

myPortal Smart

User Guide

A31003-P3010-U100-26-7619

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1 Introduction

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

1.1 myPortal Smart

myPortal Smart is an Adobe AIR-based PC application (Microsoft Windows and Mac OS X) for unified communications using the UC solution UC Smart. Besides convenient dialing aids via phone directories and favorites and information on the presence status of colleagues, you can, for example, also access your voicemails.

Depending on the licenses assigned to you, the scope of the available features may vary slightly.

myPortal Smart supports the following features:

- Presence status
- Status-based call forwarding
- Directories
- Favorites List
- Journal
- Search by phone number and name
- Call Functions
- One Number Service (ONS)
- Voicemail
- Text messages

INFO: Some features such as consultation holds and conferencing are not available in myPortal Smart in conjunction with SIP telephones.

1.2 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

1.3 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 on 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	<code>Command not found.</code>
Input	Monospace font, e.g., Courier	Enter <code>LOCAL</code> as the file name.
Key combination	Monospace font, e.g., Courier	<code><Ctrl>+<Alt>+<Esc></code>

2 Installation

myPortal Smart is installed under Windows or the Mac OS and supports automatic updates.

In addition, for Windows operating systems, the "Desktop Dialing" software can be installed. This enables a phone number selected in a different application to be automatically transferred to myPortal Smart by using a hotkey.

INFO: It is strongly recommended to install the offered updates for myPortal Smart promptly. This also applies to software that is required for myPortal Smart.

2.1 How to Install myPortal Smart

Prerequisites

- The administrator of your communication system has made the myPortal Smart installation file available to you.
- The latest version of Adobe AIR is installed.
- You have local administrator rights.

Step by Step

- 1) Run the installation file `SmartClient.air`.
- 2) Click on **Install** and follow the instructions of the installation program.

2.2 How to Install Speed Dialing using a Hotkey (Desktop Dialing) (Windows)

Prerequisites

- The administrator of your communication system has made the Desktop Dialing installation file available to you.
- myPortal Smart is installed.
- You have local administrator rights.

Step by Step

- 1) Run the Desktop Dialing installation file `DesktopIntegration_Setup.exe`.
- 2) Follow the instructions of the Installation program.
- 3) After a successful installation, Desktop Dialing is added to the Startup menu and appears as "Desktop Dialing" handset icon on the task bar.

Installation

How to Uninstall myPortal Smart (Windows)

Next steps

Start myPortal Smart (if not already started) and define a hotkey for the speed dial under **Settings > Appearance**.

2.3 How to Uninstall myPortal Smart (Windows)

Step by Step

- 1) Close myPortal Smart.
- 2) Click in the **Control Panel** on **Programs and Features**.
- 3) Click on **Uninstall** in the context menu of **myPortal Smart**.

2.4 How to Uninstall myPortal Smart (Mac OS)

Step by Step

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

2.5 How to Uninstall Speed Dialing using a Hotkey (Desktop Dialing) (Windows)

Step by Step

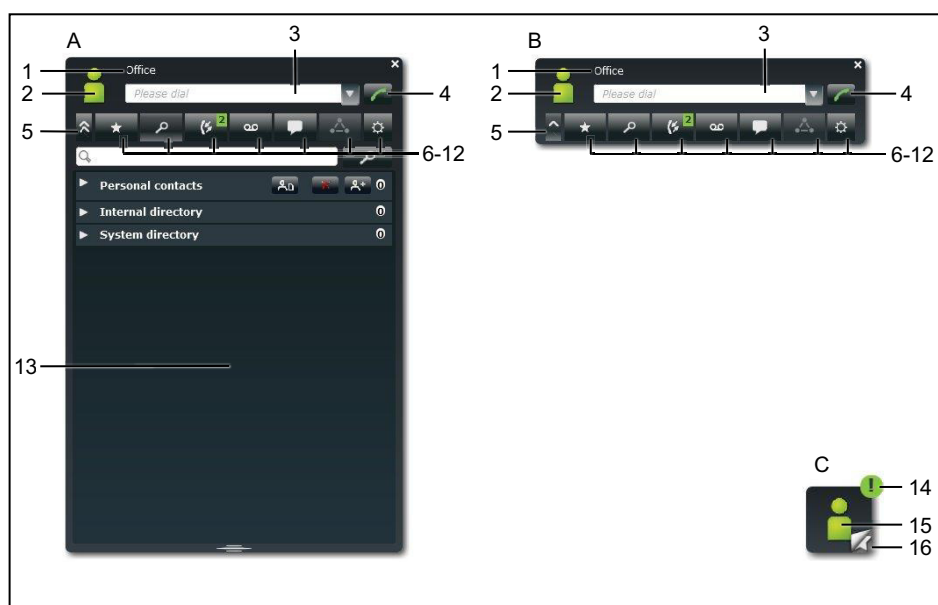
- 1) Close myPortal Smart.
- 2) Click in the **Control Panel** on **Programs and Features**.
- 3) Click on **Uninstall** in the context menu of **Desktop Integration**.

3 First Steps

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

3.1 User Interface

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



A Normal view

B Compact view - same as Normal view, but without the workspace

is automatically activated on starting myPortal Smart or ending a call in the Normal view


C Minimized view - requires only minimal space

1 Title bar - with the following items:

- Your presence status (text)
- Info text for your presence status, if any
- **Close** button

- 2 Symbol for your presence status - provides access to:
 - Your presence status (**my presence**)
 - Your picture (**my image**)
 - Your profile information (**my profile**), which appears in the internal directory
- 3 **Please dial** field - with the following functions:
 - Input field for phone number to be dialed
 - Input field for name to be searched
 - Drop-down list for redialing (up to 10 last used phone numbers).
- 4 **Dial number** button
- 5 **Minimize** button
- 6 Main menu: Tab for Favorites list
- 7 Main menu: **Directories / Search** tab
- 8 Main menu: **Journal** tab
Displays the number of new items, if present, in a green symbol.
- 9 Main menu: **Voicemail** tab (only active if a voicemail box is assigned to the call number)
Displays the number of new items, if present, in a green symbol.
- 10 Main menu: **Instant messages** tab
Displays the number of new items, if present, in a green symbol.
- 11 Main Menu: **Conferences** tab
- 12 Main menu: **Settings** tab
- 13 Workspace
The available information and actions depend on the selected tab. Clicking on a list item in the Favorites list, Directories, Journal or Voicemail opens it in the Details view. The Detail view enables further actions using buttons.
- 14 Symbol for missed calls or new voicemails
- 15 Symbol for your presence status
- 16 Symbol for Favorites list
Enables quick calls from Favorites

No connection to the system

If myPortal Smart has no connection to the communication system, the following symbol appears in the area of the symbol for your presence status: 

Screen Pops

For calls, the appropriate call information and buttons are displayed in screen pops or in the workspace of the **Calls** tab in the Normal view, if that view is currently active. The contents of screen pops can be shifted by clicking on the arrow icon in the workspace of the **Calls** tab in the Normal view.

Tooltips

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

3.2 How to Start myPortal Smart

Prerequisites

- myPortal Smart is installed to your PC.
- The administrator of your communication system has enabled the UC solution UC Smart and configured an initial password for the use of myPortal Smart.
- You have received the **User name** (phone number), **Password** (initial password), **Server IP address**, **Port Number** and **Protocol to server** from your administrator.

Step by Step

- 1) To start myPortal Smart, select one of the following options:
 - Windows:
Click on **Start > Program Files > CommunicationClients > myPortal Smart**.
 - Mac OS:
Click on **Program Files > CommunicationClients > myPortal Smart**.
- 2) Enter your internal phone number (e.g., 330) in the **User Name** field.
- 3) Enter the initial password for myPortal Smart that you received from your administrator in the **Password** field.
- 4) Enter the IP address (e.g., 192.168.1.2) or the name of the UC server in the **IP address of your server** field.

INFO: Adobe AIR takes over the network proxy settings of the operating system. If the UC Server cannot be reached, please check the proxy settings.

- 5) If your administrator has given you a different port number, specify that port number in the **IP port of your server** field.
- 6) Select the type of connection to the system in the **Protocol to server** drop-down list:
 - For an encrypted connection to the system (recommended for security reasons), select **https (Port 8802 by default)**. You must then install a certificate on your PC to avoid certificate warnings when starting myPortal Smart.
 - For an unencrypted connection to the system (not recommended), select **http (Port 8801 by default)**.

- 7) Click on **OK**.
- 8) Only for encrypted connection: Install certificate under Windows (using the example of Internet Explorer V10):
 - a) Click on **View Certificate** in the **Security Alert** window.
 - b) Click on **Install Certificate** (only visible with administrator rights).
 - c) Start the Certificate Import Wizard with **Next**.
 - d) Select the option **Place all certificates in the following store**, click **Browse** and specify **Trusted Root Certification Authorities**.
 - e) Confirm with **OK** and then with **Next** and **Finish**.
 - f) Confirm the installation of the certificate with **Yes** and close the Certificate Import Wizard with **OK**.
 - g) Close the **Certificate** window with **OK** and confirm the **Security Alert** window with **Yes**.
 - h) You then switch back automatically to myPortal Smart.
- 9) Only for encrypted connection: Install certificate under MAC OS:
 - a) In the **Verify Certificate** window, click on **Show Certificate**.
 - b) Click on **Trust**.
 - c) In the drop-down list, select the item **Always Trust** and confirm this with **Continue**.
 - d) Enter your MAC user password. If you do not have administration rights, you will need to enter the user name and password of the administrator.
 - e) Confirm your settings with **Refresh Preferences** and close the certificate window.
 - f) You then switch back automatically to myPortal Smart.
- 10) If you selected **https** as the connection type, you can change the password directly in myPortal Smart:
 - a) Enter the initial password for myPortal Smart again in the **Old Password** field.
 - b) Enter your new password in accordance with the security policies in the **New Password** and **Repeat password** fields.

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

- c) Then click **OK**.
- 11) If you selected **http** as the connection type, you must change the password via the UC Smart Assistant:
 - a) Click on link to the **UC Smart Assistant**.

- b)** To log into the UC Smart Assistant, enter the initial password in the **Password** field and click on **Login**.
- c)** Enter your new password in accordance with the security policies in the **Password** and **Repeat password** fields.

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

- d)** Click on **Apply** and log out from the UC Smart Assistant.
- e)** Close the UC Smart Assistant.
- f)** Enter your newly-defined password in myPortal Smart in the **Password** field and then click on **OK**.

3.3 How to Select the User Interface Language

Step by Step

- 1)** Click **Settings**.
- 2)** Click on the **Appearance** tab.
- 3)** Select the desired language in the **Language** drop-down list.
- 4)** Click **OK**.

myPortal Smart restarts automatically.

3.4 How to Enter your Contact Data

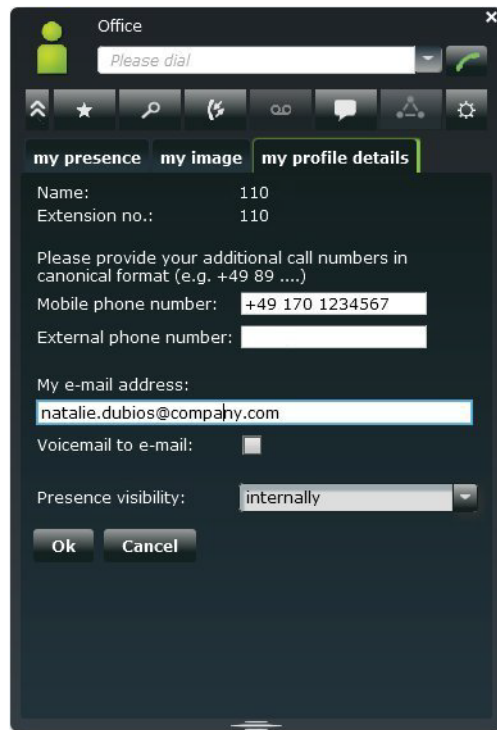
The contact data you specify is made available to other subscribers in directories and favorites, for example.

Step by Step

- 1)** Click on the **My profile** icon for your presence status.
- 2)** Click on the **my profile details** tab.

First Steps

How to Switch to the Normal View



The screenshot shows a mobile application interface titled 'Office'. At the top, there is a status bar with a green circle icon, a search bar containing 'Please dial', and a green phone icon. Below this is a navigation bar with icons for home, star, search, settings, and a gear. The main content area has three tabs: 'my presence', 'my image', and 'my profile details' (which is selected and highlighted with a green border). The 'my profile details' tab contains the following fields: 'Name:' with the value '110', 'Extension no.:' with the value '110', a text prompt 'Please provide your additional call numbers in canonical format (e.g. +49 89)', 'Mobile phone number:' with the value '+49 170 1234567', 'External phone number:' with an empty field, 'My e-mail address:' with the value 'natalie.dubios@company.com', 'Voicemail to e-mail:' with an unchecked checkbox, and 'Presence visibility:' with a dropdown menu set to 'internally'. At the bottom are 'Ok' and 'Cancel' buttons.

- 3) Fill in the **Mobile phone number**, **External phone number** and **My email address** fields with your contact details. Phone numbers should be entered in canonical format (e.g., +49891234567).
- 4) Click **OK**.

3.5 How to Switch to the Normal View

Step by Step

- › Select one of the following options:
 - If you are in the Minimized view:
Double-click on the icon for your presence status.
 - If you are in the Compact view:
Click on the icon for your presence or on a tab in the main menu.

3.6 How to Switch to the Compact View

Step by Step

- › Select one of the following options:
 - If you are in the Minimized view:
Click on the icon for your presence status.

- If you are in the Normal view:
Click on the **Minimize** button.

3.7 How to Switch to the Minimized View

Step by Step

- › Select one of the following options:
 - If you are in the Normal view:
Double-click on the **Minimize** button.
 - If you are in the Compact view:
Click on the **Minimize** button.

3.8 How to Start myPortal Smart

Prerequisites

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

Step by Step

- › Select one of the following options:
 - Windows:
Click on **Start > Program Files > CommunicationClients > myPortal Smart**.
 - Mac OS:
Click on **Program Files > CommunicationClients > myPortal Smart**.

Related Topics

- [UC Smart Assistant](#)
- [How to Start UC Smart Assistant](#)
- [How to Change the Password for myPortal Smart](#)

3.9 How to Exit myPortal Smart

Prerequisites

- You are in the Normal view or Compact view.

Step by Step

- › In the title bar of the myPortal Smart window, click on the **Close** icon.

4 Unified Communications











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

4.1 Presence Status






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

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

The following symbols are available for the presence status:

Symbol	Presence status	Availability
	Office	Available - optional: status-based call forwarding (e.g., for home office)
	Meeting	Absent – optional: status-based call forwarding
	Sick	Absent – optional: status-based call forwarding
	Break	Absent – optional: status-based call forwarding
	Gone Out	Absent – optional: status-based call forwarding
	Vacation	Absent – optional: status-based call forwarding
	Lunch	Absent – optional: status-based call forwarding
	Gone Home	Absent – optional: status-based call forwarding
	Do Not Disturb	Absent (not available in MULAP configurations)
		Presence status is not visible

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

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

Status-Based Call Forwarding

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

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

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

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

Visibility of your Presence Status

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

- **internally and externally**
Visible to both internal subscribers (display in UC Smart client and voicemail announcements) as well as external callers (voicemail announcements)
- **internally**
Visible only to internal subscribers (display in UC Smart client and voicemail announcements)
- **not visible**
Not visible to all others

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

Related Topics

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

4.1.1 How to Change the Presence Status to Absent

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my presence** tab.



- 3) Click on one of the following Presence statuses: **Meeting, Sick, Break, Out of the Office, Vacation, Lunch, At home** or **Do not disturb**.

INFO: The presence status **Do not disturb** cannot be set if the associated phone is in a MULAP or is configured as an intercept position.

- 4) Select one of the following options for the return date and time:
 - If you want to specify the time of your return, click on the calendar icon and select the date and time accordingly.

- If you do not want to specify a time for your return, click **Delete**.
- 5) If you want to specify an info text for the Presence status, enter it in the text field.
- 6) Click on **OK**.

4.1.2 How to Change the Presence Status to Office

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my presence** tab.
- 3) Click on **Office**.
- 4) If you want to specify an info text for the Presence status, enter it in the text field.
- 5) Click **OK**.

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

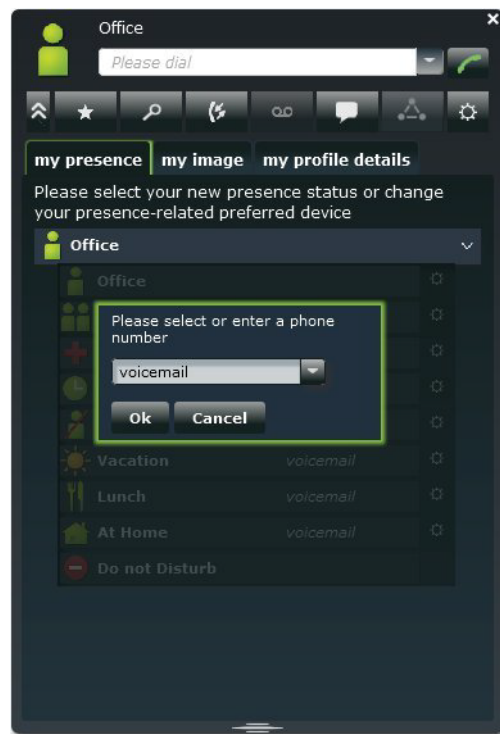
Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my profile details** tab.
- 3) Select one of the following options in the **Presence visibility** drop-down list:
 - If you want to make your presence status visible to both internal subscribers as well as external callers, click on **internally and externally**.
 - If you want to make your presence status visible to internal subscribers only, click on **internally**.
 - If you want to make your presence status invisible to all subscribers, click on **not visible**.
- 4) Click on **OK**.

4.1.4 How to Enable or Disable Status-based Call Forwarding

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my presence** tab.
- 3) Click on the **Settings** icon on the right side of the appropriate presence status.



- 4) Select one of the following options:
 - If you want to enable status-based call forwarding to a predetermined destination, select the appropriate entry in the drop-down list (**Voicemail**, **Mobile** or **External**).
 - If you want to enable status-based call forwarding to another destination, enter the desired number to be set as a forwarding destination in canonical format (e.g., +4989700798765) in the **Please select or enter a phone number** field.
 - If you want to disable the status-based call forwarding, remove the number in the **Please select a phone number** field.
- 5) Click on **OK**.

4.2 Directories and Journal

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

4.2.1 Directories

Directories contain your contacts. You can search the directory by phone number or by name. Contacts can be added to the favorites list.

myPortal Smart offers the following directories:

- **Personal contacts**

You can import your Outlook contacts into your Personal Contacts via the UC Smart Assistant. In addition, you can import contacts from a CSV file or XML file or manually add contacts. Contacts from the journal or senders of voicemails can also be added to the Personal Contacts. Imported contacts can be edited later. Such contacts are marked as "manually added contacts" and are no longer synchronized during the next import (Outlook, CSV or XML)..

- **Internal directory**

Contains internal subscribers and groups with their presence status and their possible additional phone numbers. The "Display in Directory" feature must be enabled in the communication system for this purpose.

- **System directory**

Contains all speed-dial destinations of the communication system.

The contents of the directories can only be accessed via a search.






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

Contact Details

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

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

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

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

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

Search

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

Related Topics

- [Presence Status](#)

4.2.1.1 How to Search in Directories

Step by Step

- 1) Click **Directories**.
- 2) Enter the first letter of the desired name in the input field.
- 3) Click on the **Search** button. The hits are displayed per directory as a number.
- 4) Click the desired folder to display the corresponding entries of the search results in the List view.
- 5) Click on a contact to see more details on that contact.

Related Topics

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

4.2.1.2 How to Perform a Quick Search by Name

Step by Step

- › Enter the first letter of the desired name in the **Please dial** field. All entries from the directories starting with the letters you have entered will be displayed in a list.

4.2.1.3 How to Import Contacts into the Personal Contacts

Prerequisites

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

Step by Step

- 1) Click on **Directories**.
- 2) Click in the Personal Contacts on the **Import Contacts** icon.

- 3) Only for importing a CSV file: Select the encoding of the CSV file under **File encoding CSV import**.
- 4) Click on **Start Import**.
- 5) Navigate to the storage location of the desired XML or CSV file and click **Open**. Once the import is complete, you will be informed of the result in the window.

4.2.1.4 How to Add a Personal Contact

Step by Step

- 1) Click on **Directories**.
- 2) Click in the Personal Contacts on the **New Personal Contact** icon.
- 3) Enter the contact data in the **Edit Personal Contact** window.
- 4) Click on **OK**. The contact appears in the Personal Contacts.

4.2.1.5 How to Edit a Personal Contact

Step by Step

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

4.2.1.6 How to Delete a Personal Contact

Step by Step

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

4.2.2 Favorites List

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

The Favorites list manages contacts in groups.

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

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

Outlook Contacts

If you want your Favorites to include Outlook contacts, you will need to first import them into the personal directory with the UC Smart Assistant.

Related Topics

- [Presence Status](#)
- [UC Smart Assistant](#)

4.2.2.1 How to Add a Contact to the Favorites List

Prerequisites

- You have searched for the desired contact in directories.

Step by Step

- 1) Click on the appropriate contact in the relevant directory.
- 2) In the contact, click on the **Add to favorites** icon.
- 3) Select one of the following options for the group to which the contact is to be added:
 - Select an existing group in the drop-down list.
 - Enter a new group name in the input field.
- 4) Click **OK**.

Related Topics

- [How to Search in Directories](#)

4.2.2.2 How to Delete a Contact from the Favorites List

Step by Step

- 1) Click on the Favorites list icon.
- 2) Click on the relevant group to expand the associated Journal entries.
- 3) Click on the relevant contact.
- 4) In the contact, click on the **Delete from favorites** icon.
- 5) Click **OK**.

4.2.2.3 How to Rename a Group from the Favorites List

Step by Step

- 1) Click on the Favorites list icon.
- 2) Click on the relevant group to expand the associated Journal entries.
- 3) Click in the group on the **Rename favorites group** icon.
- 4) In the next window, change the name of the favorites group
- 5) Click on **OK**.

4.2.2.4 How to Delete a Group from the Favorites List

Step by Step






- 1) Click on the Favorites list icon.
- 2) Click on the relevant group to expand the associated Journal entries.
- 3) Click in the group on the **Delete favorite group** icon.
- 4) Click **OK**.

4.2.3 Journal

The Journal is the list of all your inbound and outbound calls. You can use it to quickly and easily call your contacts again or to respond to missed calls. You can add a contact to your personal contacts.

Folder







The calls are arranged on the following tabs:




Symbol	Folder
	Open List of all incoming and outgoing calls that were not completed. The entry is deleted from this list if the call was successfully completed. Calls that have not yet been completed can be marked as completed and thus deleted from this list.
	Missed List of all incoming and outgoing calls that were not completed.
	Answered List of all incoming and outgoing calls that were completed.
	All calls List of all incoming and outgoing calls.
	Overdue reminders If a reminder was set for a call and the time for this reminder has elapsed, the call will be displayed here.

The number of entries contained in each group is displayed in parentheses.

Identification of Journal Entries

The entries are identified as follows:

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

Symbol	Folder
	Outgoing call - No answer
	Outgoing call to a group - Answered
	Outgoing call to a group - No answer

Journal Details

The journal details include the date, time and duration of each call, as well as the phone number, if detected. If a journal entry contains more information than the phone number such as the last name and first name, for example, these are also displayed. If a call was redirected to another subscriber (e.g., because he or she picked up your call), this will be shown to you via a message text (e.g., **Picked up by ...**). A pencil symbol on the right indicates a note; a clock symbol indicates a reminder.

Notes and Reminders

You can add a note to a journal entry, e.g., "discuss plan B". Optionally, you can set a reminder for the note after a certain time period. After the time period expires, a corresponding journal entry additionally appears in the folder for overdue reminders.

4.2.3.1 How to Display Details of a Journal Entry

Step by Step

- 1) Click **Journal**.
- 2) Click on the desired folder.
- 3) Click on the desired journal entry.

4.2.3.2 How to Mark an Open Call as Completed

Step by Step

- 1) Click **Journal**.
- 2) Click on the **Open** folder.
- 3) Click on the desired journal entry.
- 4) Click on the **Mark as completed** icon. The call will be deleted from the **Open** folder.

4.2.3.3 How to Add a Note to a Journal Entry

Step by Step

- 1) Click **Journal**.
- 2) Click on the desired folder.
- 3) Click on the desired journal entry.
- 4) Click on the **Edit Note** icon.
- 5) If you want to add a reminder to this note, select the appropriate time frame in the drop-down list.

4.2.3.4 How to Save a Journal Entry as a Personal Contact

Step by Step

- 1) Click on **Journal**.
- 2) Click on the desired folder.
- 3) Click on the desired journal entry.
- 4) Click on the **Add to Personal Contacts** symbol.
- 5) Complete the data as needed in the **Edit Personal Contact** window and click **OK**. The contact is saved in the personal contacts.

4.2.3.5 How to Delete a Journal entry

Step by Step

- 1) Click **Journal**.
- 2) Click on the relevant folder.
- 3) Click on the relevant entry.
- 4) In the entry, click on **Delete single journal entry**.

4.2.3.6 How to Delete Journal Entries in a Specific Time Period

Step by Step

- 1) Click **Journal**.
- 2) Click on the **Delete** symbol.
- 3) Click on **Delete journal entries older than**.
- 4) Select the desired time period from the drop-down list.
- 5) Click **Delete**.

4.2.3.7 How to Delete all Journal Entries

Step by Step

- 1) Click **Journal**.
- 2) Click on the **Delete** symbol.
- 3) Click on **Delete all journal entries**.
- 4) Click **Delete**.

4.3 Calls

A number of convenient features such as calling from a directory, favorites list or journal are available for making calls.

4.3.1 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Canonical	Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + () / - : ; are allowed.	+49 (89) 7007-98765
Dialable	Exactly as you would dial the call number on the 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.

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).

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

4.3.2 Call Functions







You can control call functions with myPortal Smart. You can also dial phone numbers directly from the Journal, the Favorites list or a directory.

Call Functions

Using call functions, you can access the features of your communication system.

During a call, buttons for call functions will be displayed. During a consultation call, additional call functions for a party who is on hold are visible when moving the mouse over the on hold party.

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

Symbol	Description
	Disconnect
	Consultation
	Retrieve call
	Alternate (Toggle/Connect)
	Redirect (during an incoming call) Transfer (during a call)
	Conference (phone-controlled)

For Windows operating systems, a phone number selected in a different application can be automatically transferred to myPortal Smart and dialed by using a hotkey. In order to do this, the "Desktop Dialing" software must be installed, and a hotkey must be configured under the myPortal Smart settings.

4.3.2.1 How to Dial a Number Manually

Step by Step

- › Enter the phone number in dialable format or in canonical format in the **Please dial** field and press the `Enter` key.

The last 10 phone numbers dialed are stored for redialing in the drop-down list for phone numbers.

4.3.2.2 How to Dial a Number using a Hotkey

Prerequisites

- A Windows operating system is installed on the PC.
- The "Desktop Dialing" software is installed.
- A hotkey was configured for this feature under the myPortal Smart settings.

Step by Step

- 1) Mark the number to be dialed in your application.
- 2) Press the key combination (hotkey) configured for the speed dial.

The phone number is displayed in the **Please dial** field of myPortal Smart. After about 3 seconds, the dialing is automatically performed. During this time, you can correct the number if necessary or to cancel the dialing.

INFO: If the number is not recognized as an internal number or is not in canonical format (e.g., +49 ...), a CO access code is added as a prefix to the number.

- 3) To correct numbers:
 - a) Click in the **Please dial** field and correct the number.
 - b) Then click on the handset icon on the right of the dialing window or press the `Enter` key on the keyboard.
- 4) To cancel dialing:
 - Press the `ESC` key on the keyboard or
 - Click on the Delete icon on the right in the dialing window.

4.3.2.3 How to Redial

Step by Step

- › Click with the left mouse button on the desired phone number in the Redial drop-down list.

4.3.2.4 How to Make a Call by Entering a Name (Quick Search)

Step by Step

- 1) Enter the initial letters of the name of the subscriber to be called in the **Please Dial** field. All entries from the directories starting with the letters you have entered will be displayed in a list.
- 2) Click on the desired entry. The call is initiated.

4.3.2.5 How to Make a Call from a Directory Search

Step by Step

- 1) Click on the **Directories / Search** tab.
- 2) Enter a search term in the input field.
- 3) Click on the **Search** button.
- 4) Click on a folder to expand the corresponding entries of the search results.
- 5) Click on the desired contact.
- 6) Click in the contact on the desired station number.

Related Topics

- [How to Search in Directories](#)

4.3.2.6 How to Make a Call from the Favorites List

Step by Step

- 1) Click on the Favorites list icon in either in the Minimized view or the Normal view.
- 2) Click on the relevant group to expand the associated Journal entries.
- 3) Select one of the following options:
 - a) Double-click on the desired entry in the Favorites list. The contact will be called back at the first stored phone number.
 - b) Click on the desired entry in the Favorites list. Click on the desired station number in the Favorites list entry. The contact will be called back at the selected number.

4.3.2.7 How to Make a Call from the Journal

Step by Step

- 1) Click on **Journal**.
- 2) Click on the desired folder.
- 3) Select one of the following options:
 - a) Double-click on the desired journal entry. The contact will be called back at the displayed number.
 - b) Click on the desired journal entry. Click in the journal entry on the desired station number. The contact will be called back at the selected number.

4.3.2.8 How to Initiate a Consultation Hold

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

Step by Step

- 1) Click **Consultation**.
- 2) Enter the phone number in dialable format or in canonical format and click **Dial**.

INFO: As an alternative to dialing manually, you can select the desired destination via **Redial**, **Favorites**, **Directories** or **Journal**.

4.3.2.9 How to Alternate between two Parties

Prerequisites

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

Step by Step

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

4.3.2.10 How to Transfer a Call

Prerequisites

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

Step by Step

- › Click **Transfer**.

4.3.2.11 How to Pick up a Call from the Favorites List

Step by Step

- 1) Click on the Favorites list icon in either in the Minimized view or the Normal view.
- 2) Click on the relevant group to expand the associated entries. An internal subscriber for whom a call is pending is flagged with bell symbol in the presence status.

INFO: To protect the privacy of the caller, the caller data (such as the phone number and name) is only displayed after the call is accepted.

- 3) Click on the presence status of the subscriber and confirm the pop-up window. The caller is redirected to you.

4.3.2.12 How to Initiate a Conference

Prerequisites

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

Step by Step

- › In the Call window, click on the **Conference** icon.

4.3.2.13 How to Start a Web Collaboration Session

Prerequisites

- You are connected with a subscriber.

Step by Step

- › In the Call window, click on the **Web Collaboration** icon.

4.3.2.14 How to Redirect a Call to your Voicemail Box

If you do not want to answer an incoming call personally, you can redirect it to your voicemail box.

Step by Step

- › Click on **Redirect**.

4.3.2.15 How to End a Call

Step by Step

- › Click **Disconnect**.

4.4 Voicemail

You can listen to voicemails in the voicemail box (UC Smart) of the communication system and call the respective senders. You can also add the sender to your personal contacts.



Before using your voicemail box for the first time, you will need to change the preassigned code number of the voicemail box. The code number is for security purposes when accessing the voicemail box remotely.

New Voicemail Indicator

As soon as there is at least one new voicemail, the number of voicemails is displayed under **Voicemail** in the main menu.

Folders for Voicemail





myPortal Smart organizes voice messages in the following folders:

Symbol	Folder
	New voice messages
	Old voice messages

The number of messages received is shown next to the folder name. On reaching the maximum number of voicemails, you can only receive further messages after deleting a voicemail. The maximum number of voicemails can be configured by the administrator.

Voicemail functions

The following symbols identify voicemail functions:

Symbol	Function
	Play message
	Move message
	Call sender
	Delete message

Listening to Voicemail

When a new voice message is listened to for the first time, the communication system moves it automatically from the **New voicemails** folder to the **Old voicemails** folder.

4.4.1 How to Change the Preassigned Code Number for the Voicemail Box

Step by Step

- 1) Dial the voicemail box number (default: 351) at your internal phone.
- 2) When prompted, enter the preassigned code number of the voicemail box (default: 123456).

- 3) When prompted, enter a new code number for the voicemail box.

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

4.4.2 How to Listen to a Voice Message on the Phone

Prerequisites

- Your presence status is **Office**.

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the desired folder.
- 3) Click on the desired voicemail.
- 4) Select the phone number of the desired phone in the **Play via** drop-down list.

INFO: Listening to voicemail is only possible through your own phone number or any additional numbers you have specified. Listening to voicemail via external numbers is only possible if your administrator has configured this in the system.

- 5) Click **Play voicemail**.

Next steps

Accept the call from the voicemail box at the telephone.

4.4.3 How to Call back the Sender of a Voice Message

Prerequisites

- The caller's phone number has been transmitted.

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the desired folder.
- 3) Click on the desired voicemail.
- 4) Click on the desired number of the voicemail sender.

4.4.4 How to Save the Sender of a Voicemail as a Personal Contact

Prerequisites

- The caller's phone number has been transmitted.

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the desired folder.
- 3) Click on the desired voicemail.
- 4) Click on the **Add to Personal Contacts** symbol.
- 5) Complete the data as needed in the **Edit Personal Contact** window and click **OK**. The contact is saved in the personal contacts.

4.4.5 How to Move a Voice Message

If you want to move a voice message from the **New voice messages** folder to the **Answered messages** folder, perform the following steps:

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the **new voice messages** folder.
- 3) Click on the desired voicemail.
- 4) Click on **Move Message**.

4.4.6 How to Delete a Voicemail

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the desired folder.
- 3) Click on the desired voicemail.
- 4) Click **Delete voicemail**.

4.4.7 How to Display Details of a Voicemail

Step by Step

- 1) Click **Voicemail**.
- 2) Click on the desired folder.
- 3) Click on the desired voicemail to display the details.

4.4.8 How to Activate or Deactivate Message Recording

Step by Step

- 1) Click **Settings**.
- 2) Click on the **Voicemail** tab.
- 3) Select one of the following options:
 - a) If you want to enable callers to leave a message after the greeting, select the **Recording** check box.
 - b) If you do not want callers to leave a message after the greeting, clear the **Recording** check box.
- 4) Click on **OK**.

4.4.9 How to Change your PIN for the Voicemail Box

Prerequisites

- This function is only available after you have changed the preassigned PIN (your internal phone number by default) for your voicemail box (see [How to Change the Preassigned Code Number for the Voicemail Box](#)).
- This function is only available when the connection to the system is encrypted (https).

Step by Step

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

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

- 6) Click on **OK**.

4.4.10 Notification Service for Messages

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

Prerequisites for the Notification Service

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

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

4.4.10.1 How to Enable or Disable E-mail Notifications

Prerequisites

- The sending of e-mails has been configured in the system.
- Your e-mail address is specified under **my profile details**.

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my profile details** tab.
- 3) Select one of the following options:
 - If you want to enable the e-mail notifications, select the **Voicemail to e-mail** check box.
 - If you want to disable the e-mail notifications, clear the **Voicemail to e-mail** check box.
- 4) Click on **OK**.

4.5 Conferences

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

Phone-controlled and Application-controlled Conferences

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

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

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

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

Differences between the conference types:

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

Scheduled Conference

Scheduled conferences are created as permanent conferences. The conference can be used as needed at any time without further scheduling. Scheduled conferences do not occupy any conference channel so long as no participant has dialed into the conference. The order of dialing in determines the assignment of the conference channels.

Administrators can change the specified dial-in number (MeetMe) for conferences via the WBM during the initial setup. The dial-in number with which the participants can dial into the conference is shown to the participants. They are then required authenticate themselves with their personal PIN or with the general guest PIN if allowed.

Moderators

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

- Create, edit and delete scheduled conferences.
- Add and remove conference participants.
Removed participants do not remain in the conference.





- Disconnect conference participants.
Disconnected participants can dial back into the conference.
- Specify another internal participant on the same node as the moderator
- Leave the conference without ending it immediately.
If the last moderator leaves the conference, it ends after 5 minutes.
- End active conferences.
- Start a web collaboration session in an active conference.
- Send predefined invitations to all or individual conference participants.

All internal participants within a node can be moderators. However, a conference license is required for this.

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

Conference Participants

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

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

Automatic Termination without a Moderator

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

Notification of Conference Participants

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

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

4.5.1 How to Display an Active Conference

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Active** tab. You will see all active conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
- 3) Click on the arrow icon of the desired conference to display the data and the participants of the conference.

Moderators are marked with a green star.

4.5.2 How to Display a Scheduled Conference

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Scheduled** tab. You will see all the conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
Conferences that are currently active are displayed in green and underlined.
- 3) Click on the arrow icon of the desired scheduled conference to have the data and participants of the conference displayed.

Moderators are marked with a green star.

4.5.3 How to Rename a Scheduled Conference

Prerequisites

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

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Scheduled** tab. You will see all the conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
Conferences that are currently active are displayed in green and underlined.
- 3) Click in the header of the scheduled conference on the name of the conference.
- 4) Change the name of the conference.

4.5.4 How to Create a Scheduled Conference

Step by Step

- 1) Click **Conference**.
- 2) Click on the **New Conference** icon on the tab bar.
- 3) Enter a name for the scheduled conference.
- 4) If you want other participants who are not listed in the scheduled conference to also be able to dial into the conference, select the **Allow dial-in via Guest PIN** check box.
- 5) Click **Create**.

The conference is created with you as the moderator.
- 6) Click on the arrow icon of the conference you just created to have the data and participants of the conference displayed.
- 7) Add further participants:
 - a) Click on the **Add Participants** symbol.
 - b) For a participant from the directories (e.g., internal subscribers), select the radio button **Add participant from directory** and enter either the phone number or name of the participant. Select the participant from the search results.
 - c) For an external participant, select the radio button **Add external participant** and enter the data of the participant.
 - d) Click on **OK**.
 - e) Repeat steps a through d for further participants.

INFO: You can also add further participants to the conference later via the Favorites list or a search in directories.

- 8) Specify the moderator for the conference:

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

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

INFO: You can delete conferences and add or remove participants only as a moderator.

9) Send invitations if required:

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

- a) If you want to send an invitation to all conference participants, click on the **Send invitations to all** symbol. The email program is opened, and an email with the dial-in number and guest PIN (if allowed) is created.
- b) If you want to send an invitation to one conference participant, click on the desired conference participant entry and then on the **Send invitation to ...** symbol. The email program is opened, and an email with the dial-in number, the personal PIN (conference ID) and guest PIN (if allowed) is created.
- c) If you want to copy the predefined invitation text to the clipboard in order to continue using it in other programs (e.g., chat), click on the **Copy invitation** icon.

4.5.5 How to Dial into a Conference

Prerequisites

- You are a participant of a scheduled or active conference.

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

Step by Step

- 1) Click **Conference**.
- 2) Select the conference:
 - If you want to dial into a scheduled conference, click on the **Scheduled** tab. You will see all the scheduled conferences in which you are a conference participant.
 - If you want to dial into an active conference, click on the **Active** tab. You will see all active conferences in which you are a conference participant.
- 3) Click on the arrow icon of the desired conference to display the data and the participants of the conference.

Moderators are marked with a green star.

- 4) Click on the **Connect** icon of the entry where you are listed. You will now be participating in the conference.

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

4.5.6 How to Add Conference Participants

Prerequisites

- You are a moderator of the conference.

Step by Step

- › Add the conference participants by one of the following methods:
 - Add a participant from the Favorites list:
Click in the Favorites list on the **Add to conference** symbol for the desired participant. Select the conference to which the participant is to be added and confirm this with **OK**.
 - Add a group from the Favorites list:
Click in the Favorites list on the **Add all favorites from group to conference** symbol for the desired group. Select the conference to which the group members are to be added and confirm this with **OK**.
 - Add a participant or group using the directory search:
Perform a search in the directories and click on the **Add to conference** symbol for the desired participant in the results list. Select the conference to which the participant is to be added and confirm this with **OK**.
 - Add a participant or group from the directories via the Conference Management:
Click on **Conference** and then on the **Scheduled** or **Active** tab. Click on the arrow icon of the desired conference to have the data and participants of the conference displayed. Click on the **Add Participants** symbol. Select the radio button **Add participant from directory** and enter either the phone number or name of the participant. Select the participant from the search results and confirm the selection with **OK**.
 - Add external participants via the Conference Management:
Click on **Conference** and then on the **Scheduled** or **Active** tab. Click on the arrow icon of the desired conference to have the data and participants of the conference displayed. Click on the **Add Participants** symbol. Select the radio button **Add external participant** and enter the data of the participant. Click **OK** to confirm your selection.

4.5.7 How to Disconnect a Conference Participant

Prerequisites

- You are a moderator of an active conference.

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Active** tab. You will see all active conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
- 3) Click on the arrow icon of the desired conference to display the data and the participants of the conference.

Moderators are marked with a green star.
- 4) Click on the **Remove member from conference** icon for the conference participant that you want to disconnect and confirm this with **OK**.

You can also remove yourself from the conference.

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

4.5.8 How to Remove Conference Participants

Prerequisites

- You are a moderator of a scheduled conference.

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Scheduled** tab. You will see all the conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
Conferences that are currently active are displayed in green and underlined.
- 3) Click on the arrow icon of the desired scheduled conference to have the data and participants of the conference displayed.

Moderators are marked with a green star.
- 4) Click on the conference participant you want to remove from the conference and then click on the **Delete Participant** icon.

You can also remove yourself from the conference.

4.5.9 How to Delete a Scheduled Conference

Prerequisites

- You are a moderator of the scheduled conference.

Step by Step

- 1) Click **Conference**.
- 2) Click on the **Scheduled** tab. You will see all the conferences in which you are a conference participant.

Conferences in which you are a moderator are marked with a green star.
Conferences that are currently active are displayed in green and underlined.
- 3) Click on the arrow icon of the desired scheduled conference to have the data and participants of the conference displayed.

Moderators are marked with a green star.
- 4) Click on the **Delete conference** symbol.

4.6 Web Collaboration

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

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

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

Integration of Web Collaboration

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

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

Instant Messaging and Web Collaboration

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

4.6.1 How to Start a Web Collaboration Session

Prerequisites

- Access to the Web Collaboration server is set up in the communication system.
- An email program is installed on the client PC.
- Only when started from an active conference: You are a moderator of the active conference.

Step by Step

- 1) Navigate to Start option of the Web Collaboration:
 - To start the web collaboration session from within a call, open the Call window.
 - To start the web collaboration from an active conference, click on **Conference** and then on the **Active** tab. Click on the arrow icon of the desired conference to display the data and the participants of the conference.
Moderators are marked with a green star. You can start a web collaboration session only in a conference in which you are a moderator.
- 2) Click on the **Start Web Collaboration** symbol.
The email program opens, and an email with a link to the web collaboration client is created. Recognized email addresses are automatically added to the distribution list.
In addition, a web page opens with the download link of the web collaboration client (fastviewer).
- 3) Add any further email addresses (e.g., for external conference participants) to the email if required and then send the email.
- 4) Load the web collaboration client on your PC and log in with the name and password. The web collaboration session is started.

INFO: The other participants of the active conference can optionally start their web collaboration client via the link in the email or by calling up this active conference with myPortal Smart and accessing the Web Collaboration client via the **Participate in Web Collaboration** symbol.

4.6.2 How to Participate in a Web Collaboration Session

Prerequisites

- Your conversation partner or the moderator of an active conference has started the web collaboration session.

Step by Step

- 1) Navigate to the option of dialing into the web collaboration session:
 - a) To participate in the web collaboration session from within a call, open the Call window.
 - b) To participate in the web collaboration session from within an active conference, click on **Conference** and then on the **Active** tab. Click on the arrow icon of the desired conference to have the data and participants of the conference displayed.
- 2) Click on the **Participate in Web Collaboration** symbol.
The download of your web collaboration client is initiated.
- 3) Load the web collaboration client on your PC and log in with the name and password. You have now joined the web collaboration session.

INFO: If you received an email from the moderator of the active conference, you can also start the web collaboration client via the link provided in the mail.

4.6.3 How to End a Web Collaboration Session

Prerequisites

- A web collaboration session has been started.
- Only for active conference: You are a moderator of the active conference.

Step by Step

- 1) Navigate to symbol for ending the web collaboration session:
 - To end the web collaboration session from within a call, open the Call window.
 - To end the web collaboration session from within an active conference, click on **Conference** and then on the **Active** tab. Click on the arrow icon of the desired conference to have the data and participants of the conference displayed.
- 2) Click on the **End Web Collaboration** symbol.

INFO: A web collaboration session is terminated automatically on ending the call or active conference from which it was started.

4.7 Instant Messaging

Using instant messaging, you can chat with other users of UC Smart.

The sent and received instant messages are presented to the communication partners as an interactive dialog. On selecting a recipient, the client shows whether the communication partner is currently online. If a communication partner is offline, no instant message can be transmitted to him or her. The IM overview page displays the most recent streams. The system stores a limited number of instant messages. A maximum of up to 100 of the last instant messages of a user are displayed.

4.7.1 How to Send an Instant Message from the Favorites List

Prerequisites

- Instant Messaging is enabled in the system.

Step by Step

- 1) Click on the Favorites list icon in either in the Minimized view or the Normal view.
- 2) Click on the relevant group to expand the associated Journal entries.
- 3) Click on the desired contact.
- 4) Click on **Start Chat**.
- 5) Enter the text in the input area below.
- 6) Click **Send**.
- 7) If you want to switch to IM the overview page, click on the icon to the left of **Instant Messaging**.

4.7.2 How to Send an Instant Message from a Directory Search

Prerequisites

- Instant Messaging is enabled in the system.

Step by Step

- 1) Click on the **Directories / Search** tab in either in the Minimized view or the Normal view.
- 2) Enter a search term in the input field.
- 3) Click on the **Search** button.
- 4) Click on a folder to expand the corresponding entries of the search results.
- 5) Click on the desired contact.

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

- 6) Click on **Start Chat**.
- 7) Enter the text in the input area below.
- 8) Click **Send**.
- 9) If you want to switch to IM the overview page, click on the icon to the left of **Instant Messaging**.

5 Configuration

You can configure myPortal Smart in accordance with your requirements. Some configuration tasks require UC Smart Assistant.

5.1 Personal Preferences

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

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

5.1.1 How to Edit your Contact Data

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

Step by Step

- 1) Click on the **My profile** icon for your presence status.
- 2) Click on the **my profile details** tab.
- 3) Edit the **Mobile phone number**, **External phone number** and **My email address** fields if required. Phone numbers should be entered in canonical format (e.g., +49891234567).
- 4) Click **OK**.

5.1.2 How to Provide your own Picture

Prerequisites

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

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my image** tab.
- 3) Click on **Refresh**.
- 4) Choose a folder and a file and click **Open**.

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

5.1.3 How to Delete your own Picture

Step by Step

- 1) Click on the icon for your presence status.
- 2) Click on the **my image** tab.
- 3) Click **Delete**.

5.2 Speed Dial (Desktop Dialing) Settings

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

The speed-dial function is enabled as soon as the PC is started. However, the functionality can only be used with myPortal Smart. The hotkey for speed dialing is set up in myPortal Smart as a single key or a key combination.

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

After the user has marked the phone number in the application and entered the configured hotkey, the hotkey is intercepted by the speed-dial function and passed on to the application only after a predefined delay. This delay causes the selected phone number to be automatically copied to the clipboard and passed to myPortal Smart.

As soon as the phone number has been passed to myPortal Smart, the dialing is performed after an adjustable delay time. Within this time period, you can still cancel the dialing or change the passed number. If you change the default value of 3s to 0s, the dialing will occur immediately.

Configuration

The hotkey and delay time can be set in myPortal Smart.

The other speed-dial settings can be changed in the "Desktop Dialing" software:

- Enabling or Disabling Speed Dialing:
 - **Intercept Key** enabled: speed dialing is enabled because the configured hotkey is intercepted by the speed-dial function (default setting).
 - **Intercept Key** disabled: speed dialing is disabled because the configured hotkey is not intercepted by the speed-dial function.
- Enabling or Disabling Speed Dialing for Other Applications:
 - **Send Key After (value in ms)** enabled: the configured hotkey is passed to the application after the set delay (default).

- **Send Key After (value in ms)** disabled: the configured hotkey is used exclusively for speed dialing. The hotkey does not work in other applications.
- Configuring the Delay Time for Passing the Hotkey:
The time for passing on the hotkey to the application is adjustable within a range from 50 ms to 2000 ms.

5.2.1 How to Define a Hotkey for Speed Dialing

Prerequisites

- A Windows operating system is installed on the PC.
- The "Desktop Dialing" software is installed.

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **Appearance** tab.



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

Key combination	Notes
F1 - F12	Often already in use by other applications.
SHIFT + another key	
CTRL + another key	Not allowed: CTRL+c, CTRL+x CTRL+v

- 4) If required, change the time period within which you can still cancel the dialing or change the passed number under **Delay time**. At 0 seconds, the dialing is executed immediately.
- 5) Click on **OK**.

5.2.2 How to Activate or Deactivate Speed Dialing

Prerequisites

- The "Desktop Dialing" software has been started.

Step by Step

- 1) Click with the right mouse button on the "Desktop Dialing" handset icon in the task bar.
- 2) Select the menu item **Change Config**.
- 3) Select one of the following options:
 - If you want to activate the speed dialing, select the **Intercept Key** check box.
 - If you want to deactivate the speed dialing, clear the **Intercept Key**

5.2.3 How to Activate or Deactivate the Hotkey for Other Applications

Prerequisites

- The "Desktop Dialing" software has been started.

Step by Step

- 1) Click with the right mouse button on the "Desktop Dialing" handset icon in the task bar.
- 2) Select the menu item **Change Config**.
- 3) Select one of the following options:
 - If you want the configured hotkey to be sent to the application after the delay, select the **Send Key After (value in ms)** check box.
 - If you do not want the configured hotkey to be sent to the application after the delay, clear the **Send Key After (value in ms)** check box. This hotkey will then be used exclusively for the speed dialing and can no longer be used in other applications.

5.2.4 How to Configure the Delay Time for Passing the Hotkey

Prerequisites

- The "Desktop Dialing" software has been started.

Step by Step

- 1) Click with the right mouse button on the "Desktop Dialing" handset icon in the task bar.
- 2) Select the menu item **Change Config**.
- 3) Select the menu item **Send Key After (value in ms)**.
- 4) Click on the desired delay time (50 - 200 ms).

5.3 Programming the Function Keys of the Telephone

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

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

INFO: The function keys of a SIP phone, an ISDN phone or an analog phone cannot be programmed with the UC Client.

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

Programming Function Keys on Different Levels

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

5.3.1 How to Program the Function Keys of the Telephone

Step by Step

- 1) Click **Settings**.
- 2) Click on the **Appearance** tab.
- 3) Click on the **Key Programming** link. A window for programming the function keys of the telephone is opened in the web browser.
 - a) If a message such as `There is a problem with this website's security certificate.` appears, click on **Continue to this website**.
- 4) Under the phone icon, Click on the key area that you want to edit.

- 5) In the detailed view of the key area, click on the key icon at end of the corresponding row. The key icon goes red and indicates that the function is active for programming.
 - a) If you want to display details on the current function of a key, move the mouse pointer over the label field to the left of the key.
- 6) Select the desired function from the **Choose Function** drop-down list.
 - a) If a function requires additional information (parameters), select these details or enter the required data.

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

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

5.4 General Settings

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

Server Connections

If a subscriber can be reached at different locations (e.g., via a LAN in the office and via the Internet at home), up to 4 server connections can be configured.

5.4.1 How to Change your myPortal Smart Password

Prerequisites

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

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Click on **Change password**.
- 4) Enter your old myPortal Smart password under **Old password**.

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

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

- 6) Click on **OK**.

5.4.2 How to Change the User Interface

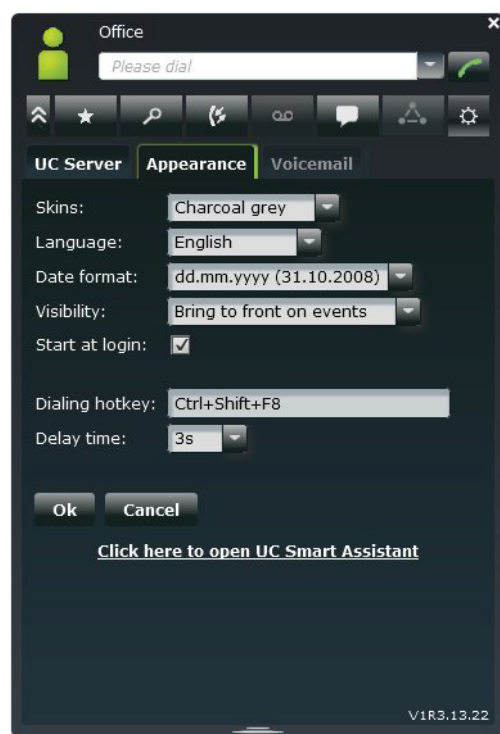
Step by Step

- 1) Click on **Settings**.
- 2) Click on the **Appearance** tab.
- 3) Select the user interface with the desired appearance from the **Skin** drop-down list.
- 4) Click on **OK**. The client will automatically restart.

5.4.3 How to Configure the Visibility of myPortal Smart

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **Appearance** tab.



- 3) Select one of the following options in the **Visibility** drop-down list:
 - If you want the myPortal Smart window to be always displayed in the foreground, select the **Always on top** check box.
 - If you want the myPortal Smart window to be displayed in the foreground only for calls or new messages, select **Bring to front on events**.
- 4) Click on **OK**.

5.4.4 How to Enable or Disable the Automatic Startup of myPortal Smart

Step by Step

- 1) Click **Settings**.
- 2) Click on the **Appearance** tab.
- 3) Select one of the following options:
 - If you want myPortal Smart to be started automatically, select the **Start at login** check box.
 - If you do not want myPortal Smart to be started automatically, clear the **Start at login** check box.
- 4) Click on **OK**.

5.4.5 How to Select the User Interface Language

Step by Step

- 1) Click **Settings**.
- 2) Click on the **Appearance** tab.
- 3) Select the desired language in the **Language** drop-down list.
- 4) Click **OK**.

myPortal Smart restarts automatically.

5.4.6 How to Select the Date Format

Step by Step

- 1) Click **Settings**.
- 2) Click on the **Appearance** tab.
- 3) Select the desired format from the **Date format** drop-down list.
- 4) Click **OK**.

5.4.7 How to Edit the Server Settings

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

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Enter the IP address or name of the communication system (e.g., 192.168.1.2) under **IP address of your server**.
- 4) Under **IP port of your server**, enter the port used by the UC client to communicate with the communication system (default: 8802).
- 5) In the **Protocol to server** drop-down list, select whether the connection to the communication system should be encrypted (**https** by default) or unencrypted (**http**).
- 6) Click **OK**.

5.4.8 How to Configure Additional Server Connections

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Under **Server connection**, select the index for the next available server connection.
- 4) Enter a user name for the server connection under **User Name**.
- 5) Under **Password**, enter the password for the server connection in accordance with the security policies.

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

- 6) Optional for MULAP: Enter the call number of the associated phone in the **Controlled device** field.
Prerequisite: Your user name represents a MULAP.
- 7) Only for Mobility Users: Select one of the following options in the **Dial Mode** drop-down list:
 - If you want to initiate outbound calls with your office phone, select **Associated dial**.
 - If you want to initiate outbound calls with your mobile phone, select **Callback preferred**.
- 8) Enter the IP address or the domain name of the server in the **IP address of your server** field.
- 9) Under **IP port of your server**, enter the port used by the UC client to communicate with the server (default: 8802).
- 10) In the **Protocol to server** drop-down list, select whether the connection to the server should be encrypted (**https** by default) or unencrypted (**http**).
- 11) Click **OK**.
- 12) If you want to configure additional server connections, repeat the previous steps.

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

Prerequisites

- Your user name represents a MULAP.
- The call number for the associated phone was communicated to you by your administrator.

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Enter the call number of the associated phone in the **Device Configured** field.
- 4) Click on **OK**.

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

Step by Step

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

5.4.11 How to Reconnect with myPortal Smart

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Only if you want to use another server connection: select the desired server connection under **Server connection**.
- 4) Click on **Reconnect**.

5.5 UC Smart Assistant

UC Smart Assistant is the web-based application for special configuration tasks of myPortal Smart by users.

In order to access UC Smart Assistant, you must log in with the user name and password of myPortal Smart.

UC Smart Assistant can be used for the following tasks:

- Change the password of myPortal Smart (also possible using myPortal Smart)
- Change the language of the UC Smart Assistant user interface.
The language of the myPortal Smart user interface is not affected by this.

- Enter or edit your own profile data (also possible using myPortal Smart)
- Import Outlook contacts into the personal contacts (Java required)
- Delete imported contacts

Related Topics

- [How to Start myPortal Smart](#)
- [Favorites List](#)

5.5.1 How to Start UC Smart Assistant

Step by Step

- 1) Click on **Settings**.
- 2) Click on the **UC Server** tab.
- 3) Click on the link **Click here to open the UC Smart Assistant**. UC Smart Assistant opens in the web browser.
- 4) Enter your user name for myPortal Smart (default: your internal station number, e.g., 330) in the **Name** field.
- 5) Enter your password for myPortal Smart in the **Password** field.
- 6) Click on **Login**.

Related Topics

- [How to Start myPortal Smart](#)

5.5.2 How to Change the Password for myPortal Smart

Prerequisites

- You have started the UC Smart Assistant.

Step by Step

- 1) Click **User settings**.
- 2) Enter the new Password under **Password** and **Repeat Password** in accordance with the security guidelines.

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

- 3) Click **Apply**.

Related Topics

- [How to Start myPortal Smart](#)

5.5.3 How to Change the Language of the UC Smart Assistant User Interface

Prerequisites

- You have started the UC Smart Assistant.

Step by Step

- 1) Click **User Settings**.
- 2) Select the desired language for the user interface of UC Smart Assistant in the **Language** drop-down list.

INFO: The language of the myPortal Smart user interface is not affected by this.

- 3) Click **Apply**.

5.5.4 How to Edit your Profile Data

Prerequisites

- You have started the UC Smart Assistant.

Step by Step

- 1) Click **User Settings**.
- 2) Change your profile data in the **profile details** area if required.
- 3) Click **Apply**.

5.5.5 How to Import Outlook Contacts into the Personal Contacts

Prerequisites

- Your Outlook contacts contain phone numbers in canonical format.
- Java is enabled in your web browser.
- You have started the UC Smart Assistant in the web browser of the PC on which Outlook is running.

Step by Step

- 1) Click on **Import Contacts**.
- 2) If you do not want to import Outlook contacts that contain no phone numbers, select the check box **Do not import contacts without phone numbers**.
- 3) If you want to import the images as well, select the **Import pictures** check box.
- 4) Click **Start Import**.

INFO: Refer to the notes provided in UC Smart Assistant about security warnings at this point and grant the appropriate access to perform the import. Reject any related prompts to block components.

5.5.6 How to Delete the Imported Contacts

Prerequisites

- You have started the UC Smart Assistant.

Step by Step

- 1) Click on **Import Contacts**.
- 2) Click on **Delete imported contacts**.

INFO: Refer to the notes provided in UC Smart Assistant about security warnings at this point and grant the appropriate access.

5.6 Web collaboration integration

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

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

5.6.1 How to Configure the Connection to the Web Collaboration Server (Public Server)

Prerequisites

- You have started the UC Smart Assistant.
- Internet access is available.
- You need a license number and a password for the secure connection to the web collaboration server (public server).

Step by Step

- 1) Click on **Web Services**,
- 2) Select the **Public Server** radio button.
- 3) Enter the license number for the secure connection to the web collaboration server (public server) in the **Licence Number** field.
- 4) Enter the password for the secure connection to the web collaboration server (public server) in the **Password** field.

INFO: If you want to test the Web Collaboration for 5 minutes, you can select the radio button **Public Server (Demo Mode/ Evaluation Mode)**. No license number and password are required for this purpose.

- 5) Click on **Apply** followed by **OK**.

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