related Topics**

- [How to Change the Presence Status 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 on the **Setup** symbol.
- 2) Click on **Sensitivity > Presence Visibility**.
- 3) Select one of the following options:
  - If you want to make your presence visible to a specific subscriber, enable the check box in the appropriate row.
  - If you want to make your presence invisible to a specific subscriber, clear the check box in the appropriate row.
  - If you want to make your presence visible to all subscribers, click **Select All**.
  - If you want to make your presence invisible to all subscribers, click **Unselect All**.
- 4) Click **Save**.

---

##### **Related 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 Outlook.

##### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Outlook Connectivity**.
- 3) Select one of the following options:
  - If you want to enable automatic updating of the Presence status via Outlook appointments from the Exchange calendar, select the item **Exchange Calendar Integration**.

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

---

#### Related Topics

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

---

#### Related 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 on the **Setup** symbol.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
  - If you want to enable screen pops on changing the Presence status, select the check box **Display tray pop when I change my presence**.
  - If you want to disable screen pops on changing the Presence status, clear the check box **Display tray pop when I change my presence**.
- 4) Click **Save**.

---

#### Related 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 Outlook 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 Outlook, the communication system sets up two connections. It first calls you at your Call-Me destination. If you answer the call, the communication system then calls the desired destination and connects you with it. Your internal phone number is displayed at the destination (One Number Service).

#### Presence Status

When the Call-Me service is enabled, the message "Call-Me active" appears in the display of your phone (not for analog and DECT phones). Other subscribers will see your presence status as **Office**.

### Activation

You can activate the 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 CallMe 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) Click on the symbol for the presence status and then click **Office**.
- 2) Click on the option **Enable CallMe service**.
- 3) Click on **<No Number Selected>**.
- 4) Set the call number of the 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.

---

- 5) Click **OK**.

---

### Related Topics

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

## 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](#)
- [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 on the **Setup** symbol.
- 2) Click on **Call Rules > Forwarding Destinations**.
- 3) Choose one of the following destinations in the column with the appropriate Presence status in the drop-down list: **None**, **Mobile**, **Assistant**, **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 are activate or deactivate them at any time by using the Rules wizard. A rule can only be active if your phone has not been forwarded. Status-based call forwarding (except to the voicemail box) overrides rule-based call forwarding.

When a call forwarding rule is active, 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, Outlook contacts or from any station number)
- (except) when transferred to you from certain people (in the internal directory, external directory, Outlook contacts or from any station number)
- (except) from a certain type, i.e., **internal**, **external** or **Unknown Contact**
- (except) on a certain date (also on multiple dates)
- (except) on certain weekdays
- (except) between a certain Start and End date
- (except) between a certain Start and End time

---

### **Related Topics**

- [Presence Status](#)
- [Status-based Call Forwarding](#)

## **4.1.4.1 How to Add a Call Forwarding Rule**

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

- 1)** Click on the **Setup** symbol.
- 2)** Click on **Call Rules > Rules Engine**.
- 3)** Click **New**.
- 4)** Click **Destination**.
- 5)** Enter the phone number in dialable format or in canonical format and click **OK**.
- 6)** Click **Next**.

- 7) 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: (**Date Values, Weekdays, Type, People, Start Date, End Date, Start Time, End Time** or **Presence Status**) to specify the condition more precisely in the next dialog.
- 8) Click **Next**.
- 9) If you want to add an exception, enable the check box **Except when ...** in the appropriate row and click in the lower area on the desired underlined details (**Start Date, End Date, Date Values, Start Time, End Time, Weekdays, People, Presence Status** or **Type**) to specify the exception more precisely in the next dialog.
- 10) Click **Next** twice.
- 11) Enter a name for the rule under **Name for rule** (max. 15 characters).
- 12) 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**.
- 13) Click on **Save** twice.

---

#### 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 on the **Setup** symbol.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Click on the relevant rule and then on **Edit**.
- 4) 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**.
- 5) Click **Next**.
- 6) 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: (**Date Values, Weekdays, Type, People, Start Date, End Date, Start Time, End Time** or **Presence Status**) to specify the condition more precisely in the next dialog.
  - If you want to edit a condition, click in the lower area on the appropriate underlined detail: (**Date Values, Weekdays, Type, People, Start Date, End Date, Start Time, End Time** or **Presence Status**) to specify the condition more precisely in the next dialog.
  - If you want to remove a condition, clear the **When ...** check box in the appropriate row.
- 7) Click **Next**.
- 8) 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, Date Values, Start Time, End Time, Weekdays, People, Presence Status** or **Type**) 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, Date Values, Start Time, End Time, Weekdays, People, Presence Status** or **Type**) 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.
- 9) Click **Next** twice.
- 10) 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**.
- 11) Click on **Save** twice.

---

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

---

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

---

#### **Related 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 on the **Setup** symbol.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Click on the relevant rule and then on **Remove**.
- 4) Click on **Yes**, followed by **OK**.
- 5) Click **Save**.

---

##### **Related 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 on the **Setup** symbol.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Click on the rule that you want to move.
- 4) Select one of the following options:
  - If you want to move the rule up by one position in the order, click on **Move Up**.
  - If you want to move the rule down by one position in the order, click on **Move Down**.
- 5) Click **Save**.

---

##### **Related 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 Outlook works the following directories, which support the following functions:

Symbol	Directory	Make Call	Look up caller names	Send Instant Message	Add to Favorites List	Add to Conference
	Outlook contacts	x	x	-	-	-
	Internal directory (symbol for system phones in accordance with current Presence status)  Contains internal subscribers with their Presence status (only system telephones) and possibly their additional phone numbers, provided the subscriber has made these numbers visible to others. When a subscriber is absent, you can see the scheduled time of return in the <b>Date / Time</b> column, provided that subscriber has allowed his or her Presence status to be visible to you. and any info text that may have been entered by the subscriber are also displayed.	x	x	x	x	x
	External directory:  Contains contacts from a corporate directory and possibly from the public Exchange folder (not usable with Office 365) and must be configured by the administrator of the communication system.	x	x	-	x	x
	External offline directory:  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.	x	x	-	x	x

---

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

---

### Contact Details

Depending on the directory involved, the List view of 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, XMPP ID, Department, Site, Company** and **CustomerID**.

### Simple Search

You can search the directories, including your Outlook contacts, by **First Name, Last Name** or a call number. The directories are searched in the order shown in the table above. The search can be conducted using whole words and also with

partial search terms such as a part of a station number, for example. The set search options remain in effect for subsequent searches. All search terms used are saved. You can optionally delete the list of search terms used.

### 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 sorting of a directory is retained even after the directory is closed.

### Zooming in on an Entry

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

---

### Related Topics

- [User Interface Elements](#)
- [How to Pick up a Call for Another Subscriber](#)
- [How to Call from a Directory](#)
- [How to Enable or Disable the Opening of Outlook Contacts on Inbound Calls](#)
- [How to Send an Instant Message](#)
- [How to Add a Contact to the Favorites List](#)
- [How to Add Contacts from the Journal to Outlook Contacts](#)
- [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** symbol, followed by **Find**.
- 2) If necessary, click on **Options** to display the Search options.
- 3) 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.
- 4) If necessary, click on **Advanced** to switch between simple and advanced searches.
  - 5) 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 **Find**. If your search returns a result, myPortal for Outlook 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 **Find**. If your search returns a result, myPortal for Outlook will display a hit list.
  - 6) To abort an ongoing search, click **Stop**.
  - 7) To delete the list of search terms used, click **Clear History**.
  - 8) Click **Close**.

---

#### Related Topics

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

### 4.2.1.2 How to Perform a Quick Search by Name

#### Step by Step

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

---

**INFO:** For Outlook 2010, click the **Dial** button (instead of pressing the `Enter` key).

---

### 4.2.1.3 How to Sort a Directory

#### Step by Step

- 1) Click on the **Directories** symbol and then on the desired directory, e.g., **Internal**.
- 2) Click on one of the column titles, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.
- 3) If you want to reverse the sort order, click again on column header.

- 4) To jump to the first entry in the sorted column that begins with a specific character, click on any contact in the directory and enter the desired character.

---

**Related Topics**

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

#### 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***

- › 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 Enable or Disable Searching for Caller Names in Outlook Contacts

***Prerequisites***

- You are working under Windows.
- Your administrator has configured the Exchange Calendar Integration.
- You have specified a valid MS Exchange e-mail address in myPortal for Outlook.

***Step by Step***

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Outlook Connectivity**.
- 3) Select one of the following options:
  - If you want to enable the search for caller names in Outlook contacts, select the check box under **The following outlook storage locations will be used when searching for caller information** and enter the folder name with the desired contacts on the right, e.g., `\\Mailbox - Dubios, Natalie\Contacts`.

- If you want to disable the search for caller names in Outlook contacts, clear the check box under **The following outlook storage locations will be used when searching for caller information.**

4) Click **Save**.

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

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

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

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

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

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

### Displaying the Favorites List

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

### Always On Top

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

### Auto Hide

Alternatively, you can also use the auto-hide feature to make the Favorites list disappear and appear automatically as soon as you move the mouse pointer away from it or return the mouse pointer to the vertical edge of the hidden Favorites list on the screen. When you use this feature, the Favorites list is



docked to the left or right edge of the screen. In addition, the option **Favorites are always on top** is automatically enabled. For multiple displays, the function is only available on the primary display.

### Transparency

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

---

### Related 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 **Add Favorite Group**.
- 2) Enter the desired name for the group in the input field.
- 3) Click **OK**.

### *Next steps*

Add contacts to the Favorites list.

---

### Related 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 the desired name for the group in the input field.
- 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 Favorite 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) Select one of the following options:
  - Click on the **Directories** symbol and then on **Internal** or **External**.
  - Search the directories; see [How to Search in Directories](#) for details.
  - Click on the **Contacts** folder in Outlook.
- 2) Drag the desired contact to 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 as the default number for this favorite from the drop-down list.
- 3) Click **OK**.

---

##### **Related Topics**

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

## 4.2.2.8 How to Enable or Disable the Favorites List Display

### *Step by Step*

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

---

### **Related Topics**

- [How to Create a Favorites List](#)
- [How to Enable or Disable Automatic Hiding of the Favorites List](#)
- [How to Enable or Disable the "Always on Top" Setting of the Favorites List](#)
- [How to Enable or Disable the Dimming of Unused Favorites on Exiting](#)

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

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

### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Appearance**.
- 3) Select one of the following options in the **Auto Hide** drop-down list:
  - If you want the Favorites list to be automatically hidden, select **Hide to the left** or **Hide to the right**.
  - If you do not want the Favorites list to be automatically hidden, select **Do not hide**.
- 4) Click **Save**.

---

### **Related Topics**

- [How to Create a Favorites List](#)
- [How to Enable or Disable the Favorites List Display](#)
- [How to Enable or Disable the "Always on Top" Setting of the Favorites List](#)
- [How to Enable or Disable the Dimming of Unused Favorites on Exiting](#)

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

##### *Step by Step*

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

---

##### **Related Topics**

- [How to Create a Favorites List](#)
- [How to Enable or Disable the Favorites List Display](#)
- [How to Enable or Disable Automatic Hiding of the Favorites List](#)
- [How to Enable or Disable the Dimming of Unused Favorites on Exiting](#)

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

##### *Step by Step*

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

---

##### **Related Topics**

- [How to Create a Favorites List](#)
- [How to Enable or Disable the Favorites List Display](#)
- [How to Enable or Disable Automatic Hiding of the Favorites List](#)
- [How to Enable or Disable the "Always on Top" Setting of the Favorites List](#)

## 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 Outlook must be open at the scheduled time; your presence status must be **Office** or **CallMe**, and you must confirm the execution of the call in a dialog. If you are busy at the time the scheduled call is to be made, the communication system defers the scheduled call until you are free again. myPortal for Outlook informs you of any pending scheduled calls on exiting the program. On starting the application, myPortal for Outlook notifies you about any scheduled calls for which the scheduled time has elapsed. You can then either delete such calls or save them with a new scheduled time.

### Grouped by time period

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


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

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

### Call Details

Every call is shown with the 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.

Route	Meaning
◀	Inbound
▶	outbound

Call Complete	Meaning
	The call was successful or was answered.

### Sorting

You can sort the calls in the Journal by any column (except **Direction**) in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order. The sorting of the Journal is retained even after it is closed.

### Zooming in on an Entry

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

### Retention Period

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

### Export

You can export the log data for the current day manually or automatically to a CSV file. The automatic export is performed:

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

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

---

#### Related Topics

- [User Interface Elements](#)
- [How to Make a Call from the Journal](#)
- [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** symbol.
- 2) Click on one of the groups: **Open**, **All Calls**, **Missed**, **Answered**, **Internal**, **External**, **Inbound**, **Outbound** or **Scheduled**.
- 3) If required, click on the triangle on the left of the relevant group to expand the associated Journal entries.
- 4) Click on one of the column titles, e.g., **Last Name**, to sort the Journal entries by this criterion in ascending alphanumeric order.
- 5) If you want to reverse the sort order, click again on column header.

---

#### Related 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** symbol.
- 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) 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** symbol.
- 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 **Delete** 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 on the **Setup** symbol.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Enter the desired retention period in days in the **Keep call history for** field.
- 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** symbol.
- 2) Click on the **Scheduled** group.
- 3) Click **New**.
- 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 **OK**.

---

**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** symbol.
- 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 **OK**.

---

**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** symbol.
- 2) Click on the **Scheduled** group.
- 3) Click on the relevant entry.
- 4) Click **Delete**.

---

**Related Topics**

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

### 4.2.3.8 How to Add Contacts from the Journal to Outlook Contacts

**Step by Step**

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

- 4) Click on the relevant entry.
- 5) Select **Copy to personal** in the context menu.

#### **Next steps**

Save the contact in Outlook.

---

#### **Related Topics**

- [Directories](#)

### **4.2.3.9 How to Configure the Journal Export**

Use the following steps to

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

#### **Step by Step**

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Click **Browse**.
- 4) Select the desired folder and click **Save**.
- 5) Select one of the following options:
  - If you want to activate the automatic export, select the **Enable export** check box.
  - If you want to deactivate the automatic export, clear the **Enable export** check box.
- 6) Click **Save**.

### **4.2.3.10 How to Export the Journal Manually**

#### **Prerequisites**

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

#### **Step by Step**

- 1) Click on the **Journal** symbol.
- 2) Click **Export**.
- 3) Click **OK**.

## 4.3 Calls

For calls, convenient features such as a desktop dialer, screen pops and the option to record calls and conferences (LX/MX) 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 with the trunk access code.	<ul style="list-style-type: none"> <li>• 321 (internal)</li> <li>• 0700798765 (own local network)</li> <li>• 0089700798765 (external local network)</li> <li>• 0004989700798765 (international)</li> </ul>

---

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

---

When dialing an external station (dialable format) manually, the CO access code must always be dialed as well. The CO access code must likewise also be specified when manually entering the destination number for the CallMe service in myPortal for Desktop and myPortal for Outlook.

When dialing an external phone number in dialable format from a directory and when using the Desktop Dialer and Clipboard Dialer, the communication system automatically adds the CO access code (route 1). The automatic addition of the CO access code also occurs when you select a phone number of your own personal data (**Mobile number, Private Number, External Number 1, External Number 2**, etc.) as a destination number for the CallMe service.

---

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

---

---

#### Related Topics

- [How to Dial a Number Manually](#)
- [Desktop Dialer and Clipboard Dialer \(Windows\)](#)
- [How to Enable the 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 Outlook, e.g., accept calls or pick up calls for another subscriber. You can also dial phone numbers directly from the journal, the favorites list, a directory, an Outlook contact or from the Outlook Inbox. The call functions can be controlled both in screen pops and in the menu bar of myPortal for Outlook.

---

#### Related Topics

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

---

- In the screen pop, click on the **Answer** symbol.
- Click on **Answer** in the tool bar of myPortal for Outlook.

---

**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** symbol, then on **Internal**, and then on the subscriber being called, and select **Call Pickup** from the context menu.

---

**Related Topics**

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

### 4.3.2.3 How to Redirect a Call to your Voicemail Box

**Step by Step**

- › Select one of the following options:
  - In the screen pop, click on the **Forward** symbol.
  - In the toolbar of myPortal for Outlook, click on **Forward**.

---

**Related Topics**

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

### 4.3.2.4 How to Dial a Number Manually

**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 and press the `Enter` key.

---

**INFO:** For Outlook 2010, click the **Dial** button (instead of pressing the `Enter` key).

---

- Select a phone number from the drop-down list for phone numbers and press the `Enter` key.

---

**Related Topics**

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

### 4.3.2.5 How to Call from a Directory

*Step by Step*

- 1) Click on the **Directories** symbol and then on the desired directory, for example: **Internal**.
- 2) 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, click on the triangle on the left of the relevant group to expand the associated entries in the Favorites list.
- 2) Select one of the following options:
  - If you want to use the standard phone number of the Favorites, double-click on the relevant subscriber.
  - If you want to use any other number of the Favorites, click in the context menu of the relevant subscriber on the desired station number.



---

**Related Topics**

- [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** symbol.
- 2) Click on one of the folders: **Open, All Calls, Missed, Answered, Internal, External, Inbound** or **Outbound**.
- 3) If required, click on the triangle on the left of the relevant group to expand the associated Journal entries.
- 4) 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 Call an Outlook Contact

**Step by Step**

- 1) Click on the desired contact under **Contacts** in Outlook.

---

**INFO:** Alternatively, you can open the Outlook contact and perform steps 2 through 3 in the tool bar of the Outlook contact.

---

- 2) Select the desired phone number for this contact from the drop-down list for phone numbers in the tool bar for myPortal for Outlook (the **Business phone** number is the default).

---

**INFO:** Do not use the **Dialing Aid** phone icon or the **Call Contact** menu item in the Outlook contacts.

---

- 3) Instead, click on **Dial** in the tool bar of myPortal for Outlook.

---

**Related Topics**

- [User Interface Elements](#)

### 4.3.2.9 How to Place a Call on Hold

*Step by Step*

- 1) In the toolbar of myPortal for Outlook, click on the **Hold** symbol.
- 2) When you want to resume (unhold) the call, click on the **Reconnect** symbol.

---

**Related Topics**

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

*Step by Step*

- 1) In the screen pop, click on the **Record** symbol.
- 2) If you want to stop the recording before the call ends, click on the **Stop Live Recording** symbol.

---

**Related 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 Start Web Collaboration During a Call

*Step by Step*

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

---

**Related Topics**

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

### 4.3.2.12 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.

---

- Only when conducting an incoming call: Click on the **Hang Up** symbol in the **Inbound Call** screen pop.
- In the toolbar of myPortal for Outlook, click on the **Hang Up** symbol.

---

**Related 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 and Clipboard Dialer (Windows)

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

Depending on the type of string used, the Dialer works as follows:

- A phone number in canonical format is dialed directly.
- A station number in dialable format is dialed directly if the communication system can decide whether an internal or external destination is involved. Otherwise, the user is asked to make the appropriate selection.
- A string containing letters is searched in the directories as a first name or company.

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

---

**Related Topics**

- [Call Number Formats](#)

- [Call Functions](#)

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

#### *Prerequisites*

- You have marked the desired string (Desktop Dialer) or the desired string has been copied to the Windows clipboard (Clipboard Dialer).

---

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

---

#### *Step by Step*

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

---

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

---

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

---

#### **Related Topics**

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

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

#### *Step by Step*

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

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

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

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

#### **Step by Step**

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

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

---

#### **Related Topics**

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

### 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 and additional pop-ups, if required, appear above it. There are many types of screen pops, some of which you can activate or deactivate yourself. 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: Outlook Contacts, Internal Directory, External Offline Directory and External Directory. The first hit, if found, is shown in the screen pop. You can select whether myPortal for Outlook should close these screen pops at the end of a call. The following functions are available:

Symbol	Function
 	<ul style="list-style-type: none"> <li>During incoming call: <b>Accept (pick up)</b></li> <li>During ongoing call: <b>Hang Up</b></li> </ul>
	<b>Forward</b> to voicemail box
	<b>Record</b> , if enabled in the communication system
	<b>E-mail</b> to the communication partner
	<b>XMPP</b> to the communication partner; the presence status of the communication partner is displayed if available
	<b>Web Collaboration</b>

### Opening Outlook Contacts for Incoming Calls

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

---

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

---

### Closing Screen Pops on Call Termination

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



### Screen Pop for New Voicemails

Screen pops show the caller's phone number and name (if the name details are available in a directory) as well as the date and time the call was received. The following functions are available:

- **Play through phone**
- **Play through speakers and Pause**
- **E-mail**
- **Instant Messaging**



### 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. It is always enabled: The following functions are available:

Symbol	Function
	<b>View</b>
	<b>Close</b>

### Screen Pop after Sending a Fax Message

This screen pop shows the date and time as well as the number of successful or failed transmissions. This type of screen pop only appears if myPortal for Outlook is open when sending fax messages. The following functions are available:

Symbol	Function
	<b>View</b>
	<b>Close</b>

### Screen Pop with Overview on Starting myPortal for Outlook

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



- New voicemails
- New Fax messages
- Open calls

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

If your presence status is not **Office**, you will receive a corresponding message.

### Screen Pop on Overdue Presence Status

The screen pop is displayed if your presence status is not **Office**, and the scheduled time of your return has passed. If you close the screen pop, it will reappear after one hour if your presence status is still overdue. The following functions are available:

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

---

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

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

### Step by Step

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

---

### Related Topics

- [How to Answer a Call](#)



- [How to Redirect a Call to your Voicemail Box](#)
- [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 Outlook Contacts on Inbound Calls

##### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
  - If you want to enable the opening of Outlook contacts on inbound calls, select the check box **Pop up application on inbound calls**.
  - If you want to disable the opening of Outlook 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 Screen Pops on Outbound Calls

##### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
  - If you want to enable screen pops on inbound calls, select the check box **Display tray pop on 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 Place a Call on Hold](#)
- [How to Record a Call or a Conference](#)
- [How to End a Call](#)

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

##### *Step by Step*

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

---

##### **Related Topics**

- [Journal](#)

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

##### *Step by Step*

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

---

##### **Related Topics**

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

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

#### *Step by Step*

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

---

#### **Related Topics**

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

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

#### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
  - If you want to enable the opening of the messages window on receiving a new voicemail, select the check box **Screenpop the messages window when I receive a new voicemail message**.
  - If you want to disable the opening of the messages window on receiving a new voicemail, clear the check box **Screenpop the messages window when I receive a new voicemail message**.
- 4) Click **Save**.

---

#### **Related Topics**

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

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

##### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
  - If you want to enable the opening of the messages window on receiving a new fax message, select the check box **Open the messages window when I receive a new fax message**.
  - If you want to disable the opening of the messages window on receiving a new fax message, clear the check box **Open the messages window when I receive a new fax message**.
- 4) Click **Save**.

---

##### **Related Topics**

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

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

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

##### *Step by Step*

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

## 4.4 Conferencing (not with OpenScape Office HX)

In a conference, multiple participants (including external parties) can communicate with one another at the same time. The Conference Management function of myPortal for Outlook enables you to quickly and easily host different types of conferences and also to schedule them in advance.

### Types of Conferences

The different types of conferences offer the following features:

	<b>Ad-hoc</b>	<b>Scheduled</b>	<b>Permanent</b>	<b>Open</b>
Usage	<ul style="list-style-type: none"> <li>• Phone-controlled</li> <li>• Application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>• Application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>• Application-controlled</li> </ul>	<ul style="list-style-type: none"> <li>• Application-controlled</li> </ul>
Start	<ul style="list-style-type: none"> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduled</li> </ul>	<ul style="list-style-type: none"> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Manually</li> </ul>
End	<ul style="list-style-type: none"> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduled</li> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Manually</li> </ul>
Duration of the reservation of conference channels	<ul style="list-style-type: none"> <li>• 1 hour by default</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduled</li> </ul>	<ul style="list-style-type: none"> <li>• Until the deactivation or deletion of the conference</li> </ul>	<ul style="list-style-type: none"> <li>• Until the deactivation or deletion of the conference</li> </ul>
Extension	-	x	-	-
Recurrence	<ul style="list-style-type: none"> <li>• Manually</li> </ul>	<ul style="list-style-type: none"> <li>• Scheduled</li> </ul>	-	-
Direction of connection setup from the viewpoint of the system	<ul style="list-style-type: none"> <li>• Outbound</li> </ul>	<ul style="list-style-type: none"> <li>• Outbound</li> <li>• Inbound</li> </ul>	<ul style="list-style-type: none"> <li>• Inbound</li> </ul>	<ul style="list-style-type: none"> <li>• Inbound</li> </ul>
Set of participants	<ul style="list-style-type: none"> <li>• Fixed</li> </ul>	<ul style="list-style-type: none"> <li>• Fixed</li> </ul>	<ul style="list-style-type: none"> <li>• Fixed</li> </ul>	<ul style="list-style-type: none"> <li>• Open</li> </ul>
Authentication of conference participants	-	<ul style="list-style-type: none"> <li>• Individual conference ID (optional)</li> <li>• Password (optional)</li> </ul>	<ul style="list-style-type: none"> <li>• Individual conference ID (optional)</li> <li>• Password (optional)</li> </ul>	<ul style="list-style-type: none"> <li>• Shared conference ID (optional)</li> </ul>

**Unified Communications**

Conferencing (not with OpenScape Office HX)

	<b>Ad-hoc</b>	<b>Scheduled</b>	<b>Permanent</b>	<b>Open</b>
Recording, if enabled in the system	<ul style="list-style-type: none"> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>	<ul style="list-style-type: none"> <li>Automatically (Auto Conference Recording)</li> <li>Manually (On Demand Conference Recording)</li> </ul>
Invitation by E-mail with:	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> <li>Date and time of the start and end of the conference</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> <li>Link for Web Collaboration session</li> </ul>	<ul style="list-style-type: none"> <li>Conference Name</li> <li>Dial-in number</li> <li>Conference ID</li> <li>Password</li> </ul>
Outlook appointment as an e-mail attachment (.ics)	-	x	-	-

**Application-controlled conference**

As a subscriber, you can initiate, control and manage a conference with the Conference Management feature of myPortal for Desktop or myPortal for Outlook.














**Phone-controlled Conference**

As a subscriber, you can initiate a phone-controlled conference and then control it via the phone by the following methods:

- Call the desired conference participant and connect him or her to the conference
- Extend a consultation call into a conference
- Extend a second call into a conference

**Virtual conference room**

The virtual conference room enables you to follow a conference and its participants in a graphical environment and to also manage the conference if you are the conference controller. The virtual conference room shows the phone number, name and presence status to the conference participants, where available.

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

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

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

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

### Dial-in Number

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

### Conference Controller

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

## Unified Communications

Conferencing (not with OpenScape Office HX)

- Add or remove conference participants:  
Removed participants do not remain in the conference.
- Disconnect or reconnect conference participants:  
Disconnected participants remain in the conference. When the conference controller is connecting a conference participant, all other conference participants remain connected to one another. If there is only one participant connected, that participant will hear music on hold.
- Record a conference  
Conferences in which a participant is on hold cannot be recorded.
- Set another internal participant on the same node as the conference controller
- Leave the conference without ending it:  
The longest attending internal participant of the conference automatically becomes the conference controller.
- End the conference

### Conference Participants

Conference participants can leave the conference and optionally dial-into it again (scheduled and permanent conferences). As long as a conference has only one participant, the participant hears music on hold. The administrator can specify whether multiple external conference participants are allowed. The maximum number of external conference participants is determined, among other things, by the number of available trunks.

### 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.

### Automatic Termination without a Conference Controller

If there are only external subscribers left in a conference, the participants will hear an alert tone after a specified time period. Following a further timeout, the conference is automatically terminated by the communication system. The administrator can change these timeouts.

### Notification by E-mail and Outlook Appointment

The system can automatically notify conference participants by e-mail and, for scheduled conferences, additionally through an Outlook appointment as an attachment (.ics):



Event	Notified conference participants	Outlook appointment
New conference	All	Automatic creation
Delete the conference		Automatic deletion
Reschedule the conference		Automatic update
Adding conference participants	Those affected	Automatic creation (those affected)
Remove conference participants		Automatic deletion (those affected)

This requires the administrator to have configured the sending of e-mails. In addition, an internal conference participant must have specified his or her e-mail address. For external conference participants, the initiator of the conference must enter their individual e-mail addresses.

---

**INFO:** For e-mail notifications, no return acknowledgments are obtained for failed deliveries or absence messages, since the e-mails are sent directly from the system due to the integration of Web Collaboration.

---

### Further Calls

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

### Park, Toggle/Connect

The Park and Toggle/Connect features are not available in a conference.

### Call Charges

Toll charges are assigned to the party who set up the toll call. When a conference is transferred to another conference controller, all further charges are assigned to that controller.

### Video Monitoring

Any ongoing video transmission, e.g., with OpenScape Personal Edition, must be terminated before participating in a conference.

---

### Related Topics

- [User Interface Elements](#)
- [Web Collaboration Integration](#)
- [How to Specify 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 system opens the window with the virtual conference room automatically for all internal conference participants, provided they have started myPortal for Desktop with the classic user interface or myPortal for Outlook. The system calls all conference participants simultaneously. On joining the conference, each conference participant hears a greeting announcement with the name of the conference controller.

### Recording the Conference

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

### Ending the Conference

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

---

### Related Topics

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

### 4.4.1.1 How to Configure and Initiate an Ad-hoc Conference

#### *Step by Step*

- 1) Click on the **Conference** symbol.
- 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 system now calls you and all other conference participants.
- 5) If you want to use OpenScape Web Collaboration in this conference, click on **Collaboration > Start Collaboration**.

- 6) If you want to repeat the ad-hoc conference with the same set of participants later, you can now save it. To do this:
  - a) Click on **Conference Room > Save As**.
  - b) Enter 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 Display your Own Ad-hoc Conference

#### *Prerequisites*

- You have saved an ad-hoc conference.

#### *Step by Step*

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

## Unified Communications

Conferencing (not with OpenScape Office HX)

- 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:  
Click in the **AdHoc Conference** window on **Participants > Add Participant**. In the **Add Participant To Conference** window, click on **Directory Listed Participant**, then click on a directory, enter the details of the participant in the **Search By** field, and click **Search**. Click on the desired participant in the hit list of the search results, then click **Add** and **Close**.
- Any participant:  
Click in the **AdHoc Conference** window on **Participants > Add Participant**. Click in the **Add Participant To Conference** window on **New Participant** and enter the following details of the subscriber: **Participant Name**, **Phone Number** in dialable format or in canonical format, **Password** and **Email Address** and then click on **Add** and **Close**.

---

### Related Topics

- [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, but the participant remains in the conference.

---

**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, and the participant is removed from the conference.

---

**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.
- The new conference controller is an internal subscriber from the same node.

---

**INFO:** A different conference controller for an associated Web Collaboration session, for example, can only be set there.

---

##### *Step by Step*

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

---

##### **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 **Stop**.

---

##### **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 under a specified name.

##### *Step by Step*

- 1) Click on the **Conference** symbol.
- 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 under a specified name.

##### *Step by Step*

- 1) Click on the **Conference** symbol.
- 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 conference ID and password via the phone keypad).

---

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

---

The default password for conferences is 123456. The conference controller can change this for the conference participants individually.

- Language of the announcements and invitations by e-mail (by default, this is the language of the voicemail box).
- Direction for the connection setup for each conference participant (default: **outbound**).

### **Invitation by E-mail and Outlook Appointment**

The system can invite conference participants automatically by e-mail and an Outlook appointment. This requires the administrator to have configured the sending of e-mails. In addition, an internal conference participant must have specified his or her e-mail address. For external conference participants, the initiator of the conference must enter their individual e-mail addresses. The e-mail includes the corresponding Outlook appointment (.ics) as an attachment.

### **Starting the Conference**

The system opens the window with the virtual conference room at the scheduled time automatically for all internal conference participants, provided they have started myPortal for Desktop with the classic user interface or myPortal for Outlook. If the presence of the conference controller is required, the system first calls the controller. After the successful authentication of the controller, all the other conference participants are called simultaneously. Conference participants who have forwarded their calls to their voicemail boxes or who are determined to be absent by their presence status are not called. Depending on how the connection setup has been configured, the system calls the conference participants or the participants can dial in themselves. The system



announces every participant who joins the conference by name, as in: ". . . has joined the conference", provided the initiator has recorded his or her name announcement.

---

**INFO:** In order to enable the participants of a conference you have scheduled without authentication to hear the name announcement at the start of the conference, you will need to have first already initiated a conference with authentication on one occasion.

---

### **Dialing In**

Every conference participant can use the dial-in number to dial into the conference within the scheduled time period, regardless of which direction for the conference setup was set for that participant. Attempts to dial into the conference outside the scheduled time period result in a corresponding announcement.

### **Forcing Authentication with the Star (\*) Key**

The conference controller can set the conference so that each conference participant is forced to provide authentication by at least by pressing the \* key. This ensures that only the participants who are actually present are connected to the conference, as opposed to a voicemail box, for example.

### **Extending the Conference**

Ten minutes before the scheduled end of the conference, the participants hear an announcement indicating that the conference is about to end and are offered the option of extending the conference by dialing a specific digit. Any conference participant can extend the conference by dialing that specific digit. The conference controller can extend the conference in myPortal for Outlook at any time.

### **Recording the Conference**

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

### **Ending the Conference**

The conference ends at the time scheduled for the end of the conference or if the conference controller terminates the conference.

---

### **Related Topics**

- [How to Add Conference Participants](#)
- [How to Disconnect a Conference Participant](#)
- [How to Reconnect Conference Participants](#)

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

#### 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 on the **Conference** symbol.
- 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) 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** in the context menu, select the option **Inbound** or **Outbound** from **Direction: Outbound** or **Direction: Inbound**, respectively.
- 5) In the **AdHoc Conference** window, click on **Conference Room > Save As**.
- 6) Enter a name for the conference in the input field.
- 7) Enter a **Start Date**.
- 8) Enter a **Start Time**.
- 9) Enter the **End Time**.
- 10) If the conference is to occur repeatedly, click on **Recurring Conference**.
  - a) Select an **End Date** for the conference series.
  - b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select any additional options from the details on the right-hand side.
- 11) If you want to delete a conference appointment time for a conference series, perform the following steps:

- a) Click **Exceptions**.
  - b) Click **Add**.
  - c) Select the relevant date in the **Original Date/Time** drop-down list.
  - d) Click on **Remove this recurrence**.
  - e) Click **OK**.
  - f) Click **Cancel**.
- 12) If you want to reschedule a conference appointment for a conference series, perform the following steps:
- a) Click **Exceptions**.
  - b) Click **Add**.
  - c) Select the relevant date in the **Original Date/Time** drop-down list.
  - d) Click on **Reschedule this recurrence**.
  - e) Select a **New scheduled date**.
  - f) Select a new **Start Time**.
  - g) Click **OK**.
  - h) Click **Cancel**.
- 13) Click **Save**.
- 14) Click **Advanced**.
- 15) Select one of the following options in the **Conference Type** drop-down list:
- If you want to mandate the authentication of the conference participants using passwords, select **Meet-Me Conference**.
  - If you want to waive the authentication requirement for the conference participants using passwords, select **Meet Me Conference (No Password)**.
- 16) Select the desired **Conference Language** for the announcements and the invitations by e-mail (by default, this is the language the voicemail box).
- 17) Enable the check box **This conference is active**.
- 18) If you want the conference to occur only when the conference controller is present, enable the check box **This conference requires the controller to be present**.
- 19) If you want to force the conference participants to authenticate by pressing the \* (star) key, select the check box **Force 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.

---

## Unified Communications

Conferencing (not with OpenScape Office HX)

- 20) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
- 21) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
- 22) If you want the e-mail invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
- 23) If you want to add some introductory text to the invitation e-mail, enter this in the input field.
- 24) Click **Save**.
- 25) Then click **Yes** in the **Send Conference Invitations** window. The invitation e-mails will now be sent.

---

### Related Topics

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

## 4.4.2.2 How to Display your Own Scheduled Conference

### *Step by Step*

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

---

### Related Topics

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

### 4.4.2.3 How to Determine the Dial-in Number for a Scheduled, Permanent or Open 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 on the **Conference** symbol.
- 2) Click **Manage my conferences**.
- 3) Click on the **My Conferences** tab.
- 4) Click on the relevant conference under **Conference Name**.
- 5) Click **Edit**.
- 6) The dial-in number can be found under **Conference DID**.
- 7) Click **Cancel**.
- 8) Click **Close**.

---

#### **Related Topics**

- [Permanent Conference](#)

### 4.4.2.4 How to Determine the Conference ID for a Scheduled or Permanent Conference

#### *Prerequisites*

- You are the conference controller.

---

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

---

#### *Step by Step*

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

## Unified Communications

Conferencing (not with OpenScape Office HX)

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

---

### Related Topics

- [Permanent Conference](#)

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

##### *Step by Step*

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

---

##### **Related Topics**

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

#### 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 Time**, 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 Reschedule a Scheduled Conference

##### *Prerequisites*

- You are the conference controller.

##### *Step by Step*

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

## Unified Communications

Conferencing (not with OpenScape Office HX)

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

### 4.4.2.9 How to Delete a Scheduled or Open Conference

#### *Prerequisites*

- You are the conference controller.

#### *Step by Step*

- 1) Click on the **Conference** symbol.
- 2) Click **Manage my conferences**.
- 3) Click on the **My Conferences** tab.
- 4) Click on the relevant conference under **Conference Name**.
- 5) If the conference has started, click **Stop Conference**.
- 6) Click on **Remove**, followed by **Close**.

---

#### **Related Topics**

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

### 4.4.2.10 How to Reschedule a Conference Appointment for a Conference Series

#### *Prerequisites*

- You are the conference controller of the scheduled conference.

#### *Step by Step*

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



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

#### 4.4.2.11 How to Delete a Conference Appointment for a Conference Series

##### *Prerequisites*

- You are the conference controller of the scheduled conference.

##### *Step by Step*

- 1) Click on the **Conference** symbol.
- 2) Click **Manage my conferences**.
- 3) Click on the **My Conferences** tab.
- 4) Click on the relevant conference under **Conference Name**.
- 5) Click **Edit**.
- 6) Clear the **Recurring Conference** check box and select it again.
- 7) Click **Exceptions**.
- 8) Click **Add**.
- 9) Select the relevant conference appointment in the **Original Date/Time** drop-down list.
- 10) Click on **Remove this recurrence**.
- 11) Click **OK**.
- 12) Click **Cancel**.

**13)** Click **OK**.

**14)** Click **Advanced**.

**15)** If you want to add some introductory text to the invitation e-mail, click in the **Notes** input field and enter the desired text.

**16)** Click **Save**.

### 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 permanent conference under a specified name. The conference is retained until it is explicitly deleted.

#### Options for Configuring a Scheduled Conference

The initiator of the conference can define the following properties:

- Authentication of conference participants on joining the conference required (by entering a conference ID and password via the phone keypad).

---

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

---

The default password for conferences is 123456. The conference controller can change this for the conference participants individually.

- Language of the announcements and invitations by e-mail (by default, this is the language of the voicemail box).

#### Invitation by E-mail

The communication system can invite conference participants automatically by e-mail. This requires the administrator to have configured the sending of e-mails. In addition, an internal conference participant must have specified his or her e-mail address. For external conference participants, the initiator of the conference must enter their individual e-mail addresses. The e-mail includes the corresponding Outlook appointment (.ics) as an attachment.

#### Starting the Conference

As soon as the first conference participant dials in, the system opens the window with the virtual conference room automatically for all internal conference participants, provided they have started myPortal for Desktop or myPortal for Outlook. All conference participants dial in themselves. The system announces every participant who joins the conference, as in: ". . . has joined the conference."

#### Dialing In

Every conference participant can use the dial-in number to dial into the conference at any time.

## Recording the Conference

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

---

### Related Topics

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

## 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 on the **Conference** symbol.
- 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 **Conference Room > Save As**.
- 5) Enter a name for the conference in the input field.
- 6) Click **Advanced**.
- 7) Select one of the following options in the **Conference Type** drop-down list:
  - If you want to mandate the authentication of conference participants using passwords, select **Permanent Conference**.
  - If you want to waive the authentication requirement for the conference participants using passwords, select **Permanent Conference (No Password)**.
- 8) Select the desired **Conference Language** for the announcements and the invitations by e-mail (by default, this is the language the voicemail box).

- 9) Enable the check box **This conference is active**.
- 10) If you want to force the conference participants to authenticate by pressing the \* (star) key, select the check box **Force 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.

---

- 11) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
- 12) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
- 13) If you want the e-mail invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
- 14) If you want to add some introductory text to the invitation e-mail, enter this in the input field.
- 15) Click **Save**.
- 16) Then click **Yes** in the **Send Conference Invitations** window. The invitation e-mails will now be sent.

---

**Related Topics**

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

#### 4.4.3.2 How to Display your Own Permanent or Open Conference

**Step by Step**

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

### 4.4.3.3 How to Delete a Permanent Conference

#### *Prerequisites*

- You are the conference controller.

#### *Step by Step*

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

---

#### **Related Topics**

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

### 4.4.4 Open Conference

Open conferences are intended for a fixed number of arbitrary participants. Any participant who has the requisite access data can dial into them.

The conference controller saves a permanent conference under a specified name. The conference is retained until it is explicitly deleted.

#### **Options for Configuring an Open Conference**

The initiator of the conference can define the following properties:

- The number of conference participants (max. 16).
- Authentication of conference participants on joining the conference required (by entering a conference ID and password via the phone keypad).

---

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

---

The default password for conferences is 123456. The conference controller can change this for the conference participants individually.

- The common conference ID for all conference participants.
- Language of the announcements and invitations by e-mail (by default, this is the language of the voicemail box).

### **Starting the Conference**

All conference participants dial in themselves. The system announces every internal participant who joins the conference, as in: "... has joined the conference."

### **Dialing In**

Every conference participant can use the dial-in number to dial into the conference at any time.

### **Recording the Conference**

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

## **4.4.4.1 How to Configure an Open Conference**

### ***Prerequisites***

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

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

- 1) Click on the **Conference** symbol.
- 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 **Conference Room > Save As**.
- 5) Enter a name for the conference in the input field.
- 6) Enter a **Start Date**.
- 7) Enter a **Start Time**.
- 8) Enter the **End Time**.
- 9) If the conference is to occur repeatedly, click on **Recurring Conference**.
  - a) Select an **End Date** for the conference series.
  - b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select any additional options from the details on the right-hand side.
- 10) If you want to delete a conference appointment time for a conference series, perform the following steps:

- a) Click **Exceptions**.
  - b) Click **Add**.
  - c) Select the relevant date in the **Original Date/Time** drop-down list.
  - d) Click on **Remove this recurrence**.
  - e) Click **OK**.
  - f) Click **Cancel**.
- 11) If you want to reschedule a conference appointment for a conference series, perform the following steps:
- a) Click **Exceptions**.
  - b) Click **Add**.
  - c) Select the relevant date in the **Original Date/Time** drop-down list.
  - d) Click on **Reschedule this recurrence**.
  - e) Select a **New scheduled date**.
  - f) Select a new **Start Time**.
  - g) Click **OK**.
  - h) Click **Cancel**.
- 12) Click **Save**.
- 13) Click **Advanced**.
- 14) Select the item **Open Conference** in the **Conference Type** drop-down list.
- 15) Select the desired **Conference Language** for the announcements and the invitations by e-mail (by default, this is the language the voicemail box).
- 16) Enable the check box **This conference is active**.
- 17) 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.

---

- 18) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
- 19) If you want to define the conference ID yourself, proceed in the following steps:
- a) Select the **Create your own conference ID** check box.
  - b) Enter the desired **Conference ID** (4-8 characters) in the input field.
- 20) Select the maximum number of conference participants under **Number of Channels**

**21) Click Save.**

## 4.4.5 Web Collaboration Integration

Together with myPortal for Desktop (Windows) and myPortal for Outlook, the system also supports the convenient integration of the separate product OpenScape Web Collaboration for simultaneous multi-media collaboration during phone calls as well as phone-controlled and application-controlled (LX/MX) teleconferences. This gives you quick access to functions such as desktop and application sharing, file sharing, co-browsing, whiteboarding, URL Push, IM chat and video chat with multiple participants.

### Supported Types of Connections

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

- Ad-hoc conference (LX/MX)
- Scheduled conference (LX/MX)
- Permanent conference (LX/MX)

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

### FastViewer

Web Collaboration includes FastViewer as a client. No local installation of FastViewer is required. More information can be found in the Web Collaboration product documentation.

---

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

---

### Connecting to the Web Collaboration Session (LX / MX)

Internal conference participants with UC PC clients are automatically connected to the appropriate Web Collaboration session on starting the conference. To do this, FastViewer is automatically downloaded and opened in the background, which may take several seconds. External conference participants with known e-mail addresses receive an e-mail with an appropriate link to the Web Collaboration session.

---

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

---

For a scheduled conference, it is possible to connect to the Web Collaboration session as early as 5 minutes before the start of the scheduled conference.



### Conference ID and Password (LX/MX)

The conference ID and password for a Web Collaboration session are identical to the conference ID and password of the associated phone conference.

### Instant Messaging and Web Collaboration

Note that Instant Messaging of the system and Instant Messaging of a Web Collaboration session are mutually independent, i.e.: the instant messages from a UC client do not appear in a Web Collaboration session of the same participant, and vice versa.

---

#### Related Topics

- [How to Start Web Collaboration During a Call](#)
- [Conferencing \(not with OpenScape Office HX\)](#)

## 4.5 Voice and Fax Messages

The Voicemail and Fax services integrated in the system (not for OpenScape Office HX) enable subscribers to receive and manage voicemails and fax messages via myPortal for Desktop and myPortal for Outlook. Fax messages can be sent by subscribers using Fax Printer.

### 4.5.1 Voicemail Box

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

You can view or edit the settings of your voicemail box; for example, you can select the language of the voicemail box, determine its call number, switch between recording and announcement modes, control the announcement of your Presence status, record your announcements and import announcements. On importing announcements, The system performs the automatic level control and normalization needed to meet the "USA / TIA 968 Signal Power Limitations" requirements.

---

**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
<b>Busy</b>	-	-	for <b>Busy</b> (if not recorded: general)
<b>No answer</b>	-	-	for <b>No Answer</b> (if not recorded: general)
<b>Meeting</b>	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
<b>Sick</b>			
<b>Break</b>			
<b>Gone Out</b>			
<b>Vacation</b>			
<b>Lunch</b>			
<b>Gone Home</b>			
<b>Do Not Disturb</b>	-	-	general

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

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

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

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
<b>Gone Out</b>	-	-	"I am unfortunately unable to take your call at the moment ..."

### Central AutoAttendant

The central AutoAttendant enables the administrator of your communication system to offer callers time-based choices to forward their calls to numbers he or she has defined or to your voicemail box. As with the personal AutoAttendant, callers signal their choices by entering digits at the phone. Due to the central AutoAttendant, further announcements may follow those described above.

### Announcement of your Presence Status

You can define whether callers should hear the announcement of your Presence status on reaching your voicemail box. You can enable or disable this collectively for all external callers and for specific subscribers.

### Retrieving your Voicemail through the Attendant

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

### Bypassing the Password Prompt

If you call the voicemail box from one of your additional phone numbers, you can bypass the password prompt. This setting also applies to the phone notification service of the voicemail box.

### Language of the Voicemail Box

You can define in which language the voicemail box plays back the menu choices and the internal system announcements.

---

#### Related Topics

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

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

### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **Personal Details > My Personal Details**.
- 3) The call number for the voicemail box can be found in the **My Contact Details** area in the **VoiceMail Ph.** field.
- 4) Click **Close**.

---

**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 on the **Setup** symbol.
- 2) Click on **Communications > VoiceMail Settings**.
- 3) For each presence status, select one of the following values from the drop-down list:
  - If you want callers to be able to leave messages in your voicemail box, select **Active**.
  - If you want callers to only hear the announcements of your voicemail box, select **Inactive**.
- 4) Click **Save**.

### 4.5.1.3 How to Record an Announcement

*Step by Step*

- 1) Click on the **Setup** symbol.
- 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 on the **Setup** symbol.
- 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 on **Close**, followed by **Save**.

---

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

---

---

**Related Topics**

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

#### 4.5.1.5 How to Delete an Announcement

**Step by Step**

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

---

**Related 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 on the **Settings** symbol.
- 2) Click on **Sensitivity > VoiceMail Presence**.
- 3) Select one of the following options:
  - If you want to suppress the voicemail box announcement of your Presence status for a specific number, click **Add**, enter the desired number in the input field, and click **OK**.

---

**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 on the **Setup** symbol.
- 2) Click on **Sensitivity > Security and Access**.
- 3) Select one of the following options:
  - If you want to allow your voicemail and fax messages to be retrieved by the Attendant, enable the check box **Receptionists are able to listen to my voicemail and to read my fax messages**.
  - If you want to prevent your voicemail and fax messages from being retrieved by the Attendant, clear the check box **Receptionists are able to listen to my voicemail and to read my fax messages**.
- 4) Click **Save**.



---

**Related Topics**

- [Fax Box](#)

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

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**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 on the **Setup** symbol.
- 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 Outlook organizes voice messages in the following folders:

- **Inbox**

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

### Displaying Voicemail Messages

The following symbols identify different types of voicemail:

Symbol	Meaning
-	Voicemail to a subscriber
	Voicemail to a group
	Recorded call
	Recorded conference

The List view of voicemails shows the following details:

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

### Retention Period for Voicemail

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

### Voicemail for Groups

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

### Listening to Voicemail

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

### Calling the Sender of a Voicemail

You can call the sender of a voice message.

### Forwarding a Voice Message

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

### Moving a Voice Message

You can move a voice message to another folder.

### Saving a Voice Message as a File

---

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

---

You can save a voice message as a WAV file in the file system of your PC to archive it permanently.

### Sending Voice Messages as E-Mails

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

---

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

---

### **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 **Messages** symbol.
- 2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
- 3) Click on the desired voicemail.
- 4) Click in the context menu on the item **Dial: ...** with the appropriate phone number.

#### 4.5.2.4 How to Forward a Voicemail Message

##### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
- 3) Click on the desired voicemail.
- 4) Click on **Forward Message**, in the context menu.
- 5) To sort the list of recipients, click on the column headers **Extension** or **Name** to sort by that criterion in alphanumeric ascending order.
- 6) If you want to reverse the sort order of the list of recipients, click again on the column header.
- 7) Activate the check box for the desired recipient or recipients.
- 8) If you want to add a comment, proceed in the following steps:
  - a) Click on **Comment**.
  - b) Click **Start**. The voicemail box will now call you on your phone.
  - c) Accept the call from the voicemail box.
  - d) Speak out the text of your comment after the tone.
  - e) Click **Stop**.
  - f) If you want to listen to the comment on the phone, click on **Listen**. To exit the playback loop, click on **Stop**.
  - g) If you want to record the comment again, click on **Record** again.
- 9) Click **Forward**.

#### 4.5.2.5 How to Move a Voice Message

##### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Under **Voicemail**, 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 > ....**

#### 4.5.2.6 How to Save a Voice Message as a WAV File

##### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Under **Voicemail**, click on the desired folder, e.g., **Played**.

- 3) Click on the desired voicemail.
- 4) Click on **Save VoiceMail Message** in the context menu.
- 5) Select a folder in the **Save VoiceMail Message** window, enter a **File Name** and click **Save**.

#### 4.5.2.7 How to Send a Voice Message as an E-mail

##### *Step by Step*

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

##### *Next steps*

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

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

##### *Step by Step*

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

##### *Next steps*

Save the contact in Outlook.

#### 4.5.2.9 How to Sort Voice Messages

##### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Under **Voicemail**, click on the desired folder, e.g., **Played**.
- 3) Click on one of the column titles: **Type**, **Date**, **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.

## 4.5.2.10 How to Delete a Voicemail

### Step by Step

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

## 4.5.3 Fax Box

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

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

### Determining your own Fax Number

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

### Retrieving Fax Messages through the Attendant

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

---

### Related Topics

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

### 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 on the **Setup** symbol.
- 2) Click on the tab **Personal Details > My Personal Details**.
- 3) You will find your fax number in the **Fax Ph.** field.
- 4) Click **Close**.

### 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 Outlook organizes fax messages in the following folders:

- **Inbox**
- **Read**
- **Deleted**
- **Sent Items:**  
Contains the fax messages already sent by the communication system
- **Sending Items**  
Contains queued fax messages that have not yet been sent The communication system tries to transmit a fax message up to 5 times within 25 minutes. The **Progress** of each fax message being sent is indicated by a progress bar.

#### **Details of Fax Messages**

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

#### **Retention Period for Fax Messages**

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



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

### Fax Messages for Groups

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

### Calling the Sender of a Fax Message

You can call the sender of a fax message.

### Forwarding a Fax Message

You can forward a fax message to other internal subscribers.

### Saving a Fax Message as a File

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

### Sending Fax Messages as E-Mails

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

### Displaying Fax Messages

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

### Fax Transmission Report

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

---

### Related 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 **Messages** symbol.
- 2) Under Fax messages, 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 **Messages** symbol.
- 2) Under **Fax Messages**, 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 **Messages** symbol.
- 2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
- 3) Select **Forward Message** in the context menu of the appropriate Fax message.
- 4) Enter the fax number of the recipient in dialable or canonical format in the **Forward Message** window.
- 5) Click on **+** to add this recipient to the fax message.
- 6) If you want to send the fax to further recipients, click in the input field and repeat steps 4 through 5 accordingly.

---

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

---

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

- 8) Click **OK**.

#### 4.5.4.4 How to Move a Fax Message

##### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Under **Fax Messages**, 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 **Messages** symbol.
- 2) Under **Fax Messages**, click on the desired folder, e.g., **Read**.
- 3) Click on the desired fax message.
- 4) Click on **Save as TIF** in the context menu.
- 5) Select a folder in the **Save Fax Message** window, enter a **File Name** and click **Save**.

#### 4.5.4.6 How to Send a Fax Message as an E-mail

##### *Step by Step*

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

##### *Next steps*

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

#### 4.5.4.7 How to Sort Fax Messages

##### *Step by Step*

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

- 3) Click on one of the column titles: **Date**, **Group Name**, **Call no**, **Last Name**, **First Name**, **Company Name**, **Pages** or **Notes** to sort the fax messages by this criterion in ascending alphanumeric order.
- 4) If you want to reverse the sort order, click again on column header.

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

##### *Prerequisites*

- You have sent fax messages with Fax Printer.

##### *Step by Step*

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

---

##### **Related Topics**

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

#### 4.5.4.9 How to Cancel Sending a Fax Message

##### *Prerequisites*

- You have sent a fax message with Fax Printer.

##### *Step by Step*

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

---

##### **Related Topics**

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

#### 4.5.4.10 How to Display an Overview of Sent Fax Messages

##### *Prerequisites*

- You have sent fax messages with Fax Printer.

##### *Step by Step*

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

---

##### **Related Topics**

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

#### 4.5.4.11 How to Resend a Fax Message

##### *Step by Step*

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

#### 4.5.4.12 How to Display a Fax Transmission Report

##### *Prerequisites*

- You have sent a fax message with Fax Printer.

##### *Step by Step*

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

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

### 4.5.4.13 How to Delete a Fax Message

#### *Step by Step*

- 1) Click on the **Messages** symbol.
- 2) Click under **Fax Messages** on either the **Inbox** or **Read** folder or under **Outbox** on either the **Sent Items** or **Sending Items** folder.
- 3) Select one of the following options:
  - Click on the desired fax message.
  - Mark the desired Fax messages.
- 4) Select **Move Message to > Deleted** in the context menu.
- 5) If you want to delete the Fax messages permanently:
  - a) Click under **Fax Messages** on the **Deleted** folder.
  - b) Select the desired Fax message(s).
  - c) Select **Move Message to > Permanently Delete Message** in the context menu.

### 4.5.5 Sending Fax Messages

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

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

---

#### **Related Topics**

- [Fax Box](#)

### 4.5.6 Notification Service for Messages

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

The Notification Service works as follows:

Notification	for voicemail	for fax message
E-mail	You receive an e-mail with the message as a WAV file, the date and time it was received, the duration of the message and, if available, the phone number and name of the sender. If the size of the WAV file exceeds a defined value, it is not attached to the e-mail. This value can be changed by the administrator of the communication system; the default is 10 MB. Voicemails with "urgent" priority are flagged as e-mails with "High" importance. E-mails with a voicemail have a separate symbol in Outlook. If you are using an IMAP mailbox that shows only the e-mail headers, the usual e-mail icon will appear instead.	You receive an e-mail with the message as a TIFF file, the date and time it was received, the number of pages and, if available, the phone number and name of the sender. If the size of the TIFF file exceeds a defined value, it is not attached to the e-mail. This value can be changed by the administrator of the communication system; the default is 10 MB. E-mails with a Fax message have a separate symbol in Outlook. If you are using an IMAP mailbox that shows only the e-mail headers, the usual e-mail icon will appear instead.
SMS	You receive an SMS about the received message at the phone number defined by you.	
by phone	Your voicemail box calls you at the number you have specified and plays back the message to you.	-

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

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

---

#### Related Topics

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

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

#### *Prerequisites*

- The administrator of your communication system has configured the sending of e-mails.
- Your e-mail address is specified under **Personal Details**.

### Step by Step

- 1) Click on the **Setup** symbol.
- 2) Select one of the following options:
  - If you want to enable or disable the notification for voice messages, click on **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 on the **Setup** symbol.
- 2) Click on **Communications > VM Notification**.
- 3) Select one of the options below in the **Outbound** row for each column with one of the following Presence statuses: **Office, Meeting, Sick, Break, Out of 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) Enter the desired phone number in the **Outbound Number** field in dialable format or in canonical format
- 5) Choose one the following options in the **Outbound Notification Times** area:
  - If you want to be notified only during business hours, click on **During Business Hours Only**.
  - If you want to be notified at any time, click on **24 Hours a Day**.
- 6) Enter the desired time interval and the number of attempts to be made when repeating the notification.



- 7) Click **Save**.

---

#### Related 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 . 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	<b>Mailbox</b>
1	<b>New</b>
1	<b>Replay</b>
2	<b>Call back</b>
3	<b>Next message</b>
4	<b>Save</b>
5	<b>Save as new</b>
6	<b>Delete</b>
7	<b>Copy to other voicemail box</b>
0	<b>Date and Time</b>
2	<b>Played</b> (same functions as those under <b>New</b> )
3	<b>Saved</b> (same functions as those under <b>New</b> )
4	<b>Deleted</b> (same functions as those under <b>New</b> )
2	<b>Change Status</b>
1	<b>Office</b>
2	<b>Meeting</b>
3	<b>Sick</b>
4	<b>Break</b>
5	<b>Gone out</b>
6	<b>Vacation</b>
7	<b>Lunch</b>
8	<b>Gone Home</b>
3	<b>Record announcements</b>
1	<b>Name</b>
2	<b>Default Greeting</b>
3	<b>Presence-based greetings</b>
0	<b>Busy</b>
1	<b>No Answer</b>
2	<b>Meeting</b>
3	<b>Sick</b>
4	<b>Break</b>
5	<b>Gone out</b>

Digit		Function
	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 the 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

### *Prerequisites*

- You have recorded your name announcement and your personal greeting for the voicemail box.

### *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 Record your Name Announcement](#)
- [How to Record your Personal Greeting](#)
- [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 presented to you and your communication partners as a dialog.

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

Symbol	Status
	Logged in
	Logged out

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

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

### External Instant Messaging

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

### Multi-user chat

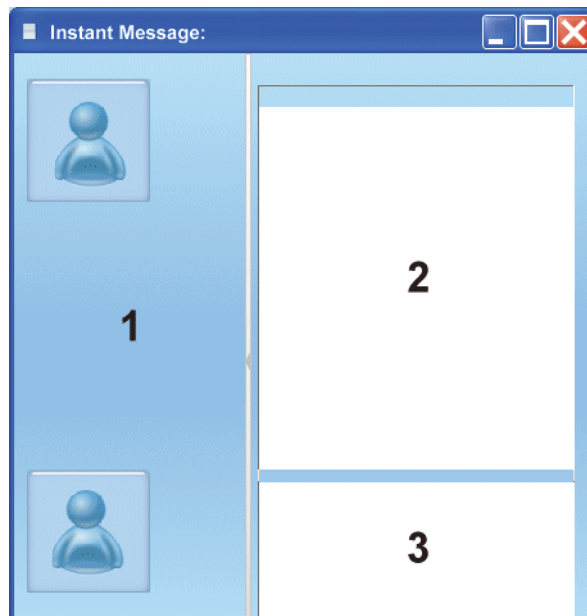
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external XMPP communication partner.

### Instant Messaging and Web Collaboration

Note that Instant Messaging of the system and Instant Messaging of a Web Collaboration session are mutually independent, i.e.: the instant messages from a UC client do not appear in a Web Collaboration session of the same participant, and vice versa.

### Instant Message Window

The **Instant Message** window in myPortal for Desktop with the classic user interface and in myPortal for Outlook consists of the following areas:



- User area (1)  
This area shows every participating communication partner as a symbol or with a picture, if available.
- Message area (2)  
This area shows the instant messages of all the chatting subscribers.
- Input area (3)  
This area contains the input field for the instant messages.

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

---

#### Related Topics

- [Screen Pops](#)

### 4.6.1.1 How to Send an Instant Message

#### *Prerequisites*

- Instant Messaging is enabled in the system.
- Your XMPP alias is defined (if you want to chat with an external communication partner).

#### *Step by Step*

- 1) Select the recipient by one of the following methods:
  - Click on a contact or a group in the **Favorites** list.

- Click on the **Directories** symbol, then on **Internal** or **External** and then on one of the subscribers.

---

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

---

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

---

#### Related Topics

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

## 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. On importing announcements, the system performs the automatic level control and normalization needed to meet the "USA / TIA 968 Signal Power Limitations" requirements.  
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
<b>Busy</b>	-	-	x
<b>No answer</b>	-	-	x
<b>Meeting</b>	x (if dynamic announcements have been enabled)	x (if dynamic announcements have been enabled)	x
<b>Sick</b>			
<b>Break</b>			
<b>Gone Out</b>			
<b>Vacation</b>			
<b>Lunch</b>			
<b>Gone Home</b>			
<b>Do Not Disturb</b>	-	-	x

**Example: dynamic announcements enabled**

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
<b>Meeting</b>	"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 on the **Setup** symbol.
- 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 Outlook 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 any key, possibly in combination with `Ctrl` or `Alt` and the `Shift` key, as hotkeys for the following functions:

- **Answer/Disconnect call**
- **Forward/Transfer call**
- **Task bar icon for call**  
(Screen pop for calls)
- **Display / Hide favorites**
- **Desktop Dialing**

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

### User name

You can change the user name for your login.

---

**Related Topics**

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

## 5.1 How to Edit your own Name

### *Step by Step*

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

---

**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 the sending of e-mails.

### *Step by Step*

- 1) Click on the **Setup** symbol.
- 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 \(not with OpenScape Office HX\)](#)
- [How to Enable or Disable E-mail Notifications](#)

## 5.3 How to Define an Additional Phone Number

### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Enter an additional phone number in dialable format or in canonical format in one of the following fields: **Mobile Ph.**, **External 1 Ph.**, **External 2 Ph.**, **Home Ph.** or **Assistant Ph.**
- 4) Select one of the following options:
  - If you do not want to see **Mobile Ph.**, **External 1 Ph.**, **External 2 Ph.** or **Home Ph.** displayed in the internal directory, clear the **Visibility** check box next to the phone number.
  - If you do not want to see **Mobile Ph.**, **External 1 Ph.**, **External 2 Ph.** or **Home Ph.** displayed in the internal directory, clear 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](#)
- [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 on the **Setup** symbol.
- 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 on the **Setup** symbol.
- 2) Click on **Personal Details > My Picture**.
- 3) Click **Select**.
- 4) Choose a folder and the desired file and click **Open**.
- 5) Click **Save**.

---

**Related Topics**

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

## 5.6 How to Delete your own Picture

### *Step by Step*

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

## Configuration

Programming the Function Keys of the Telephone (not for OpenScape Office HX)

---

### Related Topics

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

## 5.7 Programming the Function Keys of the Telephone (not for OpenScape Office HX)

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

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

---

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

In the case of phones with a display, you can also program some function keys directly at the phone.

---

### Programming Function Keys on Different Levels

You can program the function keys on two levels: the first level can be assigned all the offered functions, and the second level can be assigned external phone numbers. The Shift key must be configured on the phone in order to use the second level. The LED of the function key is always assigned to the first level.

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

#### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Click on **Program Phone Keys**. A window for programming the function keys of the telephone is opened in the web browser.
  - a) If a message such as `There is a problem with this website's security certificate.` appears, click on **Continue to this website**.
- 4) Under the phone icon, Click on the key area that you want to edit.
- 5) In the detailed view of the key area, click on the key icon at end of the corresponding row. The key icon goes red and indicates that the function is active for programming.



- a) If you want to display details on the current function of a key, move the mouse pointer over the label field to the left of the key.
- 6) Select the desired function from the **Choose Function** drop-down list.
  - a) If a function requires additional information (parameters), select these details or enter the required data.

---

**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 the Password

---

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

---

---

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

---

#### Step by Step

- 1) Click on the **Setup** symbol.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Under **Password**, click on **Change Password**.
- 4) Enter your current password in the **Current** field.

## Configuration

### How to Deactivate the Automatic Login

- 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 Outlook, myPortal for Desktop, 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 Outlook](#)
- [Phone Menu of the Voicemail Box](#)

## 5.9 How to Deactivate the Automatic Login

---

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

---

---

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

---

#### *Step by Step*

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

---

#### Related Topics

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

## 5.10 How to Change the Login Name

### *Step by Step*

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

---

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

---

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

## 5.11 How to Select the User Interface Language

### *Step by Step*

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

### *Next steps*

Close Outlook and restart myPortal for Outlook.

---

### **Related Topics**

- [User Interface Elements](#)

## 5.12 How to Change the User Interface

### *Step by Step*

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

### *Next steps*

Close Outlook and restart myPortal for Outlook.

---

**Related Topics**

- [User Interface Elements](#)

## 5.13 How to Activate or Deactivate a Hotkey

### *Step by Step*

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Select one of the following options:
  - If you want to activate a hotkey, click in the rectangular field next to the relevant function and hold down one or more of the *Shift, Ctrl and Alt* keys while pressing the additional key desired for the key combination. If the pressed key or key combination can be used for myPortal for Outlook, this is displayed. Then select the **Hot Key Enabled** check box next to it.
  - If you want to disable a hotkey, clear the **Hot Key Enabled** check box next to that key.
- 4) Click **Save**.

## 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 on the **Setup** symbol.
- 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 on the **Setup** symbol.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Select one of the following options in the **Transfer Method** drop-down list:
  - If you want to 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**.

## 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 Outlook](#)

## 5.16.2 How to Resolve the Problem: myPortal for Outlook is not Loading (Outlook 2003)

### *Step by Step*

- 1) Click on ? > **About** in the Outlook tool bar.
- 2) Click on **Disabled Items**.
- 3) Click on **myPortal for Outlook** and then on **Activate**.

---

### **Related Topics**

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

## 5.16.3 How to Resolve the Problem: myPortal for Outlook is not Loading (Outlook 2007)

### *Step by Step*

- 1) Click on **Tools > Trust Center** in the Outlook tool bar.
- 2) Click on **Add-Ins** on the left.
- 3) In the Add-ins section, under **Disabled Application Add-ins**, click on **myPortal for Outlook** and then on **Activate**.

---

### **Related Topics**

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

## 5.16.4 How to Resolve the Problem: myPortal for Outlook is not Loading (Office 2007)

### *Step by Step*

- 1) Click on **Control Panel > Add/Remove Programs** in Windows.
- 2) Select Microsoft Office 2007 and click **Change**.
- 3) Select all .NET components in the installation options and proceed with the installation.
- 4) Click in Outlook on ? > **Disabled Items...**
- 5) Click on **OLI** and then on **Enable**.

## 5.16.5 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](#)

## Appendix

### Presence Status Keywords for Outlook Appointments

# 6 Appendix

The appendix contains additional information.

## 6.1 Presence Status Keywords for Outlook Appointments

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

Language	Presence status keyword							
Croatian (Croatia)	Ured	Sastanak	Bolovanje	Pauza	Odsutan	Odmor	Ručak	Kuća
Czech (Czech Republic)	Kancelář	Porada	Nemoc	Přestávka	Mimo kancelář	Dovolená	Oběd	Domů
Danish (Denmark)	Kontoret	Møde	Syg	Pause	Ikke på kontoret	Ferie	Frokost	Gået for i dag
Dutch (Netherlands)	Kantoor	Bespreking	Ziek	Pauze	Niet op kantoor	Vakantie	Lunch	Thuis
English (United Kingdom)	Office	Meeting	Sick	Break	Out of Office	Holiday	Lunch	Home
English (United States)	Office	Meeting	Sick	Break	Out of Office	Vacation	Lunch	Home
Finnish (Finland)	Paikalla	Neuvottelusa	Sairaana	Tauolla	Matkoilla	Lomalla	Lounaalla	Poissa
French (France)	Bureau	Réunion	Maladie	Pause	Déplacement	Congé	Déjeuner	Domicile
German (Germany)	Büro	Meeting	Sick	Break	Gone Out	Vacation	Lunch	Zuhause
Hungarian (Hungary)	Iroda	Találkozó	Beteg	Szünet	Házon kívül van	Szünidő	Ebédidő	Otthon
Italian (Italy)	Ufficio	Riunione	Malattia	Pausa	Fuori sede	Vacanza	Pranzo	A casa
Norwegian, Bokmål (Norway)	Kontor	Møte	Syk	Pause	ikke på kontoret	Ferie	Lunsj	Startside
Polish (Poland)	Biuro	Spotkanie	Chorobowe	Przerwa	Wyszedł	Urlop	Lunch	Dom



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

---

#### Related Topics

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

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

The following features of the UC clients myAttendant, myPortal for Desktop and myPortal for Outlook can be used with SIP telephones.

The used SIP telephone must satisfy the following prerequisites:

- 3PCC as per RFC 3725 is supported.
- The "Call waiting" feature is supported.
- Do Not Disturb is disabled.

Alternatively, for subscribers with SIP phones, DND can be activated in the communication system.

---

**INFO:** The full functionality of the features depends on the SIP phone used and cannot be guaranteed.

A successful test of the following features was performed with OpenStage 15 S.

---

- Connection-/call-oriented features:
  - Make Call
  - Redirect call
  - Resume call
  - Application-controlled conference
  - Hold
  - Toggle/Connect
  - Consultation

## Appendix

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

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

# Index

## A

- absence 27
  - automatic creation of Outlook appointments 27
- ad-hoc conference 77, 82
- announcement 105
- announcement mode 105
- application-controlled conference 78
- authentication
  - conference participant 77
- AutoAttendant 135
  - central 105
  - personal 105, 136
- automatic login 140
- automatic updates 19, 140

## B

- Break 27

## C

- call
  - answer 62
  - missed 54
  - pick up for another subscriber 62
  - scheduled 54
- call forwarding
  - rule-based 37
  - status-based 37
- call functions 62
- call number format 61
- call sender
  - fax message 120
  - voicemail 113
- callback
  - journal 54
  - Phone menu 129
- CallMe 27, 35
- CallMe service 35
- canonical call number format 61
- clients, hardware and software prerequisites 13
- clipboard dialer 67
- color
  - user interface 140
- concept 9
- condition
  - rule-based call forwarding 37
- conference 77
- conference management 78

- conference, phone-controlled 78
- configuration
  - 140
- contact 48

## D

- desktop dialer 67
- dialable call number format 61
- dial-in number
  - conference 77
- dialing a number 62
- directory
  - make call 62
- display conventions 10
- Do Not Disturb 27
- dynamic announcement 136

## E

- e-mail
  - fax message 120
  - invitation to conference 77
  - notification 126
  - specify address 140
  - voicemail 113
- exception
  - rule-based call forwarding 37
- external directory 43

## F

- FastViewer 104
- Favorites list
  - make call 62
- favorites list 48
- fax box 119
- fax message
  - delete 120
  - display 120
  - forward 120
  - group 120
  - move 120
  - retrieve through attendant 105, 119
  - send 126
- fax number 119
- first steps 22
- folder
  - fax messages 120
  - voicemail 113

## Index

function keys  
  program 140

functions  
  myPortal for Outlook 8

## G

general personal greeting 105

group  
  voicemail 113

## H

Home 27

## I

installation 13  
instant message 132  
introduction 8  
invitation  
  conference 77

## J

journal 54  
  call 62  
  group entries 54  
  retention period 54  
  sort 54

## K

key combination for the Desktop Dialer 67  
key programming 144

## L

language  
  user language 140  
  voicemail box 105  
Lunch 27

## M

Meeting 27  
Mobility Entry stations  
  conferencing 77  
  presence status 27  
myPortal for Outlook  
  functions 8  
  starting 13

## N

name  
  change 140  
name announcement 22, 105, 136  
notification  
  fax message 126  
  voicemail 126  
notification by phone 126

notification service 126

## O

Office 27  
offline, working 13  
open conference 101  
operating instructions 9  
Out of the Office (Away) 27  
Outlook appointment  
  for conference 77  
Outlook contact  
  make call 62  
  sender of voicemail 113

## P

password  
  change 140  
  Phone menu 129  
  voicemail box 105  
permanent conference 77, 98  
personal announcement 136  
personal AutoAttendant 136  
personal details 140  
personal greeting 22, 105  
Phone menu 129  
phone number  
  additional 140  
  visibility 140  
  voicemail box 105  
picture  
  delete 140  
  provide 140  
Presence status  
  announcements 105  
presence status 27, 136  
  automatic reset 27  
  automatic update of Outlook appointments 27  
  call forwarding 37  
  Mobility Entry stations 27  
  phone menu 129  
  screen pops 27  
  visibility 27  
priority 113, 126  
private voicemail 113  
profile for personal AutoAttendant 136  
program settings 140

## R

recording mode 105  
rule 37

## S

scheduled conference 77, 88

- screen pops 70
- security concept 20
- sent fax messages 120
- server address 140
- setup 140
- Sick 27
- SIP telephone
  - features of UC clients 153
- skin 10
- skin color 140
- SMS
  - notification 126
- sort
  - fax messages 120
  - voicemail 113
- status-based call forwarding 37

## T

- teleworking 35
- TIFF file
  - fax message 120
  - notification 126
- topics, types 9
- troubleshooting 149

## U

- uninstallation 13
- upgrade 20
- urgent voicemail 113
- user interface 10
  - color 140
  - language 140
- user-defined profile, custom profile 136

## V

- Vacation 27
- virtual conference room 77
- voicemail
  - delete 113
  - forward 113
  - listen to 113
  - move 113
  - private 113
  - urgent 113
- voicemail box 105, 136
  - Phone menu 129

## W

- WAV file
  - notification 126
  - voicemail 113
- Web Collaboration 104