

# Documentation

**HiPath 3000/5000 V8**  
**HiPath 500 V8**  
**myPortal entry**

User Guide

A31003-H3580-U102-4-7619

Communication for the open minded

Siemens Enterprise Communications  
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# 1 Introduction

This document is intended for users of myPortal entry and describes its operation in detail.

myPortal entry can be used with the following communication systems:

- HiPath 3300/3350/3500/3550 as of V8R4
- HiPath 500 as of V8R4

You can enjoy the benefits of myPortal entry on your iPhone as well with myPortal web!

See the User Guide for myPortal web for details.

Extend the functionality of myPortal entry with the Firefox plugin WebCall Extension!

## 1.1 About this Guide

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

Purpose	Presentation	Example
User interface elements	Bold	Click <b>OK</b> .
Menu sequence	>	<b>File &gt; Exit</b>
Special emphasis	Bold	<b>Do not delete</b> Name.
Cross-reference text	Italics	You will find more information in the topic <i>Network</i> .
Output	Monospace font, e.g., Courier	Command not found.
Input	Monospace font, e.g., Courier	Enter LOCAL as the file name.

Purpose	Presentation	Example
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>
Work Steps and Substeps	Numbered and alphabetical lists	Configure the DSL telephony stations with the associated DID phone numbers. Click <b>Add</b> . Enter the name of the Internet telephony station under <b>Internet Telephony Station</b> .
Alternative Work Steps	Enumeration	If you want to output amounts, enable the check box <b>Display amounts instead of units</b> . If you want to output units, clear the check box <b>Display amounts instead of units</b> .

When operating PC programs with a mouse, the following assumptions are made for the mouse configuration:

- Primary mouse key: "Click on ..."
- Secondary mouse key: "Right-click on ..."

## 1.2 Overview

The unified messaging solution myPortal entry offers convenient dialing aids via Presence and Journal functions as well as access to voicemail.

The myPortal entry Web Services allow you to quickly access the phone numbers of employees, colleagues and external contacts from your mobile phone. Several different directories are provided by the Web Services for this purpose.

The system directory contains all the speed dial destinations of the telecommunications system. The internal directory contains all internal users, including their current presence status. The personal phone directory contains your individually created contacts and offers you the option of importing your Outlook contacts. The recursive search function across directories allows you to quickly find the desired contact.

## Introduction

### User Interface Elements

myPortal entry supports you in using your phone with the following features:

- Call control for inbound and outbound calls
- Presence
- Journal
- Voicemail
- Team functions
- Scalable interface, e.g., through skins, and easy localization
- Status-based call forwarding
- Personal directory/contacts
- Access to internal directory and system directory
- Freely programmable function keys
- Use of an Internet directory
- Invoking (web) applications depending on the phone number

---

**IMPORTANT:** As a user of myPortal entry, you should avoid using the **phone lock** function at your office telephone.

---

## 1.3 User Interface Elements

The user interface of myPortal entry consists of a Start button, a function bar and status-dependent popup windows.

### myPortal entry Start

**myPortal entry Start** is used to show and hide the function bar and to bring up different configuration menus.













## Function Bar

The function bar includes the following symbols (from right to left):



Symbol	Name/Function
	<b>Connections</b> Call control for inbound and outbound calls
	<b>Presence</b> Presence function and status-based call forwarding
	<b>Contacts / Directories</b> Personal contacts, importable and editable, and access to directories of the communication system
	<b>Team functions</b> Hidable Info and Forwarding functions for a team
	<b>Function keys</b> Call phone numbers and functions quickly
	<b>Journal</b> Call list function
	<b>Voice Messages</b> Access to your voicemail (can be hidden)
	<b>Internet directory</b> Use public phone directories

The symbol names are displayed as tooltips when a user hovers the mouse over them.

### Call control

On receiving inbound calls and during a call, the call is automatically shown in the call control.



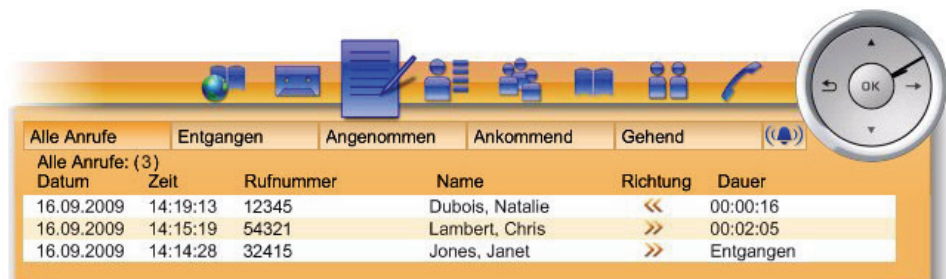
Inbound calls can be answered with a single click on the Answer Call button or rejected by clicking on the red handset symbol. If the caller's phone number is contained in the personal directory, the user's name also appears above the phone number.

Outbound calls can be easily initiated by entering the phone number and clicking the on the **Dial Number** button next to it or by using the **Redial** button (max. 9 entries).

The red handset symbol can be used to end a call.

### Popup windows

Popup windows appear when a function is called manually. The function called in each case is presented in a popup window.



### Symbols in myPortal entry Start

If there are new entries in the local journal or in the mailbox of your communication system, this is indicated by red exclamation marks. In such cases, an exclamation mark also appears above the **Voicemail** or **Journal** symbol.



In the event of connection problems with the WebServices PC, a lightning symbol is displayed, and a corresponding message text appears above the function bar. If the error message persists, please contact the administrator of your communication system.



### **Context menus**

Context menus provide situation-based actions for selection. Context menus can be opened by clicking on the relevant object with the right mouse button.

### **Online Help**

If you want to invoke the Help for a function, click in the function bar on the desired function and then press the <F1> key on the keyboard. Clicking the **X** symbol at the top right of the Help window closes the help.

### **Tooltips**

Tooltips are small windows that are used to display more information on specific elements of the graphical user interface (e. g., symbols). A tooltip appears when you let the mouse pointer hover over that element for a brief period of time.

## **1.4 Yahoo! Widgets Engine**

In order to use myPortal entry, you will need the Yahoo! Widgets Engine. Details on the installation and configuration can be obtained from your system administrator.

The Yahoo! Widgets Engine consists of a symbol in the task bar and the expandable Yahoo! Widgets console at the edge of the screen.



You can start, stop, hide and reveal myPortal entry at any time via the console. The console may include further widgets in addition to myPortal entry.

More information on the operation of Yahoo! widgets and the console can be found on the Internet at <http://widgets.yahoo.com/>.

## 1.5 First Steps

If configured accordingly, you will need to change your personal password before using myPortal entry for the first time. Your system administrator has the required data.

If you have a voicemail box with a personal voicemail password, you must also enter this data in myPortal entry; see [How to Configure Access to Voicemail](#).

This section also shows you how to start and stop myPortal entry and display information. More information on the operation of myPortal entry and other Yahoo! widgets as well as the Yahoo! Widgets Engine can be found on the Internet at <http://widgets.yahoo.com/>.

### 1.5.1 How to Change the Password

The password is changed by using the myPortal entry Web Services Assistant.

- Prerequisites:**
- Login Name (your station number) and Initial Password (identical to the login name by default).
  - IP address of the myPortal entry Web Services Assistant.

- Step by Step:**
1. Open an Internet browser and enter either of the following URLs `http://<admin IP address>:8801/admin` or `http://<admin IP address>:8802/admin` in its URL line. Then confirm your entry. `<admin IP address>` refers to the IP address of the myPortal entry Web Services Assistant.
  2. Enter your phone number in the **Name** field and the initial password (which is identical to the user name by default) in the **Password** field, and click **Login**.
  3. Enter a new password that is only known to you in the **Password** and **Confirm Password** fields. If required (ask your system administrator), the password must contain a minimum of eight and a maximum of 16 characters and consist of a combination of uppercase and lowercase letters, digits and special characters. The valid special characters are:  
`!"$%&=?\{'^*+~/'#|^;:<>&.`
  4. Click **Save**.

**Next steps:** Apply your new password in myPortal entry; see [How to Define Access Data for the Plug Computer](#).

## 1.5.2 How to Start myPortal entry

- Prerequisites:**
- The Yahoo! Widgets Engine has started.
  - myPortal entry is installed.

- Step by Step:**
1. Open the Yahoo! Widgets console and click on the symbol **myPortal entry**.

## 1.5.3 How to Display Information about myPortal entry

Among other things, the version of myPortal entry widget is displayed on the Info page.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **About myPortal entry** in the context menu.

## 1.5.4 How to Exit myPortal entry

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Close Widget** in the context menu.

## 2 Making Calls

myPortal entry provides you with not only the usual call control functions for your assigned telephone, but also the convenient functionality of the personal directory, the journal and the function keys.

### 2.1 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Dialable	For the dial mode "Callback preferred" and "Call through": exactly as you would dial the phone number at the telephone of the PBX system. For the dial mode "GSM preferred": exactly as you would dial the phone number at the mobile phone, i.e., always as when located in the external network or when making an international call.	321 (internal) 072298765 (own local network) 008972298765 (external local network) 000498972298765 (international)
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) 722-98765 after importing from Outlook, for example

For details on the interpretation of canonical phone numbers in myPortal entry, see [How to Set the CTI Site Parameters](#).

## 2.2 Call Functions

You can use myPortal entry to control call functions, e.g., to accept or make calls. You can optionally dial phone numbers directly from the journal, by using function keys or from the personal directory (phonebook).

### 2.2.1 How to Answer a Call

**Prerequisites:** • An inbound call is displayed in the **Connections** call control.

**Step by Step:** 1. Click on the large button with the ringing bell symbol.

### 2.2.2 How to Make Calls by Entering a Number Manually

**Step by Step:**

1. Click in the middle of **myPortal entry Start**.
2. Click on the **Connections** symbol.
3. Click in the white field and enter the phone number in dialable format or paste a number from the clipboard with <CTRL>+<V>.
4. Select one of the following options:
  - Click on the **Dial number** button.
  - Press the Enter key on the PC keyboard.

### 2.2.3 How to Redial

**Prerequisites:** • There are existing entries in the redial list.

**Step by Step:**

1. Click in the middle of **myPortal entry Start**.
2. Click on the **Connections** symbol.
3. Click the **Redial** button.
4. Click on the desired number in the redial list.

## 2.2.4 How to Make Calls from a Directory

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click on one of the **Personal contacts, Internal directory, System directory** or **All directories** tabs.
  4. Select one of the following options:
    - Click in the appropriate directory entry on the desired station number.
    - Click in the context menu of the appropriate directory entry on the desired station number.

## 2.2.5 How to Make Calls with Function Keys

- Prerequisites:**
- There are existing function keys; see [How to Add a Function Key](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Function Keys** symbol.
  3. Click on the desired function key.

## 2.2.6 How to Make a Call from the Journal

- Prerequisites:**
- There are existing entries in the journal.
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Journal** symbol.
  3. Click on one of the following folders: **All Calls, Missed, Answered, Inbound, Outbound** or **Reminder** (ringing bell symbol).
  4. Select one of the following options:
    - Click on the desired journal entry.
    - Click in the context menu of the appropriate journal entry on the station number.

## 2.2.7 How to End a Call

- Step by Step:**
1. Select one of the following options:
    - Click in the **Current Connections** popup window on **Hang Up**.
    - Click on **Hang Up** in the menu bar.



## 2.3 Directories

Besides your personal contacts, you can also access the internal directory and system directory of your communication system (if configured). Only the entries in the personal contacts can be edited with myPortal entry. A maximum of 1,000 entries are possible in the personal contacts.




### Directory details

The List view of the directories shows details in the following columns:

- Last Name
- First Name
- Phone No. Business
- Phone No. Mobile
- Phone No. Home

### Symbols

The following symbols are displayed under the List view:

Symbol	Function
	Import / update imported Outlook contacts
	Import / update imported CSV contacts
	Add a contact

### Searching/Filtering

On opening the directory, a list with all existing contacts is displayed. To facilitate the search for a specific entry, the list can be filtered by specific search terms.

The filter can be applied to all fields/columns, e.g., **Last Name** or **Phone No. Business**. It is also possible to search by subterms. The results of the search are displayed dynamically in a list during the input.

### Importing Contacts

Besides adding contacts manually, you can also import contacts from Outlook or a CSV file.

---

**IMPORTANT:** Phone numbers imported from other sources (Outlook Excel CSV) must be available and imported in the canonical format (+49...) in order to ensure correct dialing in all dial modes.

---

Supported CSV structure (UTF-8) for import:

```
Header line with any text
Last Name;First Name;Phone Business;Home Phone;Mobile
Miller;Steven;+49 (89) 722-12345;+49 (89) 1234567;+49 (151) 1234567
```

## 2.3.1 How to Search or Set a Filter in a Directory

**Prerequisites:**

- Personal contacts exist (see [How to Add a Personal Contact](#)) or the directories of the communication system have been set up.

**Step by Step:**

1. Click in the middle of **myPortal** entry **Start**.
2. Click on the **Contacts / Directories** symbol.
3. Click on one of the **Personal contacts**, **Internal directory**, **System directory** or **All directories** tabs.
4. Click in the **Search** field at the lower edge of the window.
5. Enter one or more characters.

**Next steps:** Select an entry from the results list.

## 2.3.2 How to Add a Personal Contact

**Step by Step:**

1. Click in the middle of **myPortal** entry **Start**.
2. Click on the **Contacts / Directories** symbol.
3. Select one of the following options:
  - Click on the **Add a contact** symbol at the lower edge of the window.
  - Click in the context menu of any directory entry on **Add a contact**.
4. Enter the appropriate contact data in the **First Name**, **Last Name**, **Phone No. Business**, **Phone No. Home** and **Phone No. Mobile** fields.
5. Click **Save**.

## 2.3.3 How to Edit a Personal Contact

**Prerequisites:**

- There are existing contacts; see [How to Add a Personal Contact](#).

**Step by Step:**

1. Click in the middle of **myPortal** entry **Start**.
2. Click on the **Contacts / Directories** symbol.
3. Click in the context menu of the desired directory entry on **Edit this contact**.
4. Edit the appropriate contact data in the **First Name**, **Last Name**, **Phone No. Business**, **Phone No. Home** and **Phone No. Mobile** fields.
5. Click **Save**.

## 2.3.4 How to Delete a Personal Contact

**Prerequisites:** • There are existing contacts; see [How to Add a Personal Contact](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click in the context menu of the desired directory entry on **Delete this contact**.

## 2.3.5 How to Delete all Personal Contacts

**Prerequisites:** • There are existing contacts; see [How to Add a Personal Contact](#).

---

**IMPORTANT:** The deletion of all entries occurs without a confirmation prompt.

---

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click in the context menu of any directory entry on **Delete all contacts**.

## 2.3.6 How to Import Contacts from Outlook

- Prerequisites:**
- Outlook is installed, and there are exiting contacts in Outlook with phone numbers in dialable or canonical format.

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click on the **Import / update imported Outlook contacts** symbol at the lower edge of the window.
  4. Select or clear the check box **Do you want to first delete the old contacts?** as required.
  5. Select or clear the check box **Do not import contacts without phone numbers** as required.

Depending on the number of entries involved, the import may take up to several minutes.

## 2.3.7 How to Import Contacts from a CSV file

- Prerequisites:**
- A valid CSV file is available.

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click on the **Import / update imported CSV contacts** symbol at the lower edge of the window.
  4. Confirm the prompt **Do you want to first delete the old contacts?** with **Yes** or **No**.
  5. Select a CSV file and click **Open**.

Depending on the number of entries involved, the import may take up to several minutes.

## 2.4 Function Keys

The function keys are assigned phone numbers or feature code procedures.

When a function key is programmed with a station number of an internal subscriber who is configured for myPortal, it also shows the Presence status of that subscriber.

Using the PABX feature codes, for example, the *Do Not Disturb* (\*97) function could be assigned to a function key. Clicking a function key then initiates dialing immediately or executes the procedure.

## 2.4.1 How to Add a Function Key

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Function Keys** symbol.
  3. Select one of the following options:
    - Click in the lower end of the popup window.
    - Click in the context menu of any function key on **Add Function Key**.
  4. Enter a phone number in canonical or dialable format or a feature code procedure in the **Phone number or feature code procedure** field.
  5. Enter any text in the **Function Key label** field.
  6. Click **Save**.

## 2.4.2 How to Edit Function Key Assignments

- Prerequisites:**
- There are existing function keys; see [How to Add a Function Key](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Function Keys** symbol.
  3. Click in the context menu of the desired function key on **Edit this function key**.
  4. Enter another phone number in canonical or dialable format or another feature code procedure in the **Phone number or feature code procedure** field.
  5. Enter any appropriate text in the **Function Key label** field.
  6. Click **Save**.

## 2.4.3 How to Delete a Function Key

- Prerequisites:**
- There are existing function keys; see [How to Add a Function Key](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Function Keys** symbol.
  3. Click in the context menu of the desired function key on **Delete this function key**.
  4. Confirm the prompt with **Yes**.

## 2.5 Journal

The Journal is the list of all your inbound and outbound calls. You can call back contacts quickly and easily from within the journal or call them again if required and even flag calls for a scheduled follow-up. The journal data is stored locally. Data is recorded in the journal only when myPortal entry is active.

### Folders for call types

The calls are arranged in the following folders:

- **All**
- **Missed**
- **Answered**
- **Inbound**
- **Outbound**
- **Follow-up** (ringing bell symbol)

### Display of journal entries



New entries are displayed as red exclamation marks before **myPortal entry Start** and in front of the **Journal** symbol in the function bar.



### Retention period

myPortal entry retains calls in the journal for an unlimited time period. They can, however, be deleted manually on a timed basis.

### Call Details

Every call is shown with the **Date** and **Time** and, if available, with the **Phone No.** If the personal directory includes additional information for the phone number such as the **Last Name** and **First Name**, these details are also displayed. In addition, the **Direction**, **Duration** and column with symbols for Notes, if available, are displayed.

Direction symbols	Meaning
	Inbound
	Outbound

Note symbols	Meaning
	A note has been saved for the entry.
	The note has been assigned a follow-up.

## 2.5.1 How to Delete a Journal Entry

**Prerequisites:** • There are existing journal entries.

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Journal** symbol.
  3. Click in the context menu of the desired journal entry on **Delete Single Journal Entry**.

## 2.5.2 How to Delete Multiple Journal Entries

**Prerequisites:** • Multiple journal entries exist.

---

**IMPORTANT:** The deletion of all entries occurs without a confirmation prompt.

---

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Journal** symbol.
  3. Click in the context menu of any directory entry on **Delete Multiple Journal Entries**.
  4. Select the time period from the list before which the entries are to be deleted and select **All**.
  5. Click **Delete**.

## 2.5.3 How to Filter Journal Entries by Call Type

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Journal** symbol.
  3. Click on one of the following folders: **All Calls**, **Missed**, **Answered**, **Inbound**, **Outbound** or **Reminder** (ringing bell symbol).

## 2.5.4 How to Add or Edit Notes

**Prerequisites:** • There are existing entries in the journal.

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Journal** symbol.
  3. Click in the context menu of the desired journal entry on **Add/Edit Note**.
  4. Enter any text in the **Note** field.
  5. If required, select a time period for the follow-up from the **Time** field.
  6. Click **Save**.

## 2.5.5 How to Delete a Note

**Prerequisites:** • There are existing entries with notes in the journal; see [How to Add or Edit Notes](#).

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Journal** symbol.
  3. Click in the context menu of the desired journal entry on **Delete Note**.

## 2.5.6 How to Respond to a Follow-up

**Prerequisites:** • A popup window with an overdue follow-up is displayed.

- Step by Step:**
1. Select one of the following options:
    - Click on the desired journal entry to dial.
    - Click in the context menu of the appropriate journal entry on the phone number to dial.
    - To discard a follow-up, click in the context menu of the desired reminder on **Discard**.
    - To discard all follow-ups, click on **Discard All**.



## 3 Controlling Availability








You can control your availability by using powerful functions of the communication system.

### 3.1 Presence Status

The Presence status controls different call forwarding destinations and the Do Not Disturb mode. The call forwarding destinations are configurable.

#### Symbols

The popup window for the Presence status contains the following symbols:

Symbol	Presence status
	Office
	Meeting
	Sick
	Break
	Gone Out
	Vacation
	Lunch
	Gone Home
	Do Not Disturb

### **Display of the Presence status**

Your currently selected Presence status is indicated by a symbol in the function bar of your myPortal entry. In addition, your status is also shown to other users in their contacts of myPortal web.

## **3.1.1 How to Change the Status**

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Presence** symbol.
  3. Select the desired presence status.
  4. If no call forwarding destination has been set up as yet, the configuration is started automatically; see [How to Configure Status-based Call Forwarding](#).
  5. Specify the time of your return and click **OK**, or click **Unknown** if you do not want to specify a return time.

## **3.2 Status-based Call Forwarding**

Status-based call forwarding enables you to forward calls to any other phone number or to voicemail, depending on your Presence status.

When you change your presence status, the communication system activates call forwarding to the destination defined by you for this purpose. For example, if you are away from the office, to your mobile phone or if you are on vacation, to your representative.

### **3.2.1 How to Configure Status-based Call Forwarding**

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Intelligent Routing** symbol.
  3. Select one of the following options:
    - Click in the context menu of the desired status on **Edit Forwarding Destination**.
    - Only if no destination is configured: click on the desired status.
  4. Enter the phone number in canonical or dialable format.
  5. Click **Save**.

## 3.3 Return Time

Every status can be associated with a return time. The return time is set on changing the presence status; see [How to Change the Status](#).

The own return time, if set in the selected status, is shown on the right under the function bar.

### 3.3.1 How to Display the Return Time of other Subscribers with Function Keys

**Prerequisites:** • There are existing function keys; see [How to Add a Function Key](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Function Keys** symbol.
  3. Position the mouse pointer over the Presence icon of the desired function key to have the return time displayed as a tool tip.

### 3.3.2 How to Display the Return Time of Other Subscribers in the Personal Contacts

**Prerequisites:** • There are existing entries in the personal contacts; see [How to Add a Personal Contact](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Contacts / Directories** symbol.
  3. Click on the **Internal directory** tab.
  4. If the Presence status is available and set to be displayed, the return date and time of the contact will appear in the **Return Time** column.

## 4 Team Functions

Team functions enable you to perform actions simultaneously for multiple internal subscribers, e.g., send Info texts or set up call forwarding, provided the subscribers are authorized for Associated Services.

### 4.1 Configuring Team Functions

You can set up a team of internal subscribers, referred to as team members. A maximum of 100 internal subscribers can be added to a team, of which a maximum of 30 members may be selected. Otherwise, this menu item can be hidden via the Widget Preferences.

#### Importing Users



Besides adding users manually, you can also import contacts from a CSV file.

Supported CSV structure (UTF-8) for the import:

```
Headline with any text  
Last name;first name;internal phone number  
Miller;Steven;11  
Meier;Hans;12
```

#### Symbols

The popup window for Team functions contains the following symbols:

Symbol	Name/Function
	Add internal user
	Import list of internal users from a CSV file

#### Display of users

The unselected users are shown on the left under **Select 1 or more user(s)**, and the selected users appear on the right under **Selected user(s)**.

## 4.1.1 How to Add Users to a Team

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Team Functions** symbol.
  3. Select one of the following options:
    - Click on the **Add an internal user** symbol.
    - Click in the context menu of any user on **Add an internal user**.
  4. Enter the appropriate data in the **First Name, Last Name** and **Phone No. Business** fields.
  5. Click **Save**.

## 4.1.2 How to Import a User List from a CSV File

- Prerequisites:**
- A valid CSV file is available.
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on the **Import list of internal users from CSV file** symbol.
  4. Confirm the prompt **Do you want to first delete all entries?** with **Yes** or **No**.
  5. Select a CSV file and click **Open**.

## 4.1.3 How to Edit Team Members

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on **Edit this user** in the context menu of the desired member.
  4. Enter the modified data in the **First Name, Last Name** and **Phone No. Business** fields.
  5. Click **Save**.

## 4.1.4 How to Remove Team Members

- Prerequisites:**
- There are existing members in the team; see [How to Add Users to a Team](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on **Remove this user from team** in the context menu of the desired member.

## 4.1.5 How to Change a Team Selection

**Prerequisites:** • There are existing subscribers in the team; see [How to Add Users to a Team](#).

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on a user in the list on the left to add that user to the team, or click on a user in the list on the right to remove that user from the team.

## 4.1.6 How to Configure Info Texts

Note that when editing the texts in myPortal entry, the Info texts in the communication system must also be adapted accordingly. The texts in myPortal entry are only intended for information purposes.

- Step by Step:**
1. Right-click on **myPortal entry Start**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Team**.
  4. Edit the texts in the **Info text 0** through **Info text 9** fields.
  5. Click **Save**.

## 4.1.7 How to Configure Team Forwarding Destinations

- Step by Step:**
1. Right-click on **myPortal entry Start**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Team**.
  4. Enter one or more comma-separated phone numbers in the **Team forwarding destinations** field.
  5. Click **Save**.

## 4.2 Actions for Team Members

You can perform actions simultaneously for selected team members. To do this, you will need the authorization for Associated Services.

## 4.2.1 How to Send an Internal Info to Team Members

- Prerequisites:**
- There are existing subscribers in the team who have been selected; see [How to Change a Team Selection](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on the **Send Internal Info** button.
  4. Select the desired Info from the list.

## 4.2.2 How to Forward All Calls for Team Members

- Prerequisites:**
- Team members exist and have been selected; see [How to Change a Team Selection](#).
  - A team forwarding destination has been configured; see [How to Configure Team Forwarding Destinations](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on the **Forward all calls** button.
  4. Select from the **Forward to:** list.

## 4.2.3 How to Turn off Call Forwarding for Team Members

- Prerequisites:**
- Call forwarding has been turned on for a team; see [How to Forward All Calls for Team Members](#).

- Step by Step:**
1. Click in the middle of **myPortal** entry **Start**.
  2. Click on the **Team Functions** symbol.
  3. Click on the **Forward all calls** button.
  4. Select from the **Forwarding off** list.

## 5 Voicemail

myPortal entry enables you to conveniently manage voice messages in your voicemail. You can listen to your voicemails, for example, and delete voice messages. In order to access voicemail from within myPortal entry, voicemail must be set up in the communication system and subsequently configured and enabled in myPortal entry.

### Symbols

The popup window for voice messages contains the following symbols to control the voicemail:

Symbol	Name/Function
	Back to first message
	Previous message
	Repeat message
	Next message
	Delete voice message
	Call sender of current voice message
	Stop listening to voice messages

### Displaying Voicemail Messages

New messages are displayed as red exclamation marks before **myPortal entry Start** and in front of the **Voice Messages** symbol in the function bar. In addition, the number of all new and old messages is shown in the Voicemail Messages popup. During the retrieval, the date, time and, if present, the caller's phone number are displayed.



### Listening to Voicemail Messages

myPortal entry lets you control the voice messages in your voicemail by listening to them at your own phone or at any other phone via a configurable phone number. It is not possible to play back voicemails through the PC loudspeaker.

### Calling the Sender of a Voicemail Message

If the caller's phone number is available, you can call the sender of a voicemail.

## 5.1 How to Listen to Voicemails at your Own Phone

- Prerequisites:**
- Your own phone number (extension) has been configured; see [How to Set the CTI Site Parameters](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Voicemail** symbol.
  3. Click on the phone symbol with your own extension (i.e., internal number).
- Next steps:** Click on the **Next message** symbol to listen to further messages.

## 5.2 How to Configure Another Phone to Retrieve Voicemail

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Voice Messages** symbol.
  3. Click on the <??> symbol under the mobile phone symbol.
  4. Enter the phone number in canonical or dialable format.
  5. Click **Save**.

## 5.3 How to Listen to Voicemails at Another Phone

- Prerequisites:**
- The phone number of another phone has been configured; see [How to Configure Another Phone to Retrieve Voicemail](#).
- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Voicemail** symbol.
  3. Click on the mobile phone symbol.
- Next steps:** Click on the **Next message** symbol to listen to further messages.

## 5.4 How to Delete a Voicemail

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Voice Messages** symbol.
  3. Select one of the following options:
    - Click on the phone symbol with your own extension (i.e., internal number).
    - Click on the mobile phone symbol.
  4. Select the desired message.
  5. Click on the **Delete voice message** symbol.

## 5.5 How to Call the Sender of the Voicemail

- Step by Step:**
1. Click in the middle of **myPortal entry Start**.
  2. Click on the **Voice Messages** symbol.
  3. Select one of the following options:
    - Click on the phone symbol with your own extension (i.e., internal number).
    - Click on the mobile phone symbol.
  4. Select the desired message.
  5. Click on the **Call sender of current voice message** symbol.

## 5.6 How to Configure Access to Voicemail

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Voicemail**.
  4. Select the **Entry Voice Mail (EVM) available** check box to activate the voicemail for myPortal entry .
  5. Enter your internal number (extension) in the **Your mailbox number** field.
  6. Enter your personal password for accessing your voicemail in the **Your mailbox password** field. Default password: 1234.
  7. Click **Save**.

## 6 Configuration

You can configure myPortal entry to suit your requirements by editing your personal data or the program settings, for example.

### Configuration windows

Most of the settings are made via configuration windows. The configuration window consists of the following tabs (from left to right):

- **General**
- **GUI**
- **Servers**
- **CTI**
- **Voicemail**
- **Team**
- **Windows**

The configuration of voicemail is described under [How to Configure Access to Voicemail](#), and the configuration of Team functions under [How to Configure Info Texts](#) and [How to Configure Team Forwarding Destinations](#).

---

**INFO:** When you make multiple changes under **Widget Preferences** on different tabs, it is sufficient to click on **Save** just once at the end.

---

### 6.1 Connecting to the WebServices PC

Specify the data for the connection with the myPortal Web Services.

Enabling the **Ignore system proxy settings** check box causes the proxy settings in the myPortal Widget Engine to be ignored if a proxy is used there.

---

**INFO:** Please do not make any changes here if you do not have all the required information. In cases of doubt, please contact your system administrator.

---

## 6.1.1 How to Set up the IP Connection to the Plug Computer

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Server**.
  4. Enter the IP address or the DNS name of the PC on which the myPortal entry Web Services are installed in the **IP address of your server** field.
  5. Enter the port number of the used port (default: 8801 for HTTP or 8802 for HTTPS) in the **IP port of your server** field.
  6. Select the **HTTPS to Server** check box if you want to set up a secure HTTP connection.
  7. Select the **Ignore system proxy settings** check box if the proxy settings are to be bypassed when the Widget HTTP Connector is active.
  8. Click **Save**.

## 6.1.2 How to Define Access Data for the Plug Computer

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Server**.
  4. Enter your user name and password in the **User Name** and **Password** fields.
  5. Click **Save**.

## 6.2 Appearance of the User Interface

You can make several changes to the user interface

### 6.2.1 Colors and Shapes (Skins) in **myPortal** entry

You can change the colors and shapes displayed in the user interface by selecting skins. Some skins have an analog clock, which is displayed before **myPortal** entry **Start**.

#### 6.2.1.1 How to Select a Skin

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click in the context menu on **Skins** and **Select skin**.
  3. Select a skin from the **myPortal** entry: **Select skin** list.
  4. Click **Save**.

#### 6.2.1.2 How to Import a Skin File

- Prerequisites:**
- A valid skin file is available.
- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click in the context menu on **Skins** and **Import skin file**.
  3. Click on the button to browse in the file system.
  4. Select a skin file and click **Open**.

#### 6.2.1.3 How to Find Additional Skins

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click in the context menu on **Skins** and **Find more skins**.
  3. Go to **Skins** on the displayed page and follow the instructions.

## 6.2.2 How to Change the Appearance of the myPortal entry Start Clock

**Prerequisites:**

- The selected skin includes a clock; see [Colors and Shapes \(Skins\) in myPortal entry](#).

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **GUI**.
  4. Under **Clock layout (skin-specific)**, select the desired appearance for the displayed clock.
  5. Select the **Display second hand** check box to show the seconds hand when the clock is activated.
  6. Click **Save**.

## 6.2.3 How to Edit the Function Bar Label

If desired, an optional text (e.g., the company name) can be displayed at the left end of the function bar.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **General**.
  4. Enter any text in the **Widget Title** field.
  5. Click **Save**.

## 6.2.4 How to Make the Long Function Bar Description Visible

Long descriptions for the function bar can be displayed as scrolling text (ticker tape) to make them readable. This should only be enabled on powerful PCs, since the function uses a lot of processing power.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **GUI**.
  4. Select the **Scroll system label** check box.
  5. Click **Save**.

## 6.3 Visibility of the User Interface

You can define for which events and to what extent the user interface should be visible.

### 6.3.1 How to Change the Visibility of the Function Bar

You can set the function bar to be auto-hidden when inactive.

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **GUI**.
  4. Select the **Hide widget bar automatically** check box.
  5. Click **Save**.

### 6.3.2 How to Change Responses to Events

You can set myPortal entry to be automatically displayed (i.e., autoshown) at specific events.

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **GUI**.
  4. Select the **Show hidden widget on events** check box.
  5. Click **Save**.

### 6.3.3 How to Change the Behavior of the myPortal entry Window

- Step by Step:**
1. Right-click on **myPortal** entry.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click on **Window**.
  4. Select the level for the window display under **Window Level**.
  5. Select the **Ignore Mouse** check box if myPortal entry should not respond to mouse clicks.
  6. Select the **Prevent Dragging** check box if myPortal entry should not be movable with a mouse.
  7. Move the **Opacity** slider to set the transparency of myPortal entry.
  8. Click **Save**.

## 6.3.4 How to Change the Hotkey for the Top Window Level

The hotkey (<CTRL>+<ALT>+<F8> by default) sets myPortal entry to the top window level and thus makes it visible from all other windows.

- Prerequisites:**
- myPortal entry is set to be shown and has not been set to be kept below all other window levels; see [How to Change the Behavior of the myPortal entry Window](#).

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **General**.
  4. Press the key combination in the **Hotkey** field.
  5. Click **Save**.

## 6.4 User Language

The language of the user interface can be adapted to suit your requirements.

You can load additional language settings or create new user languages. The selection of the language occurs automatically based on the language setting of the operating system.

### 6.4.1 How to Load Another User Language

- Prerequisites:**
- A valid language file is available.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click in the context menu on **Import own language file**.
  3. Click on the button to browse in the file system.
  4. Select a language file and click **Open**.

### 6.4.2 How to Create a User Interface Language File for Another Language

- Prerequisites:**
- You are competent in the language you want to add and in the source language.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click in the context menu on **Export current language to file**.
  3. Use a text editor to edit the language-specific texts in the language file, i.e., the characters following `;`, and save the edited file.
  4. For details on loading the language file, see [How to Load Another User Language](#).



### 6.4.3 How to Reset the Language Setting

The default language of myPortal entry has been loaded.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click in the context menu on **Back to the language setting of widget engine**.

## 6.5 Further Configuration Options

Some additional parameters to configure myPortal entry are described below.

### Invoking (web) applications depending on the phone number

Depending on the phone number of a caller, you can have myPortal entry call up a PC program or an Internet page. The caller's phone number can be passed as a parameter to the program or Internet page. Possible application: reverse search in an Internet directory.

You can specify a maximum of four different calls. Only one call can be triggered by a specific phone number. The placeholder used to pass the phone number in the call is `%CALLER_ID%`.

Possible call parameters:

- `start cmd.exe /k myConsoleProgram %CALLER_ID%`
- `start myGuiProgram %CALLER_ID%`
- `http://www.myInversSearch.com?cn=%CALLER_ID%`

### 6.5.1 How to Assign Applications to be Started for Specific Phone Numbers

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **Apps**.
  4. Select the **Open URL or execute command on incoming calls** check box.
  5. Select the **Remove Central Office Number** check box if required.
  6. Enter a phone number or a part thereof in one of the **If the calling number starts with** fields.
  7. Then enter a valid call for a program or Internet page in the associated **open this URL or command** field.
  8. Click **Save**.

## 6.5.2 How to Set the CTI Site Parameters

The site parameters can be used to have phone numbers in canonical format translated to dialable format. This has an impact on all the call numbers entered and saved in myPortal entry. Your own internal number (extension) is also required to retrieve your voicemails.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **CTI**.
  4. Select the **Add central office number for journal entries** check box if entries in the journal are to be automatically added to the central office number specified here.
  5. Click **Save**.

## 6.5.3 How to Specify a URL for an Internet Phonebook (Directory)

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **General**.
  4. Enter a URL in the **Public Internet Directory (URL)** field.
  5. Click **Save**.

## 6.5.4 How to Select the Date Format

The format affects how the date is displayed in the journal.

- Step by Step:**
1. Right-click on **myPortal entry**.
  2. Click on **Widget Preferences...** in the context menu.
  3. Click **General**.
  4. Select a format from the **Date format** list.
  5. Click **Save**.

## 7 myPortal entry Web Services Assistant

myPortal entry Web Services Assistant is a web-based configuration tool with which you can customize your personal settings and display information.

The screenshot shows the 'myPortal entry Web Services Assistant' interface. At the top right, it says 'myPortal entry Web Services Assistant' and '202 Abmelden'. Below this is a navigation bar with 'Administration' selected. On the left, there is a sidebar with 'Administration', 'Benutzerverwaltung', and 'Information'. The main content area is titled 'Benutzerverwaltung' and contains a 'Benutzer' dropdown menu set to '202, Testuser'. Below this is an 'Einstellungen' section with fields for 'User' (Testuser), 'Passwort' (masked), 'Sprache' (Deutsch), 'Wahlverfahren' (Callback bevorzugt), 'Voicemailnummer', and 'Voicemail Passwort'. There are also checkboxes for 'Zugriff auf Assistant', 'myPortal web Zugriff', 'Konfiguriert für Mobility Entry', and 'Assoziierte Dienste'. The 'Endergäteeinstellungen' section includes 'Telefonbucheinträge pro Bildschirm' (4), 'Automatisches Refresh' (5), 'Display Auflösung' (320x480), and 'Touchscreen' (checked). At the bottom, there are 'Sichern' and 'Zurücksetzen' buttons.

### Menu

The menu contains the following areas:

- **User Management**  
Used to set up your user data. Some data cannot be changed and is only displayed here.
- **Information**  
Displays version information on the myPortal entry Web Services Assistant.

### User Management

The **Password** is required for accessing myPortal entry and myPortal web on the WebServices PC.

---

**IMPORTANT:** If you change the password here, you will also need to change it in myPortal entry; see [How to Define Access Data for the Plug Computer](#). If you are using myPortal web, you have to use the new password there as well (see the myPortal web User Guide).

---

The **Language** and **Dial mode** settings affect only the look and feel and operation of myPortal web.

The other settings are only displayed here Contact your system administrator to obtain further information about this.

## 7.1 How to Open the Web Interface

- Prerequisites:**
- Login Name (your station number) and your personal password
  - IP address of the myPortal entry Web Services Assistant.

- Step by Step:**
1. Open an Internet browser and enter either of the following URLs `http://<admin IP address>:8801/admin` or `http://<admin IP address>:8802/admin` in its URL line. Then confirm your entry. `<admin IP address>` refers to the IP address of the myPortal entry Web Services Assistant.
  2. Enter your phone number in the **Name** field and your personal password in the **Password** field and click **Login**.

## 7.2 How to Change the Password

- Prerequisites:**
- The myPortal entry Web Services Assistant has been started; see [How to Open the Web Interface](#).

- Step by Step:**
1. Click **User Management**.
  2. Enter a new password that is only known to you in the **Password** and **Confirm Password** fields.
  3. Click **Save**.

## 7.3 How to Select the User Language

- Prerequisites:**
- The myPortal entry Web Services Assistant has been started; see [How to Open the Web Interface](#).

- Step by Step:**
1. Click **User Management**.
  2. Select a language from the **Language** list.
  3. Click **Save**.

## 7.4 How to Select the Dial Mode

**Prerequisites:** • The myPortal entry Web Services Assistant has been started; see [How to Open the Web Interface](#).

**Step by Step:**

1. Click **User Management**.
2. Select a dial mode from the **Dial mode** list.
3. Click **Save**.

## 7.5 How to View Information

**Prerequisites:** • The myPortal entry Web Services Assistant has been started; see [How to Open the Web Interface](#).

**Step by Step:**

1. Click **Information**.

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