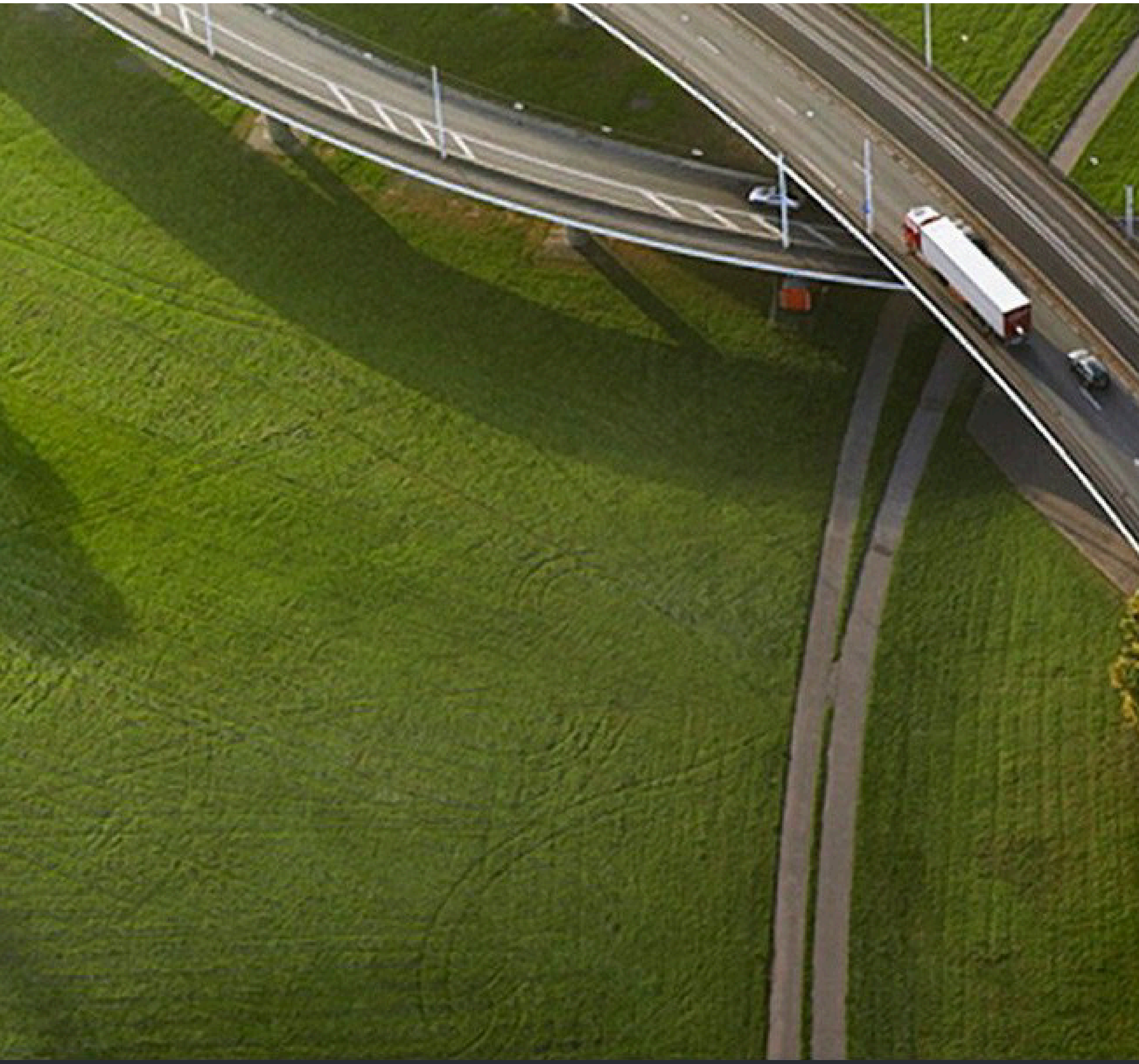

myPortal @work

User Guide

A31003-P3030-U100-06-7619

Provide feedback to further optimize this document to edoku@atos.net

As reseller please address further presales related questions to the responsible presales organization at Unify or at your distributor. For specific technical inquiries you may use the support knowledgebase, raise - if a software support contract is in place - a ticket via our partner portal or contact your distributor.

Our Quality and Environmental Management Systems are implemented according to the requirements of the ISO9001 and ISO14001 standards and are certified by an external certification company.

Reference No.: A31003-P3030-U100-06-7619

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1 History of changes

Changes mentioned in the following list are cumulative.

Changes in V3R1

Impacted chapters	Change description
How to add a STUN server on page 55	New chapter.

Changes in V3

Impacted chapters	Change description
How to Add a Contact to the Favorites on page 25	Add User to favorites.
How to Delete a Contact from the Favorites on page 25	Delete user from favorites.
How to Add a Contact to the Favorites on page 25	Add User to favorites.
How to Delete a Group from the Favorites on page 25	Delete favorite froup.
How to Edit your Contact Data on page 46	Mobile, Home number, Email CrUD operations.
Conversations on page 25	Conversations events for journal, chat, voicemail.
How to Delete all Conversations on page 26 How to Delete a whole Conversation on page 27 How to Delete a Conversation Item (chat, journal, voicemail) on page 27	Delete conversations feature for UC Suite.
How to Change your myPortal @work Password on page 49	Change password of user.
How to enable VoIP on page 54	VoIP activation user hints.
How to enable VoIP on page 54	Hide VoIP seetings icon in title bar if VoIP is deactivated.
How to manage headset buttons on page 56	Support answer call and disconnect via headset buttons.
Automatic Updates on page 59	Include relevant restrictions.
CallMe Service on page 23	Added information for CallMe service

Changes in V2R7

Impacted chapters	Change description
How to set a default phone number in Favorites How to use DTMF tones during an active VoIP call How to Install myPortal @work (Mac OS) How to Uninstall myPortal @work(Mac OS) How to Dial a Number Using the tel or callto Protocol How to Delete a Conversation How to Delete a Conversation Entry How to Delete all Conversations How to Pick up a Call from the Favorites List *How to enable Device@Home* How to Configure the Pop-up Visibility for Active Calls	Added new chapters
How to Start myPortal @work for First Time	Added connection selection in login screen
How to Configure Additional Server Connections	Added information for additional server connections
How to Dial a Number Manually	Added info about using a dialable number

Changes in V2R6FR2

Impacted chapters	Change description
myPortal @work VoIP in myPortal @work How to enable VoIP How to manage audio settings	myPortal @work-VoIP

1.1 History of improvements/fixes

Changes mentioned in this chapter are cumulative.

Changes in V3R1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000051895	23 Mar. 2021	Added note for favorite contacts	Favorites on page 24
PRB000052523	09 Apr 2021	Added note for hold call function	Call Functions on page 29

2 Introduction

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

2.1 myPortal @work

myPortal @work is a Unified Communication Application, which combines all needed features and services, like convenient dialing via phone directories, favorites, conversations and information on the presence status of colleagues, into a single solution design to accelerate daily communication, improve teamwork and to get in quick contact with colleagues, customers and Partners.

myPortal @work can be used either in UC Smart or in UC Suite mode. Depending on the mode, the offered features in the user interface vary. You cannot change the operation mode, as this is set by the system configuration. In case of any doubt about the current operation mode of your myPortal @work client, ask your system administrator for details.

myPortal @work offers an embedded Voice over IP (VoIP) telephony client. If the VoIP option is activated, the voice call related features of the myPortal @work client use the VoIP functionality.

myPortal @work in UC Smart mode can be used instead of an existing myPortal Smart client. Existing UC Smart settings are automatically incorporated into myPortal @work after its installation. The existing UC Smart user licenses can also be used with myPortal @work.

myPortal @work in UC Suite Mode can be used not only as stand-alone but also in combination with existing myPortal for Desktop/Outlook Client (CTI, Favorites and Conversations). The existing UC Suite user licenses can also be used with myPortal @work.

The following description refers mainly to my Portal @work in UC Smart mode. Deviations for the UC Suite mode are pointed out explicitly.

myPortal @work supports generally the following features:

- Presence status
- Status-based call forwarding
- Directories including search by name
- Favorites
- Conversations
- Instant messaging
- Conferencing
- Hotkey Dialing / Hotkey Search
- Call Functions either via:
  1) Associated telephone device
  2) Integrated Voice over IP telephony client
- Voicemail control
- Zoom In / Zoom Out
- Screen share via OpenScape Web Collaboration (optional)

3 Installation

It is recommended that the myPortal @work client software is installed by your system administrator. You can also install the software by yourself if your system administrator has prepared the communication system accordingly and has provided the following prerequisites to you:

- Administrator rights
- myPortal @work software setup program
- IP addresses and ports of the communication system
- Login Data (User and Password) for your UC user account in the communication system
- Voice-Mail account information (optional)
- MULAP call number in case of multiple number assignment (optional)

NOTICE: Make sure that TLS1.2 protocol support is enabled within the Windows operating system for a secure data transmission by myPortal @work.

3.1 How to Install myPortal @work (Windows)

Prerequisites

The administrator of your communication system has made the myPortal @work installation file available to you.

You have local administrator rights.

Step by Step

1) Run the installation file `myPortalAtWorkSetup.exe`.

2) Click on **Install** and follow the instructions of the installation program.

3.2 How to Uninstall myPortal @work (Windows)

Step by Step

1) Close myPortal @work.

2) Click in the **Control Panel > Programs and Features**.

3) Click on **Uninstall** in the context menu of **myPortal @work**.

3.3 How to Install myPortal @work (Mac OS)

Prerequisites

The administrator of your communication system has made the myPortal @work installation file available to you.

You have local administrator rights.

Step by Step

1) Run the .dmg installation file

2) Click on **Install** and follow the instructions of the installation program.

3.4 How to Uninstall myPortal @work(Mac OS)

Step by Step

1) Close myPortal @work.
2) Click in **Finder** on **Applications**.
3) Drag **myPortal @work** to the **Recycle Bin**.
4) If all the settings for myPortal @work are to be deleted as well, delete the **Client** folder in the user directory.

4 First Steps

The First Steps describe the user interface and the recommended actions to be taken right at the beginning.

4.1 How to Start myPortal @work for First Time

Prerequisites

myPortal @work is installed to your PC.

The administrator of your communication system has enabled the UC Smart or UC Suite solutions and configured an initial password for the use of myPortal @work.

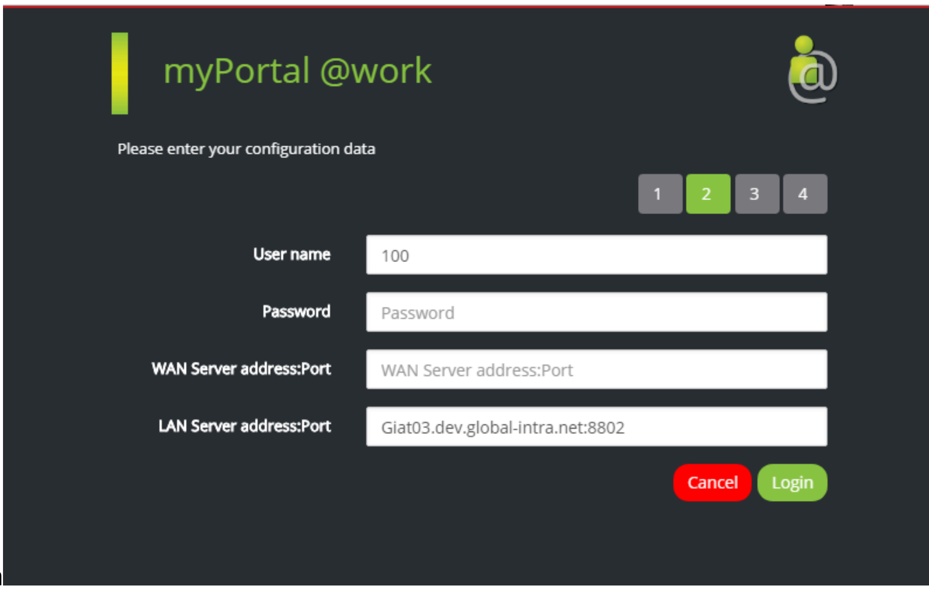
You have received the **User name** (phone number), **Password** (initial password), **Server IP address** either for LAN or WAN access and the **Port Number** from your administrator.

Step by Step

1) To start myPortal @work, click on **Start** > **myPortal @work**.

2) Click on one of the four buttons to enter your configuration data.

You can configure up to four different server connections in the login screen



NOTICE: In case of MULAP or Mobility Users, the configuration is done only in **User account** tab, see How to Configure Additional Server Connections

3) Enter your internal phone number (e.g., `330`) in the **User Name** field.

4) Enter the initial password for myPortal @work that you received from your administrator in the **Password** field.

5) Enter the WAN server address data (required for WAN access via the Internet to the UC Server):

- In **IP WAN server address:Port** field enter the IP address or name of the UC Server together with the port number that you received by the administrator. Enter the IP address and port number in one line separated by a colon (:).

6) Enter the LAN server address data (required for internal access to the UC Server):

- In **IP LAN server address:Port** field enter the IP address or name of the UC Server together with the port number that you received by the administrator. Enter the IP address and port number in one line separated by a colon (:).

7) Click on **Login**.

8) A pop-up window appears in order to install the certificate. Click YES to accept the certificate.

9) If this is the first time you start myPortal @work, you are prompted by the myPortal @work client to change your login password depending on the administrator configuration:

- UC Smart mode, see How to Change your myPortal @work Password
- UC Suite mode (use another UC Suite client).

NOTICE: The default password is set by the administrator.

NOTICE: If myPortal @work displays the message "Connection Time out", the UC Server cannot be reached. In this case please check the IP address and port information in your myPortal@ work login settings. In addition, check the network and proxy settings of your PC. In case of any doubt contact your network or system administrator.

4.2 How to Start myPortal @work

Prerequisites

You have already replaced the initial password with your own password when you started myPortal @work for the first time.

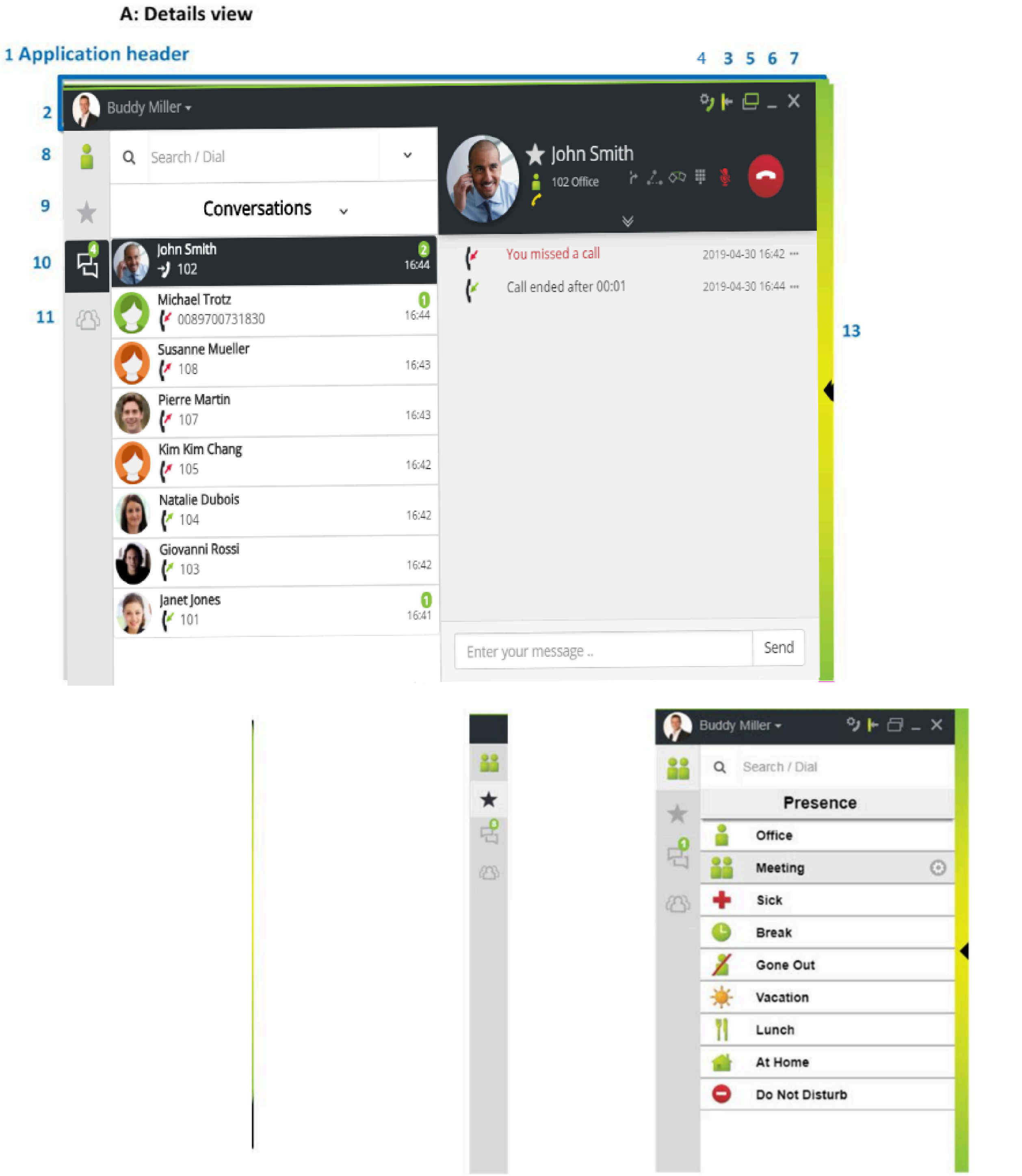
Step by Step

Select one of the following options on **Start** > **myPortal @work**

4.3 User Interface

The user interface can be represented in three different views: Details View (A), List View (B), Menu View (C) and Mini View (D). Your own presence status, as well as information about missed calls and new voice messages are visible in every view.

The views are generated dynamically depending on the UC Smart, UC Suite mode and the configuration of features in your communication system. The following figures present myPortal @work in UC Smart mode with full feature set.



A	Details view

B	Mini view
C	Menu view
D	List view
1	Application header
2	Name
3	**Dock** button
4	VoIP settings
5	**Set on top** button
6	**Minimize** button
7	**Close** button
8	**Presence status - with your current status**
9	**Favorites**
10	**Conversations** Displays all events per contact
11	**Conference** (UC Smart mode only)
12	**Search/ Dial** field - with the following functions: • Input field for phone number to be dialed • Input field for name to be searched • Dropdown list with 10 last dialed numbers for quick redial
13	**Minimize bar** button

No connection to the system

If myPortal @work has lost the connection to the communication system, the current screen will be greyed out and an information text is displayed. In this case you can still reach the menu to exit the application or change the connection settings.

Screen Pops

For calls, the appropriate call information and buttons are displayed in screen pops or in the workspace of the Conversations, if that view is currently active.

Tooltips

Tooltips are tiny windows in which myPortal @work displays more information on objects of the graphical user interface such as icons, input fields or buttons, for example. The appropriate tool tip appears when you let the mouse pointer hover over that element for a brief period of time.

4.4 How to Switch to the Mini View

Step by Step

Select one of the following options:

- If you are in the Details view:

  Click on the **Dock** button to move to other screen.

  Click the **Pin window** button.

  Move your mouse out of myPortal @work screen.
- If you are in the List view:

  Click on the **Dock** button to move to other screen.

  Click the **Pin window** button.

  Move your mouse out of myPortal @work screen.
- If you are in the Menu view and you have firstly followed the steps from Details or List view:

  Move your mouse out of myPortal @work screen.

4.5 How to Switch to the Details View

Step by Step

Select one of the following options:

- If you are in the Menu view:

  Double-click on any menu icon of the menu bar.
- If you are in the List view:

  Click on the already selected menu icon of the menu bar.
- If you are in the Mini view:

  Open the application by hovering Mini view and follow the above steps in case you are in the Menu or List view.

4.6 How to Switch to the List View

Step by Step

Select one of the following options:

- If you are in the Menu view:

  Click on any menu icon of the menu bar.
- If you are in the Details view:

  Click on the **Minimize bar** or on the already selected menu icon of the menu bar.
- If you are in the Mini view:

  Open the application by hovering Mini view and follow the above steps in case you are in the Menu or Details view.

4.7 How to Switch to the Menu View

Step by Step

Select one of the following options:

- If you are in the Details view:

  Click twice on the **Minimize bar**.
- If you are in the List view:

  Click on the **Minimize bar**.
- If you are in the Mini view:

  Open the application by hovering Mini view and follow the above steps in case you are in the Details or List view.

4.8 How to Close/Exit myPortal @work

Prerequisites

You are in the Details or List view.

Step by Step

1) To close the application window, click on the **Close** button in the application header. The application will continue to run in the system tray.

2) To close and remove the application from the system tray, click on your name and then click on **Exit**.

3) To logout from the application, click on your name and then **Logout**. By selecting this option, you will have to enter again your credentials to login.

5 Unified Communications

Unified Communications is a generic term that refers to the integration of different communication systems, media, devices and applications within an environment (e.g., telephony, presence, voicemail and instant messaging).

5.1 Directories

Directories contain your contacts. myPortal @work provides access to the following directories:

- **Personal contacts directory**

  Contains your personal contacts.
- **Internal directory**

  Contains the internal UC subscribers.
- **System directory** (speed dials)

  Contains all speed-dial destinations of the communication system.
- **Global directory**

  Contains contacts which are imported by the administrator into the communication system.
- **External directory (UC Suite only)**

  Contains the contacts from the external directory of the UC Suite.

The contents of the directories can be accessed via the Search/Dial field of myPortal @work. You can search the directories by name and dial contacts directly or add contacts to your Favorites.

In UC Smart mode you can manage the content of your personal contacts with myPortal @work either manually one by one or via bulk import from XML/CSV file or from Microsoft Outlook contacts. You can also add contacts from the journal or senders of voicemails. Imported contacts can be edited in myPortal @work. Such contacts are marked as "manually added contacts" and are no longer synchronized during the next import (Outlook, CSV or XML).

In UC Suite mode you need to add or import your personal contacts using another UC Suite client.

The content of all other directories are managed by your system administrator. The personal contacts are stored by the UC Application in OpenScape Business and are not shared to any other UC users.

NOTICE: Phone numbers in directories should always be entered in canonical format (e.g., +4989700798765).

Contact Details

The Details view of contacts shows the following details in the search results:

- Picture (if present)
- Name
- Presence status (only for internal subscribers), possibly with the scheduled time of return and info text

- Phone numbers and email address (if available)

Clicking on a contact or a hit in the quick search shows the following details:

Symbol	Meaning
	Internal call number
	Business phone number
	Private or external phone number
	Mobile phone number
	Email address

Only the name and number are available in the system directory.

Search

You can search directories by name or by the initial letters of a name. If a contact that matches the specified name is found, the details for that contact are displayed.

Wildcard character "*" is supported at the end of a search string. German diacritics are supported.

Related concepts

Presence Status on page 19

5.1.1 How to Search in Directories

Step by Step

1) Enter the first letter of the desired name in the **Search/Dial** field.

2) All entries from the directories starting with the letters you have entered will be displayed in a list.

3) You can select a specific directory by clicking on the **Search results** and activating an option from the drop down menu.

4) Click on a contact to see more details.

Related tasks

How to Add a Contact to the Favorites on page 25

5.1.2 How to Update a Personal Contact

Prerequisites

UC Smart mode

Step by Step

1) Click on the **Search/ Dial** field and type the name of contact you are searching for.
2) Click on the personal contact you want to update.
3) Click on
4) Click on **Update personal contact** button in the Details tab of the contact.
5) Update the contact data in the **Update Personal Contact** window.
6) Click on **OK**.

5.1.3 How to Delete a Personal Contact

Prerequisites

UC Smart mode

Step by Step

1) Click on **Search/ Dial field** and type the name you are searching for.
2) Click on the personal contact you want to delete.
3) Click on .
4) Click on **Delete personal contact** button.
5) Click on **OK**.

5.2 Presence Status

The Presence status indicates the availability of internal subscribers and mobile users in Favorites, the internal directory and in voicemail announcements.

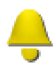
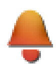
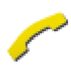
You can change your presence status in myPortal @work, in the phone menu of the voicemail box (Voicemail), with myPortal for OpenStage and in other UC clients. For every change in the presence status (except for **Office**), you also define the scheduled date and time of your return to the **Office** status. In addition, you can define the destination to which the calls are to be forwarded.

The following symbols are available for the presence status:

Symbol	Presence status	Availability
	**Office**	Available - optional: status-based call forwarding (e.g., for home office)

Symbol	Presence status	Availability
	**CallMe** Only selectable if the CallMe service is active Otherwise, **Office** appears here.	Available at an alternative workplace, only in UC Suite mode.
	**Sick**	Absent – optional: status-based call forwarding
	**Break**	Absent – optional: status-based call forwarding
	**Gone Out**	Absent – optional: status-based call forwarding
	**Vacation**	Absent – optional: status-based call forwarding
	**Lunch**	Absent – optional: status-based call forwarding
	**At Home**	Absent – optional: status-based call forwarding
	**Do Not Disturb**	Absent (not available in MULAP configurations)
		Presence status is not visible

The following additional symbols for the connection status appear in the Favorites and in the internal directory for subscribers:

Symbol	Connection status
	Subscriber receives an internal call
	Subscriber receives an external call
	Subscriber is calling
	The subscriber is on the phone (internal)
	The subscriber is on the phone (external)

Status-Based Call Forwarding

UC Smart mode:

Status-based call forwarding enables you to forward calls to your voicemail box or a special phone number based on your presence status, for example, to your mobile phone if you are out of the office or to your delegated representative during your vacation.

You can configure status-based call forwarding for every presence status except **Do Not Disturb**. In this case, the communication system redirects your incoming calls to the configured forwarding destination (by default, your voicemail box) and notifies the callers via status-based announcements about the nature of your absence and possibly the scheduled date and time of your return.

If you do not have a personal voicemail box, you can also forward the calls to a group mailbox or a system mailbox. myPortal @work does not provide direct access to group mailboxes. You can, however, have these voicemails delivered to you via the **Voicemail to email** feature (see Notification Service for Messages on page 37).

For each presence status, the type or number of the forwarding destination is displayed under **my presence**.

UC Suite mode:

If your Presence status is not Office or CallMe, the communication system redirects your incoming calls to the configured forwarding destination (by default, your voicemail box) and notifies the callers via status-based announcements about the nature of your absence and the scheduled time for your return.

> **NOTICE:** The configuration for forwarding destination is done by another UC Suite client.

Visibility of your Presence Status

You can specify, whithin the setting, who is to be notified about your presence status other than **Office** (as well as the scheduled time of your return and any info text you have entered) via a display in the UC Smart client or via automatic voicemail announcements:

- **internally and externally**

  Visible to both internal subscribers (display in UC Smart client and voicemail announcements) as well as external callers (voicemail announcements)
- **internally**

  Visible only to internal subscribers (display in UC Smart client and voicemail announcements)
- **not visible**

  Not visible to all others

After the scheduled time for your return has passed, the announcement of this time is dropped. Your presence status remains unchanged.

Related concepts

Directories on page 17
Favorites on page 24

5.2.1 How to Change the Presence Status to Absent and Enable Status-based Call Forwarding

Step by Step

1) Click on the **Presence status**.
2) Click on one of the following Presence status: **Meeting**, **Sick**, **Break**, **Gone Out**, **Vacation**, **Lunch**, **At home** or **Do not disturb**.
3) If you want to enable status-based call forwarding to a predetermined destination, select the appropriate entry in the **Calls will be forwarded to** drop-down list (**Voicemail**, **Mobile** or **External**).
4) If you want to specify the time of your return, click on the calendar icon and select the date and time accordingly.
5) If you want to specify an info text for the Presence status, enter it in the Note field.
6) Click on **Apply**.

5.2.2 How to Change the Presence Status to Office

Step by Step

1) Click on the **Presence status**.
2) Click on **Office**.
3) If you want to specify an info text for the Presence status, enter it in the text field.
4) Click on **Apply**.

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

Step by Step

1) Click on your name.
2) Click on **Settings > Appearance**.
3) Select one of the following options in the **Presence visibility** drop-down list:
   - If you want to make your presence status visible to both internal subscribers as well as external callers, click on **internally and externally**.
   - If you want to make your presence status visible to internal subscribers only, click on **internally**.
   - If you want to make your presence status invisible to all subscribers, click on **not visible**.

5.2.4 How to Configure the Pop-up Visibility for Active Calls

Step by Step

1) Click on your name.
2) Click on **Settings > Appearance**.

3) Select one of the following options in the **Popup visibility** drop-down list:

Option	Description
Always visible	The pop-up window always appears
5 seconds	The pop-up window appears for 5 seconds
10 seconds	The pop-up window appears for 10 seconds
When minimized	The pop-up window appears only when minimized or when pin window is disabled.
Never visible	The pop-up window never appears.

5.3 CallMe Service

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

Inbound Calls

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

Outbound Calls

When you dial a number in the UC client, the communication system first calls you at the CallMe destination. If you answer the call, the communication system then calls the desired destination and connects you with it. Your internal phone number is displayed at the destination (One Number Service).

Presence Status

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

Activation

You can activate the CallMe service manually. In addition, the CallMe service is also reactivated by an automatic reset of the Presence status following an absence, provided it was active earlier. Then following types of CallMe destinations are not supported:

- Group
- Redirected telephone

NOTICE:

When the CallMe service is enabled thecall handling happens on the background without a popup notification during the call.

Deactivation

The CallMe service remains active until you delete the **CallMe number**.

NOTICE: CallMe function should not be used when dialing or calling in an open conference.

5.3.1 How to Enable the CallMe Service

Step by Step

1) Select **Office** for the Presence status.
2) Set the call number of the CallMe destination.

NOTICE: Do not enter a group or a redirected phone as the CallMe destination.

3) Click **Apply**.

5.4 Favorites

The Favorites shows you all the contacts you have configured as favorites at a glance. These contacts can also be called very easily directly from the Favorites.

The Favorites manages contacts in groups.

All internal subscribers that were copied over from the internal directory into the Favorites can be seen with their respective presence status and connection status.

When an internal subscriber receives a call, this is indicated to you in the presence status of the subscriber. You can then take this call.

NOTICE: myPortal @work Favorites do not include personal contacts imported from Outlook.

NOTICE: If you answer the call of another subscriber, this call will be indicated as missed to the original subscriber. “Answered by” information is not provided.

There are differences in the handling of Favorites between UC Smart and UC Suite mode.

Related concepts

Presence Status on page 19

5.4.1 How to Add a Contact to the Favorites

Step by Step

1) Enter the name of the contact in the **Search/Dial** field.
2) Click on the contact you want to add to the Favorites.
3) In the details view of the contact, click on the star button.
4) Select one of the following options for the group to which the contact is to be added:
   - Select an existing group in the drop-down list.
   - Create new favorites group by entering a name in the input field, and then click on Add.

Related tasks

How to Search in Directories on page 18

5.4.2 How to Delete a Contact from the Favorites

Step by Step

1) Click on the **Favorites** icon in the main menu.
2) Click on the relevant group to expand the associated Favorites entries.
3) Click on the relevant contact.
4) Click on  .
5) Click on **Delete from <name of the group>**.

5.4.3 How to Rename a Group from the Favorites

Step by Step

1) Click on the **Favorites** icon in the main menu.
2) Click on the relevant group and then click on the **Rename group** button.
3) In the pop-up window, change the name of the Favorites group.
4) Click on **OK**.

5.4.4 How to Delete a Group from the Favorites

Step by Step

1) Click on the **Favorites**.
2) Click on the relevant group to expand the associated Favorites entries.
3) Click on the **Delete group** button.
4) Click on **OK**.

5.5 Conversations

Conversations contain the history of your activity.

The conversation entries are displayed per contact and each entry contains details about the following events:

- Calls
- Voicemails
- Instant Messaging (UC Smart mode)

The latest event is always displayed first on an entry. The active and on hold calls are displayed on top on the List view. If you have unread events a green counter is shown in the entry, which indicates the number of the unread events.

Each Conversation entry contains the following in the details view:

- The history of the events, showing always the latest events at the end of the view.
- Information about the conversation entry by clicking on ».

NOTICE: Call control is handled by Conversations list.

5.5.1 How to Save a Conversation Entry as a Personal Contact

Prerequisites

UC Smart mode

Step by Step

1) Click on the **Conversations** icon in the main menu.
2) Click on the desired conversation entry.
3) Click on » and then click on **Add to Personal Contacts**.
4) Complete the data as needed in the **Add Personal Contact** pop-up window and click **OK**. The contact is saved in the personal contacts.

5.5.2 How to Display Details of a User in a Conversation Entry

Step by Step

1) Click on the **Conversation**s icon in the main menu.
2) Click on the desired conversation entry.
3) Click on ».

5.5.3 How to Delete all Conversations

Step by Step

1) Click on the **Conversations** icon in the main menu.
2) Click the down arrow next to **Conversations** button.
3) Click on **Delete all conversations**.
4) Click on **OK**.

5.5.4 How to Delete a whole Conversation

Step by Step

1) Click on the **Conversations** icon in the main menu.
2) Click on the desired conversation entry.
3) Click on **Details** and then click on **Delete this conversation**.
4) Click on **OK**.

5.5.5 How to Delete a Conversation Item (chat, journal, voicemail)

Step by Step

1) Click on the **Conversations** icon in the main menu.
2) Click on the desired conversation entry.
3) Click on **Click for more actions**.
4) Click on **Delete this entry**.
5) Click on **OK**.

5.5.6 How to Send an Instant Message from Conversations

Prerequisites

Instant Messaging is enabled in the system.

Selected contact is able to receive instant messages

UC Smart mode

Step by Step

1) Click on the **Conversations** icon in the main menu.
2) Click on the desired contact.
3) Click on a folder to expand the corresponding entries of the search results.
4) Enter your message in the respective field on the details view.
5) Click on **Send**.

5.5.7 How to Send an Instant Message from Favorites

Prerequisites

UC Smart mode

Step by Step

1) Click on the **Favorites** icon in the main menu.
2) Click on the relevant group to expand the associated Favorites entries.
3) Click on the desired contact.
4) Enter your message in the respective field on the details view.
5) Click on **Send**.

5.6 Calls

The call history of all your inbound and outbound calls is displayed in the **Conversation** icon in the main menu.

Identification of Call History

The call events in a conversation entry are identified as follows:

Symbol	Folder
	Inbound call - Answered
	Inbound call - No answer
	Inbound call to a group - Answered
	Inbound call to a group - not accepted
	Inbound call, forwarded or transferred
	Outbound call - Answered
	Outgoing call - No answer
	Outgoing call to a group - Answered
	Outgoing call to a group - No answer

5.6.1 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

Format	Description	Example
Dialable	Exactly as you would dial the call number on the system telephone in your office, always with the trunk access code.	• 321 (internal) • 0700798765 (own local network) • 0089700798765 (external local network) • 0004989700798765 (international)

INFO: If possible, you should always use the canonical call number format. This ensures that a phone number is always complete, unique and consistent for networking and mobile stations in every situation.

NOTICE: For calls within the USA to a number in canonical format, phone numbers are converted to the dialable format.

5.6.2 Call Functions

MyPortal @work can either control an associated phone or make use of the embedded VoIP telephony client. Depending on the chosen configuration within myPortal @work and the communication system, the call control function can be slightly different.

Call Functions

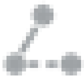
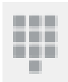
Using the call functions of myPortal @work, you can access the features of your communication system. The available function buttons offered are call status dependent.

Pop-up windows offer you a convenient way to respond to calls with a single click. For example, in case of an incoming call, a Pop-up window appears in the lower right corner of the screen displaying phone number and if available name and image of the caller. The same call buttons in the screen pops are also displayed in the main application.

NOTICE: Some actions (e.g. blind transfer, deflect) must be completed in the main application.

Information and possibly a picture of the caller are displayed together with some of the following buttons, depending on the situation:

Symbol	Description
	**Accept Call**

Symbol	Description
	**Disconnect**
	**Consultation/ Alternate**
	**Retrieve call**
	**DTMF** (only for VoIP functionality)
	**Deflect to Voicemail** (during an incoming call)
	**Blind transfer / Deflect to phone**
	**Conference** (phone-controlled)
	**Hold Call** (not for VoIP functionality)
	**Mute** (only for VoIP functionality)

Calls can be initiated either by entering the phone number manually into the Search/Dial field or by clicking to an entry in the Conversations List, the Favorites List or a directory.

A phone number selected in a different application can be automatically transferred to myPortal @work and dialed by using a hotkey. In order to do this, a hotkey must be configured under the myPortal @work setting.

5.6.2.1 How to Dial a Number using a Hotkey

Prerequisites

A hotkey was configured for this feature under settings.

Step by Step

1) Mark the number to be dialed in your application.

2) Press the key combination (hotkey) configured for the speed dial.

The phone number is displayed in the active call area of myPortal @work. The dialing is automatically performed.

5.6.2.2 How to Make a Call by Entering a Name

Step by Step

1) Enter the initial letters of the name of the subscriber to be called in the **Search / Dial** field. All entries from the directories containing the letters you have entered will be displayed in a list.

2) Click on the desired entry and then select one of the following options:

a) Click on the dial shortcut button for the first available phone number

b) Click on the to select a desired phone number and then click on the phone number to start the call.

5.6.2.3 How to Make a Call from Favorites

Step by Step

1) Click on the **Favorites** icon in the main menu.

2) Click on the relevant group to expand the associated favorites entries.

3) Select one of the following options:

a) Click on the call button on the entry in the Favorites. The contact will be called on the first stored phone number.

b) Click on the desired entry in the Favorites. Click on and then click on the desired phone number.

Once you initiate the call, a conversation entry is created automatically in the Conversations.

5.6.2.4 How to set a default phone number in Favorites

Prerequisites

UC Smart mode

Step by Step

1) Click on the **Favorites** icon in the main menu.

2) Click on the favorite contact you want to set the default number.

3) Click on

4) Set as default your desired phone number by clicking on it. The icon is changed automatically next to the contact.

NOTICE: The call button is automatically updated next to the contact.

5.6.2.5 How to Make a Call from a Conversation Entry

Step by Step

1) Click on the **Conversation**s icon in the main menu.

2) Locate the desired conversation entry.

3) Select one of the following options:

a) Click on the call button in the details view. The contact will be called back at the displayed number.

b) Click on the desired entry. Click on the and then click on the desired phone number.

c) Click on the call button directly in the conversation entry.

5.6.2.6 How to Dial a Number Using the tel or callto Protocol

With myPortal @work you can make outgoing calls from a web browser by clicking on hyperlinks which are intended for telephony usage.

Step by Step

1) Click on your name.

2) Click **on Settings**.

3) Click on the **Appearance** tab.

4) Enable **Always use this application for Telephony Hyperlinks**.

NOTICE: When you enable **Always use this application for Telephony Hyperlinks** myPortal @work is set as the default application. If you disable this option, myPortal @work continues to be the default application, until it is changed by a user or another application.

---

5) Click on the Uniform Resource Identifier (**URI**).

NOTICE: For Windows 10 only callto Protocol is supported.

5.6.2.7 How to Redirect a Call to your Voicemail Box

Prerequisites

Screen pops for inbound calls have been activated.

Step by Step

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

5.6.2.8 How to Answer a Call

Step by Step

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

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

5.6.2.9 How to Redial

Step by Step

1) In the **Search/Dial** field click on the arrow on the right.

   NOTICE: A drop-down list with 10 last dialed numbers appears.

2) Click on the desired contact.

5.6.2.10 How to Place a Call on Hold

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

1) Click on the **Hold** symbol.
2) When you want to resume (unhold) the call, click on the **Reconnect** symbol.

5.6.2.11 How to Initiate a Consultation

During a call, you can initiate a consultation call with another subscriber.

Step by Step

1) Click on the **Consultation to another party** button on an active call.
2) Enter the phone number in **Search/Dial** field and press Enter.

5.6.2.12 How to Alternate between two Parties

Prerequisites

You are talking to one party, while keeping another party on hold, e.g., during a consultation.

Step by Step

Click **Toggle/Connect** to switch from one user to another.

5.6.2.13 How to Transfer a Call

Step by Step

1) If you receive an incoming call, click on the **Deflect Call** button, enter the phone number you want to transfer the call and click on **Transfer**.
2) If you are on an active call, click on the **Blind Transfer** button, enter the phone number you want to transfer the call and click on **Transfer**.

5.6.2.14 How to Pick up a Call from the Favorites List

A call pickup option appears on mouseover in case one of the favorites receives a call.

Prerequisites

The receiver is a favorite contact

The receiver is in an internal directory

Blinking circle around user image (ringing status). The color of the circle is yellow for internal callers and orange for external callers.

NOTICE: If the receiver is in UC Suite mode and is a networking contact then call pick up is not supported because of lack of hook status events.

Step by Step

1) Click on the **Favorites** icon in the main menu.
2) Put the mouse pointer over the favorite contact.
3) Click on green button to pick up the call.

5.6.2.15 How to Initiate a Conference During a Call

Prerequisites

You are talking to one party, while the other party is on hold.

Step by Step

In the Call window, click on the **Conference** button.

5.6.2.16 How to Start a Web Collaboration Session

Prerequisites

You are on an active call.

Step by Step

In the Call window, click on the **Web Collaboration** button.

5.6.2.17 How to End a Call

Step by Step

Click on the **End Call** button.

5.6.2.18 How to Dial a Number Manually

Step by Step

Enter the phone number in dialable format or in canonical format in the **Search / Dial** field and press the `Enter` key.

NOTICE: In UC Smart, if you enter a dialable number, it is recommended not to use a seizure code for external line. A pop-up window appears, asking you if the number is internal or external.

In UC Suite, when the number is in a dialable format, the access code is added automatically from the system, from the default trunk.

5.6.2.19 How to use DTMF tones during an active VoIP call

During an active VoIP call the UC Suite user can enter DTMF digits. A DTMF dialpad is available by pressing CTRL+D on the keyboard. A popup windows opens in the center of the main display and the user is able to move the window to his/her preferred position.This position is stored and used when the application opens next time.

Prerequisites

UC Suite client

Active VoIP call

Step by Step

1) Press the **CTRL+D** key on the keyboard

2) An on screen keyboard appears

3) Use this keyboard to enter DTMF tones

NOTICE: The on screen keyboard is minimized by pressing 

5.7 Voicemail

myPortal @work organizes voicemails under the **Conversations**.

When you receive a voicemail for an unanswered call, a message with the voicemail is attached automatically in the respective conversation entry. The title of the message is **Voice message**

Played voice messages are deleted after 30 days by default.

NOTICE: Voicemail control is only available for UC Smart mode

Identification of Voicemails

The entries are identified as follows:

Symbol	Description
	New voice message
	Played voice message

NOTICE: This feature is available with the UC Smart and UC Suite solutions.

5.7.1 How to Listen to a Voice Message on the Phone

Prerequisites

Your presence status is **Office**.

UC Smart mode

Step by Step

1) Click on the **Conversations**.
2) Click the entry which contains the voicemail.
3) Select a phone number under **Play via <your phone number>** in the Deatails view and click on the play icon.

5.7.2 How to Activate or Deactivate Message Recording

Prerequisites

UC Smart mode

Step by Step

1) Click on your name.
2) Click on **Settings**.

3) Click on the **Voicemail** tab.
4) Select one of the following options:
   a) If you want to enable callers to leave a message after the greeting, select the **Recording** check box.
   b) If you do not want callers to leave a message after the greeting, clear the **Recording** check box.
5) Select the desired greeting in the **Greeting** drop-down list.

5.7.3 How to Change your PIN for the Voicemail Box

Prerequisites

This function is only available after you have changed the preassigned PIN (your internal phone number by default) for your voicemail box.

UC Smart mode

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **Voicemail** tab.
4) Click on **Change PIN**.
5) Enter your old PIN for the voicemail box under **Old PIN**.
6) Then enter a new PIN for your voicemail box under **New PIN** and **Repeat PIN**, respectively.

> **NOTICE:** The code number consists of a six digit sequence. Repeated digits (e.g., `333333`) and digit sequences in ascending or descending order (e.g., `987654`) are not allowed.

5.7.4 Notification Service for Messages

The system can optionally notify a UC Smart user about a new voicemail by e-mail.

Prerequisites for the Notification Service

- The delivery of e-mails (e-mail forwarding) has been configured by the administrator in the system.
- The user's e-mail address must be known to the system. The administrator can import all e-mail addresses in the WBM during the initial installation via an XML file or enter an e-mail address for each user in the UC Smart Assistant. Alternatively, users can specify their own e-mail addresses in their myPortal @work client.
- A Voicemail licence is assigned to the user.
- The **Send voicemail to e-mail** feature is enabled. The administrator can activate the feature for each user in the UC Smart Assistant. Alternatively, users can activate the feature themselves in their myPortal @work client.

The myPortal @work user receives an e-mail with the voicemail as an attached WAV file (16 bit, mono), together with the date and time of receipt, duration of the voicemail and, if available, the phone number and name of the sender.

5.8 Conferences

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

Phone-controlled and Application-controlled Conferences

As a subscriber, you can initiate conferences both via the phone and via the myPortal @work application.

You can initiate a phone-controlled conference in the following ways, and then control that conference via the phone:

- 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

You can initiate, control and manage application-controlled conferences via the Conference Management of myPortal @work. A Conference license is required for the use of Conference Management.

Differences between the conference types:

NOTICE: The application controlled Conference is available in UC Smart mode only.

	Phone-controlled conference	Application-controlled conference
Direction of connection setup from the viewpoint of the system	• Outbound	• Inbound (dial-in by the participant)
Authentication of conference participants	-	• Personal PIN (conference ID) • Guest PIN (optional)
Predefined invitation to the conference participants	-	• Conference Name • Dial-in number (MeetMe) • Personal PIN (conference ID) • Guest PIN (optional)
Max. number of participants per conference	8	16

Application controlled Conference

Application controlled conferences are created as permanent conferences. The conference can be used as needed. Conferences do not occupy any conference channel so long as no participant has dialed into the conference. The order of dialing in determines the assignment of the conference channels.

Moderators

The initiator of a conference is automatically the moderator and can:

- Create, edit and delete scheduled conferences.
- Add and remove conference participants.

  Removed participants do not remain in the conference.
- Disconnect conference participants.

  Disconnected participants can dial back into the conference.
- Specify another internal participant on the same node as the moderator
- Leave the conference without ending it immediately.

  If the last moderator leaves the conference, it ends after 5 minutes.
- End active conferences.
- Start a web collaboration session in an active conference.
- Send predefined invitations to all or individual conference participants.

All internal participants within a node can be moderators. However, a conference license is required for each user that is defined or assigned as moderator.

Conference participants whose contact details were entered manually are treated as external participants and cannot be set as moderators.

Conference Participants

Conference participants can leave the conference and dial-in again. In addition, they can participate in a web collaboration session has already been started. As long as a conference has only one participant, the participant hears music on hold. The maximum number of external conference participants is limited, inter alia, by the number of available trunks.

Symbol	Status	Description
	Inactive	The participant is not in the conference. No conference channel is used.
	Dialing in	The participant is just dialing into the conference.
	Waiting	The participant is in the conference and is currently listening to music on hold.
	Active	The participant is in the conference. A conference channel is in use.

Automatic Termination without a Moderator

If the last moderator leaves the conference, the other participants are notified with an info text that the conference will end after about 5 minutes.

Notification of Conference Participants

The moderator can send all or some conference participants an invitation by email. This requires an email program to have been installed on the client PC. Known email addresses are automatically added to the distribution list. In an invitation to all conference participants, only the general guest PIN (if allowed) is included; for individual invitations, the personal PIN is also sent.

Alternatively, a predefined invitation text can be copied to the clipboard for further use in other programs (e.g., a chat program).

> **NOTICE:** This feature is only available with the UC solution UC Smart

5.8.1 How to Create a Conference

Step by Step

1) Click on the **Conference**.

2) Click on the **New Conference** button. The conference is created with you as the moderator.

3) Enter a name for the scheduled conference.

4) If you want other participants who are not listed in the scheduled conference to also be able to dial into the conference, select the **Allow dial-in via guest PIN** check box.

5) Add further participants:

a) Click on the **Add Participants** button.

b) To add a participant from the directories, enter either the phone number or name of the participant in the **Add participant from directory** field. Select the participant and click on **Add**.

c) To add an external participant, enter the data of the participant in the **Add external participant** field.

d) Repeat steps a through d for further participants.

e) Click on close button once you have added all the participants.

> **NOTICE:** You can also add further participants to the conference later via the Favorites or a search in directories.

6) Specify the moderator for the conference:

As the initiator of the conference, you are automatically a moderator. If needed, you can specify further conference participants as moderators. The prerequisite for this is that the selected participant has a conference license. If you do not want to be a moderator yourself, you can reset your moderator status. However, there must be at least one conference participant set as a moderator of the conference.

- If you want to set further participants as a moderator, click on the **Set moderator status** button in the desired conference participant entry.
- If you want to reset your own moderator status, click on **Reset moderator status** button in your conferece participant entry.

> **NOTICE:** You can delete conferences and add or remove participants only as a moderator.

7) Send invitations if required:

You can send an invitation to all or individual conference participants. An email program must be installed on the client PC for this purpose. Known email addresses are automatically added to the distribution list. You can copy the invitation text to the clipboard.

a) If you want to send an invitation to all conference participants, click on the **Send invitations to all** button. The email program is opened, and an email with the dial-in number and guest PIN (if allowed) is created.
b) If you want to send an invitation to one conference participant, click on the **Invite by email** button in the desired conference participant entry. The email program is opened, and an email with the dial-in number, the personal PIN (conference ID) and guest PIN (if allowed) is created.
c) If you want to copy the invitation text, click on the **Copy invitation** button.

5.8.2 How to Display a Conference

Step by Step

1) Click on the **Conference**.
2) All conferences, in which you are a conference participant, are displayed on the list view. The active conferences are displayed on top of the list view.

Conferences in which you are a moderator are marked with a green star.

3) Click on the desired conference to display the data and the participants of the conference in the details view.

Moderators are marked with a green star.

5.8.3 How to Rename a Scheduled Conference

Prerequisites

You are a moderator of the conference that you want to rename.

Step by Step

1) Click on the **Conference**.
2) Click on the conferences you want to rename.
3) Click in the header of the scheduled conference on the name of the conference.
4) Change the name of the conference.

5.8.4 How to Dial into a Conference

Prerequisites

You are a participant of a scheduled or active conference.

You can dial into a conference via myPortal @work or directly from your phone. To dial in from the phone, you will need the dial-in number and your personal PIN (conference ID). This data may have been sent to you by email, for example.

Step by Step

1) Click on the **Conference**.

2) Select the conference you want ot dial.

3) Call the **Indial number** of the conference and enter the PIN of the conference.

If you are the first participant of a scheduled conference, you will hear music being played until another participant dials in.

Once you dial into the conference a Conversation entry is created automatically with the details of the conference.

5.8.5 How to Add Conference Participants

Prerequisites

You are a moderator of the conference.

Step by Step

Add the conference participants by one of the following methods:

- Add a participant from the Favorites:

  Click in the Favorites and select the participant you want to add. Click on and then click on the **Add user to conference** symbol for the desired participant. Select the conference to which the participant is to be added and confirm this with **OK**.
- Add a group from the Favorites:

  Click in the Favorites on the **Add group to conference** symbol for the desired group. Select the conference to which the group members are to be added and confirm this with **OK**.
- Add external participants:

  Click on **Conference** and then on the desired conference. Click on the add participant button. Enter the requested information for the participant in the **Add external participant** area. Click **Add** to confirm your selection.
- Add a participant from directories:

  Enter either the phone number or name of the participant in the **Add participant from directory** field. Select the participant and click on **Add**.

5.8.6 How to Disconnect a Conference Participant

Prerequisites

You are a moderator of an active system conference.

Step by Step

1) Click on the **Conference**.

2) Click on the desired active conference.

3) Click on the **Disconnect user** button in the conference participant entry you want to disconnect.

   The connection to the participant is cleared, but the participant remains in the participant list of the active conference and may dial-in at any time.

5.8.7 How to Remove Conference Participants

Prerequisites

You are a moderator of a scheduled application controlled conference.

Step by Step

1) Click on the **Conference**.
2) Click on the desired conference.
3) Click on the **Remove user** button in the conference participant entry you want to disconnect.

5.8.8 How to Delete a Scheduled Conference

Prerequisites

You are a moderator of the scheduled conference.

Step by Step

1) Click on the **Conference**.
2) Click on the desired conference.
3) Click on the **Delete conference** button in the details view.

5.9 Web Collaboration

myPortal @work supports the integration of the separate product Web Collaboration for simultaneous multi-media collaboration during phone calls and conferences. This provides quick access to functions such as desktop and application sharing, file sharing, co-browsing, whiteboarding, URL push, IM chat and video chat with multiple participants.

Web collaboration can be started by a subscriber during a phone call via the Call window of the UC PC client or by the moderator of an active conference from within the conference. A Web page from which the download of the web collaboration client can be initiated is opened. A local installation of Web Collaboration on the UC PC client is not required. If an email program is available on the UC PC client, an email with the link to the web collaboration client can be sent to the communication partners. Detailed information on web collaboration can be found in the Web Collaboration product documentation.

On deleting or ending a conference, the associated web collaboration session is automatically deleted as well.

Integration of Web Collaboration

In order to integrate web collaboration, the license number and password for the hosted web collaboration connection must be entered by the administrator in the WBM. The vendor offers the web collaboration server as a service on the Internet (Public Server). The license number and password are transmitted over a secure https connection. By default, TCP port 5100 is used for this purpose. Local web collaboration servers are not supported.

> **NOTICE:** In order to use web collaboration, the UC PC clients and the communication system require an Internet connection. Connections via a proxy are not supported by the communication system.

Instant Messaging and Web Collaboration

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

5.9.1 How to Start a Web Collaboration Session

Prerequisites

Access to the Web Collaboration server is set up in the communication system.

An email program is installed on the client PC.

Only when started from an active conference: You are a moderator of the active conference.

Step by Step

1) To start a web collaboration session:

- from within a an active call, click on the **OpenScape Web Collaboration** button.
- To start the web collaboration from an active conference, click on the **OpenScape Web Collaboration** button .

  You can start a web collaboration session only in a conference in which you are a moderator. Moderators are marked with a green star.

2) The email program opens, and an email with a link to the web collaboration client is created. Recognized email addresses are automatically added to the distribution list. In addition, a web page opens with the download link of the web collaboration client (fastviewer).

3) Add any further email addresses (e.g., for external conference participants) to the email if required and then send the email.

4) Load the web collaboration client on your PC and log in with the name and password. The web collaboration session is started.

> **NOTICE:** The other participants of the active conference can optionally start their web collaboration client via the link in the email or by calling up this active conference with myPortal

@work and accessing the Web Collaboration client via the **Participate in Web Collaboration** symbol.

6 Configuration

You can configure myPortal @work in accordance with your requirements.

Some configuration items in the settings menu and associated dialogs are displayed depending on the configuration of the communication system, e.g. MULAP number configuration or Mobility feature configuration.

6.1 Personal Preferences

You can enter personal preferences for myPortal @work such as your e-mail address or an additional phone number, for example, and even add a picture of yourself.

The image you provide will be displayed to other internal subscribers in directories and favorites, for example. Your image can also be displayed on system telephones with a large color display (only with the HFA variants).

6.1.1 How to Edit your Contact Data

The contact data you specify is made available to other subscribers in directories and favorites, for example.

Step by Step

1) Click on your name.

2) Click on the **Settings** tab.

3) Click on the **Appearance** tab.

4) Edit the **Mobile Phone Number**, **Home/External phone number** and **My Email Address** fields if required. Phone numbers should be entered in canonical format (e.g., `+49891234567`).

6.1.2 How to Provide your own Image

Prerequisites

You have an image with at least 40 x 40 pixels in the JPG or PNG file format. The file size must be no larger than 512 kB.

Step by Step

1) Click on your name.

2) Click on the **Settings** tab.

3) Click on the **Appearance** tab.

4) In the Profile Image section click on **Update** and select the image you want to upload.

NOTICE: The image is automatically scaled to 200 x 200 pixels.

6.1.3 How to Delete your own Picture

Step by Step

1) Click on the icon for your presence status.

2) Click on the **my image** tab.

3) Click **Delete**.

6.2 Dialing Hotkey Settings

The hotkey for speed dialing and its functionality can be configured.

However, the functionality can only be used with myPortal @work. The hotkey for speed dialing is set up in myPortal @work as a single key or a key combination.

Since the configured hotkey may have already been assigned a function in the application in which the phone number is marked (e.g., Ctrl + P to open the Print dialog), the speed-dial function behaves by default as follows:

After the user has marked the phone number in the application and entered the configured hotkey, the hotkey is passed on to the application.

As soon as the phone number has been passed to myPortal @work, the dialing is performed.

6.2.1 How to Define a Hotkey for Speed Dialing

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **Appearance** tab.

4) Enter a key or a key combination of your choice in the **Dialing hotkey** field based on the following table:

Key combination	Notes
F1 and F12	Not allowed
F2 - F11	Allowed
Shift + <Number/Letter>	Not allowed
Shift+F1 and Shift+F12	Not allowed
Shift+F2 - Shift+F11	Allowed
Ctrl+c, Ctrl+v, Ctrl+z ,Ctrl+r, Ctrl +a,Ctr+x	Not allowed
Ctrl + <Number/Letter>	Allowed
Ctrl + Alt + <Number/Letter>, Ctrl + Shift + <Number/Letter> (Three keys combination)	Allowed

6.3 Programming the Function Keys of the Telephone

You can customize the function keys of your telephone device and any available key module or Busy Lamp Field (BLF) to suit your requirements via the UC client with a web application.

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

> **NOTICE:** The function keys of a SIP phone, an ISDN phone or an analog phone cannot be programmed with the UC Client.
>
> In the case of phones with a display, you can also program some function keys directly at the phone.

Programming Function Keys on Different Levels

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

> **NOTICE:** When switching from a physical device to VoIP and back, programmed function keys are lost.

6.3.1 How to Program the Function Keys of the Telephone

Step by Step

1) Click on your name and then click on **Settings**.

2) Click on the **Appearance** tab.

3) Click on the **Key Programming** link. A window for programming the function keys of the telephone device opens in the web browser.

   a) If a message such as `There is a problem with this website's security certificate.` appears, click on **Continue to this website**.

4) Under the phone icon, Click on the key area that you want to edit.

5) In the detailed view of the key area, click on the key icon at end of the corresponding row. The key icon goes red and indicates that the function is active for programming.

   a) If you want to display details on the current function of a key, move the mouse pointer over the label field to the left of the key.

6) Select the desired function from the **Choose Function** drop-down list.

a) If a function requires additional information (parameters), select these details or enter the required data.

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

7) Click **Save**.

8) If you selected a system phone with automatic key labeling, you can enter the text that should appear in the display of the function key in the **Labeling** column.

9) If you have programmed a function key as the **Shift Key**, select the check box **2. Level**. Enter the external phone numbers as described under steps 7 to 9.

10) If you want to program further function keys, repeat steps 5 through 10.

11) Close the web browser window for key programming.

12) Click in the **Appearance** tab on **OK**.

6.4 General Settings

You can specify general settings for myPortal @work such as the date format or the address of the server.

Server Connections

If a subscriber can be reached at different locations (e.g., via a LAN in the office and via the Internet), up to 4 server connections can be configured. The server used is OpenScape Business UC Server.

6.4.1 How to Change your myPortal @work Password

Prerequisites

This function is only available when the connection to the system is encrypted (https).

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on **User account** and then click on **Change Password** button.

4) In UC Smart mode enter your old password under **Old password** field.

5) Then enter your new password in accordance with the security policies under **New password** and **Repeat password**.

> **NOTICE:** The password must be between 8 and 16 characters long and must include at least one uppercase letter, one lowercase letter, one digit and one special character. Make sure that you remember your new password.

6) Click on **OK**.

6.4.2 How to Enable or Disable the Automatic Login of myPortal @work

Step by Step

1) Click on your name.

2) Click **on Settings**.

3) Click on the **Appearance** tab.

4) Select one of the following options:

- If you want as a myPortal@work user to login automatically, select the **Automatic login** check box.
- If you do not want myPortal@work to login automatically, clear the **Automatic login** check box.
- If you want myPortal@work to start automatically when you turn on your computer select the **Start application on launch** check box.

6.4.3 How to Select the User Interface Language

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **Appearance** tab.

4) Select the desired language in the **Language** drop-down list.

myPortal @work changes the language automatically.

6.4.4 How to Select the Date Format

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **Appearance** tab.

4) Select the desired format from the **Date format** drop-down list.

6.4.5 How to Configure the Pop-up Visibility for Active Calls

Step by Step

1) Click on your name.

2) Click on **Settings > Appearance**.

3) Select one of the following options in the **Popup visibility** drop-down list:

Option	Description
Always visible	The pop-up window always appears

Option	Description
5 seconds	The pop-up window appears for 5 seconds
10 seconds	The pop-up window appears for 10 seconds
When minimized	The pop-up window appears only when minimized or when pin window is disabled.
Never visible	The pop-up window never appears.

6.4.6 How to Add a Personal Contact

Prerequisites

UC Smart mode

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click in the **Personal contacts** and then click on the **Add personal contact** icon.
4) Fill in the fields in the **Add to personal contacts** window.
5) Click on **OK**. The contact appears in the Personal Contacts.

6.4.7 How to Import Contacts into the Personal Contacts

Prerequisites

An appropriate XML file in UTF-8 encoding or a CSV file with personal contacts is available. A template for this is available via the Download Center in the WBM of the communication system and can be edited with Microsoft Excel, for example.

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **Personal contacts**.
4) For importing a Csv/Xml file, select the encoding of the Csv/Xml file under **File encoding CSV/Xml import drop-down list**.
5) Click on the **Import personal contacts from Csv/Xml** icon.
6) Navigate to the storage location of the desired XML or CSV file and click **Open**. Once the import is complete, you will be informed of the result in the window.

6.4.8 How to Edit the Server Settings

NOTICE: Do not change the server settings unless you are instructed to do so by the administrator of your communication system. You cannot use myPortal@ work with an invalid server address.

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **User account** tab.

4) Select the right Server connection (1-4).

5) Enter the IP address or name of the communication system (e.g., `192.168.1.2`) under **Server IP Address**.

6) Under **Server Port Address**, enter the port used by the UC client to communicate with the communication system (default: `8802`).

7) Click **Reconnect**.

6.4.9 How to Configure Additional Server Connections

This configuration is used for switching between different users.

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **User account** tab.

4) Under **Server Connections**, select the index for the next available server connection.

5) Enter a user name for the server connection under **Username**.

6) Under **Password**, enter the password for the server connection in accordance with the security policies.

NOTICE: The password must be between 8 and 16 characters long and must include at least one uppercase letter, one lowercase letter, one digit and one special character. Make sure that you remember your new password.

7) Optional for MULAP: Enter the call number of the associated phone in the **Controlled device** field.

Prerequisite: Your user name represents a MULAP. Ask your system administrator in case of doubt.

8) Only for Mobility Users: Select one of the following options in the **Dial Mode** drop-down list:

- If you want to initiate outbound calls with your office phone, select **Associated dial**.
- If you want to initiate outbound calls with your mobile phone, select **Callback preferred**.

9) Enter the IP address or the domain name of the server in the **Server IP Address** field and the port number (default: 8802) in one line separated by a colon (:).

10) Click **Reconnect**.

11) If you want to configure additional server connections, repeat the previous steps.

> **NOTICE:** Server configurations are automatically synchronized and are saved to the login screen by starting myPortal @work.

6.4.10 How to Enter the Call Number for the Associated Phone (for a MULAP)

Prerequisites

Your user name represents a MULAP.

The call number for the associated phone was communicated to you by your administrator.

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **User account** tab.

4) Enter the call number of the associated phone in the **Controlled Device** field.

5) Click on **Reconnect**.

6.4.11 VoIP in myPortal @work

myPortal @work provides an embedded VoIP client which enables the user to make and receive VoIP calls. It can be used with both UC Smart and UC Suite solutions. No physical telephone device needs to be connected in order to make VoIP calls through myPortal @work. When VoIP functionality is activated, all telephony calls are controlled by the embedded VoIP telephony client.

> **NOTICE:** The VoIP client can be activated and used only if the appropriate prerequisites for Voice over IP telephony have been fulfilled by the OpenScape Business System administrator.

In case of VoIP, additional settings are required for the selection of Audio input, Audio output and ringing device, see How to manage audio settings.

6.4.11.1 How to enable VoIP

With myPortal @work you can make and receive VoIP calls.

Prerequisites

In order to make VoIP calls through myPortal @work, you must not connect a physical device.

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **VoIP** tab.
4) If you want to enable VoIP calls, switch the **VoIP disabled** slider to ON (green).

The slider is by default disabled (grey).

If the VoIP is enabled, the **Show VoIP icon in title bar** is also enabled.

If the VoIP is disabled, you can decide if you want to see the VoIP settings button on the title bar or not.

If the configuration is not adequate (e.g. missing license, not compatible controlled device), the slider is auto-deactivated.

Alternatively, you can quickly navigate to VoIP settings, by clicking and then click **VoIP settings.** When you enable VoIP, you also have to manage audio settings (see How to manage audio settings).

> **NOTICE:** In case you are in a MULAP, tap on **Controlled device** to select your WebRTC phone number. For the specific number to choose, please ask your administrator.

6.4.11.2 How to manage audio settings

You can choose which devices you want to use for voice communication and possibly a separate audio device for the ringing output of incoming calls.

Prerequisites

The appropriate audio devices have to be supported and enabled within the Microsoft Windows OS.

Step by Step

Click on the at the top of myPortal @work and then:

a) Under **Microphone** area, choose the device or headset you want to use for calls and the selected device will be highlighted.
b) Under **Audio output** area, choose the audio device or headset you want to use for audio calls in myPortal @work and the selected device will be highlighted.

c) Under **Ringing device** area, choose the audio device or headset that you want to ring for incoming calls and the selected device will be highlighted.

NOTICE: When a new device is connected/disconnected, **VoIP Settings** list is updated automatically and the **VoIP settings** button is blinking.

6.4.11.3 How to check NAT type

Prerequisites

VoIP is enabled.

When there are problems with VoIP or when you are asked by the administrator, you can use the following procedure to check the NAT type.

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **VoIP** tab.
4) Click **Advanced ICE settings** to show the settings.
5) Click on **Check NAT type**.
A pop-up window appears with the title **NAT type detection** and a progress bar showing the operation is loading.
6) Once the operation completes, a new pop-up window appears with one of the following messages depending on the NAT type detected:

- **NAT Type: simple**

  A message informs the user that VoIP services can be used without restrictions.
- **NAT Type: Symmetric**

  A message informs the user that VoIP services behind a Symmetric NAT are not supported over public networks. The client may still be used in a local network.
- **NAT Type could not be detected.**

  A message informs the user that the request is taking too long and timed out, or UDP appears to be blocked.

6.4.11.4 How to add a STUN server

Prerequisites

VoIP is enabled.

myPortal @work is set up with a default STUN server that is used for VoIP communication. When there are problems with VoIP or when you are asked by the administrator, you can use the following procedure to add a STUN server.

Step by Step

1) Click on your name.

2) Click on **Settings**.

3) Click on the **VoIP** tab.

4) Click **Advanced ICE settings** to show the settings.

5) Click on **Check ICE status** to check if the STUN server can be reached.

> **NOTICE:** The default STUN server will not appear in the **ICE servers** list and you can't remove it.

6) Click on **Add server** to enter a STUN server.

> **NOTICE:** The administrator can provide you with the specific server addresses to add.

If the server address is valid, it is added to the list.

If there is any problem, the notification `Failed to add the server. Please check your environment` appears.

If the entered server is already present in the list, the notification `Server is already present` appears.

6.4.12 How to manage headset buttons

Users can use headset's buttons for important call functions. The following functions shall are supported for Jabra and Plantronics headsets:

- Answer incoming call
- Reject/decline call
- Mute/Unmute

> **NOTICE:**
>
> For parallel calls, the handling of headset buttons (answer/reject call) is not feasible.

Prerequisites

For Plantronics, download the application: https://www.plantronics.com/ca/en/support/downloads-apps/hub-desktop

Step by Step

1) Enable VoIP calls (see How to enable VoIP)

2) Enable your desired device on the **VoIP**tab.(**Jabra Headset Integration/ Plantronics Headset Integration)**

3) Select your device in VoIP settings (see How to manage audio settings)

6.4.13 How to Change the Dialing Mode (only for Mobility Users)

Prerequisites

Mobility feature has been enabled for you within the Communication system.

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **User account** tab.
4) Select one of the following options in the **Dial Mode** drop-down list:
    - If you want to initiate outbound calls with your office phone, select **Associated dial**.
    - If you want to initiate outbound calls with your mobile phone, select **Callback preferred**.
5) Click on **Reconnect**.

6.4.14 How to Reconnect with myPortal @work

Step by Step

1) Click on your name.
2) Click on **Settings**.
3) Click on the **User account** tab.
4) Only if you want to use another server connection: select the desired server connection under **Server connections**.
5) Click on **Reconnect**.

6.5 Web collaboration integration

For the integration of Web Collaboration, the address of the Web Collaboration server must be known to the communication system. The vendor offers the web collaboration server as a service on the Internet (Public Server). The license number and password are transmitted over a secure https connection. By default, TCP port 5100 is used for this purpose.

NOTICE: In order to use web collaboration, the UC PC clients and the communication system require an Internet connection. Connections via a proxy are not supported by the communication system.

7 myContacts

The myContacts Outlook Addin is an optional add-on for UC Smart and UC Suite users which works with personal contacts in Outlook. In case of a UC Smart configuration, a myPortal @work license has to be assigned to the user before he can login to the UC Smart server. In case of UC Suite, a UC user or UC groupware license is required.

7.1 Introduction

The Addin allows synchronizing personal Outlook contacts with the UC server manually or as a scheduled auto-synchronization task. By synchronizing, the following clients will gain access to the user's personal Outlook contacts for phonebook access and caller identification:

- System phones
- myPortal to go clients (Android, iOS and Web Edition)
- myPortal Smart
- other clients using the Web Services Interface (WSI), including third party applications

NOTICE: The classic UC Suite desktop clients are not affected as they access Outlook contacts locally on the client PC.

7.1.1 Minimum requirements

The Outlook addin will be provided for:

- OpenScape Business V2R5 or later with active UC Smart or UC Suite.
- Desktop environments running Microsoft Windows 7, Windows 8.x and Windows 10 (x86 and x64 architectures).
- Outlook versions: Outlook 2010, 2013, 2016 (32bit or 64bit).

7.2 How to Install myContacts

Prerequisites

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

Step by Step

1) Close Outlook
2) Run the `myContactsforOutlook.exe` program.
3) If the **User Account Control** window appears, click **Allow** or **Yes**.
4) Check the **I agree to the license terms and conditions** checkbox.
5) Click **Install**.
6) Wait for the **myContacts** addin to be installed.
7) Click **Finish** to complete the installation process.

Next steps

Start Outlook.

7.3 How to Uninstall myContacts

Step by Step

1) Close Outlook.
2) Click in the **Control Panel** on **Programs and Features**.
3) Click on **Change** in the context menu of **myContacts**.
4) Click **Uninstall**.
5) Select the **myContacts** addin to be uninstalled.

7.4 Automatic Updates

The Outlook Addin includes an update mechanism which checks if a newer version of the software is available on the OpenScape Business server for download and installation.

In case that an update is available, the user is guided through the download and installation process. If necessary, a message is displayed indicating that one or more applications must be closed to perform the update.

NOTICE: We recommend that you always perform the updates offered. This also applies to software that is required for certain UC clients.

NOTICE: Automatic update of myPortal @work is not supported in Mac computers.

7.4.1 How to Perform Automatic Updates

Prerequisites

You have received a message such as: `A new vesion of myContacts is available` followed by the Release Notes.

Step by Step

Select one of the following options:

a) **Skip this version**

The existing version remains installed.

b) Remind me later

Anew pop up window appears with the following options:

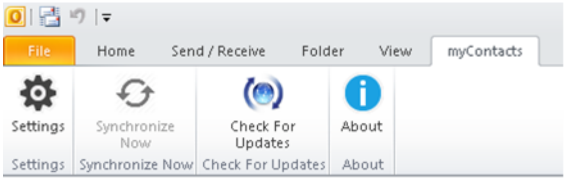
- **Yes, please remind me later** and a drop down list in to select the time before the next reminder.
- **No, download updates now (recommended)**

c) **Update**

The installation of the latest version starts automatically.

7.5 User Interface

The **myContacts** tab is available in the main menu area of Outlook when the Addin is installed and active.



The interface contains:

- the **Settings** menu button,
- the **Synchronize Now** menu button,
- the **Check for Updates** button,
- the **About** button

7.5.1 Settings menu

The Settings menu contains:

- the submenu for the server connectivity,
- the submenu for synchronization of Outlook contacts with the UC server,
- the advanced submenu for maintenance purposes

7.5.1.1 How to Configure Connectivity Settings for the UC Server

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Settings** menu button.

3) Click on **UC Server** submenu button.

4) Fill in the **IP Address** under the **UC Server IP Address** area.

5) Fill in the **Username** and **Password** under the **UC Server Account details** area.

6) Click on **Apply** to complete the connectivity settings configuration.

NOTICE: The first time Outlook is opened after the installation, this menu opens automatically and the configuration should be done in order to proceed with any other action.

7.5.1.2 How to Synchronize Contacts

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Settings** menu button.

3) Click on **Synchronize Contacts** submenu button.

4) The number of contacts in Outlook appears under Sync outlook contacts settings. Check or uncheck the **Do not import contacts without phone numbers** and **Import profile pictures** checkboxes.

5) Select the **sync interval** from the drop down list.

6) Click on **Start Sync Now** to synchronize your Outlook contacts.

Alternatively, you can click on the **Synchronize Now** button without entering the **Settings** menu

NOTICE: Contact phone numbers should always be entered in canonical format (e.g., +4989700798765) whenever possible.

7.5.1.3 How to Configure the Advanced Settings

In case of technical problems, you may be asked to provide a trace file of myContacts for further analysis by the support team.

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Settings** menu button.

3) Click on **Advanced** submenu button.

4) Check or uncheck the **Enable Logging** checkbox to select whether a log file is written.

5) Select the **Log Level** from the drop down list.

6) lick on **Apply** to complete the advanced settings configuration.

NOTICE: If you have increased the trace level, please do not forget to decrease it again after you have finished the trace creation.

7.5.2 Check for Updates

Except for the automatic update mechanism, the user can check manually for an updated version of the myContacts addin.

7.5.2.1 How to Check for Updates

Prerequisites

Outlook is running and the myContacts addin is installed.

Step by Step

1) Click on **myContacts** tab.

2) Click on **Check for Updates** button.

3) Click on **Check for Updates** button.

If a new version is available, a window informing about the available version appears

4) Click on **Yes** to update the application.

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