

myAttendant

User Guide

A31003-P3030-U108-01-7619

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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 Copy User Buttons from Another User on page 99	New Chapter
User Interface Elements on page 10	Added information about changing the size of buttons, icons and fonts on user interface

Changes in V2R7

Impacted chapters	Change description
How to Install myAttendant	Updated the installation procedure

Changes in V2R6

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

2 About this Documentation

This section contains some introductory information on this documentation.

2.1 Display Conventions

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

Type of information	Presentation	Example
User Interface Elements	Bold	Click OK .
Menu sequence	>	File > Exit
Special emphasis	Bold	Do not delete Name.
Cross-reference text	Italics	You will find more information in the topic <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>

2.2 Types of Topics

The types of topics include concepts and tasks:

Type of topic	Description
Concept	Explains the "What" and provides an overview of context and background information for specific features, etc.
Task (operating instructions)	Describes task-oriented application cases (i.e., the "How") step-by-step and assumes familiarity with the associated concepts. Tasks can be identified by the title How to ...

3 Introduction

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

3.1 myAttendant

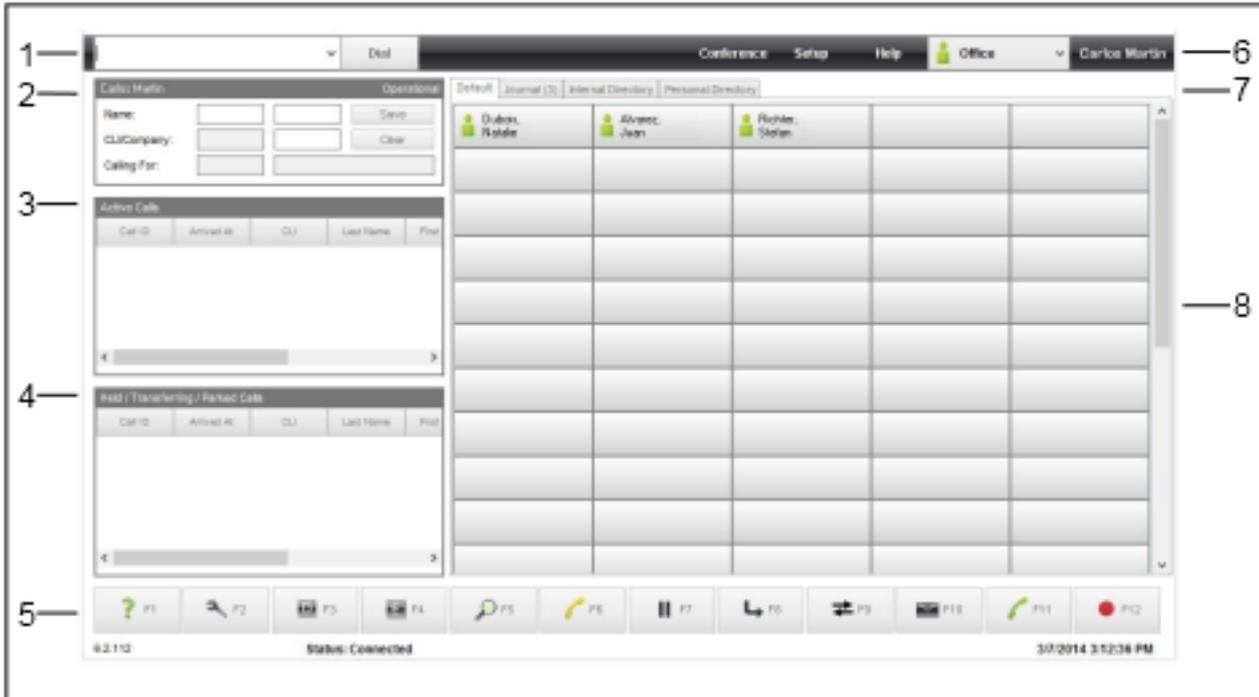
myAttendant is a unified communications solution for Attendant functions. Besides convenient Attendant functions, dialing aids via phone directories and information on the presence status of other subscribers, myAttendant can, for example, also be used to access voicemails and faxes. Instant Messaging supports the communication with internal subscribers.

myAttendant provides the following features:

- Attendant functions
- Directories
- Journal
- Pop-up windows
- Change the presence status of subscribers
- Record calls
- Message Center
- User Buttons
- Manage voice and fax messages
- Instant Messaging
- Team functions
- Conference management

3.2 User Interface Elements

The main window with the function and user buttons is the central interface for setting up and operating myAttendant.



The main window includes the following elements:

- 1) Display of phone number for current call
- 2) Display of the own phone status with detailed information on the nature of the call (e.g., callback, forwarded)
- 3) Display of active calls
- 4) Display of parked and transferred calls and calls on hold
- 5) Function Buttons
- 6) Menu bar with Presence status
- 7) Tabs for user buttons, **Internal Directory** and **Journal**
- 8) User Buttons

User Buttons

When the cursor hovers over the user button of a subscriber, a screen pop with information on that subscriber is displayed.

The following are displayed:

- Name, Extension and Department of the subscriber
- Presence status
- Voicemails
 - Normal voicemails
 - Confidential voicemails
 - Urgent voicemails
- Notes

- Fax Messages
 - New Fax messages
 - Read Fax messages
 - Deleted Fax messages

Function Buttons

Function buttons are available for the most important functions for controlling Attendant functions and invoking directories.

The individual functions are activated with a click or by pressing the appropriate function key on the keyboard. The assignment of the function button to each function key can be customized by the user.

The following is an explanation of what these buttons do (default assignment following the installation).

Button	Function key	Description
	F1	Open the help file.
	F2	Access setup options.
	F3	Display and edit the communication system's internal subscribers.
	F4	Display company-wide contacts.
	F5	Search for subscribers in the internal and external directory.
	F6	Accept or release calls.
	F7	Hold and reconnect (unhold) callers.
	F8	Perform screened or unscreened call transfers.
	F9	Park and unpark calls.
	F10	Open the Message Center.
	F11	Dial station numbers.
	F12	Record calls.

Screen Pops

Situation-based screen pops appear in the main window of myAttendant and offer you convenient ways to respond to the situation with a single click. Exam-

ples: you can accept inbound calls immediately, listen to new voicemails directly and also start web collaboration sessions directly from within the screen pops.

Displaying Missed Calls

Missed calls are also shown as an icon and tray pop in the Microsoft task bar. Click on the icon to have the number of missed calls displayed.

Operating myAttendant

myAttendant can be operated in different ways:

- With user buttons (operated with the mouse) - This is the primary method described in this manual.
- With the function keys (F1 to F12) on the keyboard
- With the number pad on the keyboard to enter phone numbers
- via function buttons

This documentation always describes the most common and most direct operating methods.

Using myAttendant with two Monitors

For an installation at a PC with two connected monitors, only the primary monitor should be used when working with myAttendant.

Minimizing and Maximizing the Screen Display

You can optionally maximize the myAttendant display screen to the full screen size or minimize the screen. This is done with the familiar Windows functionality in the upper right corner of the window.

INFO: Please avoid a screen display with 120 dpi, since all the information of myAttendant cannot be presented with this setting.

Adjusting the size of buttons

You can adjust the size of BLF buttons by using CTRL and +/- . Additionally, you can also hold down the CTRL key and use the mouse wheel. This adjustment changes the button size, the font size of names, and the user/contact icons. Up to 5x zoom is supported.

NOTICE: When you use CTRL + the mouse wheel for zooming in/out and the size of the buttons reach the minimum or maximum zoom level, the mouse wheel reverts to scrolling the screen, even if you keep holding the CTRL button.

Setup

Some operating tasks (mainly for the configuration) are executed via the **Setup** (F2) button. After clicking **Setup**, you should normally log in again with your password for security reasons. This operating step will no longer be listed explicitly in the individual operating tasks.

Related concepts

[Unified Communications](#) on page 23

[Directories](#) on page 30

[Attendant Functions](#) on page 92

[Subscriber Management](#) on page 97

[Message Center](#) on page 100

Related tasks

[How to Select the User Interface Language](#) on page 19

[How to Initiate a Call Manually](#) on page 96

3.3 Online Help

The integrated online help describes key concepts and operating instructions. The online help is context-sensitive and opens the associated Help topic for each opened WBM page.

Navigation

The buttons in the online help provide the following functions:

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

4 Installing, Starting and Closing myAttendant

This section explains how to install, start and close myAttendant and the procedure for an upgrade or update.

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

The UC Suite clients myAttendant and myPortal are called from the same start-up routine; however, myAttendant supports only the classic user interface **Classic Grey**. When you start myAttendant for the first time, this user interface is set as the default for myAttendant and myPortal. Please note, however, that if myPortal was used earlier with the modern user interface, the user interface must be changed back to the classic UI in myPortal so that myAttendant can be started.

4.1 How to Install myAttendant

Prerequisites

Your PC meets the requirements for myAttendant

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

NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file, which is located in the storage directory of the install files.

Step by Step

- 1) Run the `CommunicationsClients.exe` install file.
- 2) If the **User Account Control** window appears with the message `An unidentified program wants access to your computer`, click **Allow**.
- 3) Enter the IP address provided by your administrator and click **Next**.
- 4) After validation of IP address, the installer will check if `.NET 4.5` is available and install it if not.
- 5) Click on **myPortal for Desktop** to mark it for installation.

Clicking on an application will cycle between actions:

Symbol	Function
	Install
	Repair
	Remove

- 6) If you want, change the installation folder in the **Install To:** field.

- 7) Click **Install**.
- 8) Follow the instructions of the installation program.

Next steps

Start myAttendant for the first time.

4.2 How to Start myAttendant the First Time

Prerequisites

myAttendant is installed on your PC.

You are configured as an Attendant Console in the communication system.

Step by Step

- 1) Click **Start > Program Files > Communication Clients > myPortal**. You will then be presented with the login screen.
- 2) Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
- 3) Enter your current password in the **Password** field. The default password when logging in for the first time is 1234. If you have any questions, please contact the administrator of your communication system.
- 4) In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
- 5) Click **Login**. myPortal for Desktop is started.
- 6) It is probably best to change your password immediately to prevent unauthorized access.

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

- 7) Exit myPortal for Desktop.
- 8) Click **Start > Program Files > Communication Clients > myPortal**. You will then be presented with the login screen.
- 9) Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
- 10) Enter your current password in the **Password** field. The default password when logging in for the first time is 1234. If you have any questions, please contact the administrator of your communication system.
- 11) In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
- 12) Select **myAttendant** in the drop-down list.
- 13) Click **Login**. myAttendant is started.

4.3 How to Start myAttendant

Prerequisites

myAttendant is installed on your PC.

You are configured as an Attendant Console in the communication system.

Step by Step

- 1) Click **Start > Program Files > Communication Clients > myPortal**. You will then be presented with the login screen.
- 2) Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
- 3) Enter your password, which must consist of only digits, in the **Password** field. The maximum number of repeated characters is two and the maximum number of sequential characters is three. The account name (reversed or not) cannot be part of the password. The user is forced to change the default password after the first use. The maximum number of erroneous login attempts is five. The default password when logging in for the first time is 1234. If you have any questions, please contact the administrator of your communication system.

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

- 4) If you want to use myAttendant with an automatic login in the future, enable the **Save Password** check box. The Login window will then no longer be displayed. Note that a normal startup of myPortal for Desktop will subsequently no longer be possible.

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) In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
- 6) Select **myAttendant** in the drop-down list.
- 7) Click **Login**.

NOTICE: When you start myAttendant for the first time, you will be asked to change the password. This prompt is not dis-

played if you have already changed the password via another client application or via the phone menu of the voicemail box.

If you are starting myAttendant after an initial installation, enter the default password **1234** 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 is valid for all UC Suite clients and for accessing your voicemail box via the telephone.

4.4 Closing myAttendant

Generally, myAttendant does not need to be explicitly closed, but logs off automatically when the computer shuts down.

INFO: On 64-bit Microsoft Windows operating systems, it may be necessary to manually close myAttendant before shutting down the PC.

4.5 How to Uninstall myAttendant

Prerequisites

myPortal for Desktop is also no longer required.

Step by Step

1) Close myAttendant.

NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file, which is located in the storage directory of the install files.

2) Select one of the following options:

- Windows XP:

Click in the **Control Panel** on **Software**.

- Windows Vista:

Click in the **Control Panel** on **Programs and Features**.

3) Click on **Edit** in the context menu of the **CommunicationsClients** entry.

4) Click **Modify**.

5) Select the **myPortal for Desktop / myAttendant** feature to be uninstalled.

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

4.6 Automatic Updates

Automatic updates ensure that myAttendant is always kept up-to-date with the latest version.

If myAttendant determines that there is a newer version than the one currently running, a corresponding message will be displayed. The automatic update is performed on exiting myAttendant.

4.6.1 How to Perform Automatic Updates

Prerequisites

Your PC meets the requirements for myAttendant

You have received a message such as: Client update available.

Please wait while the update is done. Please close the following programs to continue the update: [...].

Step by Step

Close the named programs.

Next steps

Restart myAttendant after the automatic update.

5 First Steps

The following important or helpful steps should be performed right at the outset (for detailed instructions, see below).

Selecting the Language

Select the language for the myAttendant user interface.

Assigning Subscribers to User Buttons

Specify which users you want to have displayed on user buttons (with a direct overview of their calls/messages).

5.1 How to Select the User Interface Language

Step by Step

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

Next steps

Exit myAttendant and restart the application.

Related concepts

[User Interface Elements](#) on page 10

5.2 How to Select the Language of the Voicemail Box

Step by Step

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

5.3 How to Record your Name Announcement

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

Step by Step

- 1) Click **Setup**.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.

First Steps

How to Record your Personal Greeting

- 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**.

5.4 How to Record your Personal Greeting

NOTICE: You can also record your personal greeting via the Phone menu of the voicemail box.

Step by Step

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

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

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

5.5 How to Specify your Email Address

Prerequisites

The administrator of your communication system has configured the sending of emails.

Step by Step

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

5.6 How to Configure Function Keys

Step by Step

- 1) Click on **Setup**.
- 2) Click on **myAttendant > Prog. feature key**. In the left column of the following window, you will see the available functions such as **Help, Search, Park**, etc.
- 3) Select the desired function key for each function in the drop-down menu of the middle column.
- 4) Select the desired keys of the numeric keypad for each function in the drop-down menu of the right column.
- 5) Click **Save**.

NOTICE: If you accidentally press a function key or assign a key on the numeric keypad twice, an error message will appear on saving the entries, and you can then correct the invalid entry.

5.7 How to Reset Function Key Assignments

Step by Step

- 1) Click on **Setup**.
- 2) Click on **myAttendant > Prog. feature key**.
- 3) Click the **Reset** button.
- 4) Click **Save**.

5.8 Outlook connectivity

You can connect myAttendant directly to Microsoft Outlook and thus obtain a conveniently integrated calendar.

5.8.1 How to Configure Outlook Connectivity

Prerequisites

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

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > Outlook Connectivity**.
- 3) Select the **Import Outlook Contacts on Startup** check box if you want to use this function.
- 4) Select the check box **Automatically generate calendar appointments from my presence changes** if you want to use this function.
- 5) Select the desired calendar function from the drop-down list. The possible options are: **No Calendar Integration, Outlook Calendar Integration** or **Exchange Calendar Integration**.
- 6) Click **Save**.

6 Unified Communications

Unified Communications is the integration of various communication systems, media, devices and applications within an environment (e.g., IP telephony, site-based and mobile telephony, email, instant messaging, desktop applications, voicemail, fax, conferencing and unified messaging).

Related concepts

[User Interface Elements](#) on page 10

6.1 Presence Status

The Presence status provides information on the availability of internal subscribers. It is indicated in the internal directory and on the User buttons.

The following presence states are possible:

Symbol	Presence status	Availability
	Office Only selectable if the CallMe service is not active. Otherwise, CallMe appears here.	Available at the normal workplace
	CallMe Only selectable if the CallMe service is active. Otherwise, Office appears here.	Available at an alternative workplace
	Meeting	Absent
	Sick	Absent
	Break	Absent
	Gone Out	Absent
	Vacation	Absent
	Lunch	Absent
	Gone Home	Absent

NOTICE: The "sick" presence status may not be available, depending on system settings by the administrator.

Symbol	Presence or connection status
	Subscriber receives a call
	Subscriber is calling
	The subscriber is on the phone
	Subscriber receives or makes a call at or from his or her mobile number
	Subscriber is on the phone using his or her mobile number
	Presence status is not visible
	Phone is not connected

INFO: For subscribers without system telephones (e.g., ISDN or analog), the internal directory does not show any Presence status, 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: The absence status of external subscribers who are using Yahoo or Microsoft Messenger can also be displayed using XMPP.

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

Presence status	Represented as XMPP status
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.

Automatic Reset of the Presence Status

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

Visibility of your Presence Status

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

Screen Pops on Changing the Presence Status

You can have changes to your Presence status indicated by a screen pop.

6.1.1 How to Change the Presence Status of Other Subscribers

Step by Step

- 1) Right-click on the user button of the user, whose presence status you want to change.
- 2) Select **Change Users Status**.
- 3) Select the desired presence/absence status (only possible for internal subscribers).

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

Step by Step

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

- 3) Select one of the following options:
 - If you want to enable automatic resetting of the Presence status to **Office**, select the **Auto back to office** check box.
 - If you want to disable automatic resetting of the Presence status to **Office**, clear **Auto back to office** check box.
- 4) Click **Save**.

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

Step by Step

- 1) Click on **Setup**.
- 2) Click on **Sensitivity > Visibility of your presence status**.
- 3) Choose one the following options in the area:
 - 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**.

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

Step by Step

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

6.2 CallMe Service

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

Inbound Calls

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

Outbound Calls

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

Presence Status

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

Activation

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

- Group
- Redirected telephone

Deactivation

The CallMe service remains active until your Presence status changes.

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

6.2.1 How to Enable the CallMe Service

Step by Step

- 1) Select **Office** in the drop-down list for the Presence status.
- 2) Click on the option **Enable CallMe service**.
- 3) Set the call number of the CallMe destination by one of the following methods:
 - Select one of your additional call numbers from the drop-down list.
 - Enter a phone number in dialable format or in canonical format in the drop-down list.

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

- 4) Click **OK**.

6.3 Status-based Call Forwarding

In this case, the operating mode of myAttendant is controlled by the presence status. The following operating modes are available:

- When I am in a meeting, forward my phone to:
- When I am sick, forward my phone to:
- When I am on a break, forward my phone to:
- When I am out of the office, forward my phone to:
- When I am on vacation, forward my phone to:
- When I am at lunch, forward my phone to:
- When I have gone home, forward my phone to:

If you change the presence status, the communication system activates call forwarding to the destination you specified.

The presence status is displayed at the upper end of the Call Control area.

6.3.1 How to Define Forwarding Destinations

Step by Step

- 1) Click **Setup**.
- 2) Click on **Call Rules > Forwarding Destinations**.
- 3) Select the corresponding **forwarding destination** for the respective absence status:
 - **None**
 - **Voicemails**
 - **Mobile/Cell**
 - **Assistant**
 - **External 1**
 - **External 2**
 - **Home**
- 4) Click **Save**.

6.4 Rule-Based Call Forwarding

Calls can be forwarded on the basis of specific rules or even discarded. You can configure these rules yourself.

6.4.1 How to Create a Call Forwarding Rule

Step by Step

- 1) Click **Setup**.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Click on **New**. The **Rules Wizard** is opened.
- 4) Enter a **Name** for the rule.

- 5) Click **Next**.
- 6) Select the condition for the rule in the next window of the Rules Wizard.
- 7) Click **Next**.
- 8) If required, select an exception for the rule in the next window of the Rules Wizard.
- 9) Click **Finish**. The name of the newly created rule now appears in the Rules Engine.

6.4.2 How to Edit a Call Forwarding Rule

Step by Step

- 1) Click **Setup**.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Mark the desired rule.
- 4) Click on Edit; the Rules Wizard opens, and the rule is displayed.
- 5) Click **Next**.
- 6) Select the condition for the rule in the next window of the Rules Wizard.
- 7) Click **Next**.
- 8) If required, select an exception for the rule in the next window of the Rules Wizard.
- 9) Click **Next**. The edited rule is displayed.
- 10) Click **Finish**.
- 11) Click **Save**.

6.4.3 How to Rename a Call Forwarding Rule

Step by Step

- 1) Click **Setup**.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Mark the desired rule.
- 4) Click on Rename.
- 5) Enter a new name for the rule in the Rename Rule window.
- 6) Click **OK**.
- 7) Click **Save**.

6.4.4 How to Delete a Call Forwarding Rule

Step by Step

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

- 3) Mark the desired rule and click Remove.

INFO: The rule will be immediately deleted, without any additional prompt!

- 4) Click **Save**.

6.4.5 How to Activate a Call Forwarding Rule

Step by Step

- 1) Click **Setup**.
- 2) Click on **Call Rules > Rules Engine**.
- 3) Select the check box in front of the desired rule to enable it.
- 4) Click **Save**.

6.5 Directories

Directories organize your contacts.

The following functionality is supported:

Symbol	Directory
	<p>Personal directory:</p> <p>You can use the personal directory to either add, edit and delete your personal contacts individually or to import your Outlook contacts on starting myAttendant. If you import the Outlook contacts, you cannot edit them in myAttendant.</p>
	<p>Internal Directory</p> <p>Contains internal subscribers and MULAP groups with their Presence status (only system telephones) and their additional phone numbers. When a subscriber is absent, you can see the scheduled time of return in the Date / Time column, provided that subscriber has allowed his or her Presence status to be visible to you.</p> <p>Internal directory contains also groups and virtual stations that are marked with the icon .</p> <p>By activating the Show Users only check box, Internal Directory shows only users with basic license activated, and hides groups and virtual stations.</p>
	<p>External directory:</p> <p>Contains contacts from a corporate directory system and must be configured by the administrator of the communication system.</p>

Symbol Directory	
	<p>External offline directory:</p> <p>Contains contacts from the LDAP corporate directory and must be configured by the administrator of the communication system. The entries are always updated whenever you the directory.</p>
	<p>System directory:</p> <p>Contains all system numbers, UC and non UC users. Non UC users include stations with no UC licenses and virtual stations, like Fax, AutoAttendant.</p>

NOTICE: Phone numbers stored in user settings and directories should be entered in canonical format in order to be reachable both from UC and device.

Access code should not be in the number.

Contact Details

Depending on the directory involved, the List view of 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., Email, XMPP Address, Fax Number, Department, Site, Company.** The width of all columns is variable.

Simple Search

You can search the directories by **First Name, Last Name** or a call number. You can select which directories are to be included in the search. The directories are searched in the order shown in the table above. The search can be conducted using whole words and also with partial search terms such as a part of a station number, for example. The set search options remain in effect for subsequent searches. All search terms used are saved. You can optionally delete the list of search terms used.

Advanced Search

You can selectively search in the **Title, First Name, Last Name, Company, Extension, Company Ph., Business Ph. 1, Business Ph. 2, Home Ph. 1, Home Ph. 2, Mobile Number** and **Email** fields and limit the maximum number of hits.

Sorting

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

Related concepts

[User Interface Elements](#) on page 10

6.5.1 How to Search for Subscribers

You can search both the internal and external directory for subscriber details, such as station number or name.

Step by Step

- 1) Click **Search**.
- 2) Enter the search string, for example, a part of a name.
- 3) Select the directory (internal, external, personal or external offline directory) where you want to run the search by using the **Options** button.
- 4) Enter a search criterion in the search field (name, station number). You can select one of the following Search options:

- If you want to search for a full word, enable the **Match Full Word** check box.

NOTICE: When **Match Full Word** is enabled, the search term must not contain any space.

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

NOTICE: Search terms with spaces only apply to **first name** and **surname**.

- 5) If necessary, click on **Advanced** to switch between simple and advanced searches.
- 6) Click **Start**.

The results are shown on the right-hand side of the window.

Related tasks

[How to Send Instant Messages \(Chat\)](#) on page 91

6.5.2 How to Dial a Station Number from the Internal Directory

Step by Step

- 1) Click on **Internal Directory**
- 2) Double-click on the selected subscriber entry.

6.5.3 How to Sort Internal Subscribers

Step by Step

- 1) Click on **Internal Directory**.
- 2) Click on the column header (LastName, FirstName, Extension etc.) you want to use as the sort criterion for sorting subscribers.

6.5.4 How to Add External Contacts

You can save external subscriber data as contacts in the external directory. This give you direct access to this data.

Step by Step

- 1) Click **External Directory**. A list of all external contacts is displayed.
- 2) Click on the **New** button. An empty input field appears.
- 3) Enter details for the new contact.
- 4) Save the new contact with **Save**.
- 5) Click **Close**.

6.5.5 How to Edit External Contacts

You can edit the details of a contact such as the title, first name, last name, business ph. 1, business ph. 2, mobile/cell and home numbers in the external directory.

Step by Step

- 1) Click on **External Directory**.
- 2) Click on the contact whose details you want to edit.
- 3) Select **Edit** from the menu.
- 4) Make the changes now.
- 5) Click **OK**.
- 6) Click **Close**.

NOTICE: It is also possible to edit an external contact after searching it in the directory, right click on it and click on Edit.

6.5.6 How to Delete External Contacts

INFO: A deleted external contact cannot be restored.

Step by Step

- 1) Click **External Directory**.
- 2) Click on the contact to be deleted.
- 3) Click on the **Remove** button.
- 4) Click **Yes** to confirm the removal.
- 5) Click **Close**.

6.5.7 How to Add a Note for a Station

You can add notes for a subscriber. You can use these notes as reminders. You can view, edit or delete these notes in the Message Center (where they are called LAN messages).

Step by Step

- 1) Right-click on the user button of the subscriber for whom you want to add a note.
- 2) Select **Add Note** with a right mouse click.
- 3) Enter the text.
- 4) Click **OK**.

A letter icon appears on the subscriber's entry in the internal directory.

6.5.8 How to Add or Extend a Note for a Subscriber

Step by Step

- 1) Right-click on the user button of the subscriber, whose note you want to see.
- 2) Select with **LAN Notes**; the LAN Notes window opens.
- 3) Edit or extend the note as required.
- 4) Click **Save**.
- 5) Click **Close**.

6.5.9 How to Delete a Note for a Station

Step by Step

- 1) Right-click on the user button of the subscriber, whose note you want to see.
- 2) Select with **LAN Notes**; the LAN Notes window opens.
- 3) **Remove** the note.
- 4) Click **Save**.
- 5) Click **Close**.

6.5.10 How to Add a Personal Contact

You can save private data in the personal directory. This give you direct access to this data.

Step by Step

- 1) Click on a **Personal Directory**.
- 2) Right-click on an empty user button and select **Add User**.
- 3) Enter the contact data in the **Personal Contact** window. Enter the phone number in canonical format.

- 4) Click **Add**.

6.5.11 How to Edit a Personal Contact

You can edit private data in the personal directory at any time.

Step by Step

- 1) Click on **Personal Directory**.
- 2) Click on the relevant personal contact.
- 3) Click **Edit**.
- 4) Edit the contact data in the **Personal Contact** window.

NOTICE: Bear in mind that the phone number must always be entered in canonical format.

- 5) Click **Save**.

6.5.12 How to Delete a Personal Contact

You can delete private data in the personal directory at any time.

Step by Step

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

6.6 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**
 - Incoming (Leftwards Arrow)
 - Outgoing (Rightwards Arrow)
- **Answered**
- **Internal**

- External
- Inbound
- Outbound

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 the **Call Complete** column are displayed. The width of all columns is variable.

Direction	Meaning
	Inbound
	Outbound

Call Complete	Meaning
	The call was successful or was answered.

Grouping

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

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

Sorting

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

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

Zooming in on an Entry

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

Retention Period

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

You can also delete the entries manually at any time.

The administrator can generally prohibit the deletion of journal entries via the WBM of the communication system (Application Suite-> UC Suite -> General Settings).

Exporting Journal Data

You can export the log data for the current day manually or automatically to a CSV file. The storage location of the CSV file can be freely selected. Once a manual export is completed, a window appears with a link to the generated CSV file containing the exported journal data.

The automatic export is performed:

- whenever the Export button is pressed,
- at every shutdown of the PC,
- at midnight (if the PC is not shut down).

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**.

6.6.1 How to Sort the Journal

Step by Step

- 1) Click **Journal**.
- 2) Click on one of the groups: **Open, All Calls, Missed, Answered, Internal, External, Inbound, Outbound** or **Scheduled**.
- 3) If required, double-click on the triangle on the left of the relevant group to expand the associated Journal entries.
- 4) Click on one of the column titles, e.g., **Last Name**, to sort the Journal entries by this criterion in ascending alphanumeric order.
- 5) If you want to reverse the sort order, click again on column header.

6.6.2 How to Group Journal Entries

Step by Step

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

6.6.3 How to Delete Journal Entries

Step by Step

- 1) Click **Journal**.
- 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) Confirm the following prompt with **Yes**.

6.6.4 How to Change the Retention Period for Journal Entries

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Under **Keep call history for**, enter the time (in days) for which the call history is to be retained.
- 4) Click **Save**.

6.6.5 How to Configure the Journal Export

Use the following steps to

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

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) In the **Journal** area, under **Export path**, click on **Search**.
- 4) Select the desired storage location for the CSV file and click **Save**.
- 5) Enable or disable the automatic export of journal data:
 - If you want to activate the automatic export, select the **Enable export** check box.
 - If you want to deactivate the automatic export, clear the **Enable export** check box.
- 6) Click on **Save**.

6.6.6 How to Export the Journal Manually

Prerequisites

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

Step by Step

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

Once an export is completed, a window appears with a link to the generated CSV file containing the exported journal data.

- 3) Click on **OK** to close the window.

6.6.7 How to Add a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

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

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

6.6.8 How to Edit a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

- 1) Click on the **Journal** tab or in the corresponding window.
- 2) Click on the **Scheduled** group.
- 3) Click on the relevant entry.

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

6.6.9 How to Clear a Scheduled Call

Prerequisites

You are not an agent of the Contact Center.

Step by Step

- 1) Click on the **Journal** tab or in the corresponding window.
- 2) Click on the **Scheduled** group.
- 3) Click on the relevant entry.
- 4) Click on **Remove**, followed by **Yes**.

6.6.10 How to Generate an External Entry from Journal

Step by Step

- 1) Click on the **Journal** tab.
- 2) Right-click on the relevant entry you want to add in the external directory and select **Copy to external**.
- 3) Fill in the fields with the relevant information in the **External Directory** window.
- 4) Click on **Save**.

6.6.11 How to mark a conversation as completed

A conversation is a series of unanswered calls to and from a contact.

A conversation is only valid for a number of days. This number of days is configured by the administrator. After that period of time, a new conversation is opened for the contact in case of a missed call. You can mark manually all journal entries of a conversation as completed.

Step by Step

- 1) Click on the **Journal** tab.
- 2) Locate the journal entry from the user you want to mark as completed and right click on the entry.

3) Click on **Close Conversation** option.

All journal entries of the conversation with the user are marked as completed.

6.7 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Canonical	Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + () / - : ; are allowed.	+49 (89) 7007-98765
Dialable	Exactly as you would dial the call number on the system telephone in your office, always with the trunk access code.	<ul style="list-style-type: none"> • 321 (internal) • 0700798765 (own local network) • 0089700798765 (external local network) • 0004989700798765 (international)

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

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

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

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

6.8 Desktop Dialer

Using the Desktop Dialing function, you can call a selected destination from many applications such as an editor or an Outlook e-mail.

You can use either clipboard dialing, or desktop dialing. Both methods dial the number which is selected but the handling regarding the tagging of the number is different. Clipboard dialing is the preferred method.

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

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

The tagged number is dialed after a specified time period. Within this time period, you can still cancel the dialing. If you change the default value of 3s to 0s, the dialing will occur immediately. Over the time more and more applications have become technically incompatible with the Desktop Dialing method. If the Desktop Dialing method does not work any longer e.g. after an update of the operating system and/or application the Clipboard Dialing method has to be used instead.

NOTICE: The Desktop Dialing method is not supported by Apple Mac OS in general. In this case Clipboard dialing has to be used.

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

Prerequisites

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

Step by Step

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

- If you want to use the Clipboard Dialer, tag the number to be dialed by pressing the right mouse button and drag the mouse pointer over it. The tagged number is highlighted at the display. Afterwards press the configured key combination (e.g. CTRL + SHIFT + D) at the keyboard.
- If you want to use the Desktop Dialer, tag the number to be dialed by pressing the right mouse button and drag the mouse pointer over it while pressing the configured (CTRL) key. A green line appears which indicates the tagged range. After releasing the right mouse button the tagged number is dialed.

NOTICE: If you want to cancel the dialing of a number, click within five seconds on the Close symbol in the screen pop up. If the string consists of characters, the search window opens and displays the existing names that match the string in the directories. Clicking on an entry with the right mouse button opens a

context menu with different phone numbers; you can call directly with the left mouse button.

6.8.2 How to Configure the Desktop Dialer and Clipboard Dialer

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Hot Keys**.
- 3) If you want to use the Desktop Dialer, proceed as follow:
 - a) Select the **Hot Key Enabled** check box for **via Desktop**.
 - b) If you want to change the key/mouse combination for the Desktop Dialer, click in the rectangular box for **via Desktop**. Hold down one or more of the desired *Shift*, *Ctrl* and *Alt* keys and then click the additional mouse button desired.
- 4) If you want to use the Clipboard Dialer, proceed as follow:
 - a) Select the **Hot Key Enabled** check box for **via Clipboard**.
 - b) If you want to change the key combination for the Clipboard Dialer, click in the rectangular box for **via Clipboard**. Hold down one or more of the desired *Shift*, *Ctrl* and *Alt* keys and then press the additional key desired for the key combination.
- 5) In the **Desktop Dial Timeout (seconds)** field, change the preset value (default 3) if required. Within the time period specified here, you can still cancel the dialing. At 0 seconds, dialing occurs immediately.
- 6) Click on **Save**.

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

6.8.3 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 **Setup**.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Select one of the following options:
 - If you want to change the key combination for the Desktop Dialer, click in the rectangular box for **via Desktop**.
 - If you want to change the key combination for the Clipboard Dialer, click in the rectangular box for **via Clipboard**.

- 4) Select one of the following options:
 - If you want to change the key/mouse combination for the Desktop Dialer, hold down one or more of the `Shift`, `Ctrl` and `Alt` keys and then click the additional mouse button desired.
 - If you want to change the key combination for the Clipboard Dialer, hold down one or more of the `Shift`, `Ctrl` and `Alt` keys and then press the additional key desired for the key combination.
- 5) Click on **Save**.

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

6.9 Screen Pops

Screen pops (also called tray pops or pop-up windows) offer you convenient ways to respond to incoming calls or new voicemails with a single click, for example.

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

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

You can define the following settings for the screen pops:

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

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

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

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

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

Screen Pop on Inbound Calls

The following functions are available:

Symbol		Function
Classic	New	
		Answer
		Forwarding Forwards the call to the voicemail box
		Answer with message Email to the caller. Example: You cannot accept the call and want to notify the caller (e.g., will "call right back"). The email recipient (To:) field is prefilled with the email address of the caller, provided the address could be determined from a contact. In addition, you can define a text that is automatically displayed as the email text via Set-up > My Preferences > Miscellaneous > Answer with message .
		Caller notice Email to a subscriber to forward the data of the caller to that subscriber. The email recipient (To... :) field is not prefilled. The contact data of the caller is transferred to the email text. Not possible with OpenScape Office.
		Instant Messaging Message to the caller.
		Schedule Callback Configure the date and time as well as an info text to call the caller again.

Screen Pop During the Call

The following functions are available:

Symbol		Function
Classic	New	
		Hang Up

Symbol		Function
Classic	New	
		<p>Transfer</p> <p>Transfers the call after the input of a number to be dialed or a name to be found.</p>
		<p>Hold</p> <p>The communication partner is placed on hold so that you can consult with someone in the room or call some other subscriber. The caller on hold cannot hear your conversations.</p>
		<p>Record (if enabled in the system)</p>
		<p>Conferencing</p> <p>The call can be expanded to an ad-hoc conference and further participants can be added.</p> <p>Not possible with OpenScape Office.</p>
		<p>Answer with message</p> <p>Email to the communication partner.</p> <p>The email recipient (To:) field is prefilled with the email address of the communication partner, provided the address could be determined from a contact. In addition, you can define a text that is automatically displayed as the email text via Setup > My Preferences > Miscellaneous > Answer with message.</p>
		<p>Caller notice</p> <p>Email to a subscriber to forward the data of the communication partner to that subscriber.</p> <p>Example: You have picked up the call of a colleague and want to notify the colleague.</p> <p>The email recipient (To... :) field is not prefilled. The contact data of the communication partner is transferred to the email text.</p> <p>Not possible with OpenScape Office.</p>
		<p>Instant Messaging</p> <p>Message to the communication partner.</p>
		<p>Schedule Callback</p> <p>Configure the date and time as well as an info text to call the communication partner again.</p>

Symbol		Function
Classic	New	
		<p>Start Collaboration</p> <p>Starts the separate Web Collaboration product for access to features such as desktop and application sharing, file sharing, and video chat.</p>
 	 	<p>Transfer / Search</p> <p>If a phone number is entered in the field in front of the arrow, clicking on the arrow will transfer the call to that phone number.</p> <p>When the initial letters of a name are entered in the field in front of the arrow, the arrow changes to a magnifying glass. Clicking on the magnifying glass opens the Search, and the results for the entered letters are displayed.</p>

Screen Pops on Outbound Calls

The following functions are available:

Symbol		Function
Classic	New	
		<p>Hang Up</p>
		<p>Answer with message</p> <p>Email to the called party.</p> <p>Example: You do not reach the called party and want to notify him or her by email about some relevant issue.</p> <p>The email recipient (To:) field is prefilled with the email address of the called party, provided the address could be determined from a contact. In addition, you can define a text that is automatically displayed as the email text via Setup > My Preferences > Miscellaneous > Answer with message.</p>

Symbol		Function
Classic	New	
		<p>Caller notice</p> <p>Email to a subscriber to forward the data of the called party to that subscriber.</p> <p>Example: You do not reach the called party and want to notify a colleague about this.</p> <p>The email recipient (To... :) field is not prefilled. The contact data of the called party is transferred to the email text.</p> <p>Not possible with OpenScape Office.</p>
		<p>Instant Messaging</p> <p>Message to the called party.</p>
		<p>Schedule Callback</p> <p>Configure the date and time as well as an info text to call the called party again.</p>

Screen Pop for New Voicemails

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

Symbol		Function
Classic	New	
		Play
		Play through speakers
not installed		Save
not installed		Forward VoiceMail

Screen Pop for new Fax Message

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

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

Screen Pop after Sending a Fax Message

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

Symbol		Function
Classic	New	
		View

Screen Pop with Overview on Starting the UC Client

On starting the UC client, the screen pop displays an overview (summary) with the number of voice and fax messages received and the open calls. The following functions are available:

Symbol		Function
Classic	New	
		Voicemails: number
		Fax messages: number
		Open calls: number

You can jump to the specific details by clicking on the respective symbols.

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

Screen Pop on Overdue Presence Status

The screen pop is displayed if your presence status is not **Office**, and the scheduled time of your return has passed. If you close the screen pop, it will

reappear after one hour if your presence status is still overdue. The following functions are available:

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

6.9.1 How to Enable or Disable Screen Pops on Inbound Calls

Step by Step

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

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

Step by Step

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

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

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Notifications**.

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

6.9.4 How to Enable or Disable Screen Pops on Outbound Calls

Step by Step

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

6.9.5 How to Enable or Disable Screen Pops for New Voicemails

Step by Step

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

6.9.6 How to Enable or Disable the Automatic myAttendant Screen Pop on Receiving a New Voicemail

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Notifications**.
- 3) Select one of the following options:
 - If you want myAttendant to appear automatically in the foreground on receiving a voicemail, select the check box **Screenpop the messages window when I receive a new voicemail message**.
 - If you do not want myAttendant to appear automatically in the foreground on receiving a voicemail, clear the check box **Screenpop the messages window when I receive a new voicemail message**.
- 4) Click **Save**.

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

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

Prerequisites

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

Step by Step

- 1) Click on the **Setup** symbol.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Enter the desired hot key in the **Display Overview Traypop** field, and then select the **Hot Key Enable** check box next to it.

The hot key CTRL+L is preselected by default. If you want to use a different hotkey you will have to press the modifiers and the hot key, e.g. SHIFT+F1.

- 4) Click on **Save**.

When you press the hot key, the overview traypop is displayed.

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

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Appearance**.
- 3) Select one of the following options:
 - If you want to enable the new interface for screen pops, clear the **Use classic traypop** check box.
 - If you want to enable the classic interface for screen pops, select the **Use classic traypop** check box.
- 4) Click **Save**.

6.10 Conferences

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

Types of Conferences

The different types of conferences offer the following features:

	Ad-hoc	Scheduled	Permanent	Open
Usage	<ul style="list-style-type: none">• Phone-controlled• Application-controlled	<ul style="list-style-type: none">• Application-controlled	<ul style="list-style-type: none">• Application-controlled	<ul style="list-style-type: none">• Application-controlled

	Ad-hoc	Scheduled	Permanent	Open
Start	<ul style="list-style-type: none"> Manually 	<ul style="list-style-type: none"> Scheduled 	<ul style="list-style-type: none"> Manually 	<ul style="list-style-type: none"> Manually
End	<ul style="list-style-type: none"> Manually 	<ul style="list-style-type: none"> Scheduled Manually 	<ul style="list-style-type: none"> Manually 	<ul style="list-style-type: none"> Manually
Duration of the reservation of conference channels	<ul style="list-style-type: none"> 1 hour by default 	<ul style="list-style-type: none"> Scheduled 	<ul style="list-style-type: none"> Until the deactivation or deletion of the conference 	<ul style="list-style-type: none"> Until the deactivation or deletion of the conference
Extension	-	x	-	-
Recurrence	<ul style="list-style-type: none"> Manually 	<ul style="list-style-type: none"> Scheduled 	-	-
Direction of connection setup from the viewpoint of the system	<ul style="list-style-type: none"> Outbound 	<ul style="list-style-type: none"> Outbound Inbound 	<ul style="list-style-type: none"> Inbound 	<ul style="list-style-type: none"> Inbound
Set of participants	<ul style="list-style-type: none"> Fixed 	<ul style="list-style-type: none"> Fixed 	<ul style="list-style-type: none"> Fixed 	<ul style="list-style-type: none"> Open
Authentication of conference participants	-	<ul style="list-style-type: none"> Individual conference ID (optional) Password (optional) 	<ul style="list-style-type: none"> Individual conference ID (optional) Password (optional) 	<ul style="list-style-type: none"> Shared conference ID (optional)
Recording, if enabled in the system	<ul style="list-style-type: none"> Manually (On Demand Conference Recording) 	<ul style="list-style-type: none"> Automatically (Auto Conference Recording) Manually (On Demand Conference Recording) 	<ul style="list-style-type: none"> Automatically (Auto Conference Recording) Manually (On Demand Conference Recording) 	<ul style="list-style-type: none"> Automatically (Auto Conference Recording) Manually (On Demand Conference Recording)
Invitation by Email with:	<ul style="list-style-type: none"> Conference Name Link for Web Collaboration session 	<ul style="list-style-type: none"> Conference Name Dial-in number Conference ID Password Date and time of the start and end of the conference Link for Web Collaboration session 	<ul style="list-style-type: none"> Conference Name Dial-in number Conference ID Password Link for Web Collaboration session 	<ul style="list-style-type: none"> Conference Name Dial-in number Conference ID Password
Outlook appointment as an email attachment (.ics)	-	x	-	-

Application-controlled conference

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

Phone-controlled Conference

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

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

Virtual conference room

The virtual conference room enables you to follow a conference and its participants in a graphical environment and to also manage the conference if you are the conference controller. The virtual conference room shows the phone number, name and presence status to the conference participants, where available. The virtual conference room is only available in the classic user interface. Corresponding functions are available in the workspace of the modern user interface.

Symbol	Meaning
	Conference controller
	Communication system – Conference is stopped
	Communication system – Conference is being started
	Communication system – Conference has started
 alternately with 	Communication system – Conference is being recorded

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

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

- **Outbound:**

The communication system calls the participant. Note that this applies to internal participants only if the subscriber has not enabled forwarding to voice-mail.

- **Inbound:**

The conference participants or conference controller dials into the conference using the dial-in number.

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

Dial-in number

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

Conference Controller

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

- Add or remove conference participants:

Removed participants do not remain in the conference.

- Disconnect or reconnect conference participants:

Disconnected participants remain in the conference. When the conference controller is connecting a conference participant, all other conference partic-

Participants remain connected to one another. If there is only one participant connected, that participant will hear music on hold.

- Record a conference

Conferences in which a participant is on hold cannot be recorded.

- Set another internal participant on the same node as the conference controller
- Leave the conference without ending it:

The longest attending internal participant of the conference automatically becomes the conference controller.

- End the conference

Conference tone

When connecting or disconnecting a conference participant, the other participants hear the conference tone. The administrator can activate or deactivate the conference tone.

Conference Participants

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

Automatic Termination without a Conference Controller

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

Notification by Email and Outlook Appointment

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

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

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

NOTICE: For email notifications, no return acknowledgments are obtained for failed deliveries or absence messages, since the emails are sent directly from the system due to the integration of Web Collaboration.

Further Calls

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

Park, Toggle/Connect

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

Call Charges

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

Video Monitoring

Any ongoing video transmission must be terminated before participating in a conference.

6.10.1 Ad-hoc Conference

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

Starting the Conference

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

Recording the Conference

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

Ending the Conference

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

Expanding a Call to a Conference

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

This feature is not available with OpenScape Office.

6.10.1.1 How to Configure and Initiate an Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

Step by Step

- 1) Click **Conference**.
- 2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
- 3) Add any conference participants as needed; see [How to Add Conference Participants](#) on page 58 for details.
- 4) Click in the **AdHoc Conference** window on **Conference Room > Start**. The system now calls you and all other conference participants.
- 5) If you want to use OpenScape Web Collaboration in this conference, click on **Collaboration > Start Collaboration**.
- 6) If you want to repeat the ad-hoc conference with the same set of participants later, you can now save it. To do this:
 - a) Click on **Conference Room > Save As**.
 - b) Enter the **Conference Name**.
 - c) Click **Save**.

6.10.1.2 How to Display your Own Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

You have saved an ad-hoc conference.

Step by Step

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

6.10.1.3 How to Add Conference Participants

Prerequisites

You are working with the classic user interface.

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

Step by Step

Add the conference participants by one of the following methods:

- From the Favorites list:

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

- From a directory:

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

- From the results of a search:

Search the directories (see [How to Search for Subscribers](#) on page 32) and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.

- Any participant:

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

6.10.1.4 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.

6.10.1.5 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**.

6.10.1.6 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.

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

Prerequisites

You are working with the classic user interface.

You are conducting a call.

The screen pop (pop-up window) for incoming or outgoing calls is enabled.

You have a UC Suite Conference license.

Step by Step

- 1) During the call, click in the **Inbound Call** or **Outbound Call to ...** screen pop on the **Conference** symbol. The **AdHoc Conference** window opens with you set as the conference controller.
- 2) Add the conference participants by one of the following methods:
 - From the Favorites list:

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

Using the mouse, drag one of the participants from the **Directories** into the **AdHoc Conference** window. Select a station number from the **Num-**

ber To Contact drop-down list in the **Select Participant Contact Number** window and click **OK**.

- From the results of a search:

Search the directories (see [How to Search for Subscribers](#) on page 32) and then drag any of the participants from the listed results into the **AdHoc Conference** window. Select a station number from the **Number To Contact** drop-down list in the **Select Participant Contact Number** window and click **OK**.

- Any participant:

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

6.10.1.8 How to Specify another Conference Controller

Prerequisites

You are working with the classic user interface.

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

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

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

Step by Step

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

6.10.1.9 How to End an Ad-hoc or Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

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

Step by Step

- 1) Click on **Conference Room > Stop**.

- 2) Under **End In**, enter the waiting time in seconds until the conference is to be terminated and then click **OK**.

6.10.1.10 How to Repeat an Ad-hoc Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

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

6.10.1.11 How to Delete an Ad-hoc Conference

Prerequisites

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

Step by Step

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

6.10.2 Scheduled Conference

A scheduled conference (Meet-Me conference) occurs at some point in the future with a defined duration and may be set up to recur repeatedly at the same time.

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

Options for Configuring a Scheduled Conference

The initiator of the conference can define the following properties:

- Start time and End time
- Recurring conference
- Presence of conference controller required

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

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

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

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

Starting the Conference

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

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

Dialing In

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

Forcing Authentication with the Star (*) Key

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

Extending the Conference

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

conference controller can extend the conference in myPortal for Outlook at any time.

Recording the Conference

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

Ending the Conference

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

6.10.2.1 How to Configure a Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

- 1) Click **Conference**.
- 2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
- 3) Add any conference participants as needed; see [How to Add Conference Participants](#) on page 58 for details.
- 4) If you want to change the direction of the connection setup for a conference participant, proceed in the following steps:
 - a) Click in the context menu of the relevant conference participant on **Properties**.
 - b) Under **Direction**, click on **Outbound** or **Inbound** to change the direction.
- 5) In the **AdHoc Conference** window, click on **File > Save**.
- 6) Enter the **Conference Name**.
- 7) Enter a **Start Date**.
- 8) Enter a **Start Time**.
- 9) Enter the **End Time**.
- 10) If the conference is to occur repeatedly, select the **Recurring Conference** check box.
 - a) Select an **End Date** for the conference series.
 - b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select any additional options from the details on the right-hand side.

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

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

- 20) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
- 21) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
- 22) If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.

- 23) If you want to add some introductory text to the invitation email, enter this in the **Notes**.
- 24) Click **Save**.
- 25) Click **Send to all**. The invitation emails will now be sent.

6.10.2.2 How to Display your Own Scheduled Conference

Prerequisites

You are working with the classic user interface.

Step by Step

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

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

Prerequisites

You are working with the classic user interface.

You are the conference controller.

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

Step by Step

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

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

Prerequisites

You are working with the classic user interface.

You are the conference controller.

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

Step by Step

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

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

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

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

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

Prerequisites

You are working with the classic user interface.

Step by Step

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

6.10.2.7 How to Extend a Scheduled Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

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

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

6.10.2.8 How to Reschedule a Scheduled Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

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

- 11) Click on **Save**.
- 12) Click on **Close**.

6.10.2.9 How to Delete a Scheduled or Open Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

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

6.10.2.10 How to Reschedule a Conference Appointment for a Conference Series

Prerequisites

You are working with the classic user interface.

You are the conference controller of the scheduled conference.

Step by Step

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

6.10.2.11 How to Delete a Conference Appointment for a Conference Series

Prerequisites

You are working with the classic user interface.

You are the conference controller of the scheduled conference.

Step by Step

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

6.10.3 Permanent Conference

A permanent conference is not subject to time restrictions. The conference participants can dial in at any time.

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

Options for Configuring a Scheduled Conference

The initiator of the conference can define the following properties:

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

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

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

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

Starting the Conference

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

Dialing In

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

Recording the Conference

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

6.10.3.1 How to Configure a Permanent Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

- 1) Click **Conference**.
- 2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
- 3) Add any conference participants as needed; see [How to Add Conference Participants](#) on page 58 for details.
- 4) In the **AdHoc Conference** window, click on **File > Save**.
- 5) Enter the **Conference Name**.
- 6) Click **Advanced**.
- 7) Select one of the following options in the **Conference Type** drop-down list:
 - If you want to mandate the authentication of conference participants using passwords, select **Permanent Conference**.
 - If you want to waive the authentication requirement for the conference participants using passwords, select **Permanent Conference (No Password)**.
- 8) Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
- 9) Enable the check box **This conference is active**.

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

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

- 11) If you want to use Web Collaboration concurrently with this conference, select the **Automatically start phone conference with web collaboration** check box.
- 12) If you want the system to automatically record the conference, select the **Automatically record this conference** check box.
- 13) If you want the email invitations to be sent automatically to the conference participants, select the check box **Automatically send email invitation to conference participants**.
- 14) If you want to add some introductory text to the invitation email, enter this in the **Notes**.
- 15) Click **Save**.
- 16) Click **Send to all**. The invitation emails will now be sent.

6.10.3.2 How to Display your Own Permanent or Open Conference

Prerequisites

You are working with the classic user interface.

Step by Step

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

6.10.3.3 How to Delete a Permanent Conference

Prerequisites

You are working with the classic user interface.

You are the conference controller.

Step by Step

- 1) Click **Conference**.
- 2) Click **Manage my conferences**.
- 3) Click on the **My Conferences** tab.

- 4) Click on the relevant conference under **Conference Name**.
- 5) Click on **Remove**, followed by **Close**.

6.10.4 Open Conference

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

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

Options for Configuring an Open Conference

The initiator of the conference can define the following properties:

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

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

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

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

Starting the Conference

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

Dialing In

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

Recording the Conference

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

6.10.4.1 How to Configure an Open Conference

Prerequisites

You are working with the classic user interface.

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

Step by Step

- 1) Click **Conference**.
- 2) Click **AdHoc Conference**. The **AdHoc Conference** window opens with you set as the conference controller.
- 3) In the **AdHoc Conference** window, click on **File > Save**.
- 4) Enter the **Conference Name**.
- 5) Enter a **Start Date**.
- 6) Enter a **Start Time**.
- 7) Enter the **End Time**.
- 8) If the conference is to occur repeatedly, click on **Recurring Conference**.
 - a) Select an **End Date** for the conference series.
 - b) Click on either **Daily Recurrence**, **Weekly Recurrence** or **Monthly Recurrence** and then select the additional options desired for it in the details.
- 9) If you want to delete a conference appointment time for a conference series, perform the following steps:
 - a) Click on **Exceptions**.
 - b) Click **Add**.
 - c) Select the relevant date in the drop-down list.
 - d) Click on **Remove this recurrence**.
 - e) Click **OK**.
 - f) Click on **Cancel**.
- 10) If you want to reschedule a conference appointment for a conference series, perform the following steps:
 - a) Click on **Exceptions**.
 - b) Click **Add**.
 - c) Select the relevant date in the drop-down list.
 - d) Click on **Reschedule this recurrence**.
 - e) Select a **New scheduled date**.
 - f) Select a new **Start Time**.
 - g) Click on **OK**.
 - h) Click **Cancel**.
- 11) Click **OK**.
- 12) Click **Advanced**.
- 13) Select the item **Open Conference** in the **Conference Type** drop-down list.
- 14) Select the desired **Conference Language** for the announcements and the invitations by email (by default, this is the language the voicemail box).
- 15) Enable the check box **This conference is active**.
- 16) If you want to force the conference participants to authenticate by pressing the * (star) key, select the check box **Force called participant to enter "*" (star) to join the conference**.

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

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

6.11 Web Collaboration

The UC PC clients myPortal for Desktop (Windows) and myPortal for Outlook support the convenient integration of the separate product OpenScape Web Collaboration for simultaneous multi-media collaboration during phone calls and conferences. This provides quick access to functions such as desktop and application sharing, file sharing, co-browsing, whiteboarding, URL push, IM chat and video chat with multiple participants.

Web collaboration can be started by a subscriber during a phone call via the pop-up window of the UC PC client or by the conference controller of an active conference from within the conference. This opens the web collaboration session. A local installation of Web Collaboration on the UC PC client is not required. If an email program is available on the UC PC client, an email with the link to the web collaboration client can be sent to the communication partners. Detailed information on web collaboration can be found in the Web Collaboration product documentation.

When creating or editing a conference, the conference controller can also schedule a web collaboration session. On deleting or ending a conference, the associated web collaboration session is automatically deleted as well.

NOTICE: In order to enable UC PC clients to start web collaboration automatically, proxy authentication must be disabled whenever the UC PC clients access the Internet via a proxy server.

Supported Types of Connections

The web collaboration integration supports phone calls and phone-controlled conferences as well as the following types of application-controlled conferences:

- Ad-hoc conference
- Scheduled conference
- Permanent conference

Integration of Web Collaboration

For the integration of Web Collaboration, the address of the Web Collaboration server must be known to the communication system. The vendor offers the web collaboration server as a service on the Internet (Public Server). Alternatively, it may also be possible to use a Custom Server located on the customer's own

network or with a partner. If the server is on the customer's own network, it is usually addressed by the communication system on TCP port 5004 using http. In the case of a hosted solution on the Internet (Public Server), a secure https connection is used instead, since the license number and password are transmitted over this connection. By default, TCP port 5100 is used for this purpose.

NOTICE: In order to use web collaboration, the communication system requires an Internet connection (default router and DNS server). Connections via proxy are not supported.

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

NOTICE: Users working under a MAC OS must close the alert dialog for the terminated session manually after completion of a web collaboration session.

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

Instant Messaging and Web Collaboration

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

6.11.1 How to Start a Web Collaboration Session

Prerequisites

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

An email program is installed on the client PC.

Screen pops for inbound and outbound calls have been activated.

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

Step by Step

- 1) Click on the **Start Collaboration** symbol in the **Inbound Call** screen pop or the **Outbound Call to ...** screen pop.

The web collaboration session (fastviewer) is started. In addition, the email program opens, and an email with a link to the web collaboration client is created.

NOTICE: The email body which includes the invitation to the web collaboration is default and can not be changed.

- 2) Add the email address(es) and send the email.
- 3) As soon as a communication partner launches the Web Collaboration client, he or she is added to the web collaboration session.

6.11.2 How to End a Web Collaboration Session

Prerequisites

Screen pops for inbound and outbound calls have been activated.

You are currently conducting a call or participating in a conference.

A web collaboration session has been started.

Step by Step

Click on the **Stop Collaboration** symbol in the **Inbound Call** screen pop or the **Outbound Call to ...** screen pop.

The web collaboration session (fastviewer) is started. In addition, the email program opens, and an email with a link to the web collaboration client is created.

NOTICE: The email body which includes the invitation to the web collaboration is default and can not be changed.

6.12 Voice and fax messages

The Voicemail and Fax services integrated in the system enable subscribers to receive and manage voicemails and fax messages via myPortal for Desktop and myPortal for Outlook. Fax messages can be sent by subscribers using Fax Printer.

6.12.1 Voicemail Box

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

You can view or edit the personal 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. The system performs the automatic level control and normalization needed to meet the "USA / TIA 968 Signal Power Limitations" requirements.

NOTICE: In order to enable callers to reach your voicemail box on **Busy** and **No Answer**, the administrator must set up call forwarding to your voicemail box. Alternatively, you can also do this yourself by setting up a "call diversion after time" on your phone.

Determining the Call Number of the Voicemail Box

You can determine under which extension you can reach the voicemail box from any phone to listen to your voicemails or change your Presence status, for example.

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 when no presence status is enabled (status **Office** or **CallMe**). For example, on reaching your voicemail box, the caller would hear a message such as, "Unfortunately, I cannot take your call at the moment ...".

- Personal greeting for **Busy**:

This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) on reaching your voicemail box when your line is busy. For example: "I am currently on the phone and unable to take your call ..." If no personal greeting for **Busy** has been recorded, callers will hear your general personal greeting.

- Personal greeting for **No Answer**:

This announcement is heard by callers in default mode (i.e., when no custom profiles of the personal AutoAttendant are enabled) when their calls are forwarded to your voicemail box manually or on no answer after a specific amount of time. For example: "I am unfortunately unable to take your call at this moment ..." If you have not recorded any personal greeting for **No Answer**, callers will hear your general personal greeting.

- Personal announcements for custom profiles of the personal AutoAttendant:

These announcements are not used by the voicemail box in default mode, but only in conjunction with the personal AutoAttendant.

NOTICE: Before using announcements or music from other sources, make sure that you do not infringe on any copyrights.

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

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

Profile	Name announcement	Announcement of your Presence Status	Personal greeting
Busy	-	-	for Busy (if not recorded: general)
No answer	-	-	for No Answer (if not recorded: general)
Meeting	x (if you have enabled the announcement of your Presence status for the caller involved)	x (if you have enabled the announcement of your Presence status for the caller involved)	general
Sick			
Break			
Gone Out			
Vacation			
Lunch			
Gone Home			
Do Not Disturb	-	-	general

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

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

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

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

Central AutoAttendant

The central AutoAttendant enables the administrator of your communication system to offer callers time-based choices to forward their calls to numbers he or she has defined or to your voicemail box. As with the personal AutoAtten-

dant, callers signal their choices by entering digits at the phone. Due to the central AutoAttendant, further announcements may follow those described above.

Announcement of your Presence Status

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

Retrieving your Voicemail through the Attendant

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

Bypassing the Password Prompt

If you call the voicemail box from one of your additional phone numbers, the password prompt can be bypassed if configured so by the system administrator. This setting also applies to the phone notification service of the voicemail box.

Language of the Voicemail Box

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

6.12.1.1 How to Determine the Call Number for your Voicemail Box

Step by Step

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

6.12.1.2 How to Select Recording or Announcement Mode

Step by Step

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

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

- 4) Click **Save**.

Related tasks

[How to Edit a Profile for the Personal AutoAttendant](#) on page 108

6.12.1.3 How to Record an Announcement

Step by Step

- 1) Click **Setup**.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.
- 4) Click on the announcement with the desired designation in the list of announcements.
- 5) Click **Record**. The voicemail box will now call you on your phone.
- 6) Accept the call from the voicemail box.
- 7) Speak out the text of your announcement after the tone.

INFO: If you are using announcements or music from other sources, make sure that you do not infringe on any copyrights.

- 8) Click **Stop**.
- 9) If you want to listen to the announcement on the phone, click on **Play**. To exit the playback loop, click on **Stop**.
- 10) If you want to record the announcement again, click on **Record** again.
- 11) Click **Save**.

6.12.1.4 How to Import an Announcement

Prerequisites

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

INFO: Before using announcements or music, make sure that you do not infringe on any copyrights.

Step by Step

- 1) Click **Setup**.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.
- 4) Click **Upload**.
- 5) Select the desired file and click **Open**.
- 6) Click on **OK** in the **Warning!!!** window.
- 7) Click **OK**.

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

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

6.12.1.5 How to Delete an Announcement

Step by Step

- 1) Click **Setup**.
- 2) Click **Profiles** and then on any profile.
- 3) Click **Record**.
- 4) Click on the announcement with the desired designation in the list of announcements.
- 5) Click **Remove**.
- 6) Click on **Close**, followed by **Save**.

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

Step by Step

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

6.12.1.7 How to Enable or Disable the Announcement of your Presence Status for Specific Callers

Prerequisites

In order to disable the announcement of your Presence status for a specific number, this number must be transmitted with the call.

Step by Step

- 1) Click on **Setup**.
- 2) Click on **Sensitivity > VoiceMail Presence**.

3) Select one of the following options:

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

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

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

4) Click on **Save**.

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

Step by Step

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

6.12.1.9 How to Select the Language of the Voicemail Box

Step by Step

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

6.12.2 Managing Voicemail

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

Folders for Voicemail

myPortal for Desktop organizes voice messages in the following folders:

- **Inbox**
- **Played**

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

Displaying Voicemail Messages

The following symbols identify different types of voicemail:

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

The List view of voicemails shows the following details:

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

For recorded conferences: conference name, if available; otherwise, Last Name of the second conference participant, if available

- **First Name**, if available
- **Company**, if available
- **Priority**

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

- **Duration**

Retention Period for Voicemail

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

Voicemail for Groups

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

Listening to Voicemail

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

Calling the Sender of a Voicemail

You can call the sender of a voice message.

Forwarding a Voice Message

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

Moving a Voice Message

You can move a voice message to another folder.

Saving a Voice Message as a File

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

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

6.12.2.1 How to Listen to a Voice Message on the Phone

Prerequisites

Your Presence status is **Office** or **CallMe**.

Step by Step

- 1) Click on the **Voicemail** tab or in the corresponding window.
- 2) Click on the desired folder, e.g., **Inbox**.
- 3) Click on the desired voicemail.
- 4) Select one of the following options:
 - Classic user interface:
Click on **Play Message > Through Phone** in the context menu.
 - Modern user interface:
Click on the **Play through phone** symbol.

Next steps

Accept the call from the voicemail box.

6.12.2.2 How to Listen to a Voice Message on the PC

Prerequisites

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

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

Step by Step

- 1) Click on the **Voicemail** tab or in the corresponding window.
- 2) Click on the desired folder, e.g., **Inbox**.
- 3) Click on the desired voicemail.
- 4) Select one of the following options:
 - Classic user interface:
Click on **Play Message > Through Speakers** in the context menu.
 - Modern user interface:
Click on the **Play through speakers** symbol.
- 5) In the screen pop, click on the **Play** symbol.

6.12.2.3 How to Call back the Sender of a Voice Message

Prerequisites

The caller's phone number has been transmitted.

Step by Step

- 1) Click on the **Voicemail** tab or in the corresponding window.
- 2) Click on the desired folder, e.g., **Played**.
- 3) Click on the desired voicemail.
- 4) Select one of the following options:
 - Classic user interface:
In the context menu, click **Dial**, and if the context menu offers several phone numbers for selection, click on the desired number.
 - Modern user interface:
Click on the **Call Sender** icon, and if several phone numbers are offered for selection, click on the desired number.

6.12.2.4 How to Forward a Voicemail Message

Step by Step

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

6.12.2.5 How to Move a Voice Message

Step by Step

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

6.12.2.6 How to Save a Voice Message as a WAV File

Prerequisites

You are working with the classic user interface.

Step by Step

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

6.12.2.7 How to Sort Voice Messages

Prerequisites

You are working with the classic user interface.

Step by Step

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

6.12.2.8 How to Delete a Voicemail

Step by Step

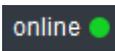
- 1) Click on the **Voicemail** tab or in the corresponding window.
- 2) Click on one of the folders: **Inbox**, **Played** or **Saved**.
- 3) Select one of the following options:
 - Click on the desired voicemail.
 - Mark the desired voicemails (Classic User Interface).
- 4) Select **Move Message to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

6.13 Instant Messaging

Instant Messaging enables you to chat with other peers. The communication system supports instant messaging with users of UC Suite as well as external communication partners via XMPP and multi-user chats (or a combination of both).

Sent and received instant messages are presented to you and your communication partners as a dialog.

The status of the relevant subscriber is indicated in the right top corner of the **Instant Messaging** window.

Symbol	Status
	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 XMPP communication partner (e.g., a Google Talk user).

Multi-user chat

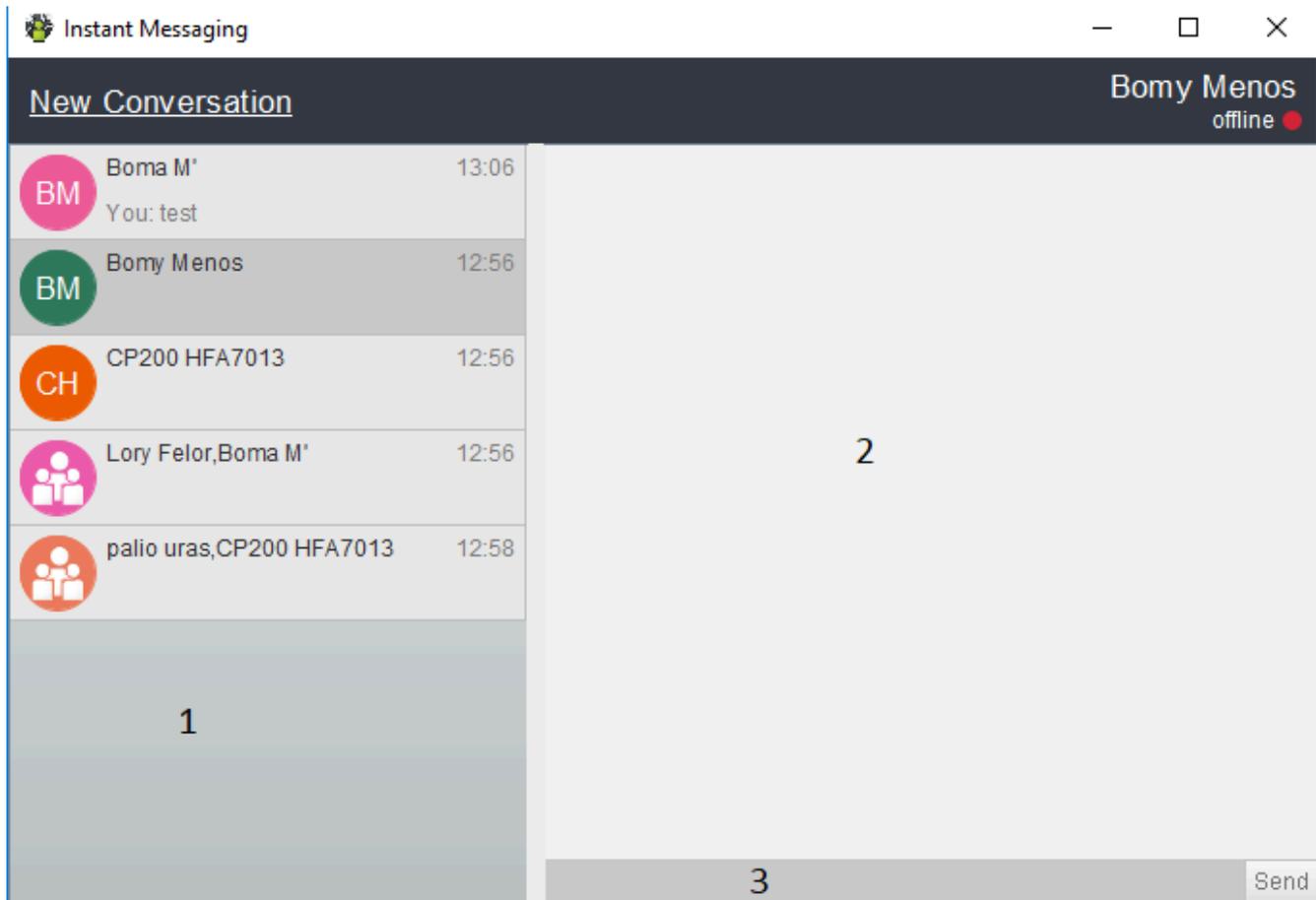
A multi-user chat is the exchange of instant messages with multiple communication partners. Here too, the communication system supports a maximum of one external XMPP communication partner.

Instant Messaging and Web Collaboration

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

Instant Message Window

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



- User area (1)
This area shows every participating communication partner as a symbol or with a picture, if available.
- Message area (2)
This area shows the current presence status and the instant messages of all the chatting subscribers.
You can also see:
 - When someone is typing a message to you by an indicator on the bottom left of the chat window.
 - What messages someone has seen by a "Seen by" label.

NOTICE: The presence status of an external XMPP communication partner is displayed only if you have explicitly requested this from the external XMPP communication partner via the context menu by using the subscription feature, and your request was granted.

- Input area (3)
This area contains the input field for the instant messages.

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

6.13.1 How to Send Instant Messages (Chat)

You can send instant messages to one or more subscribers in the internal directory, i.e., "chat" with the subscribers.

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

Step by Step

- 1) Click on **IMs**.

The **Instant Messaging** window appears.

- 2) On the **Instant Messaging** Window, select **New Conversation** and select the user you want to chat with.
- 3) If you want to add further communication partners to the chat (to create a group chat), drag them from **Favorites** or **Directories** to the **Instant Messaging** window.
- 4) Enter the text in the **Instant Message** window in the input area.
- 5) Click on **Send**.

Related tasks

[How to Search for Subscribers](#) on page 32

7 Attendant Console Functions

The Attendant Console functions describe the Attendant functions of myAttendant, as well as Subscriber Management and the Message Center.

7.1 Attendant Functions

The Attendant functions are used to control inbound phone calls. You can accept calls, transfer them to subscribers, place them on hold or park them. These functions are executed in the **Call Control** area of the main window.

Active Calls

Variable column width in the "Active Calls" area

The **Active Calls** area shows the list of inbound calls currently active. Only the **ID** field is completed if the call is from an unknown caller for whom no data is yet stored in the system. You then have the opportunity to fill in the other fields with the relevant info and to save the details to the external directory. For data that is already saved, the following details are shown for each active call:

Column	Icon	Description
Identifier		Unique identification code that the system automatically assigns for every call. You can assign this identification code to a caller so that they can be identified in future when you receive inbound calls from this number. Only the ID field is completed if the call is from an unknown caller for whom no data is yet stored.
Arrived At		Indicates when a call was received for the first time and displays an icon on the respective call status. .
		Ringing
		On The Phone
		Parked
		On Hold
		Transfer
		Dialing
		Call Waiting
Callno		Shows the caller's station number.

Column	Icon	Description
Last Name, First Name and Company		Provides detailed information if the callers are stored (first name, last name, company). If the caller ID is assigned to a customer whose data is stored in an external directory, for instance, the customer's data is displayed on inbound calls in the fields "Name" and "Station Number/Company".
Call for		Shows who the call is for. This function is particularly useful when myAttendant receives a number of calls at once.
Status		Shows the status of a call, e.g., Ringing, Talking, etc. Right-clicking a call will bring up functions that can be applied to the call such as: unpark - if a call is parked. disconnect - if you are on a call.

You can vary the column width in the **Active Calls** area. myAttendant keeps track of the column width set by you and opens the window at a later login exactly as you set it.

Held/Transferring/Parked Calls

The list of incoming calls that you have transferred, parked or placed on hold are displayed in the **Held/Transferring/Parked Calls** area. Caller details are displayed for every connection like in the **Active Calls** area.

Related concepts

[User Interface Elements](#) on page 10

7.1.1 How to Answer a Call

Step by Step

- 1) Right-click on the call in **Ringing** status in the **Active Calls** area of the Call Control.
- 2) Click on

- **Answer Call** or
- press the **0 button** on the numeric keypad

You are **talking** to the caller.

7.1.2 How to Park a Call

Parking moves a call to a free park slot until the party called is once again available to accept calls.

Prerequisites

You must have accepted the call.

Step by Step

- 1) Right-click on the relevant call in the Call Control's **Active Calls** area.
- 2) Click on **Park Call**.

The call is moved to the Call Control's **Held/Transferring/Parked Calls** area. Both the status of the call (**Parked**) and the park slot are displayed.

7.1.3 How to Unpark a Call

A parked call must be unparked before it can be resumed.

Step by Step

- 1) Right-click on the parked call.
- 2) Click on **Unpark Call**.

7.1.4 How to Place a Call on Hold

An inbound call is placed on hold if you are already conducting a call with another subscriber.

Step by Step

- 1) Right-click on the relevant call in the Call Control.
- 2) Click on
 - **Place Call on Hold** or
 - press the **- button** on the numeric keypad.

The call is moved to the Call Control's "Held/Transferring/Parked Calls" area. The call status is indicated as "On Hold".

7.1.5 How to Resume (Reconnect) a Call

Select "Reconnect Call" to resume a held call.

Step by Step

- 1) Right-click on the held call.
- 2) Click on
 - **Reconnect Call** or
 - on the **- button** on the numeric keypad.

7.1.6 How to Transfer a Call

Prerequisites

The call was accepted.

Step by Step

- 1) Click on the call.
- 2) You have the following options:
 - With the mouse button held down, drag the call to the user button of the desired subscriber and then release the mouse button (drag & drop) or
 - press the **+ button** on the numeric keypad.
- 3) Answer the prompt **Does the other party wish to talk?** in the screen pop with **Yes**.

7.1.7 How to Record and Play Back a Call

Prerequisites

You are connected to the other party.

Step by Step

- 1) Click on **F12**(Record). The call will be recorded.
- 2) A screen pop appears when the call ends:
 - Click **Listen**. The recorded call will be played back over the PC's loud-speaker.
 - or
 - Click **Close**. The recorded call is stored under Voicemail at the Message Center under your own credentials and marked with a red dot. The red dot is a symbol for recorded calls.

INFO: The phone number of the recorded call is saved in the journal.

7.1.8 How to Disconnect a Call (Hang Up)

The "Hang Up" function is used to disconnect an ongoing call.

Step by Step

- 1) Right-click on the call in "Talking" status in the Call Control.
- 2) Select
 - **Disconnect Call** from the displayed options or
 - press the **0 button** on the numeric keypad.

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

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

- 1) Click on the **Answer with Message** symbol in the **Inbound Call** and **Outbound Call to ...** screen pops.
- 2) Outlook opens with an e-mail message. The e-mail recipient field is prefilled with the e-mail address of the caller.

NOTICE: You can define the text to be automatically displayed as the e-mail text via **Setup > My Preferences > Miscellaneous > Answer with Message**.

- 3) If desired, change the subject line and expand any preset e-mail text as required.
- 4) Click on **Send**.

7.1.10 How Send Call Data to a Subscriber by E-mail

Prerequisites

Screen pops for inbound and outbound calls have been activated.

Step by Step

- 1) Click on the **Caller notice** symbol in the **Inbound Call** and **Outbound Call to ...** screen pops.
- 2) Outlook opens with an e-mail message. The contact data of the call is transferred to the e-mail text.
- 3) Enter the intended e-mail recipient.
- 4) If desired, change the subject and add other explanatory text to the contact data.
- 5) Click on **Send**.

7.1.11 How to Initiate a Call Manually

Step by Step

- 1) 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
 - Enter the first few letters of a name (at least 3 characters) in the drop-down list for phone numbers. All names starting with the entered letters are displayed in a list. Select the desired name.
 - Select a phone number or a name from the drop-down list for phone numbers.
- 2) Click on **Dial** or press the `Enter` key.

Related concepts

[User Interface Elements](#) on page 10

7.2 Subscriber Management

Subscriber management is performed in myAttendant via user buttons, the internal directory, and the external directory. Internal subscribers are referred to as users in the user interface; external subscribers are referred to as contacts.

User Buttons

The user buttons are located on the **Default** tab and are a part of the main window of myAttendant.

The user buttons are sorted in alphabetical order by default.

There are 90 user buttons available on a user buttons tab.

You can configure multiple tabs for user buttons and select the names for these user buttons freely.

Only internal subscribers (users) can be assigned to user buttons.

Presetting user buttons with internal subscribers

After creating a new group, the associated user buttons can be preset with the internal stations of the communication system.

Related concepts

[User Interface Elements](#) on page 10

7.2.1 How to Assign User Buttons to Multiple Subscribers

User buttons can be assigned to multiple subscribers via the internal and external directories.

Step by Step

- 1) Click on **Internal Directory**
- 2) Drag the selected subscriber to an empty user button.
- 3) Release the mouse button.
- 4) Repeat steps 2 and 3.

7.2.2 How to Sort Subscribers

Step by Step

- 1) Click on the **User Buttons** tab.
- 2) Right-click on a user button.
- 3) Perform sorting:
 - Right-click on **Sort > First Name** or
 - Right-click on **Sort > Last Name**.

7.2.3 How to Delete a Subscriber Entry

You can remove an internal and external subscribers from the user buttons. The subscriber is not deleted from the respective directory.

Step by Step

- 1) Click on the User Buttons tab.
- 2) Click on the subscriber to be deleted.
- 3) Right-click on **Remove User**.

7.2.4 How to Create a New Tab for a User Button

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Group Setup**.
- 3) Click on **New** and assign a name for the tab.
- 4) Click **OK**.
- 5) Mark the new item created for the tab and click on **Auto Populate**.
- 6) Select the Department or Site from the **Create groups based on** drop-down list.
- 7) Select the Last Name and First Name from the **Sort groups by** drop-down list.
- 8) Click on the radio button **Append new groups to the end of my existing groups**.
- 9) Click **OK**.
- 10) Click **Save**.

7.2.5 How to Create a New Structure for User Buttons

NOTICE: When you create a new tab structure for user buttons, the old structure is deleted.

Step by Step

- 1) Click on the **Setup**.
- 2) Click on **myAttendant > Group Setup**.
- 3) Click on **New** and assign a name for the tab.
- 4) Click **OK**.
- 5) Mark the new item created for the tab.
- 6) Click **Auto Populate**.

NOTICE: Up to 90 subscriber entries can be managed on a tab. Entries without names are listed at the end of the last tab. Sorting occurs by IP phones with names, IP phones

without names, fax numbers with names and fax numbers without names.

- 7) Select the Department or Site from the **Create groups based on** drop-down list.
- 8) Select the Last Name and First Name from the **Sort groups by** drop-down list.
- 9) Click on the radio button **Re-create my group structure**.
- 10) Click **OK**.
- 11) A confirmation prompt follows. Click **Yes**.
- 12) Click **Save**.

7.2.6 How to Copy User Buttons from Another User

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Group Setup**.
- 3) Click on **Copy from user**.
A new window is displayed.
- 4) In the **From User** drop down list, select the user who has the buttons you want to copy.
When you select the user, a summary of the groups is displayed.

NOTICE: Users that have no groups are not available for selection and will not appear in the drop down list.

- 5) Click **OK**.
- 6) Click **Save**.

The BLF groups and buttons are copied to the local user, overriding any group configuration that the local user may already have.

7.2.7 How to Sort Tabs for User Buttons

You can change the order in which user button tabs are displayed.

Prerequisites

Multiple tabs are configured with user buttons.

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Group Setup**.
- 3) Click a group in the **Group Name** field.
- 4) Click on the button **Move Up** or **Move Down**.
- 5) Repeat steps 3 and 4 as appropriate.
- 6) Click **Save**.

7.2.8 How to Delete Tabs for User Buttons

Deleted tabs cannot be restored.

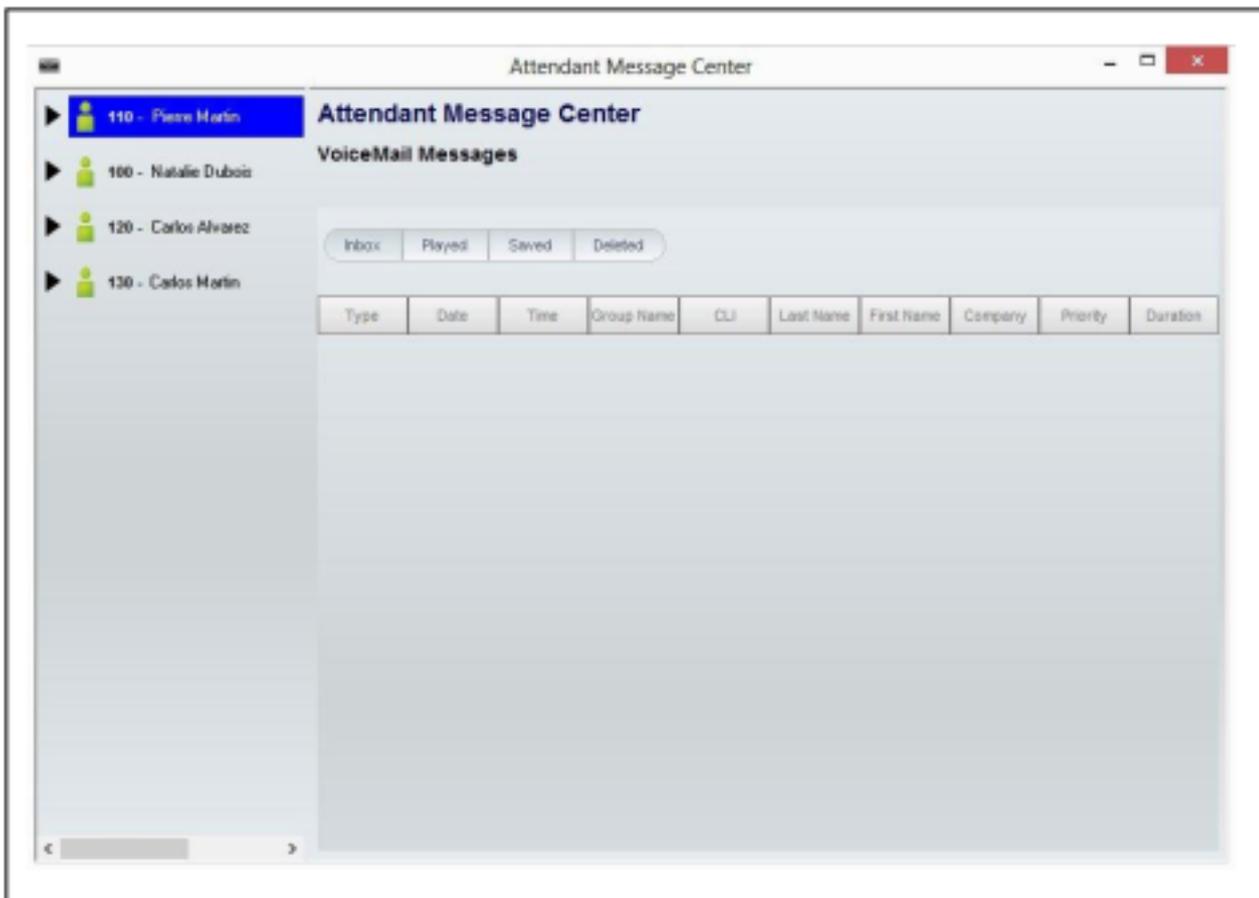
Step by Step

- 1) Click **Setup**
- 2) Click on **myAttendant > Group Setup**.
- 3) Select the group in the **Group Name** field.
- 4) Click **Remove**.
- 5) Click **Save**.

7.3 Message Center

All voicemails, faxes, instant messages and SMS messages are recorded and managed via the **Message Center**.

Messages can also be managed for other subscribers, provided these subscribers have granted the appropriate permission for this.



The left window pane, referred to below as the Subscriber List window, contains a list of all communication system subscribers with their presence/absence status. Your own status is displayed first in a drop-down message overview. The other subscribers follow in alphabetical order.

Depending on what is selected in the message overview, the right window pane, referred to below as the Message Details window, contains a table of message-specific information that can be selected for further processing.

The various message types can be processed as follows:

- **Voice Messages (i.e., voicemails)** can be played back, deleted and forwarded,
- **LAN Messages** can be read, edited and deleted,
- **SMS** messages can be read, written and sent to internal subscribers.
- **Fax messages** can be forwarded.

LAN Messages

LAN messages can be created only by myAttendant users. They serve as a kind of "bulletin board" for the subscriber, on which he or she enters notes (about individual subscribers). These messages can be viewed, edited or deleted, but cannot be sent to other subscribers.

Related concepts

[User Interface Elements](#) on page 10

7.3.1 How to Start the Message Center via a Function Key

Step by Step

Click on **Message Center**.

NOTICE: If the Message Center is already open in the background, perform a task switch to display it on top. You can only open one Message Center session per PC.

7.3.2 How to Start the Message Center via the Right Mouse Button

Step by Step

- 1) Right-click in the main window of myAttendant on the user button of the subscriber for whom you want to open the Message Center. A screen pop appears.
- 2) Click in the screen pop on the **Attendant Message Center** item.

NOTICE: If the Message Center is already open in the background, perform a task switch to display it on top. You can only open one Message Center session per PC.

7.3.3 How to Display a Message Overview

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on one of the stations.

7.3.4 How to Listen to Voicemails

Prerequisites

In order to listen to the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Voicemail** entry.
The Message Details window shows voicemails in the following categories:
Inbox, Played, Saved, Deleted and **Total**.
- 4) Click on one of these categories:
- 5) Mark a voicemail with a right mouse click. Click on **Play Message**.
- 6) Click on one of the categories:
 - **Through Phone**
 - **Through Speakers**

7.3.5 How to Move Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Voicemail** entry.
The Message Details window shows voicemails in the following categories:
Inbox, Played, Saved, Deleted and **Total**.
- 4) Mark a voicemail with a right mouse click. Click on **Move Message to**.
- 5) Click on one of the categories:
 - **Inbox**
 - **Played**
 - **Saved**
 - **Deleted**

7.3.6 How to Forward Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Voicemail** entry.
The Message Details window shows voicemails in the following categories: **Inbox, Played, Saved, Deleted** and **Total**.
- 4) Mark a voicemail with a right mouse click. Click on **Forward Message**.

7.3.7 How to Save Voicemails

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Voicemail** entry.
The Message Details window shows voicemails in the following categories: **Inbox, Played, Saved, Deleted** and **Total**.
- 4) Click on one of these categories:
- 5) Mark a voicemail with a right mouse click. Click on **Save as Wav**.

7.3.8 How to Move Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Fax Messages** entry.
The Message Details window shows voicemails in the following categories: **Inbox, Played, Saved, Deleted** and **Total**.
- 4) Click on one of the displayed **Fax Groups**.
The fax messages of the Fax Group are displayed in the Message Details window.
- 5) Mark a Fax message with a right mouse click.

- 6) Click on **Move Message to**.
- 7) Click on one of the categories:
 - **Inbox**
 - **Played**
 - **Saved**
 - **Deleted**

7.3.9 How to Forward Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Fax Messages** entry.
The Message Details window shows voicemails in the following categories: **Inbox, Played, Saved, Deleted** and **Total**.
- 4) Click on one of the displayed **Fax Groups**.
The fax messages of the Fax Group are displayed in the Message Details window.
- 5) Mark a Fax message with a right mouse click. Click on **Redirect**.
- 6) Select a fax group.
- 7) Click on **Redirect**.

7.3.10 How to Save Fax Messages

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers. The subscribers must have a Fax license.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **Fax Messages** entry.
The Message Details window shows voicemails in the following categories: **Inbox, Played, Saved, Deleted** and **Total**.
- 4) Click on one of the displayed **Fax Groups**.
The fax messages of the Fax Group are displayed in the Message Details window.
- 5) Mark a Fax message with a right mouse click.
- 6) Click on **Save as TIFF**.
- 7) Assign a file name.
- 8) Click on **Save**.

7.3.11 How to Edit a LAN Message

Prerequisites

In order to process the messages of other subscribers, you must be granted the permission for this by all such subscribers.

Step by Step

- 1) Click on **Message Center**.
- 2) Click in the stations list on the triangular symbol in front of a station.
- 3) Click on the triangular symbol before the **LAN Messages** entry.
- 4) Click on the corresponding message in the right pane.
- 5) You can edit (update) or delete the message.

7.3.12 How to View, Edit or Delete LAN Messages

INFO: LAN messages that were saved as text modules are not deleted. Only text entered directly in the LAN Messages area is deleted.

Step by Step

- 1) Start the Message Center.
- 2) Click in the stations list on the triangular symbols in front of the desired stations.
- 3) Click on the triangular symbol before the **LAN Messages** entry. The LAN messages of this subscriber are displayed.
- 4) Click in the table on the display of the desired LAN message.
- 5) Click on **Update** to edit the LAN message or
- 6) click on **Delete** to delete it.

7.4 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:

Attendant Console Functions

- Name announcement:

If you have enabled dynamic announcements, the name announcement you recorded is used for the greeting, unless your Presence status is **Office**, **CallMe** or **Do Not Disturb**.

- Dynamic announcements:

If you have enabled dynamic announcements, the voicemail box generates situation-based announcements for your Presence status (except for **Office**, **CallMe** and **Do Not Disturb**) with an indication of the scheduled time of your return, e.g., "... is in a meeting until two thirty p.m. today". You can activate or deactivate the playback of dynamic announcements individually for each profile. If the dynamic announcements for a profile have been enabled, you can activate or deactivate the announcements for your Presence status for certain callers and for all external callers separately.

- Personal announcement for the profile:

Before you activate a profile, you must record a personal announcement for this profile that indicates to your caller the appropriate digits and associated choices, e.g.: To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3." When you disable dynamic announcements for the profile, you may find it useful to start your personal announcement by indicating your Presence status.

The voicemail box plays back announcements for a profile in the following order (from left to right):

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Busy	-	x	x
No answer	-	x	x
Meeting	x (if dynamic announcements have been enabled)	x (if dynamic announcements have been enabled)	x
Sick			
Break			
Gone Out			
Vacation			
Lunch			
Gone Home			
Do Not Disturb	-	-	x

Example: dynamic announcements enabled

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Meeting	"Natalie Dubois"	"is in a meeting until two thirty p.m. today".	"To leave a message, press 1. To speak with my representative, press 2."

Example: dynamic announcements disabled

Profile	Name announcement	Dynamic greetings	Personal announcement for profile
Gone Out	-	-	"I am currently out of the office. To leave a message, press 1. To speak with my representative, press 2. To forward this call to my mobile phone, press 3."

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

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

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

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

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

Actions

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

- **Record**
The caller can leave a message in your voicemail box.
- **Transfer**
The caller is redirected to a destination defined by you.

- - **None** -

The announcements for this profile are repeated.

7.4.1 How to Edit a Profile for the Personal AutoAttendant

Prerequisites

You have recorded an announcement for the relevant status.

Step by Step

- 1) Click **Setup**.
- 2) Click **Profiles** and then on the profile for the corresponding status.
- 3) In the row with the appropriate digit, select one of the following options for the desired **Action**:
 - If the callers are to be redirected to the voicemail box on entering this digit, select **Record**.
 - If the callers are to be transferred to another destination on entering this digit, select **Transfer**.
 - If no action is to be taken on entering this digit, select **# None #**.
- 4) If you have selected **Transfer**, enter the phone number in dialable format or in canonical format in the **Destination** field.
- 5) Select one of the following options for the function of the profile:
 - If you want to activate the profile, enable the **Profile Active** check box.
 - If you want to deactivate the profile, disable the **Profile Active** check box.
- 6) Select one of the following options for the announcement of your Presence status:
 - If you want your voicemail box to announce your Presence status, clear the **Skip Dynamic Greeting** check box.
 - If you do not want your voicemail box to announce your Presence status, enable the **Skip Dynamic Greeting** check box.
- 7) Click **Save**.

Related tasks

[How to Select Recording or Announcement Mode](#) on page 80

8 Configuration

You can use myAttendant to configure call forwarding rules, direct inward dialing numbers, etc. The configuration settings can be saved and restored.

NOTICE: When a new extension is created on the system, both first name and last name fields are synchronized to the UC Suite package. This synchronization happens when system restarts or any settings changed for the station in WBM.

8.1 How to Edit your Own Data

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > My Personal Details**.
- 3) You can enter or edit the following data:

- **User name**
- **Extension**
- **Password**
- **First Name**
- **Last Name**
- **Voicemail call number**
- **Mobile number**
- **External Number 1**
- **External Number 2**
- **Fax Number**
- **Assistant Number**
- **Email**
- **XMPP ID**

NOTICE: If you want to change your first and last name, this has to be done by the administrator. Otherwise, the changes will not be kept after a synchronization happens. A synchronization happens when the system restarts or any settings are changed by the administrator.

- 4) The following of these entries can be set to visible or invisible for other users by selecting or clearing the **Visibility** check box as required:
 - **Mobile number**
 - **External Number 1**
 - **External Number 2**
 - **Private Number**
- 5) Click **Save**.

Configuration

How to Insert your Own Picture

8.2 How to Insert your Own Picture

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > My Picture**.
- 3) Click in the **My Picture** window on **Select**.
- 4) Select the picture you want to use for yourself:
- 5) Click **Save**.

8.3 How to Specify your Email Address

Prerequisites

The administrator of your communication system has configured the sending of emails.

Step by Step

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

8.4 How to Define an Additional Phone Number

Step by Step

- 1) Click on **Setup**.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Enter an additional phone number in dialable or canonical format in one of the following fields: **Mobile Number**, **External Number 1**, **External Number 2**, **Private Number** or **Assistant Number**.
- 4) Select one of the following options:
 - If you do not want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, clear the **Visibility** check box next to the phone number.
 - If you want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, select the **Visibility** check box next to the phone number.
- 5) Click **Save**.

8.5 How to Define an XMPP Alias

Prerequisites

The administrator of your communication system has enabled XMPP.

Step by Step

- 1) Click on **Setup**.

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

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

- 4) Click **Save**.

8.6 Programming the Function Keys of a Telephone

Your telephone is equipped with a certain number of function keys. Some of these function keys are programmed with predefined functions. You can customize the functions of both the predefined and other function keys to suit your requirements by using myAttendant.

INFO: 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.

8.6.1 How to Program the Function Keys of the Telephone

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Click on the **Program Phone Keys** button. A window for programming the function keys of the telephone is opened in the 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.

Configuration

How to Change the Password

- 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 numbers as described.
- 10) If you want to program further function keys, repeat steps 4 through 9.
- 11) Close the Browser window for key programming.
- 12) Click **Save** in the **myAttendant Setup** window.

8.7 How to Change the Password

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

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

Step by Step

- 1) Click on **Setup**.
- 2) Click on **Personal Details > My Personal Details**.
- 3) Under **Password**, click on **Change**.
- 4) Enter your current password in the **Current** field.
- 5) Enter your new password in the **New** and **Confirm** fields.
 - a) a. The password must not consist of only digits.
 - b) b. The maximum number of repeated characters is two and the maximum number of sequential characters is three.
 - c) c. The account name (reversed or not) cannot be part of the password.
 - d) d. The user is forced to change the default password after the first use.
 - e) e. The maximum number of erroneous login attempts is five.

NOTICE: The password is valid for all UC Suite clients and for accessing the voicemail box via the telephone.

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

8.8 How to Change the Login Name

Step by Step

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

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

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

8.9 How to Enable or Disable an Automatic Login

NOTICE: You should use the automatic login only if you are certain that no-one else has access to your PC. Otherwise, unauthorized users could, for example, potentially access your voice-mails and fax messages or redirect your station number to external toll-based destinations.

Step by Step

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

8.10 How to Allow others to See your Call Details

You can allow directory users to see information about your current active call, such as who you are talking to, whether it is an inbound or outbound call and the call duration. This option is disabled by default.

Prerequisites

The option of enabling this feature is activated by your system administrator.

Step by Step

- 1) Click on the **Setup** symbol.
- 2) Click on **Sensitivity > Security and Access**.
- 3) Select the option **Allow others to see who I am talking to**.
- 4) Click **Save**.

8.11 Notifications

You can have myAttendant notify you about calls and other actions.

The following notification options are available to you:

- Display tray pop on inbound calls
- Display tray pop on outbound calls
- Display tray pop on new voicemail
- Display tray pop on change of presence
- Screenpop the messages window when I receive a new voicemail message
- Pop up application on inbound calls

8.11.1 How to Configure Notifications

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > Notifications**.
- 3) Select the check box in front of every notification that you want to receive.
- 4) Click **Save**.

8.12 How to Select the User Interface Language

Step by Step

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

Next steps

Close and restart the client.

8.13 How to Change the User Interface

Step by Step

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

Next steps

Close and restart the client.

8.14 Hotkeys

You can configure shortcut keys for certain applications and thus facilitate dialing from the desktop, for example.

Hotkey can be defined for the following functions:

- Answer/Disconnect call
- Forward/Transfer call
- Display Call Traypop

8.14.1 How to Configure and Activate Hotkeys

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > Hot Keys**.
- 3) Hold down the **CTRL+SHIFT** or **CTRL+ALT** or **SHIFT+ALT** key combination and then press any key to define it as a hotkey.
- 4) Select the check box **Hot Key Enabled** to activate the configured hotkey.
- 5) Click **Save**.

8.15 How to Change the Server Address

You can change the IP address of the communication system as follows:

Step by Step

- 1) Click **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Edit the default address under **Server address**.
- 4) Click **Save**.

8.16 How to Configure a Call Transfer

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Select one of the following options in the **Transfer Method** drop-down list:
 - If you want to transfer the call directly to a subscriber without first speaking to that subscriber, select **Blind Transfer**.
 - If you want to speak to the subscriber before transferring the call to that subscriber, select **Consultation Transfer**.
- 4) Click on **Save**.

Configuration

How to Enable or Disable Dialing by Entering a Name

8.17 How to Enable or Disable Dialing by Entering a Name

Step by Step

- 1) Click on **Setup**.
- 2) Click on **My Preferences > Miscellaneous**.
- 3) Select one of the following options:
 - If you want to enable dialing by entering a name, select the **Enable live search** check box.
 - If you want to disable dialing by entering a name, clear the **Enable live search** check box.
- 4) Select one of the following options:
 - If you want the LDAP contacts to also be included in the live search when dialing by entering a name, select the **Include LDAP contacts in live search** check box.
 - If you do not want the LDAP contacts to be included in the live search when dialing by entering a name, clear the **Include LDAP contacts in live search** check box.
- 5) Click **Save**.

8.18 How to Specify DID Numbers

If myAttendant is shared by a number of different companies, for instance, the virtual station numbers (IDs) defined indicate which company the call is for.

Prerequisites

A direct inward dialing number must be set in the communication system for every virtual station number (DID).

NOTICE: This function should only be performed by a trained technician.

Step by Step

- 1) Click on **Setup**.
- 2) Click on **myAttendant > DIDs**.
- 3) Click on **Add** and enter the virtual station number in the **DID Number** field and the relevant company name in the **DID Name** field.
- 4) Click on **OK**, followed by **Save**.

8.19 Configuring Backups for myAttendant

You can save various configuration settings for myAttendant in backup files and restore them later or delete them if required.

8.19.1 How to Save the Configuration

You can save configuration settings for your myAttendant session in a backup file.

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Backup and Restore**.
- 3) Click **Create Backup**.
- 4) Enter a file name as appropriate. Click **OK**.
- 5) Click **Save**.

Related tasks

[How to Restore the Configuration](#) on page 117

8.19.2 How to Restore the Configuration

Prerequisites

You must have already created a backup file of your configuration.

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Backup and Restore**.
- 3) Select a backup file.
- 4) Click **Restore Backup**.
- 5) Click **Yes** to confirm.
- 6) Click **Save**.

Related tasks

[How to Save the Configuration](#) on page 117

[How to Delete the Configuration File](#) on page 117

8.19.3 How to Delete the Configuration File

Prerequisites

You must have already created a backup file of your configuration.

Step by Step

- 1) Click **Setup**.
- 2) Click on **myAttendant > Backup and Restore**.

Configuration

- 3) Select the backup file to be deleted.
- 4) Click **Delete Backup**.
- 5) Click **Yes** to confirm.
- 6) Click **Save**.

Related tasks

[How to Restore the Configuration](#) on page 117

9 Appendix

The appendix contains reference information such as a list of features that can be used with SIP phones, for example.

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

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

The used SIP telephone must satisfy the following prerequisites:

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

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

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

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

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

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