



myPortal to go

User Guide

A31003-P3010-U115-10-7619

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Contents

1 Introduction	5
1.1 myPortal to go	5
1.2 Types of Topics	6
1.3 Display Conventions	6
2 Installation	8
2.1 How to Install myPortal to go (Mobile UC App)	8
2.2 How to Configure myPortal to go (Mobile UC App) for the First Time	9
2.3 How to Create an Icon for myPortal to go (Web Edition)	10
2.4 How to Uninstall myPortal to go	11
3 First Steps	12
3.1 User Interface	12
3.1.1 Support of specific Devices	16
3.2 How to Start myPortal to go (Mobile UC App)	16
3.3 How to Start myPortal to go (Web Edition)	17
3.4 How to Select the User Interface Language	17
3.5 How to Enter your Contact Data	18
3.6 How to Exit myPortal to go	18
4 Unified Communications	19
4.1 Presence Status	19
4.1.1 How to Check your Presence Status	21
4.1.2 How to Change the Presence Status to Absent	21
4.1.3 How to Change the Presence Status to Office	22
4.1.4 How to Change the Visibility of your Presence Status for Others	22
4.2 CallMe Service	22
4.2.1 How to Enable the CallMe Service	23
4.3 Directories and Journal	23
4.3.1 Directories	24
4.3.1.1 How to Search in Directories	25
4.3.2 Favorites List	26
4.3.2.1 How to Add a Contact to the Favorites List	26
4.3.2.2 How to Delete a Contact from the Favorites List	27
4.3.2.3 How to Rename a Group from the Favorites List	27
4.3.2.4 How to Delete a Group from the Favorites List	27
4.3.2.5 How to Pick up a Call for Another Subscriber	28
4.3.3 Journal	28
4.3.3.1 How to Display Details of a Journal Entry	30
4.3.3.2 How to Add a Note to a Journal Entry	30
4.3.3.3 How to Delete a Journal entry	30
4.4 Calls	30
4.4.1 Call Number Formats	31
4.4.2 Dial Mode	31
4.4.2.1 How to Set the Dialing Mode (when the Intended Use is Mobility)	32
4.4.3 Call Functions	33
4.4.3.1 How to Dial a Number Manually (using a Dialing Aid)	33
4.4.3.2 How to Redial	34

Contents

4.4.3.3	How to Make a Call from the Favorites List	34
4.4.3.4	How to Make a Call from the Journal	34
4.4.3.5	How to Initiate a Consultation Hold	34
4.4.3.6	How to Alternate between two Parties	35
4.4.3.7	How to Transfer a Call	35
4.4.3.8	How to Initiate a Conference	35
4.4.3.9	How to Redirect a Call to your Voicemail Box	35
4.4.3.10	How to End a Call	35
4.5	Voicemail	36
4.5.1	How to Listen to a Voice Message on the Phone	37
4.5.2	How to Call back the Sender of a Voicemail	38
4.5.3	How to Delete a Voicemail	38
4.5.4	How to Display Details of a Voicemail	38
4.5.5	Notification Service for New Messages	38
4.5.5.1	How to Enable or Disable E-mail Notifications	39
4.6	Text Messages	39
4.6.1	How to Send an SMS from the Favorites List	40
4.6.2	How to Send an E-mail from the Favorites List	40
4.6.3	How to Send an SMS from a Directory Search	41
4.6.4	How to Send an E-mail from a Directory Search	41
5	Configuration	42
5.1	Personal Preferences	42
5.1.1	How to Edit your Contact Data	42
5.1.2	How to Edit your Login Data	42
5.2	General Settings	43
5.2.1	How to Select the User Interface Language	43
5.2.2	How to Select the Date Format	43
5.2.3	How to Edit the Server Settings (not for Web Edition)	43
5.2.4	How to Change the Operating Mode	44
5.2.5	How to Enter the Phone Number for the Phone to be Controlled (for a MULAP)	44
5.2.6	How to Activate or Deactivate the Offline Mode	45
5.2.7	How to Synchronize Hook States	45
5.2.8	VoIP in myPortal to go	45
5.2.8.1	How to Enable VoIP	46
5.2.9	How to Load Contact Images from the Server	47
Index		48

1 Introduction

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

1.1 myPortal to go

myPortal to go is a powerful unified communications application for smartphones and tablet PCs. Besides convenient dialing aids via phone directories and favorites, and information on the presence status of colleagues, it can, for example, also be used to access voicemails.

myPortal to go is available in three variants:

- As a Mobile UC App for the Android operating system (version 4.4 or higher)
- As a Mobile UC App for the Apple iOS operating system (version 6 or higher)
- As a Web Edition for mobile web browsers with HTML5 support, e.g., for the Windows Phone (version 8.1 or higher) or BlackBerry (version 10 or higher) operating systems. Web browsers without TLS 1.2 support are not supported anymore.

Apart from a few exceptions (e.g., access to contact details in the mobile phone), the scope of features offered is identical for all variants.

myPortal to go supports the following features:

- Presence status
- Status-based call forwarding
- CallMe service (only with UC Suite)
- Directories
- Favorites list
- Journal
- Search by phone number and name
- Call Functions
- One Number Service (ONS)
- Voicemail
- Text messages

myPortal to go can be used with both the UC solutions, UC Smart and UC Suite. Depending on the UC solution and the licenses assigned to you, the scope of the available features may vary slightly.

myPortal to go supports the following operating modes:

- **Mobility:**
Provides you with unrestricted access to telephony and UC features with myPortal to go, regardless of your location (including the One Number Service).

- Desk phone:
Enables you to use myPortal to go for UC features and as a convenient dialing aid for your office phone (without the One Number Service).

Other features can be used with the UC clients (e.g., myPortal Smart or myPortal for Desktop)

myPortal to go sets up an encrypted connection (https) to the UC server of the communication system. If the connection is interrupted (offline mode), you can still select and dial cached entries from the journal and the favorites list via GSM and perform GSM dialing manually.

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 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> .

Type of information	Presentation	Example
Output	Monospace font, e.g., Courier	Command not found.
Input	Monospace font, e.g., Courier	Enter LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>

Installation

How to Install myPortal to go (Mobile UC App)

2 Installation

myPortal to go is installed in the Mobile UC App variant as an application (Mobile UC App) on your Smartphone and then configured. For the myPortal to go Web Edition, only the link needs to be saved as a favorite in the web browser. Optionally, the link can be added as an icon on the home screen. Both variants support automatic updates.

For the myPortal to go Mobile UC App variant, the installation and automatic updates are offered via the usual mechanisms of the Google Play Store or Apple App Store. With the myPortal to go Web Edition, the available updates, if any, are offered on opening the link.

INFO: It is strongly recommended to install the offered updates for myPortal to go as soon as possible.

INFO: It is recommended to use the native myPortal to go application instead of the myPortal to go Web Edition in devices with Android or iOS.

2.1 How to Install myPortal to go (Mobile UC App)

Prerequisites

- An Android (Version 4.0 or higher) or iOS (Version 6 or higher) or higher operating system is installed on your smartphone.
- There is a connection to the Internet.

Step by Step

- 1) Start the Google Play Store (Android) App Store (iOS).
- 2) Look for the app **myPortal to go**.



- 3) Tap on **Install** and accept any terms and conditions that may be displayed.

Next steps

After the installation is complete, restart myPortal to go for the first time.

2.2 How to Configure myPortal to go (Mobile UC App) for the First Time

Prerequisites

- myPortal to go is installed on your Smartphone.
- The administrator of your communication system has set you up for the use of myPortal to go.
- You have received the **User name** (call number), **Password**, **IP address of your server**, **IP port of your server** and **Additional URL of your server** from your administrator.

Step by Step

- 1) Navigate to your applications (using the **Applications** icon, for example) and open the folder.
- 2) Tap on the application **myPortal to go**.
- 3) Read the terms of the license and confirm the license agreement with **Accept**.
- 4) Enter the login credentials:
 - a) Enter the user name that you received from the administrator, e.g., your internal phone number, in the **User name** field.
 - b) Enter the password that you received from your administrator in the **Password** field.

INFO: If the wrong password is entered five times, your access will be locked temporarily. A login of this user will only be possible again after a period of 15 minutes.

- c) Tap on **Next**.
- 5) Enter the WAN server address data (for WAN access to the UC Server):
 - a) In the field **IP address of your server**, enter the IP address or name of the UC Server that you received from the administrator.
 - b) In the field **IP port of your server**, enter the port number of the UC Server that you received from the administrator.
 - c) In the optional field **Additional URL of your server**, enter the additional URL of the UC Server if one was provided to you by the administrator.
 - d) Tap on **Next**.
- 6) Enter the LAN server address data (for LAN access to the UC Server):
 - a) In the field **IP address of your server**, enter the IP address or name of the UC Server that you received from the administrator.
 - b) In the field **IP port of your server**, enter the port number of the UC Server that you received from the administrator.
 - c) In the optional field **Additional URL of your server**, enter the additional URL of the UC Server if one was provided to you by the administrator.

Installation

How to Create an Icon for myPortal to go (Web Edition)

- d) Tap on **Next**.
- 7) Select the intended use (i.e., the operating mode):
 - a) Select **Desk phone** if you want to use myPortal to go for UC features and as a convenient dialing aid for your office phone.
 - b) Select **Mobility** if you want to have unrestricted access to the telephony and UC features with myPortal to go, regardless of your location. In this mode, a prompt for the dial mode (**Callback preferred** or **Call through preferred**; see for an explanation) then appears.
 - c) Tap on **Next**.
- 8) Then check the configured values again in the **Server settings** window.
- 9) Make sure that the check box **Offline - Running in online mode** is selected.

2.3 How to Create an Icon for myPortal to go (Web Edition)

Prerequisites

- You know the Internet address for accessing your communication system or the UC server with myPortal to go. If you have any questions, please contact your administrator.
- The administrator has set up port forwarding from external TCP/443 to internal TCP/8802 (https) or TCP/8801 (http) in the router of the internal network

The icon to be created on the home page of your smartphone or tablet PC is intended as a shortcut to easily start myPortal to go.

Step by Step

- › Create a bookmark on the home page of your mobile phone with the Internet address for accessing your communication system or the UC server with myPortal to go. Please also read the manufacturer's instructions carefully for the specific procedure to be followed on your smartphone or tablet PC and web browser.
 - a) Open the appropriate URL in the mobile web browser:

Access	Connection	link
myPortal to go (Web Edition)	https, encrypted (recommended)	https://www.example-for-a-domain.com:8802/togo
myPortal to go (Web Edition)	http, unencrypted	http://www.example-for-a-domain.com:8801/togo

INFO: For safety reasons, we strongly recommend using only encrypted connections (HTTPS). The specified port numbers may

vary for external access. Please check this with your administrator.

- b) Press **+**.
- c) Select **Add to Home Screen**.

2.4 How to Uninstall myPortal to go

INFO: All stored configuration data will be deleted.

Step by Step

- 1) For mobile UC Mobile app with Android (version 4.0 or higher):
 - a) Tap on the **More** menu button.
 - b) Tap **Exit**. myPortal to go will be terminated immediately.
 - c) You can uninstall myPortal to go under Android as usual.
- 2) For mobile UC mobile app with iOS (version 6 or higher):
 - a) Close the application exactly as you are used to for other applications.
 - b) You can uninstall myPortal to go under iOS as usual.
- 3) For Web Edition:
 - a) Delete the link saved in the browser as a favorite; the link can be optionally added as an icon on the home screen.
 - b) If the link has also been added as an icon on the home screen, delete the icon from the home screen.
 - c) Delete the browsing history and the web page memory in the browser settings.
 - d) Close the browser.

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

MyPortal to go user interface has been designed to dynamically adapt to mobile devices with different screen sizes and display resolutions, such as tablet devices, phablets and mobile phones. The user interface of myPortal to go consists of several areas, such as the header line, the main window, the menu bar and the favorites list area.

These areas are dynamically rearranged according to the screen size and resolution in the following layouts:

- One-column layout: All user interface areas are arranged in one column.
- Two-column layout: The user interface areas are arranged in two columns (menu bar and main window).
- Three-column layout: The user interface areas are arranged in three columns (menu bar, main window and favorites).

User Interface Areas

1 **Header Line**

The header consists of the following elements:

- **Go to Previous Page symbol:**
Back to last page viewed
- **Title:**
Title of the current menu
- **Search symbol:**
Opens an input field for the search by phone numbers or names

(in the single column layout)

2 **Main window**

The content of the main window depends on the selected menu button.

3 **Menu bar**

The menu bar contains the following menu buttons:

- **My status:**
Display and change the presence status.
- **Favorites:**
Display the Favorites set up by the user, sorted by Favorites groups in the single and two-column layouts. (In the three-column layout, the Favorites list area appears in the main window as a new column).
- **Dialing:**
Initiate manual call or callback. Offers more CTI functions during the call (e.g., to initiate a conference or forward a call).
- **Journals:**
Display journals and voice messages.
- **More:**
Access to additional features and the configuration of myPortal to go.

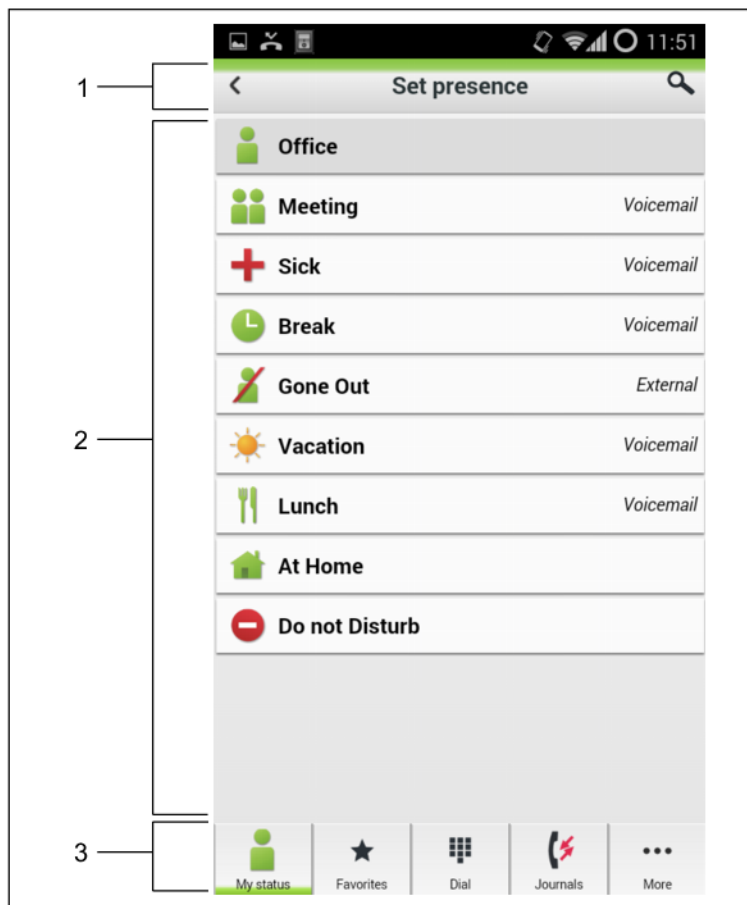
4 **Favorites:**

Display the Favorites set up by the user, sorted by Favorites groups in the three-column layout. (In the single column and the two-column layouts, the Favorites List is displayed as part of the menu bar).

User Interface Layouts

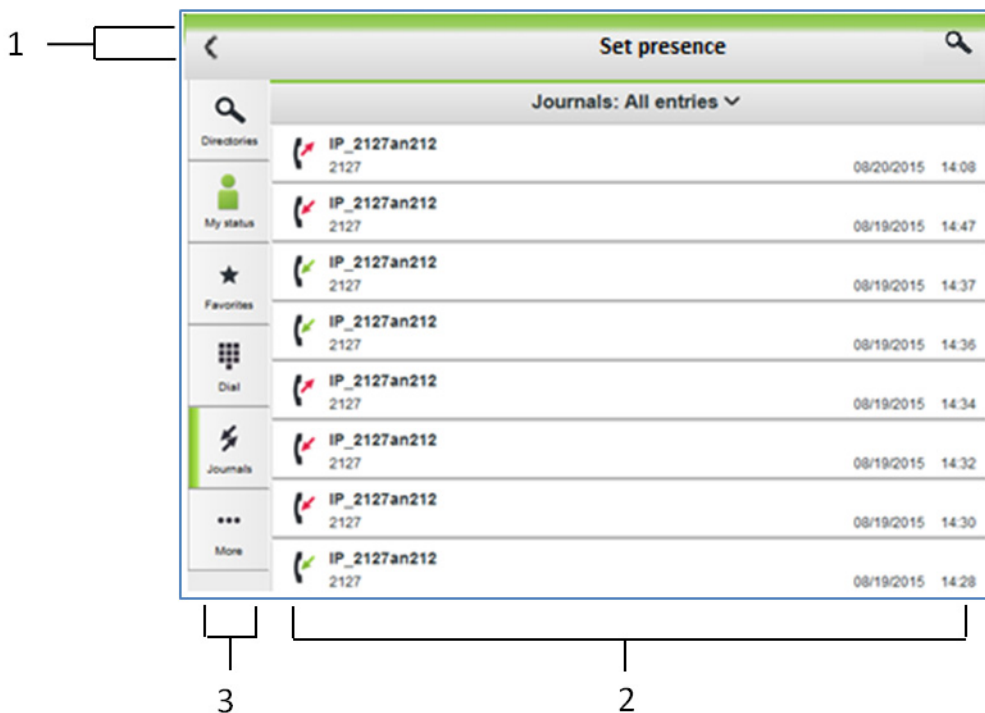
One-column layout (used on mobile phones):

First Steps User Interface



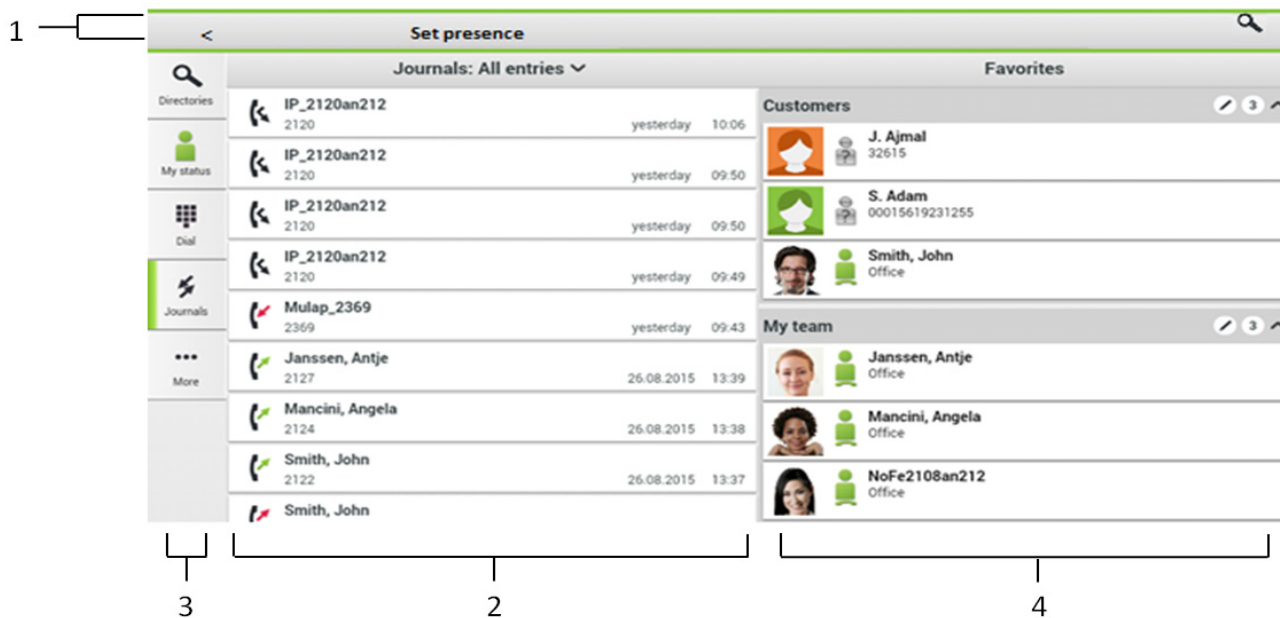
Two-column layout: (used on some phablets)

- Web view resolution: > 400 pixel (horizontal and vertical).
- The menu bar appears on the left and the main window is displayed on the right.



Three-column layout (used on tablets):

- Web view resolution: > 750 pixel (horizontal) on the left, the main window is displayed in the middle and the favorites appear on the right) and > 400 (vertical)
- The menu bar appears on the right.



First Steps

How to Start myPortal to go (Mobile UC App)

3.1.1 Support of specific Devices

Device specific features are also supported for certain devices. Maxwell 10 is used as an example for 3rd party Android based touch phone devices with a handset. In general, myPortal to go VoIP support for such devices depends on the handset integration into the Android environment. In addition to the general tablet features of Maxwell 10, the following device specific features are also supported.

- Handset support with off hook / on hook detection for wired handset or wireless DECT handset.
- Screen-saver deactivation on incoming calls.
- Optimized user interface scaling.



3.2 How to Start myPortal to go (Mobile UC App)

Prerequisites

- You have already configured myPortal to go for the first time.

Step by Step

- 1) Navigate to your applications (using the **Applications** icon, for example) and open the folder.
- 2) Tap on the application **myPortal to go**.

3.3 How to Start myPortal to go (Web Edition)

Prerequisites

- The administrator of your communication system has configured access with myPortal to go for you.
- You have created an entry for myPortal to go in the Favorites list of your web browser or an icon on the home page on your mobile phone or tablet PC.
- You have changed your password in a UC PC client or at the phone menu of the voicemail box to at least 6 digits.

Step by Step

- 1) Open myPortal to go via your Favorites list or by using the icon on the home page of your mobile phone or tablet PC.

INFO: Your user name and password are stored in the web browser. Consequently, you should protect your mobile phone or tablet PC against access by other people. Otherwise, unauthorized users could, for example, potentially access your voicemails or redirect your station number to external toll-based destinations.

Private (incognito) browsing must not be enabled in the web browser.

- 2) Enter the **User Name** and Password.

INFO: The user name and password are the same for all UC clients. For the UC Suite, the User Name must match the call number (default).

If the wrong password is entered five times, your access will be locked temporarily. A login will only be possible again after a period of 15 minutes.

3.4 How to Select the User Interface Language

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Appearance**.
- 3) Select your language. The user interface is immediately switched to your language.

3.5 How to Enter your Contact Data

Contact data can be entered with myPortal to go only in combination with the UC solution UC Smart; with UC Suite, the contact data is taken over from the UC Server.

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **My Profile**.
- 3) Tap in the **Contact data** area on **Mobile phone number**. Enter your mobile phone number in canonical format (e.g., +491721234567) and tap on **OK**.
- 4) Tap in the **Contact data** area on **E-mail address**. Enter your e-mail address and tap on **OK**.
- 5) Tap in the **Contact data** area on **External phone number**. Enter your eternal phone number (e.g., for your for Home Office) in canonical format (e.g., +4989987654332) and tap on **OK**.

3.6 How to Exit myPortal to go

Prerequisites

- myPortal to go is started.

Step by Step

- 1) For mobile UC app with Android (version 4.0 or higher):
 - a) Tap on the **More** menu button.
 - b) Tap **Exit**. myPortal to go will be terminated immediately.
- 2) For mobile UC app with IOS (version 6 or higher):
 - a) Close the application exactly as you are used to for other applications.
- 3) For Web Edition:
 - a) Close the browser window.

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 to go, 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
		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 to go does not provide direct access to group mailboxes. You can, however, have these voicemails delivered to you via the **Voicemail to e-mail** feature (see *Notification Service for New Messages*).

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

In combination with the UC solution UC Suite, myPortal to go takes over the respective status-based call forwarding for each presence status in accordance with what was configured with the UC Suite client (myPortal for Desktop or myPortal for Outlook). Changes to the call forwarding destinations can only be made in the UC Suite client.

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 client (e.g., UC Smart) or via automatic voicemail announcements:

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

- **internal**
Visible only to internal subscribers (display in UC 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.

4.1.1 How to Check your Presence Status

Step by Step

- › Tap on the **My status** menu button. The line of your currently set presence status is highlighted.

4.1.2 How to Change the Presence Status to Absent

Step by Step

- 1) Tap on the **My status** menu button.
- 2) Tap on one of the desired presence status (**Meeting, Sick, Break, Out of the Office, Vacation, Lunch, At home** or **Do not disturb**).
- 3) If you want to change the default call forwarding:
 - If you want to enable status-based call forwarding to a previously defined destination, tap on the right arrow icon under **Calls will be forwarded to** and select the desired forwarding destination (**Voicemail, Mobile** or **External**).
 - If you want to enable status-based call forwarding to some other destination, tap on the circular X icon under **Calls will be forwarded to** and then enter the desired call number as the forwarding destination in canonical format (e.g., + 4989700798765) in the field.
 - Tap on **OK**.
- 4) If you want to set a return date and time:
 - Tap on **Enter your return date & time**.
 - Select the date and time and then tap **OK**.

INFO: With UC Suite, a return date and time must be specified for all states except **Office**.

- 5) If you want to specify an info text for the Presence status, enter it in the **Note** text field.

- 6) Tap on **OK**.

4.1.3 How to Change the Presence Status to Office

INFO: You can also return to the **Office** presence status by deactivating the call forwarding at the office telephone.

Step by Step

- 1) Tap on the **My status** menu button.
- 2) Tap on **Office**.
- 3) If you want to specify an info text for the Presence status, enter it in the **Note** text field.

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

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **My Profile**.
- 3) Tap on **Presence visibility**.
- 4) Select one of the following options:
 - If you want to make your presence status invisible to all subscribers, tap on **Not visible**.
 - If you want to make your presence status visible to both internal subscribers in the same node as well as external callers, tap on **Internally and externally visible**.
 - If you want to make your presence status visible to internal subscribers only, tap on **Internally**.

4.2 CallMe Service

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

INFO: This feature is only available with the UC solution UC Suite.

Inbound Calls

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

Outbound Calls

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

If the intended use is set to **Desk phone**, no dialing can be performed with myPortal to go with CallMe enabled. If the intended use is set to **Mobility**, calls will always be conducted via the mobile call number defined with the Mobility Integration configuration. The CallMe number is not utilized for outbound calls.

Activation

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

- Group
- Redirected telephone

Deactivation

The CallMe service remains active until your Presence status changes.

4.2.1 How to Enable the CallMe Service

Prerequisites

- You are working with the UC solution UC Suite.

Step by Step

- 1) Tap on **My status**.
- 2) Tap on **Office**.
- 3) Enter the **CallMe Target** phone number in canonical or dialable format.
- 4) If you want to specify an info text for the Presence status, enter it in the text field.

4.3 Directories and Journal

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

4.3.1 Directories

Directories contain your contacts. You can search the directory by phone number or by name. Contacts can be added to Favorites list (only with the UC solution UC Smart).

myPortal for go offers the following directories:

- **Personal contacts**
The personal contacts directory shows the personal contacts of the UC client myPortal Smart. The personal contacts can be maintained with myPortal Smart or by using an Outlook Import via the Web Service Assistant.
- **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.
- **External directory (UC Suite)**
Contains the contacts from the external directory of UC Suite.
- **System directory**
Contains all speed-dial destinations of the communication system.
- **Mobile directory (not for myPortal to go Web Edition)**
Contains all the contacts entered at your smartphone.

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

INFO: External phone numbers in directories must always be entered in canonical format (e.g., +4989700798765), including internal/ external directory and personal contacts.

Contact Details







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

- Picture (if present)

INFO: Avatar pictures on myPortal to go in UC Suite mode are not supported.

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

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

Symbol	Meaning
	Internal call number, Office number
	Mobile number
	External phone number (e.g., Home Office phone number)
	E-mail address
	Mobile phone number for SMS
	Adds the contact to the favorites list

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

Quick Search

You can search directories by name or by the initial letters in a name.

Directories in Offline Mode

Only the local contacts of the smartphone (**mobile contacts** directory) are available in offline mode.

4.3.1.1 How to Search in Directories

Step by Step

- 1) Tap on the search symbol in the header row.
- 2) Enter the first letters of a name in the input field.
A list of matching entries is displayed (instant search).
- 3) Tap on the desired entry to call the contact.
- 4) Alternatively, tap “All results (full search)” to perform a full search:
 - a) Tap on an entry in the full search result list to see details of the contact and further options, e.g. e-mail.

INFO: Full search is performed in the personal, internal, system and mobile directories.

4.3.2 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.









With the UC solution UC Smart, you can edit your Favorites list, i.e. add or delete contacts and delete and rename groups. In addition, you can add contacts from the directories to your Favorites list. With the UC solution UC Suite, you cannot edit the Favorites list; thus, adding or deleting contacts, call deletion and group renaming can be performed only via the UC Suite clients (e.g., myPortal for Desktop).

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 (in online mode).

The Favorites List also displays the hook status of status of internal users if available. Supported states:

- When VoIP is registered and/or
- When the application is configured to run in desk phone mode

Picked up calls can have one of the following states:

Bar	Symbol	Activity	Status	Type of call
		Blinking	Ringing	Internal
		On	Busy	Internal
		Blinking	Ringing	External
		On	Busy	External

4.3.2.1 How to Add a Contact to the Favorites List

Prerequisites

- You have searched for the desired contact in directories.

Step by Step

- 1) Tap on the desired contact in the relevant directory.
- 2) In the contact, tap on **Add to favorites**.
- 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) Tap on **OK**.

4.3.2.2 How to Delete a Contact from the Favorites List

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap on the relevant group to expand the associated entries.
- 3) Tap on the contact to be deleted.
- 4) In the contact, tap on **Delete from favorites**.
- 5) Tap on **OK**.

4.3.2.3 How to Rename a Group from the Favorites List

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap in the relevant group on the Edit symbol.
- 3) Tap on **Rename Group**.
- 4) In the next window, change the name of the favorites group
- 5) Tap on **OK**.

4.3.2.4 How to Delete a Group from the Favorites List

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap in the relevant group on the Edit symbol.
- 3) Tap on **Delete group**.
- 4) Tap on **OK**.

4.3.2.5 How to Pick up a Call for Another Subscriber

Prerequisites

- The Favorites List area is displayed.
- A favorite contact is ringing

Step by Step

- 1) Under the Favorites List, tap on the subscriber being called.
- 2) Tap on **Call Pickup**.




You have picked up the call for this contact.




4.3.3 Journal

The Journal is the list of all your inbound and outbound calls and all incoming voice messages. You can use it to quickly and easily call your contacts again or to respond to missed calls.

Filter










The following filters can be applied through the filter function in the header:

Symbol	Filter
	Open calls (only with the UC solution UC Smart) 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.
	New entries List of all new incoming calls not completed as well as a list of all unheard voice messages. After this list has been called up once, the entries are deleted the next time. Exception: voice messages remain in the list until they have been retrieved and played.
	All entries List of all incoming and outgoing calls and all incoming voice messages.

Symbol	Filter
	Missed calls List of all incoming and outgoing calls that were not completed.
	Answered calls List of all incoming and outgoing calls that were completed.
	Voicemail (see <i>Voicemail</i>) List of all incoming voice messages.

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
	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.

Notes

You can add a note to a journal entry, e.g., "discuss plan B".

Journal in Offline Mode

In offline mode, new entries cannot be displayed. All entries since the last connection to the UC Server will no longer be updated. Journal entries can be called back only if a mobile phone number is stored.

4.3.3.1 How to Display Details of a Journal Entry

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the desired filter.
- 3) Tap on the desired journal entry.

4.3.3.2 How to Add a Note to a Journal Entry

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the desired filter.
- 3) Tap on the desired journal entry.
- 4) Enter your notes in the **Note** field.

4.3.3.3 How to Delete a Journal entry

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the desired filter.
- 3) Tap on the desired journal entry.
- 4) In the entry, tap on **Delete**.

4.4 Calls

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

4.4.1 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 in any situation, even in a network.

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

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

4.4.2 Dial Mode

Depending on the setting for the intended use (Mobility or desk phone), different dialing modes can be set for outgoing calls.

Dialing Mode with Intended Use set to Mobility

Dial mode	Description
Call through preferred	<ul style="list-style-type: none"> The system sets up the connection to your smartphone using Call Through. ONS (One Number Service) Fast connection setup CTI call functions available Useful for mobile phone contracts with a flat rate into fixed networks
Callback preferred	<ul style="list-style-type: none"> The system sets up the connection to your Smartphone using callback. ONS (One Number Service) CTI call functions available The immediate acceptance of calls by the mobile carrier mailbox must be disabled. Useful for mobile phone contracts without a flat rate into fixed networks

In offline mode (only for Mobility), dialing always occurs via GSM.

In mobility callback should change manually during the call the active application from MyPortal ToGo to the dialpad of the device and send the dtmf signals from there. Then the user has to go back again manually to MyPortal ToGo.

Dialing Mode with Intended Use set to Desk Phone

Dial mode	Description
Associated dialing	<ul style="list-style-type: none"> The app controls the connection setup for your desk phone CTI call functions available If a SIP phone or a SIP softclient is controlled via associated dialing, some CTI call functions such as consultation holds and conferencing are not available.

The dialing mode cannot be selected when the intended use is set to Desk Phone. Dialing always occurs for the assigned desk phone.

4.4.2.1 How to Set the Dialing Mode (when the Intended Use is Mobility)

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Server settings**.
- 3) Tap on **Dial Mode**.
- 4) Tap on either **Call through preferred** or **Callback preferred**.

4.4.3 Call Functions







You can control call functions with myPortal to go. You can also dial phone numbers directly from the Journal, the Favorites list or a directory. Each phone number can be transferred to the phone dialer (Dialpad) with a long tap.

Call Functions

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

During a call, buttons for call functions will be displayed.

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
	Alternate (Toggle/Connect)
	Redirect (during an incoming call) Transfer (during a call)
	Conference (phone-controlled)
	Voicemail

Controlling a SIP phone

The following call functions are not available when a controlling a SIP phone:

- Consultation
- Toggle/Connect
- Transfer
- Conference

4.4.3.1 How to Dial a Number Manually (using a Dialing Aid)

Step by Step

- 1) Tap on the **Dial** button.
- 2) Tap the field below the header row and enter the desired number in dialable or canonical format and press **OK**.

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

4.4.3.2 How to Redial

Step by Step

- 1) Tap on the **Dial** button.
- 2) Tap on the **Dial** header row. This will open the redial list.
- 3) Tap on the desired number in the redial list.

4.4.3.3 How to Make a Call from the Favorites List

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap on the relevant group to expand the associated entries.
- 3) Tap on the desired entry in the Favorites list.
- 4) Tap in the entry in the Favorites list on the desired station number.

4.4.3.4 How to Make a Call from the Journal

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the desired folder.
- 3) Tap on the desired journal entry.
- 4) Tap in the journal entry on the desired station number.

4.4.3.5 How to Initiate a Consultation Hold

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

Step by Step

- 1) Tap on **Consultation**.
- 2) Enter the phone number in dialable format or in canonical format and tap on **Dial**.

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

4.4.3.6 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

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

4.4.3.7 How to Transfer a Call

Prerequisites

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

Step by Step

- › Tap on **Transfer**.

4.4.3.8 How to Initiate a Conference

Prerequisites

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

Step by Step

- › Tap on **Conference**.

4.4.3.9 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

- › Tap on **Voicemail**.

4.4.3.10 How to End a Call

Step by Step

- › Tap on **Disconnect**.

4.5 Voicemail

You can listen to voicemails in the voicemail box of the communication system and call the respective senders.

New Voicemail Indicator

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


INFO: In order to always use myPortal to go with only the voicemail box of the communication system, you should disable the mailbox from your mobile carrier.

INFO: Listening of voicemail is only possible if your wireless service provider supports the parallel transmission of data and voice. If this is not the case, you can be notified about new voice messages by email. The voice message is attached to the email as an audio file.

INFO: Voicemail playback via external phone numbers (e.g. mobile phone) may not be possible - dependent on security settings by the system administrator.

Filter

myPortal go organizes voicemails under the **Journals** menu button. You can set the **Voicemail** filter via the filter function in the header row.



Symbol	Filter
	Voicemail

The number of messages contained in the folder is shown next to the **Voice Messages** filter. 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.

Played voice messages are deleted after 30 days by default.

Identification of Voicemails

The entries are identified as follows:

Symbol	Description
	New voice message
	Played voice message

Voicemails in Offline Mode

In offline mode, only the voice messages that were synchronized at the last connection to the UC Server can be displayed. Current voice messages can be retrieved via a GSM call directly to the voicemail box of the communication system (via the Telephone User Interface).

4.5.1 How to Listen to a Voice Message on the Phone

Prerequisites

- Your presence status is **Office**.

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the **Voicemail** filter.
- 3) Tap on the desired voicemail.
- 4) Tap **Play via**
- 5) You have the following options:
 - a) If you select **Mobile callback**, your smartphone is called and the message is played back to you on the smartphone.
 - b) If you select **Desk phone**, your office telephone is called, and the message is played back on the office phone (e.g., with the intended use set to "Desk phone").
 - c) If you select **External phone number**, your external phone number is called, and the message is played back at the phone with the external number (e.g., Home Office).

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.

- 6) Tap on **Play voicemail**.

4.5.2 How to Call back the Sender of a Voicemail

Prerequisites

- The caller's phone number has been transmitted.

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the **Voicemail** filter.
- 3) Tap on the desired voicemail.
- 4) Tap on the desired number of the voicemail sender.

4.5.3 How to Delete a Voicemail

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the **Voicemail** filter.
- 3) Tap on the desired voicemail.
- 4) Tap on **Delete** followed by **OK**.

4.5.4 How to Display Details of a Voicemail

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the header and set the **Voicemail** filter.
- 3) Tap on the desired voicemail to display the details.

4.5.5 Notification Service for New Messages

The communication system can optionally notify you about a new voicemail by e-mail.

INFO: This feature is only available with the UC solution UC Smart.

Prerequisites for the Notification Service

- The delivery of e-mails (e-mail forwarding) has been configured in the communication system.

- The user's e-mail address must be known to the communications system, e.g.:
 - by importing the e-mail addresses via an XML file during the initial installation of the communication system
 - by manual entry into myPortal to go
- You have been assigned a voicemail and a UC license.
- An application for receiving e-mail is installed on your smartphone.
- You have enabled the **Voicemail to e-mail** feature in myPortal to go under your profile settings.

The myPortal to go 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. The corresponding address is used as the sender. The language of the e-mail is the same as the one configured for voicemail.

4.5.5.1 How to Enable or Disable E-mail Notifications

Prerequisites

- The delivery of e-mails (e-mail forwarding) has been configured in the communication system.
- An application for receiving e-mail is installed on your smartphone.
- Your e-mail address is stored in your contact data.

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap **My profile**.
- 3) Select one of the following options:
 - If you want to enable the e-mail notification, select the check box **Send voice messages via e-mail** under **Voicemail to e-mail**.
 - If you want to disable the e-mail notification, clear the check box **Send voice messages via e-mail** under **Voicemail to e-mail**.

4.6 Text Messages

You can send an SMS or an e-mail to the contacts in the favorites list and the directories.

To send an SMS, a mobile phone number must be stored in the contact and an application for sending SMS must be installed on your smartphone.

To send an e-mail, an e-mail address must be stored in the contact, an application for sending e-mail must be installed on the smartphone, and an e-mail account must be set up.

4.6.1 How to Send an SMS from the Favorites List

Prerequisites

- A mobile number has been stored for the contact.
- An application for sending SMS is installed on the smartphone.

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap on the relevant group to expand the associated entries.
- 3) Tap on the desired entry in the Favorites list.
- 4) Tap in the Favorites entry on the SMS symbol. The locally installed application for sending SMS opens.

INFO: If multiple applications for sending SMS are installed, you will receive a selection list.

- 5) Write and send the SMS with your application.

4.6.2 How to Send an E-mail from the Favorites List

Prerequisites

- An e-mail address has been stored for the contact.
- An application for sending e-Mail is installed on the Smartphone, and an e-mail account has been set up.

Step by Step

- 1) Tap on the **Favorites** menu button.
- 2) Tap on the relevant group to expand the associated entries.
- 3) Tap on the desired entry in the Favorites list.
- 4) Tap in the Favorites entry on the E-mail symbol. The locally installed application for sending e-mail opens.

INFO: If multiple applications for sending e-mail are installed, you will receive a selection list.

- 5) Write and send the e-mail with your application.

4.6.3 How to Send an SMS from a Directory Search

Prerequisites

- A mobile number has been stored for the contact.
- An application for sending SMS is installed on the smartphone.

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the search symbol in the header row.
- 3) Enter the first letters of a name in the input field.
A list of matching entries is displayed.
- 4) Tap on the desired contact.
- 5) Tap in the contact on the SMS symbol. The locally installed application for sending SMS opens.

INFO: If multiple applications for sending SMS are installed, you will receive a selection list.

- 6) Write and send the SMS with your application.

4.6.4 How to Send an E-mail from a Directory Search

Prerequisites

- An e-mail address has been stored for the contact.
- An application for sending e-Mail is installed on the Smartphone, and an e-mail account has been set up.

Step by Step

- 1) Tap on the **Journals** menu button.
- 2) Tap on the search symbol in the header row.
- 3) Enter the first letters of a name in the input field.
A list of matching entries is displayed.
- 4) Tap on the desired contact.
- 5) Tap in the contact on the E-mail symbol. The locally installed application for sending e-mail opens.

INFO: If multiple applications for sending e-mail are installed, you will receive a selection list.

- 6) Write and send the e-mail with your application.

5 Configuration

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

5.1 Personal Preferences

You can enter your personal contact data for myPortal to go such as your e-mail address, mobile phone number or an additional phone number (e.g., for your Home Office).

With the UC solution UC Suite, the contact details are transferred from the UC server and cannot be changed with myPortal to go.

5.1.1 How to Edit your Contact Data

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **My Profile**.
- 3) Tap in the **Contact data** area on **Mobile phone number**. Enter your mobile phone number in canonical format (e.g., +491721234567) and tap on **OK**.
- 4) Tap in the **Contact data** area on **E-mail address**. Enter your e-mail address and tap on **OK**.
- 5) Tap in the **Contact data** area on **External phone number**. Enter your external phone number (e.g., for your Home Office) in canonical format (e.g., +4989987654332) and tap on **OK**.

5.1.2 How to Edit your Login Data

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Server settings**.
- 3) Enter the user name that you received from your administrator in the **User name** field.
- 4) Enter the password that you received from your administrator in the **Password** field.
- 5) Tap on **OK**.

5.2 General Settings

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

5.2.1 How to Select the User Interface Language

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Presentation**.
- 3) Tap on **Language**.
- 4) Select your language in the drop-down list. The user interface is immediately switched to your language.

5.2.2 How to Select the Date Format

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Presentation**.
- 3) Tap on **Date format**.
- 4) Select the desired format from the drop-down list. The date format will be converted immediately.

5.2.3 How to Edit the Server Settings (not for Web Edition)

INFO: The LAN or WAN server settings are only relevant for the UC Mobile App variant. Do not change the server settings unless you are instructed to do so by the administrator of your communication system. You cannot use myPortal to go with an invalid server settings.

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Server settings**.
- 3) If access to the UC Server occurs over a WAN, proceed as follows:
 - a) Tap on **WAN server address**.

- 4) Enter the call number of the phone to be controlled in the **Controlled device** field.

5.2.6 How to Activate or Deactivate the Offline Mode

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Server settings**.
- 3) You have the following options:
 - a) If you want to enable the offline mode, select the **Offline** check box.
 - b) If you want to disable the offline mode, clear the **Offline** check box.

5.2.7 How to Synchronize Hook States

INFO: With this setting you can specify when a data synchronization should occur. This allows you to customize the volume of data to be transferred in accordance with your mobile phone contract (with/without data flat rate).

INFO: When a Dual-Mode HFA station loses WiFi connection, there is a "window" of 90 seconds where the "hook-status" on other UC Clients users is not updated. After that time the hook status info is accurate.

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Appearance**.
- 3) Tap on **Synchronize hook states**.
- 4) Select **Never**, **Only in WLAN mode** or **Always**.

The **Only in WLAN mode** setting is not available in the myPortal to go Web Edition.

5.2.8 VoIP in myPortal to go

Integrated VoIP can be enabled on myPortal to go for secure signalling via HTTPS. It can be used with both UC Smart and UC Suite solutions, supporting a variety of configurations, such as mobile HFA only or as part of a Mulap, in all operating modes (Mobility and Desk phone).

VoIP support is available:

- For most Android devices with Android firmware 4.2. or higher
- For myPortal to go iOS

Limitations

- VoIP is available only in Wi-Fi (WLAN) environments. When MyPortal to go leaves the Wi-Fi range there is a maximum delay of 1,5 minute in synchronization. During this time calls cannot be answered. VoIP access from a remote Wi-Fi environment requires OpenScape Business system software V2R1 or higher for Android and V2R2 or higher for iOS.
- Most Smartphones with Android 4.2 and higher are delivered with VoIP capabilities, but some vendors remove this support from their firmware distributions. In this case, VoIP cannot be used in myPortal to go.?
- The voice quality of the VoIP feature depends on the Smartphone hardware, firmware and on the resources consumed by other software running in parallel with myPortal to go. This may affect the voice latency and other quality related parameters.
- For iOS devices, on incoming calls in Lock screen and Home mode there is a notification sound for alerting the user. The time of the notification tone is 5 seconds and it is not configurable. iOS's notification **Alert Style** can be configured from device Settings to be either "None", "Banners" or "Alerts". When the Alert Style is "Alerts" then the notification cannot be removed from System side or Apple side. Only user can remove it. In "Banners" (i.e. drop down from top), then Apple Service removes the notification (with variable timeout).
- VoiP functionality is not supported if a VPN client is running in the mobile device.

5.2.8.1 How to Enable VoIP

Prerequisites

- OpenScape Business system software V2R0.3 or higher.
- Smartphone or tablet with built-in VoIP capabilities
- One configured HFA virtual number per VoIP enabled application including an IP user license
- myPortal to go V2 or higher is installed on your smartphone
- Mobility user license for One Number Service (if applicable)

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **VoIP settings**.
- 3) Tap on **VoIP enabled**.
- 4) In case you are in a MULAP, tap on **Controlled device** to select the required device.

- 5) Select the call number of the HFA device to be controlled in the **Controlled device** field.
If the status is “Registered”, you have successfully enabled VoIP on myPortal to go.
- 6) If your administrator has configured the system for remote VoIP access, you may set the enable **Use VoIP in remote WiFi networks** to use VoIP also in Wi-Fi networks outside the company.
- 7) Select the option **Bluetooth headset** if you use such a device.
- 8) Enable the flag **Force loudspeaker ringer** if you want the loudspeaker to ring at incoming calls, even if a headset is connected.

5.2.9 How to Load Contact Images from the Server

INFO: With this setting you can specify when a data synchronization should occur. This allows you to customize the volume of data to be transferred in accordance with your mobile phone contract (with/without data flat rate).

Step by Step

- 1) Tap on the **More** menu button.
- 2) Tap on **Appearance**.
- 3) Tap on **Load contact images from server**.
- 4) Select **Never**, **Only in WLAN mode** or **Always**.

The **Only in WLAN mode** setting is not available in the myPortal to go Web Edition.

Index

A

absence 19

C

call
 answer 33
 end 33
 missed 28
 pick up for another subscriber 33
call forwarding
 status-based 19
call functions 33
call number format 31, 32
call sender
 voicemail 36
CallMe 23
CallMe service 23
canonical call number format 31
canonical format 32
concept 6
conference 33
configuration 42
connection status 19
consultation hold 33
contact 24, 26

D

date format 42
dial 33
dialable call number format 31
dialable format 32
dialing a number 33
directory 24
 make call 33
disconnect 33
Display Conventions 6

E

e-mail
 notification 39
e-mail address 42
event 42
exit 12

F

Favorites list
 make call 33

favorites list 26
features 5
first steps 12
folder
 journal 28
 voicemail 36
foreground 42
forward 33
functions 5

G

group 26

I

installation 8
internal directory 24
introduction 5
IP address 42

J

journal 28
 call 33

L

language 42

M

main window 12

N

note 28
notification
 voicemail 39
notification service 39

O

operating instructions 6
operating mode 5

P

password 12
personal directory 24
phone number 42
picture 42
port number 42
presence 19
presence status 19
 visibility 19
presentation 42

program settings 42
protocol 42

Q

quick search by name 24

R

redialing 33
redirect 33

S

search in a directory 24
server address 42
setup 42
start 12, 42
 automatic 42
symbol 12
system directory 24

T

teleworking 23
text messages 39
toggle/connect 33
topics, types 6
transfer 33

U

unified communications 19
user interface 12
 language 42

V

visibility
 window 42
voicemail 36
 delete 36
 listen to 36
voicemail box 33

W

WAV file
 notification 39
window
 visibility 42