Personal Agent Web Portal

- Bell Aliant Unified Communication's Personal Agent is an end user web-based portal providing direct access to user's service and features without the need of a desktop client application - enabling you to personalize your communications services.

Accessing Web Portal

- Log into **PC Phone** and select **MORE > Personal Agent**
- Browser window will open and automatically log you in
- To log-in:
  - **User name:** phone number
  - Example: 5065551212a@companyname.ca
- Default password: Password is your ten digit phone number
- Click **Remember Me**
- Click **Log-in**

You may also access your Personal Agent remotely from any PC or laptop:

- Access your web browser and go to https://personalagent.bellaliant.net
- Enter your username: Username is your ten digit phone number + "a" + @companyname.ca (your unique domain) eg. **5063451234a@companyname.com**
- Default Password: Password is your ten digit phone number

Configuring Your Contact Details

- Select **Preferences > Personal**
- The following info can be configured in this section:

Contact Info	Enter your contact details, including email, phone numbers, and time zone
Password	Update your password details here Your default password for the first time you sign in is *abcd1234*
Picture	Upload a picture of yourself to be shown to others when you call or if they are monitoring your status
Reasons	Enter any reasons why you might reject s call from a co-worker (Ex. I'm in a meeting.) - To enter a new reason, enter response into New Reasons text field and hit Add - Click Apply to save changes
My Times	Enables you to modify your work time schedule to be used with time of day call routing (if you choose to screen calls based upon time of day)

Configuring Meet Me Conferencing*

Only available for Mobile Office and Executive Office users

- Select **Preferences > Meet Me Conferencing**
- The following info can be configured in this section:

Preferences—Configure options based upon your personal preferences. See below for details	
Allow fast start	Allows conference participants to join your bridge early and talk to each other before you join
End conference when the Chairperson disconnects	It is not recommended to enable this if you routinely start conference calls from your mobile. If the line drops so does the conference call and all participants must dial back in
Send me Instant messages when I an the Chairperson	This feature will send you a reminder via IM when someone joins your bridge
Email address for conference recordings to be sent	This should already be configured to your corporate email address
Play Join/Entry tones	Personal preference setting
PIN - This passcode is only for the moderator to enter to launch the moderator functiions of the bridge. If you have not already changed your password, it is the last four digits of the phone number.	

- **Call Services > Call Grabber** allows a user to enter their mobile number tying it to this user so that Bell Aliant associates this mobile number with your account enabling you to move an active call between your devices

Changing Number of Rings to Voicemail

To change the number of Rings for an incoming call to be directed to Voice mail

- Go to **Routes**
- Choose **Call Routes**
- Choose **Sequential Ringing or Simultaneous Ring based on how you would like your devices to ring**.
- Ensure the sequential ringing option or simultaneous ringing option is "on"
- Use the drop down menu to select the number of rings you prefer
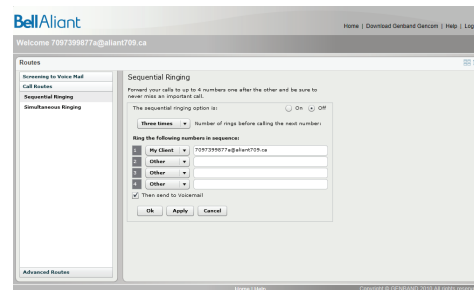
Simple Call Routing Options

- Select **Routes > Call Routes** and choose one from the following options by selecting the text
- **Sequential Ringing** - Suggested settings include:

- **Simultaneous Ringing** - Suggested settings include:

- **Presence Based Routing** - Suggested settings include:

Advanced Call Routing

- Advanced Routes give you more flexibility for call routing - similar to if / then / else statements
- **NOTE:** Advanced Routes will have no effect unless the simple routes are disabled.

Routes	This tab enables you to add new call routes - EX: Vacation / Out of office
Initiate Action	Select what actions should trigger that route - EX: When a call is received
Conditions	Select how you would like to filter messages received - EX: Received in SPECIFIC DAY/TIME RANGE(S)
Outcome Actions	Select what actions you would like to perform - EX. Send to VM and play Custom Greeting #1
Excep-tions	Select when this route should not apply - EX. From THESE PEOPLE in my personal contacts

Using the Global Address Book

- Make sure you are in the Address Book section of web portal - located in the top right-hand corner or your screen
- Make sure that **Global Address Book (GAB)** is selected from the drop down
- Enter the name of the person you wish to contact into the text field
- Select the appropriate name from your query results
- Double click name to reveal popup window
- Select **Call**
   OR
- **Click Call** - located at the bottom of the Address Book section
- **NOTE:** You can access you personal address book by selecting Personal Contacts from the drop down

Adding Personal Contacts

- Enter the name of the person you are trying to add into the **Global Address Book**
- Select the appropriate name from your query results
- Click [icon] - located at bottom of the Address Book section
- A pop up window will appear. From here, you have the ability to add that user to a Group (see Organizing Personal Contacts section)
- Make sure to check the "Show availability for users" box
- Click **OK**

Organizing Personal Contacts

- You have the ability to organize your personal contacts into groups—similar to "buddy lists"
- Click [icon] – located at the bottom of the Address Book section
- Enter name of Group you wish to create into the text field
- Click **Add**
- Click **Back** to return to the home screen
NOTE: You can assign any user in your Personal Contacts to a group you created by:
- Right click on the users name
- Select appropriate Group name from drop down
- Click **Apply** to save changes

Deleting Personal Contacts

- Select user name you want to remove
- Right click, then select **Delete Entry**

Sending Email

- Select the name of the person you want to email from the Address Book section
- Select [icon] – located at bottom of Address Book section
   OR
- Right click, then select **Email**
- A new email window will appear

Call Logs

- Call Logs allow you to see all incoming and outgoing calls - regardless of device you made them from or received them on
NOTE: You can return missed calls from this window by double clicking on the number, then selecting the **Call** button

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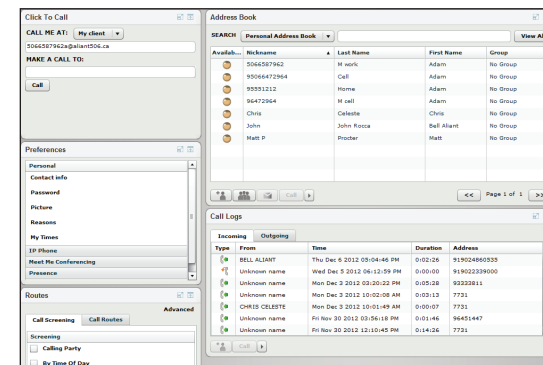
Personal Agent Quick Reference Guide

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