

managedIP FOR DESKTOP

User Guide

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About

The application for Desktop is a native Windows and Mac application for Unified Communications, providing the following communication features:

- Instant Messaging and Presence
- Voice Calling (VoIP)
- Voice Calling (Desk phone)
- Video Calling
- Desktop Sharing
- Call Settings

Get Started

This section contains the essential information for getting started with the application.

Installation

Visit support.tdsmanagedip.com/uc

Windows

- Click the Desktop Download-PC link and follow the install instructions
- Launch the application

OS X

- Click the Desktop Download-MAC and follow the install instructions
- Launch the application

Sign In

When you first launch the application, you are prompted to sign in.

1. Enter your Web Portal user name and password.
2. Select whether you would like the application to remember your password.
3. Select whether you would like the application to sign you in automatically on subsequent launches.
4. Click **Sign In**.

You can also access *help* and *preferences* directly from the login window.



NOTE: If you choose automatic sign in, you are automatically signed in and taken to the *Main* window upon subsequent launches. Otherwise, you are presented with the *Sign In* screen when launching the application.



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The *Login* window offers the last used username, but the password shall be automatically filled in only if you have checked the **Save password** checkbox. If multiple people use the same machine, only the last password is entered as a security measure. If you change the username in the *Login* window through editing it, or using the drop-down list to pick another one, the application will not fill in the password; you are always expected to type it in. This also applies when re-selecting or re-entering the last used username.

After logging in, an E911 disclosure will appear informing you about emergency calls. Click OK to proceed with Login.

Main Window

When you start the application for the first time, your *Contacts* list is empty. Use the Search and Dial field to find people and add them to your *Contacts* list. Contacts can also be added manually by clicking the **Add** button. Client windows can also be set to be always using the *Main* window menu option. The left pane call settings icon, menus, and dial pad are also integrated with the *Main* window.

Windows open up in a cascaded fashion in the middle of the screen. The *Search and Dial* field allows searching for contacts as well as making calls using phone numbers. The table that follows the images describes the key icons used in the *Main* and *Communications* windows.

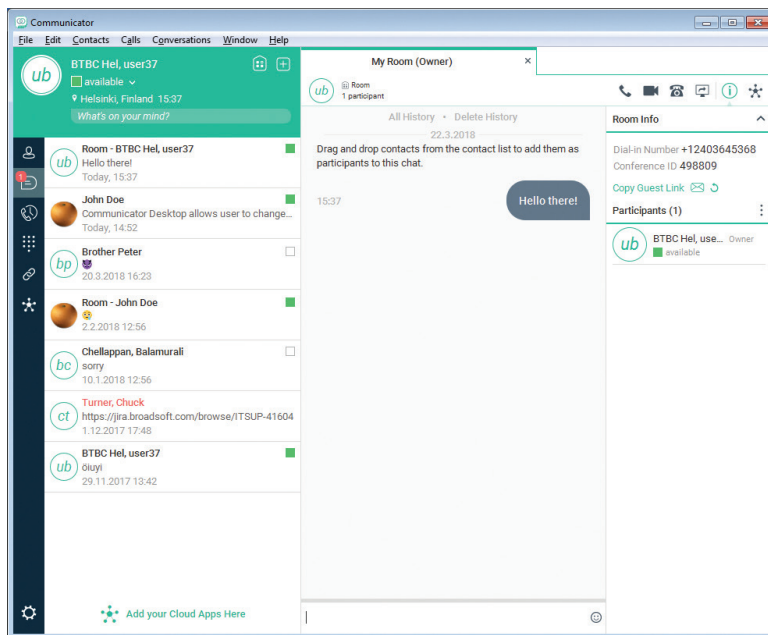







Figure 1 Main Window









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| Icon | Usage |
|---|--|
|  | My Information —View and update your information, for example, your presence, avatar, and location. |
|  | Contacts —View your contacts. |
|  | My Room —This is your permanent communication room. Participants can dial in to your audio bridge. |
|  | Communications History —View previous chats and calls. |
|  | Dial Pad —Make calls (it is integrated with the Main window). |

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| Icon | Usage |
|---|--|
|  | Preferences —Use for quick access to preferences and call settings such as Call Forwarding. |
|  | Chat —Start an instant message conversation with a selected contact. |
|  | Call —Make softphone audio call to a selected contact. |
|  | Call from Phone —Make a Click To Dial call from your desk phone (or secondary device). |
|  | Video Call —Make a video call to a selected client softphone. |
|  | Share —Share either the whole screen or an individual application. |
|  | Menu —Open communications options. |
|  | Add —Add a contact, group, or conference. |

My Information







- Click the avatar to update your status or location and enter free text (native desktop only)
- Double-click the avatar to upload a picture or use a right-click menu (single click on Chrome).
- Right-click the avatar to update your status (native desktop only).

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Presence

You can set your presence to one status indicated in the following table.

| Icon | What it means |
|---|---|
|  | The green presence icon indicates that the user is online and ready for communication. |
|  | The yellow presence icon indicates that the user is online but has been idle or away from their computer for more than ten minutes. |
|  | The red presence icon indicates that the user is busy and does not want to be disturbed. |
|  | The grey presence icon indicates that the user is offline and the only available contact method is calling or leaving a chat message. |
|  | This icon indicates that the contact is busy on a call. This is an automated presence status. |
|  | This icon indicates that the contact is busy in a meeting. This is an automated presence status. The Busy – In Call status overrides the Busy – In Meeting status so this one is only seen if there is a meeting but no call. |

The application can automatically update your presence to the following:

- *Busy—In Call*
- *Busy—In Meeting (Windows only)*
- *Available (desk phone)*
- *Available (mobile)*
- *Away on mobile*
- *Offline and busy in call*

Location

Your location is automatically determined by your public IP address; however, you can manually set the text to appear for your location and time zone using the location dialog box.

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Communications Window

After starting communication with one or more contacts, a *New tab* is displayed for chat + calls. The call window is also integrated with the Main window. From this window, you can perform the following actions:

- Escalate a chat to include audio, video, and desktop sharing
- End an audio or video call
- Open the dial pad
- Mute your microphone
- Adjust your speaker volume
- Place a call on hold
- Transfer a call

If you are using several monitors, the application opens the *Communications* window as well as notifications on the same monitor as the *Main* window.

The application limits the number of active communications to spare resources. The limit is 20 active communications on Windows and on OS X. If the maximum is reached, the main window's top section warns you with the following message: *"The maximum amount of communication windows has been reached. Please close some to open new ones."*

If an incoming call is answered while this warning is shown, the client closes the chat session that has the longest time since its last activity.

Start Chat

Start a chat using one of the following methods:

- Double-click a contact from the *Contacts* list or search results.
- Right-click one or more contacts from the *Contacts* list or search results and click the **Chat** button.
- On the *Communications* History list, double-click a chat entry.
- In a *Communications* window, click the **Chat** button.

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Send File

- In a one-to-one chat, transfer files by clicking the **Send File** button in the *Communications* window or use the “drag and drop” method so that they are moved to the *Communications* window.


Send E-mail

Right-click a contact from the *Contacts* list or search results and select the **Email** menu option. The contact must have an e-mail address defined for this feature.

Make Audio or Video Call

Make an audio or video call using one of the following methods:

- Left-click one or more contacts from the *Contacts* list or search results and click the **Call**, **Call from Phone**, or **Video button**.
- Right-click one or more contacts from the *Contacts* list or search results and click the **Call**, **Call from Phone**, or **Video**.
- Enter a phone number in the *Search and Dial* field.
 - Press **ENTER** to start a VoIP call.
 - Click the **Call**, **Call from Phone**, or **Video** button.
- Open the dial pad, enter a phone number, and then click the **Call**, **Call from Phone**, or **Video button**.
- On the *Communications* History list, double-click a call entry.
- In the *Communications* window, click the **Call**, **Call from Phone**, or **Video button**.
- When viewing a contact’s profile, click the **Call**, **Call from Phone**, or **Video button**.

 **NOTE:** If dialing a phone number using the softphone that requires additional dual-tone multi-frequency (DTMF) tones (for example, a conference bridge), you can type the numbers on your keyboard while the *Communications* window has focus or open the dial pad in the *Communications* window.

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Share Your Application or Desktop

1. Click the **Start Sharing** button in the bottom of the *Communications* window (if share panel is not visible). The Share button is visible by default in My Room also. The share selector window opens.
2. Select the application to share or the entire screen of a particular display and click the **Start Sharing** button.

Active Communications

Active communications appear at the top of the *Contacts* list in the *Main* window (native desktop only). This area provides an easy view to see the people with whom you are communicating. By default the call window is shown in the *Active Communications* area in the Main window (where the call can be fully controlled in the desktop client). It reduces the number of communications windows; however, a separate call window can still be opened using an *Active Communications* menu. The following is also available in this area:

- Double-click an active communication item to bring this *Communications* window to focus if the call window is separately shown. If the call window is integrated, you can use a menu option to show it separately.
- See who has sent you a chat message, but only after you accept the chat session. Before the chat session is established, the chat items are not visible in active communications but a history badge is visible.
- End a call.
- Mute the microphone.
- Place a call on hold.
- Merge two calls or transfer by dragging and dropping calls onto each other.
- Transfer a call.
- Make conference calls.
- Park and retrieve calls.
- Set audio device to headset or speaker.

When enabled, you can use the buttons for faster access to the services.

You can right-click the “More” icon of an active Communications item (icon with three dots) for additional options while a left click offers additional call management options for this call as well as other options when available.

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My Room

My Room is an always available and permanent room you can use to chat with anyone that joins.

If you are assigned as a host to a conference bridge, then in your room, you and your attendees can click the **Call** or **Video button** to have the application automatically dial in to the conference and enter the appropriate entry codes. Note, you cannot edit these details. You cannot hear any DTMF tones when dialing into My Room (the call is made automatically, there will be a short pause before connecting to the conference).

If a conference bridge is not specified, you cannot initiate a call in your room.

You can invite others to your room by dragging and dropping them from the Contacts list into the *My Room Communications* window.

Contacts join your room by right-clicking your name on their Contact list and selecting *Join Room*.

You can also export the attendee list using the related participant menu available via the options icon (three dots).

Select Audio Devices (softphone only)

If you have multiple audio devices available for your microphone or speakers, select the preferred audio device before starting a call.

Windows

1. Click the options icon on the left side.
2. Select *Audio/Video*.
3. Set a playback device (speakers).
4. Set a recording device (microphone).

OS X

1. Select the Preferences icon from the main menu.
2. Select *Audio/Video*.
3. Set a playback device (speakers).
4. Set a recording device (microphone).

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If “Use default” is selected, then the application uses the default device set in the operating system preferences. For Windows, if “Default Communication Device” is defined, it is selected over the “Default Device”. If you are using headsets, you can also select a separate device than the headset for alerting incoming calls.

Note that on OS X it is recommended to disable “Use ambient noise reduction” in System Preferences to reduce echo.

Contacts

Contacts are the people with whom you communicate and, in most cases, you see their presence and share your presence with them. There are three types of contacts:

- **Contacts**—Actual people with whom you communicate
- **Conferences**—Audio or video conference bridges that you use to communicate with others
- **Groups**—Containers of contacts and/or conferences

There is no hard coded limit on the number of contacts. The more contacts are added the more memory and processing is needed. The more contacts are added, the more difficult it is to find people without searching. Live search can be used instead of a very large local contact list while keeping memory and processing requirements to a minimum.

Add

When you sign in for the first time, there are no contacts on your contact list. Add a new contact at any time by selecting the *Add Contact* item from the menu or choose the **(+ icon)** button from the Main window.

In the *Add Contact* dialog box, enter the contact’s information and then click **Save**. By default, your presence information is always shared with a new contact if an Extensible Messaging and Presence Protocol (XMPP) address is provided.

When receiving a buddy request, there are two buttons for accepting and rejecting the request. Dismissing the buddy request window only ignores the request for the duration of the login session. It reappears after the next login.

However, you can always share your presence information later by selecting **Subscribe** on the right-click menu for a specific contact in the contact/directory list. Note that the contact must accept your subscription request for you to establish the presence relationship successfully.

The newly added contact appears on your contact list.

Add a conference contact by clicking the same button you did for *Add Contact* and choosing the *Add Conference* menu option. A conference contact is a special contact used for conference bridges to avoid remembering PIN codes and conference number, for example, recurring conferences. Just create a contact for the weekly conference, add a conference bridge number and PIN, and join the conference just by right-clicking the contact or choosing it and clicking the **Call** button.

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Choose the *Add Group* menu option to add a new group to the contact list. Right click a contact to add them to your group.

Contact card telephone number fields can also have SIP URIs (work, mobile, extension, personal, and conference bridge).

Edit

Edit a contact by selecting the contact first. After you select the contact, right-click anywhere in the area of the selected contact and a menu of options appears which allows you to either view or edit the contact profile. In *View* mode, click the **Edit** button to go to *Edit* mode. This base principle is the same for normal contacts, conference contacts, and groups. You may also synchronize the contact card with the Telephony Directory or the synchronization may take place automatically (native desktop only). When the import the directory information to profile button (cloud icon) is visible, there is no automated syncing of the contact card details with server information. To synchronize the contact card data, click on the cloud icon.

- *Unsubscribe* removes the presence relationship between you and that contact. This means you do not see the contact's presence information and your contact does not see yours. To re-establish the presence relationship, select **Subscribe**. An unsubscribed contact remains on the contact list and is always shown without an icon. Any contact that is not presence-enabled is shown in the same way.
- *Delete contact* removes the contact from your contact list.
- *View Profile* opens the *Contact Information* dialog box where you can add, edit, or remove information. This works for both normal and conference contacts.
- For groups, choose the *Edit* menu option to rename a group.

Once done with all changes, click the **Save** button.

Filters

You can filter contacts in two ways:

- Use the *filter* field to search by contact name. The contact list is filtered in real time as you type.
- Alternatively, use the filter menus available by right-clicking the *Contacts* icon in the left pane to display only specific types of contacts such online contacts (native desktop only). You can also sort contacts based on first or last name or choose whether to display the contact's avatar and availability status in the contact list.
- When you make a contact your favorite, the favorite group shows on top of the contact list, you can minimize your favorites list.
- When you delete all your favorite contacts, the favorite group does not show anywhere.
- When you have even one favorite marked, you see the group.









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Presence

For each contact you have subscribed to, you can see their presence. Similarly, your contacts can see your presence on their contact list.

Presence means that your friends are able to see whether you are available to communicate, for example, "I'm busy" or "I'm available".

| Icon | What it means |
|---|--|
|  | The green presence icon indicates that the user is online and ready for communication. |
|  | The yellow presence icon indicates that the user is online but has been idle or away from their computer for more than ten minutes. |
|  | The red presence icon indicates that the user is busy and does not want to be disturbed. |
|  | The grey presence icon indicates that the user is offline and the only available contact method is calling or chatting. |
|  | The question mark indicates that a subscription is pending and the contact has not yet approved sharing their presence. |
|  | This icon indicates that the contact is busy due to a call. This is an automated presence status. |
|  | This icon indicates that the contact is busy due to a meeting. This is an automated presence status. The <i>Busy-In Call</i> status overrides the <i>Busy-In Meeting</i> status so this one is only displayed if there is a meeting but no call. |
|  | This icon indicates that the contact is only available on mobile The Application. |

The avatar in this version is not completely in real time. The avatars are retrieved at login, when the contact is added, and when the contact comes online. Double-click the avatar to change it. A File Explorer view opens.

If you see an error message at the top of the *Main* window "XMPP Unavailable", it means that the XMPP connectivity has been lost for chat and presence; however, you can still make calls. You should contact TDS support 888-850-5985.

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Have the Outlook calendar automatically change your presence to *Busy - In Meeting* by enabling this in the *Preferences→General tab (Native Desktop only)*.

The presence update is only triggered by appointments and meetings that are in the Show me as busy state.

The XMPP address of a contact cannot be changed. Instead, you must delete the old contact and create a new one.

Location in presence is done based on the IP address that the machine is using. The IP address is mapped to a physical location. Change the location manually by clicking the currently displayed location.

Chat

Chat View

When you initiate a chat, the *Chat* window opens. Chatting with a contact is possible only when you are both online. If your contact initiates a chat, you see a pop-up notification in the bottom right-hand corner of the screen. If you close the *Chat* window (or tab on Chrome) and open it again, sent chat messages are shown in the window as chat history. When enabled by your service provider, a typing notification is also shown.

When the chat opens, you see the contact's information at the top of the screen. If you want to use the whole area for writing, you can press the background of the information or the top bar. You can contract or expand the information of the contact during the chat and you can leave it open or closed depending on your preference.

At the top of the message area, there are four links: Yesterday, Last week, Last month, and All history. From these links, you can load history from your local storage and different time frames. You can delete the history using the drop-down menu.

In the text field, you can add a smiley emoticon. Smiley emoticons can also be added by manually entering the corresponding characters that represent that particular emoticon. You can send text by pressing **ENTER**.

Emojis are also supported and are rendered as ordinary emoticons when received.

To enter a line break in the text field, you can use the following key commands:

- CTRL+ENTER (COMMAND+ENTER on Mac)
- SHIFT+ENTER
- ALT+ENTER

Use either one of the short commands, CTRL+C or CTRL+V, or right-click the selection for a menu to copy or paste the text to or from the *Chat* window. All sent and received chats are stored locally in the chat history.

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File Transfer

File transfer functionality is accessible only through the Chat tab.

1. To open the *File Selection* dialog box, click the **Send File** button located to the side of the text field.
2. Select the file to be sent from the dialog and then click **Open**. You can also drag and drop a file into the *Chat* window.
3. Once the file offer is issued and during its transfer, you can cancel the transfer (at any time) by clicking **Cancel**.
4. Accept an incoming file transfer by clicking the **Accept** button.
5. Reject the file transfer offer by clicking the **Decline** button.

After the file transfer has completed, the received files can be opened or viewed in the file manager by using the *File received*, *click to open*, and *Show in folder* links.

In error situations, partially received files are not deleted automatically.

Group Chat

Start a group chat by “multi-selecting” and right-clicking the *Main* window contact list. More people can be added later to the chat by “drag and drop”. Only the owner can add more participants.

A group chat works the same way as a one-to-one chat. All messages from anyone are sent to everyone else. All contacts need to be online to be able to participate in a group chat. You cannot invite an offline contact or a contact that is not on a device that supports group chat. This does not affect the group chat in any way.

A group chat history is saved both in My Room and in ad hoc chat rooms and is available to view later in the Messages tab of the Main window.

In the *text* field, the contacts’ names appear in different colors to easily distinguish between who is writing.

Only the newest chat room messages are stored on the server. One-to-one chat messages are only saved locally.

Deleting a chat room is not supported.

Chat rooms can be moderated by the owner. Use the right-click menu options to remove a participant from your chat room. If needed, the removed participant can join later. The removal also applies to desktop share sessions.





Typing notifications are not supported in group chats.

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Audio and Video Calls (Softphone)

The following table describes additional *Communications* window icons and explains what you can do with them, for voice and video calls.

| Icon | What you can do |
|---|---|
|  | Add or remove video from the call. |
|  | Mute your microphone by clicking the mute icon. |
|  | Put the call on hold. Note that if you hold the call, the other party cannot "unhold". This freezes a video call to the last frame of the video feed. In both voice and video calls, this is communicated to all parties by a notification appearing in the middle of the screen. |
|  | Use this icon to access the Call Options menu. In the Call Options menu, you can find different actions to use for a call depending on your settings and your service provider. |

In the *Options* menu, there are the following options:

- Transfer a call to a third party (native desktop only).
- Put the call on hold. Note that if you hold the call, the other party cannot "unhold". This freezes a video call to the last frame of the video feed. In both voice and video calls, this is communicated to all parties by a notification appearing in the middle of the screen.
- Adjust the volume bar to adjust the volume. Dragging it all the way to the left mutes your speakers.
- Enter additional digits using the dial pad at any time during the call (for example, to insert a conference number). The dial pad is not movable.
- Toggle between the audio headset and speakers. You must specify a different device for a headset and a speaker in *Preferences* to be able to use this feature.
- Add participants to the call (native desktop only).

As an alternative, in general available Feature Access Codes (FACs) for call management work during calls, for instance *55 for direct transfer to voice mail, but the ongoing call must be put on hold and a new call must be made to the FAC "number". Using DTMF for the same purpose does not work.

When establishing a call to a contact, you can choose several ways to call. Select the contact you wish to call and press the Call icon. This calls the default number. If you right-click on the contact you wish to call, you can choose the number to call from a right-click menu. There can be several phone numbers available in the menu. The work phone is the default and top most number is followed by mobile and other numbers. This also applies to the transfer and conference windows. However, in certain cases the transfer/conference default number can differ from other call options in other menus.



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The default call type can also be selected using accessibility menus (Calls→Dialing service). This controls the default call type when using call buttons.

Dial a number in the combined *Search and Dial* field to make a call (native desktop only). Once you type your numbers, the application searches for contacts on both the local contact list and the enterprise directory.

Choose your video size from the *Preferences* and the *Video* tab. Your selection is used by default for future video calls. The available sizes are automatically presented based on your camera.

You cannot have two simultaneous calls with the same person.

The application will not add video to an audio call without end user consent. This also applies to blind video call transfer cases where audio-only music on hold is utilized; this may result in the transferred call being reduced to audio.

Call From Computer (Softphone)

Select a contact from your contact list to start communication and click the desired communication button. Type a phone number in the Search and Dial field at the top of the window (search or communicate) to communicate with someone who is not on your contact list.

Call From Phone

The second option to communicate in the row of communication buttons is the **Call from Phone**. When you click this button, the call is established from your desk phone.

You can also have mid-call controls such as hold/resume, transfer and add people.

Automatic *Busy – In Call* presence also works with the Call from Phone feature.

It is also possible to control calls initiated without the application in the *Active Communications* view. The same mid-call controls are also available in this case. In case of an incoming call, the actual answering action must happen with the other device.

Answer Call (Softphone)

When someone is calling you, you see a pop-up notification on your screen. You can choose to answer, silence the incoming call, and then open a chat session with the caller, reject the call, or silence the incoming call by closing the pop-up notification window. If you silence the call, the ringtone is silenced but the caller does not see anything on their end. You can answer or reject the call after silencing it only if you have chosen the chat option. If you close the incoming call pop-up notification to silence an incoming call, then you do not have an option to answer or reject it any more. When choosing the chat option, chat is only enabled after the call has been answered or rejected.

If you reject the call, it causes the line to sound busy at the caller's end and they know that you rejected the call.

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When someone is calling you with a video, you see the same pop-up notification; however, the options are answer with video, answer as voice only, silence and chat, reject, or silence (by closing the pop-up window). If you decide to answer as voice only, the call is voice only.

Contact Name Lookup for Incoming Calls

The application performs a local contact search for incoming calls. If the number matches one of the contacts on the contact list, the name is shown on the incoming call screen along with the alert. Both the display name and phone number are shown when available.

If there is no match to a local contact, the application looks for a match in the Telephony Directory and other available directories, and if a match is found, the available information is shown for the incoming call. If there is no match in the Telephony Directory, the display name is taken from the available information in the incoming call.

Whenever you retrieve your call logs/history, the application does a lookup in the local contacts and populates the name if a match is found.

Missed Call or Communication

When you have one or more missed calls or other types of communications, there is a notification on the left-hand side of the navigation pane in the Main window. Clicking the icon takes you to the missed communication in the *Communications History* view.

Full Screen in Video Call

Full screen mode can be activated by clicking the **Full Screen** button or by double-clicking anywhere on a video.

Exiting full screen mode is done by pressing the **Esc** key (on both Windows and OS X) or by double-clicking the window. Exiting full screen makes the video call go back to its original state (even if there was resizing of the window previously before going full screen).

In a full-size window, you can see a similar *Options* menu at the top. It has the same functionality as it does in the normal view. When you move the mouse, the top bar and lower communication buttons appear on top of the video.

Multiparty Sessions

You can have many participants in a call, either in a *My Room* or in an ad hoc multiparty call (native desktop only). Add more participants by dragging and dropping them on to the *Communications* window or by selecting the Conference menu item via the *Communications* window menu button. By choosing the menu item, you can also add participants with just a telephone number.

In contrast to using *My Room*, which uses your permanent chat and collaboration rooms and conference bridge, you can start ad hoc multiparty sessions by either selecting multiple contacts

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on the contact list and starting a chat, by calling them, or by expanding a one-to-one session into a multiparty session by dragging and dropping a contact into the Communications window. In an ad hoc session, the room used is a temporary one that is deleted once the session ends (that is, when the last participant leaves). Voice conferencing does not use a bridge but instead uses the N-Way Calling supplementary service in a sequential fashion. The application dials out to all participants and takes everyone off hold after the last attendee answers. If someone does not answer the call has to be terminated.

If the XMPP service is not available, then ad hoc multiparty calls are not available.

Call Waiting

You can have one active call at any one time if you receive a new incoming call and accept it. The existing call is put on hold and you can change between these two calls by using the **Hold** and **Unhold** buttons.

Call Transfer

Blind call transfer is available in the *Communications* window; choose the Transfer Call menu item to transfer the call to someone else (native desktop only). Attended call transfer is also available in the same window, first call someone to check if the called party can take the incoming call and then transfer the incoming call to the desired called party.

Message Waiting Indication (MWI)

The MWI service allows you to receive a notification for a waiting voice mail in the communications history. By clicking on the message icon in the upper part of the Main window, the application calls the predefined mailbox number to allow the user to listen to the voice mail.

It is also possible to call voice mail from the dialer by long pressing the "1" icon in the dialer.

Missed calls are indicated by an icon in the *Main* window. Note that the MWI icon is in the same place when it indicates a new voice mail.

Call Park and Retrieve

Call Park is particularly suited for shared environments where one person can answer the call, park it, do something else for a while and continue the call from another device or let somebody else continue the call (supported on native desktop only).

An ongoing call can be parked against your own number or another number (an extension). Call Retrieval works in the same way, the parked call can be retrieved from your own number (an extension) or another number (an extension) to provide flexibility for who is picking up the parked call.

The user must remember the extension to which the call has been parked to retrieve it using the Main window menu (or feature access code), unless the call was parked to the one's "own" extension. If the call is not retrieved after a certain time, then the server calls the parking user.

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Call Pull

Call Pull allows you to pull an ongoing call from one of your devices to another one where the Call Pull feature is used (native desktop only). Call Pull can also be used with Feature Access Codes (FACs), in this case, *11.

Forced Logout

You may see a pop-up saying that you have been logged out due to another instance of the client logging in (native desktop only). This feature allows managedIP to track similar online client instances and only allow one of them to be online at the same time. When managedIP notifies the client to log out, all connections are terminated and client returns to the login window.

Headset Support (Softphone)

You can control incoming and ongoing calls from a compatible headset. The feature set supported is answer/hang up as well as mute/unmute. Volume control operations are not reflected in the application's UI. The following is a list of tested example devices, although other devices should also work:

- Plantronics Voyager Edge UC
- Plantronics Savi 700 series
- Plantronics Blackwire C3xx, C4xx, C5xx, and C7xx
- Plantronics Calisto 620
- Plantronics Voyager Legend UC
- Logitech H570e Mono
- Logitech BCC950
- Logitech Conference Cam Connect
- Jabra Biz 2300/2400
- Jabra Speak 510
- Jabra Pro 930 (wireless)
- Sennheiser SC 230/260
- Sennheiser SP 20
- Sennheiser MB Pro1 UC

Headsets typically use an add-in of some kind to communicate with the rest of the client while calls are made. Currently, installed add-ins are visible in the *Preferences, Media Add-ins* tab.

Headset vendors may develop their own add-ins that will replace the standard HID add-in for all devices. Some of these add-ins (for instance Jabra) cannot be used at the same time with the standard HID add-in. These vendor-specific add-ins would be installed during new headset installation; however, the standard HID add-in should remain in the preferences list. If for some reason it



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has disappeared, adding the respective .dll file back to the add-in folder should make it visible again in the preferences. If later on you would like to change to another headset, the vendor-specific add-in could be disabled from preferences to again use the standard HID or some other new add-in by another headset provider.

Application or Desktop Share

To share your desktop or individual application:

1. In the *Communications* window, click the **Start Share** button. This does not yet start the “share”.
2. Select either to share your entire display or one of your open applications and click **Start Sharing**.

The share widget appears to let you control share settings such as **Preview** that shows you what participants are seeing and **Pause** that pauses sharing.

3. To stop sharing, click the **Stop** icon. While sharing, all other communications mechanisms are also available except for video calling and file transfer. Participants cannot hide a share without closing the *Communications* window. Video call is also available while sharing.

Desktop sharing works the same way in both My Room and in ad hoc sessions. Share selector is not dynamically updated while the selector is open and minimized applications are not available in the list of applications to share.

If you are first in a video call and then start share, your own video is not shown due to limited space available, but you can make it visible using the Main window menu in the bottom right-hand corner by selecting “Show Own Video”.

If you are using dual monitors, you can choose which monitor to share. You can check the primary monitor in the operating system settings.

You can also remove desktop share participants. They are also removed from the group chat at the same time. If needed, the removed participants can join later.

My Room

My Room is started by clicking on the **My Room** icon on the right-hand side of the Main Window. *My Room* is started automatically using your permanent chat room. Add more participants by dragging and dropping them into the *Communications* window or the Conference menu, or they can join your room by right-clicking your name on their contact list and choosing the *Join Room* menu option. Once people have joined the chat room, they can click on the **Call** button of that window to join the conference. The room owner can also share their desktop.

In addition to the owner of the room, participants can also share the desktop but only the owner can add more participants. This applies to both *My Room* and ad hoc sessions.

1. To see a Context menu, right-click the **My Room** icon on the left-hand side of the navigation pane (native desktop only).

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2. You cannot modify credentials and conference bridge information, found in options.



NOTE: If the invitation link does not add you to the conference, right click on the host's contact and click **Join Room**.

3. Select *My Room Invitation* to copy an invitation link to the operating system clipboard (depending on your service provider setup, this menu option may not be available). Paste this link, for instance, to meeting invitation e-mails to allow participants to join the conference in one click from, for example, Outlook, or Office applications. Note that some applications may not recognize the application link. You can also copy the My Room Invitation to the default email client (this text does not contain the link) and go to the My Room preferences via a right-click menu option.

The link has two parts: one for users and another one for users with some other client. The invitation can also contain a link to the desktop sharing session. The invitation always contains a dial-in number and PIN for users who do not have the application. The desktop share link, when available, allows anyone to join a desktop share session from a standard web browser. In addition, the group chat session is supported with the web collaboration session. For guest user links, see the next section.

The **My Room** icon also has a tooltip indicating the conference bridge details of your My Room.

The *Communications* window also has an icon that provides the same Context menu previously discussed.

For more information on desktop sharing, see section 8.

Desktop sharing works the same way for both My Room and the ad hoc sessions.

My Room uses your permanent chat room, permanent collaboration room, and conference bridge (audio or video). My Room is the only way to use the permanent rooms. Any other multiparty communications, such as selecting multiple contacts, and right-clicking for a conference call, or dragging and dropping for a one-to-one chat, is done using ad hoc rooms. Ad hoc rooms are deleted once the session is over.

All My Room sessions start as chats but call and/or share can be added to the session while in progress. File transfer and video conferencing are not supported in My Room or ad hoc sessions.

Search

The application supports a search of the enterprise directory as well as the personal directory, enterprise common directory, and group common directory. This takes place in the same search field that is used for both a local and presence-enabled contact list search. All search results are combined into one common set of results.

Personal directory, enterprise common, and group common directories cannot be modified from the client side. Only read access is provided. A snapshot of the presence status of the contact in the results list is shown, but this presence is not updated after the search operation.

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Personal directory allows you to add contacts that are not in the enterprise directory, for instance, partner company's phone number.

The application automatically searches the local contacts and presence-enabled contact list in addition to the enterprise and other directories at the same time. As soon as there are results from the enterprise and other directories, these results are shown on a separate list in the Main window. Additionally, there may be other search result groups from other search sources such as Outlook.

Search results are displayed differently depending on the results of the contact list and directory search:

- Outlook search is enabled and there are more result groups.
- If there are no results for a certain search source (for example, local contacts, Outlook, Telephony Directory), then that group is different in the UI.

The enterprise directory searches all available fields for the search string. By default, it waits for 1.5 seconds before it sends the search request to the server to minimize unnecessary load on the server.

Typically, when adding a contact using directory search results, there are phone numbers and first names in addition to last names available. In addition, the Extensible Messaging and Presence Protocol (XMPP) address and other fields are imported when found to allow presence and chat.

Outlook integration (search and calendar integration) on Windows requires one of the following versions installed on the desktop:

- Outlook 2010
- Outlook 2013
- Outlook 2016

Outlook search also works when several Outlook accounts are in use, but only one account is used at a time (default selected, which can be changed in Outlook). Additionally, other related considerations are as follows:

- The client searches for contacts and calendar entries in the default Outlook account. The account is set to the default via *File→Info (left pane)→Account Settings→Account Settings→Data Files*. Select an account and mark it as "Set as Default". After making this change, sign out and sign back in to the client and it now searches that account for contacts and calendar entries.
- The client searches the Outlook contacts only on the local machine (that is, the *Outlook Address Book*). There is no Exchange server lookup performed. In addition, all directories in Outlook are searched for contacts, even deleted folders. The Contacts directory can also have multiple levels of subfolders.

Every minute, the application reads Outlook appointments. If there is an appointment running at the current time, then the presence is shown as *Busy – In Meeting*. Overlapping appointments are also handled. Following are some examples of operation with Outlook when time is 9:10 A.M.

- There is meeting "A" 9 A.M. through 10 A.M. Presence is shown as *Busy – In Meeting*.
- Presence is explicitly changed to Available at 9:15 A.M. Presence is shown as *Available*.

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- In the next minute, the application again reads the appointments and sees that "A" meeting is running; however, the presence was already explicitly marked as Available and presence is not shown as Busy – In Meeting but Available.
- There is an overlapping meeting "B" 9:30 A.M. through 10:30 A.M. Presence is shown as Busy – In Meeting when the time is 9:30 A.M.

When deleting a meeting that is currently ongoing in Outlook, the presence status remains as *Busy – In Meeting* until the next time Outlook appointments are checked (once every minute) and after that, presence is shown as *Available*. This change may be instantaneous or it may take a minute depending on how close the timer is to being triggered.

The presence update is only triggered by appointments and meetings that are either accepted by the user or made by them. All day meetings do not trigger a presence change to *Busy – In Meeting*.

Communications History

The fourth icon from the top in the Main window on the left-hand side of the navigation pane displays your messaging history. History view is divided into three tabs depending on your service provider settings. Possible tabs are:

- Calls
- Chat
- Voicemail

Double-clicking a conversation on the chat tab list opens it in a new window while double-clicking a call history item calls that number. Clicking the voicemail tab places a call to your voicemail box.

The application saves a call history for placed, received, and missed calls. The call history makes it easy for you to redial and call back when you have missed a call or you want to easily dial a contact with whom you have recently spoken. Each call has a separate entry in the list.

Chat history for group chats, both in My Room and in instant group chat, are stored locally on the desktop client, just like in one-to-one chat, but only for the time the user is joined into the session.

Double-click on a name or an incoming call item in the *Calls* tab to place a call.

To clear the missed chat indicator, you must open the missed chat.

The *Communication History* missed communications badges can be cleared by using the right-click menu from the **Communication History** button on the left pane (native desktop only). The menu provides options to mark "All as viewed", "Chats as viewed", "Voicemails as viewed", and "Calls as viewed".

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Click-to-Call (Highlight Text)

Users can highlight text anywhere in the desktop machine to make a call and define the default call type used for making the call using the shortcut defined in *Options*. On OS X, you must define the shortcuts on your own using the instructions provided in *Preferences*. The order in which key combinations are pressed may be significant in some cases if the operating system has reserved some key combinations for other purposes.

Register to Call

You can use the application for making calls using Callto and Tel URL links anywhere in your machine, but you need to register the application as the primary application for that purpose in the operating system.

On Windows, at first login there is a dialog asking if you would like the application to be the primary calling application for Callto and Tel URL schemes. Answering yes will modify Windows settings so that the next call using those links will use the application. If another application should afterwards take precedence in Windows settings, you can again make the application the primary calling application from Options, Outgoing Calls tab.

On OS X, you must make the same selection in FaceTime preferences. You are required to log in to FaceTime to change the preferred calling application.

Password Change

A dialog box automatically opens when your login password must be changed (native desktop only). You must provide the password two times for verification purposes. Using the menu at the top of the *Main* window, your password can be changed at any time.

Accessibility Compliance

The application supports accessibility compliance by having all client features available in menus at the top of the *Main* window (native desktop only). The menu items are also available using the keyboard shortcuts listed in *Appendix A: Keyboard Shortcuts for Desktop*.

The most recent version of the application added support for the following features:

- Dictation
- Screen reader (VoiceOver on OS X)
- Keyboard navigation

The following limitations apply:

- On OS X by default, the tab key moves the focus between text-inputs and lists. This can be changed through *System Preferences*→*Keyboard*→*Shortcuts*. Under *Full Keyboard Access*, select "All Controls" instead of "Text boxes and lists only".
- Dictation on OS X: If WebRoot SecureAnywhere is used, *Pause Secure Keyboard Entry* must be selected.



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- User must manually select the correct language in screen-reader. UC-One will not force screen reader's language according to the language selection in the client.
- On OS X, the VoiceOver focus follows the VoiceOver Cursor. When VoiceOver is enabled, user is expected to navigate with the VoiceOver Cursor. That can be enabled through *System Preferences* → *Accessibility* → *VoiceOver* → *Open VoiceOver Utility*. In the opened window, open "Navigation" and check "Keyboard focus follows VoiceOver cursor".
- When using VoiceOver on OS X with different languages, the OS language, client language, and VoiceOver language all need to be the same.

Recommended *Preferences* → *General* → *Accessibility* settings for screen reader/VoiceOver are:

- Tooltips disabled
- Pop-up errors enabled

Preferences

Preferences provide access to available settings for the application. Follow these steps to access *Preferences*.

Windows and OS X

1. Click the *Options* logo in the *Main* window left pane.
2. Select the desired view from the drop-down.

General

Login

Enable or disable automatic login when starting the application and control the remember password feature as well as enable the *Update Password* feature.

Notifications

Usually there is a confirmation pop-up notification each time you remove a contact or chat history record. By selecting one or all of the check boxes, you can disable the confirmations when deleting information. You can also control whether there is always a pop-up notification for publishing location information. Typically, this is shown at login. You can also select whether to receive a notification before ending communication or holding a call.

Accessibility

Error pop-ups will be shown in addition to the usual error text shown at the top of the *Main* window if pop-up errors are enabled. Enable pop-up errors allows error pop-ups to be shown in addition to the usual error text shown at the top of the *Main* window.

Enable tooltips is enabled by default. For accessibility screen reader/VoiceOver will read all tooltips which may be frequent and hence disturbing. For this reason in accessibility cases, it is recommended to disable tooltips.

You can also enable spell checking and auto-capitalization.



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Audio/Video

Audio

Output Device (Voice Playback)

Choose a headset, PC-integrated speakers, or external speakers for audio output. Your external playback device is selected by default (if you have one connected).

Input Device (Voice Recording)

Choose a headset microphone, PC-integrated microphone, or external microphone for voice during calls. Your external recording device is selected by default (if you have one connected). You can also choose automatic gain control and test your recording device.

Speakers

Here you can specify what are the output and input devices used for speakers when toggling between the headset and speakers. Note that to be able to toggle between the headset and speakers during calls, you must specify a different device for each. Using the default for both results in the same device being assigned to both so toggling does not work.

Output Device (Voice Playback)

Choose a headset, PC-integrated speakers, or external speakers for audio output. Your external playback device is selected by default (if you have one connected).

Input Device (Voice Recording)

Choose a headset microphone, PC-integrated microphone, or external microphone for voice during calls. Your external recording device is selected by default (if you have one connected). You can also choose automatic gain control and test your recording device.

Ring Device (Alert Signal)

Select the audio device that is played when you receive an incoming call.

Ring Signal

You can select your own ring signal. The same signal is used for both voice and video calls.

You can also select an icon to play a tone for incoming messages. To disable the tone, uncheck the icon. Select a sound event and then click **Play** to hear the sound.

Video

Capture Device (Video)

Select a camera that you want to use for video calls. Your external web cam is selected by default (if you have one connected).

Video Size

Select one of the available sizes. Note, however, that higher sizes require more bandwidth and a more capable central processing unit (CPU).

Click **Test Call** to make a test call to test voice quality.

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Advanced

The Advanced view contains three different subsections:

- Logging
- Proxy
- Credentials

Logging

Logging is used for troubleshooting. You may be asked by your service provider to turn on logging and then send a log file directory contents. You can choose basic logging or more detailed logging to be enabled. Detailed logging may consume memory resources so it is not recommended to have it enabled for a long period of time.

You can also clear the logs and open the logging folder.

Proxy

Select how to handle HTTP proxies. By default, the system settings are used but you can also choose not to use an HTTP proxy or to use the (client) proxy settings.

Credentials

Meet me conferencing bridge information is displayed if you are assigned as a host to a meet me conferencing bridge. You cannot change this information.

Call Settings

The application supports the following service management features allowing supplementary services to be managed using the *Preferences* and *Call Settings* view available in the *Main* window left pane by selecting the appropriate sub-view in the drop down:

- Incoming calls
 - Remote Office
 - Call Forwarding
 - Do Not Disturb
 - Simultaneous Ring
 - Anonymous Call Rejection
 - Call Waiting
- Voicemail
- Outgoing Calls
 - Block My Caller ID (Calling Line Identification Presentation [CLIP]/Calling Line Identification Restriction [CLIR])
 - Highlight to call
 - Automatic callback



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Remote Office

This service allows the use of any phone as the office phone from a charging and numbering perspective. For instance, a hotel room phone can be used as the office phone.

Enable Remote Office by clicking the service icon and specifying a phone number to be used as the Remote Office number.

Forward Calls

Enter a number to which your calls should be forwarded. Different variants of Call Forwarding are supported, such as forwarding always, forwarding when busy, and forwarding when you cannot answer or when you are unreachable. In addition, you can specify the number of rings before call forwarding is triggered.

Do Not Disturb

When you activate this service, all calls are typically blocked by the server and are sent to voice mail. Enable this service by enabling the service icon.

Block My Caller ID

You can hide or display your number when calling or communicating with other parties or contacts. Hide your number by enabling the service icon. To show your number, set this to "Disable".

Simultaneous Ring Personal

Add up to 10 additional numbers or Session Initiation Protocol Uniform Resource Identifier (SIP-URI) addresses that you would like to ring in addition to your primary number when you receive a call. In addition, specify whether you want answer confirmations and if you would like to receive calls when already on another call.

Voice Messaging

You can enable or disable voice messaging in the *Preferences* and *Incoming Calls* tab. A number of settings are available:

- Send all calls to voice mail
- Send busy calls to voice mail
- Send unanswered calls to voice mail
- Specify how voice mail messages are handled using an indicator in the application or forwarding to e-mail
- Enable notifications of new messages via e-mail
- E-mail a carbon copy of new voice mail

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- Transfer incoming calls to a specified number using "0" DTMF
- Specify how many rings are used before sending an incoming call to voice mail
- Allow/disallow callers to leave a message

Anonymous Call Rejection

The Anonymous Call Rejection service allows you to reject calls from parties who have explicitly restricted their identities.

You can enable or disable anonymous call rejection in the *Preferences* and *Incoming Calls* tab.

Automatic Callback

The Automatic Callback (ACB) service allows you to be notified when the previously called busy party becomes idle and is connected without having to redial the phone number.

When you call another party and the call cannot be connected because the line is busy, you are prompted to make an automatic callback request (for example, "The line you are calling is busy. Press 1 if you would like to be notified when the line becomes available").

If you select Automatic Callback, the system monitors the busy party and automatically establishes a call when the busy party becomes available.

You can enable or disable Automatic Callback in the *Preferences* and *Incoming Calls* tab.

Call Waiting

The Call Waiting service allows you to answer a call while already engaged in another call.

You can enable or disable server-based call waiting in the *Preferences* and *Incoming Calls* tab.

If you disable Call Waiting, the second incoming call will not be connected and the caller hears an announcement that the call cannot be completed.

Sign Out

Signing out of the application sets your status to "Offline" for your contacts and displays the *Sign In* screen.

Sign Out of The Application

To sign out, follow these steps.

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Windows

1. Click *File* in the *Main* window title bar.
2. Select **Sign Out**.

OS X

1. Select *Actions* from the main menu.
2. Select **Sign Out**.

Exit Application

To exit the application completely, follow these steps.

Windows and OS X


Close the *Sign In* window.

Windows

1. Select the *File* in the *Main* window title bar.
2. Click **Exit** (a keyboard shortcut can also be used).

OS X

1. Select *The Application* from the main menu.
2. Select *Quit The Application* (a keyboard shortcut can also be used).

 **NOTE:** Closing the *Main* window (not the *Sign In* window) does not exit the application but rather minimizes the application to the system tray (Dock). This allows you to continue to receive calls and messages without having the *Contact List* window appearing on the desktop.

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Multi-Device Support

The application supports users with multiple devices, according to the XMPP specifications. This is comprised of several features:

- Chat invitations sent to a user are received on all devices. Once a particular device has been used to answer the chat invitation, subsequent incoming messages only go to that device.
- One can retrieve one's own presence notifications when another client updates the user's presence. The client stores this information and updates its own presence so that it is the same as the higher priority status it received, (that is, when the received status update is manual). If the received presence update is not manual, it does not react to the received update; it only notes it.
- Accepting a sharing presence invitation in one client is also recognized by another client, and both clients start receiving presence updates.
- Last sent and received messages are available on all devices when the optional message history feature is in use. All devices should use that feature at the same time to avoid duplicate messages.
- Missed chat badges are synchronized across all own devices when this preview feature is enabled (native desktop only).
- A new presence subscription made in one client is recognized in another. If the contact declines the "invitation", there are presence notifications from the server to all of the user's clients indicating that the subscription was terminated and this information is shown to the user. If the client receives two presence authorization requests from two or more devices for the same user, it only shows one request to the user.
- Removing a contact from the contact list in one device is recognized in another client and the contact list is updated (that is, the contact is removed) in the other client as well.

If a user has many devices, each device has the same status when shown to the end user. In addition, the contacts on the contact list always see the same status with updates shown in the following priority order:

- *Busy*
- *Online*
- *Away*
- *Offline*

This means, for example, that if one client publishes a *Busy* status and another client publishes another status, contacts see the user as *Busy*. Compatible devices such as desk phones are able to show presence in the same way.

The application keeps track of its own presence status as well as the status of other devices and deducts the combined presence based on these. For more information, see Appendix E: Multi-Device Presence.

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Installation

Installer supports a number of options on Windows (native desktop only):

- Agree to the license agreement
- Run when system starts (can be changed later in *Preferences* window)
- Create a desktop icon
- Select destination folder for installation
- Select name of the software in Program menu
- Launch client after installation

When installer has been run on an end user's behalf by an administrator, the "Run program when system starts" option cannot be changed by that end user.

If you disable startup, for example, in the Task Manager's *Startup list* (on Windows 8 and 10) or from *msconfig.exe* on Windows 7, the change is not reflected in *Options*. The checkbox remains checked and grey even though the client is not actually started automatically when the system starts.

When the application is installed for the first time, you can choose the language if many languages are supported in the installer. The default language is the language of the operating system; if that cannot be found, English is used as the fallback.

Uninstallation

The uninstallation procedure is different for Windows and OS X.

Windows

Uninstallation is performed by launching the Windows uninstaller via the Start menu or by using the Windows "Remove programs" view inside the Control Panel. Windows uninstallation does not require you to select any options.

All files are deleted at uninstallation, except for the following files:

- Registry entries
- Account files are only deleted when explicitly allowed by the end user on Windows.

OS X

Uninstalling is performed by simply dragging the application folder from the applications directory to the trash can; however, account files are not deleted. If you want to remove account files, they must be manually deleted.

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System Requirements

System requirements are as follows on native desktop:

- Operating system: Mac OS 10.11 El Capitan, Mac OS 10.12 Sierra, Mac OS 10.13 High Sierra, Mac OS 10.14 Mojave, Windows 7, Windows 8/8.1, or Windows 10 (Classical view only).
- The installation footprint is approximately 125 megabytes (MB) on OS X and 215 MB on Windows.
- For voice calls, a sound card, speakers, and a microphone or a headset are required.
- For video calls, a web cam is required.

Minimum system requirements for respective operating systems need to be fulfilled, with the following additions:

- A minimum of 2 GB random access memory (RAM) is required.
- A minimum 1.5 GHz CPU is recommended. A dual core CPU is recommended for video calls at a minimum.
- Open Graphics Library (OpenGL) 1.5 or higher is recommended.

For high definition (HD) video, the following is recommended:

- HD camera
- HD resolution support in display
- Quad Core x86 or equivalent at a minimum
- 4 GB RAM

Troubleshooting

Why can't I change the avatar?

Double-clicking the avatar should open a File Explorer view to select a file. If your XMPP connection is lost, changing the avatar does not succeed. A lost XMPP connection is indicated in the Main window's top notification area.

My contacts are all offline and my client's status bar says "XMPP unavailable".

What does this mean?

It means that the XMPP connectivity has been lost for chat, as well as for presence; however, you can still make calls. You should contact your system administrator.

Why am I offline?

If you have selected "Offline" status, you are shown as offline to others. Another possibility is that you may have lost your Internet connection. In this case, the client does not log out, but rather enters an offline mode where a contact list is available but communication is not possible.

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Why can't I have more video resolutions available?

You can choose your video resolution from *Options* and the *Video* tab. Your selection is used by default for future video calls. The available resolutions are automatically presented based on your camera.

Why can't I change my user name and password?

User name and password editing is not supported in the client. To edit your user name or password, contact your system administrator. The exception is login password expiry. When it expires, you can change the password in a separate dialog window.

Why does my all day calendar entry not trigger *Busy – In Meeting* presence status?

Not all meetings trigger a presence change to *Busy – In Meeting*.

To trigger the presence update, the meeting must be in the *Show me as busy* state.

Why aren't all my group chat messages saved?

Only the newest chat room messages are stored on the server, but never for My Room for security reasons.

Why aren't all my chat messages available in my other devices?

All one-on-one and group chat messages are saved, but only locally, so they are not necessarily available in your other devices. Incoming messages are sent to all devices; however, the ones that you send are only stored in the device that you are using to send the message.

Why can't I change the XMPP address of a contact?

This is not supported in this release. However, you can delete the contact and add a new one.

Why does my location show an incorrect address?

It is done based on the public IP address that the machine is using. The IP address is mapped to a physical location. You can also manually change the location by clicking the avatar and changing the location icon.

Why can't My Room participants share the desktop?

Only the owner of the room can share the desktop.

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I have a USB headset and the call control features are not working. Is there anything special I need to do to enable call control support?

In order to use headsets on Windows (not supported on OS X), several steps are needed:

1. When the client is started, you must accept the API connection request from the connector/add-in device.
2. Additionally, your client must have the softphone service enabled.

Why is Outlook add-in disabled?

If the context menu does not show add-in menu items, this could be due to the Outlook Add-in disabled by Outlook for slow loading. This happens primarily in Outlook 2013. In such cases, enable this add-in by selecting the *Outlook menu→File→Info→Manage Add-Ins→Communication Add-in→Always enable this add-in* from the displayed menu (as shown in the following figure).

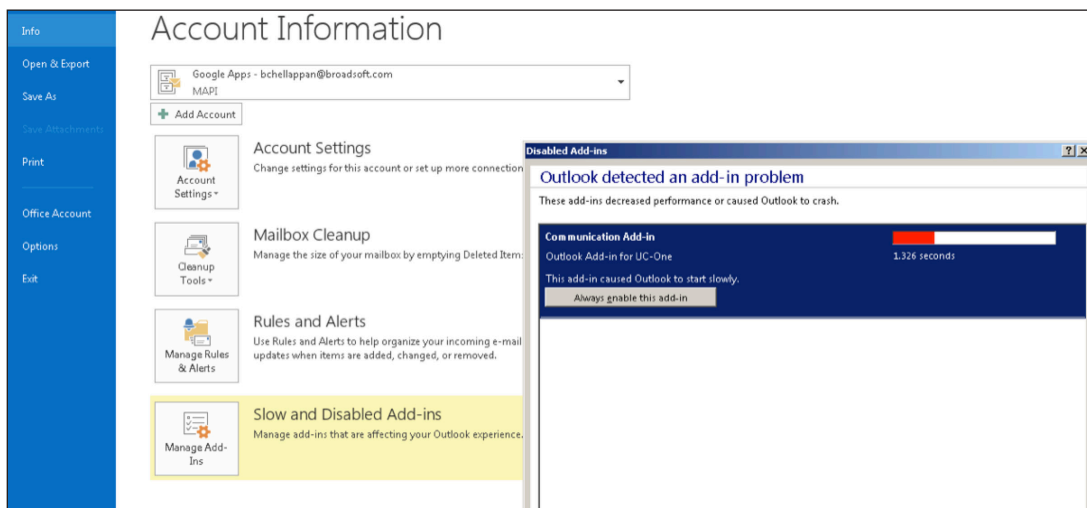


Figure 13 Outlook Account Information – Add-in Disabled

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APPENDIX A – Keyboard shortcuts for desktop

The following table lists the currently supported keyboard shortcuts (native desktop only). You can use these keyboard shortcuts to quickly perform frequently used actions. The characters used are lower case. The shortcuts are also indicated in the accessibility menus.

| Shortcut for Windows | Shortcut for Mac | What it does |
|----------------------|------------------|---|
| CTRL-Q | Cmd-Q | This quits the application. |
| Alt+F4 | Cmd-W | This closes the selected window (except for a contact card and the About window). |
| CTRL+C | Cmd-C | This copies selected text to the clipboard. |
| CTRL+V | Cmd-V | This pastes text from the clipboard to the location selected using the cursor. |
| CTRL-X | Cmd-X | This cuts the selected text to clipboard. |
| Enter | Enter | When in the <i>Communications</i> window, this sends a chat message (if the Chat view is visible). When in the contact list, this opens a chat with the selected contact. When in the <i>Communications History</i> , this opens a communications session with the contact or address related to the selected item. This opens a chat if the item was chat and a call if the item was a call. |
| -, | Cmd-, | This opens <i>Preferences</i> . |
| F1 | Cmd-? | This opens <i>Help</i> . |
| CTRL+A | Cmd-A | This selects all text in the <i>Chat</i> view. |
| - | Cmd-H | This hides the application. |
| - | Alt-Cmd-H | This hides other windows. |
| CTRL-N | Cmd-N | This opens the <i>Add Contact</i> window. |
| Shift-CTRL-N | Shift-Cmd-N | This opens the <i>Add Group</i> window. |
| CTRL -1 | Cmd-1 | When a contact is selected, this opens a chat session with the contact. |
| CTRL -2 | Cmd-2 | When a contact is selected, this calls the contact with audio. |
| CTRL -3 | Cmd-3 | When a contact is selected, this calls the contact using call from phone. |
| CTRL -4 | Cmd-4 | When a contact is selected, this calls the contact with video. |
| CTRL -5 | Cmd-5 | When a contact is selected, this joins their room. |
| CTRL -6 | Cmd-6 | When a contact is selected, this opens an e-mail-sending window using the default e-mail client. |
| CTRL -I | Cmd-I | When a contact is selected, this opens the contact card for the contact. |
| Shift-CTRL-F | Shift-Cmd-F | When a contact is selected, this makes the contact a favorite. |

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| Shortcut for Windows | Shortcut for Mac | What it does |
|----------------------|------------------|--|
| CTRL-delete | Cmd-delete | This deletes the selected contact. |
| CTRL-arrow down | Cmd-arrow down | This decreases the volume. |
| CTRL-arrow up | Cmd-arrow up | This increases the volume. |
| CTRL-space | CTRL-space | This mutes the client (while in a call). |
| CTRL-D | Cmd-D | This turns on the Do Not Disturb service. |
| CTRL-P | Cmd-P | This pulls an ongoing call from your other device to the application. |
| Alt-shift- CTRL-P | Alt-shift-Cmd-P | This retrieves your parked call. |
| - | Alt-Cmd-2 | This calls your voice mail with audio. |
| - | Alt-Cmd-3 | This calls your voice mail with audio using call from phone. |
| - | Alt-Cmd-4 | This calls your voice mail with video. |
| Shift-CTRL-R | Shift-Cmd-R | This opens your My Room. |
| CTRL-M | Cmd-M | This minimizes the window on OS X. On Windows, it only is used for the <i>Team Telephony</i> window. |
| CTRL-T | Cmd-T | This enables always on top. |
| - | Shift-Cmd-M | This opens the Main window. |
| Shift-CTRL-C | Shift-Cmd-C | This opens contacts. |
| Shift-CTRL-F2 | Shift-Cmd-F2 | This opens call history. |
| Shift-CTRL-F1 | Shift-Cmd-F1 | This opens chat history. |
| Shift-CTRL-F3 | Shift-Cmd-F3 | This opens visual voice mail. |
| Shift-CTRL-D | Shift-Cmd-D | This opens the dial pad view. |
| Shift-CTRL-W | Shift-Cmd-W | This opens the web button view. |

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Appendix B: Configure USB Headsets

This section provides more information on configuring USB devices. Note that some headset manufacturers have built their own add-ins for UC, for instance, Jabra on Windows. In this case, the standard HID add-ins cannot be used at the same time. You can enable and disable add-ins in the *Options*→*Extensions* view.

In general on Windows, if "Default Communication Device" is defined in Windows settings, it is selected over the "Default Device" for calls when several audio devices are available (for example, USB headset and the integrated audio device on the PC). However, when using headsets, you can select a separate device than the headset for alerting incoming calls.

The following examples provide more information on how to define a default communications device when a USB headset is available on the PC.

It is recommended to select "Use Default" in the *Audio* tab of *Options* for both input and output devices (as shown in the following figure).

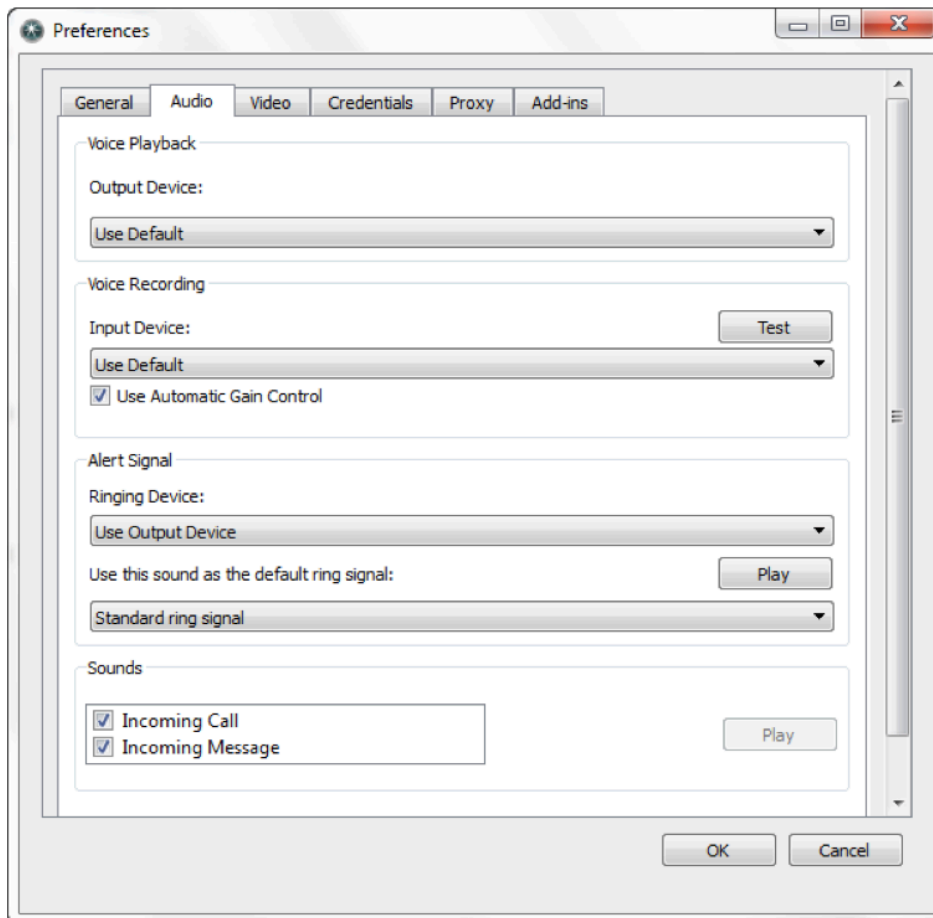


Figure 32 Options Window

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1. To define the default communications device, make sure that the Sound settings in Windows pertaining to "Recording" and "Playback" devices are correctly configured. From the *Sound* applet, select the *Playback* tab.

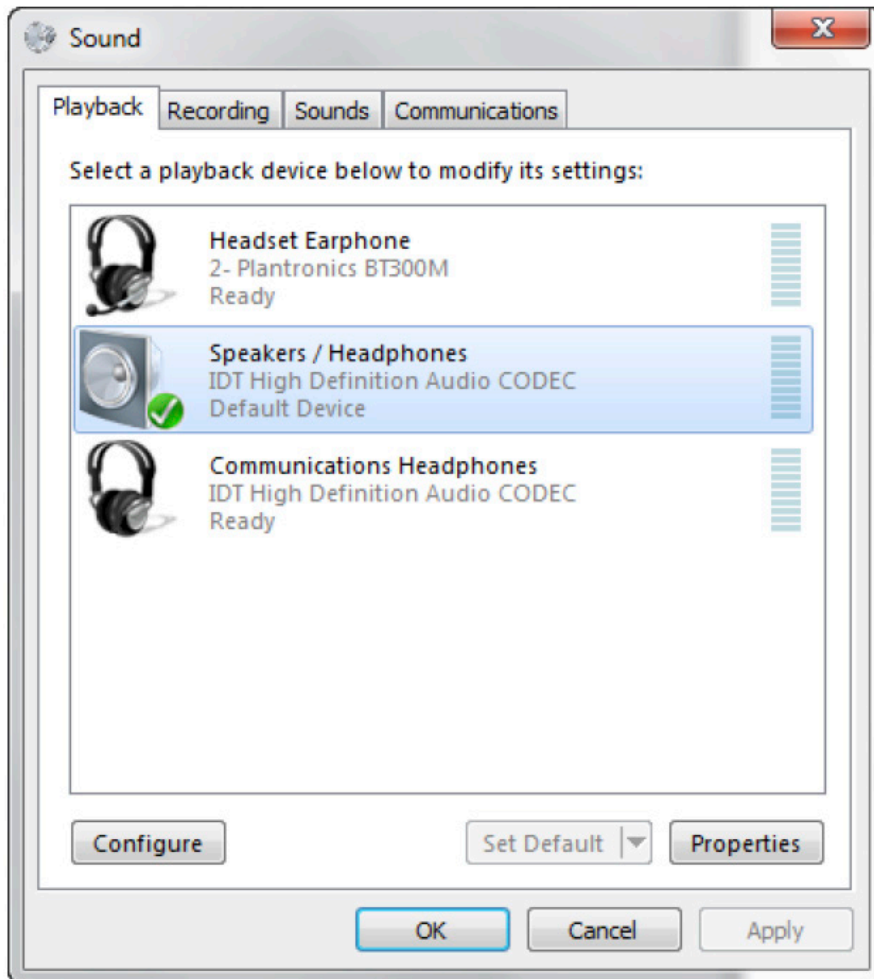


Figure 33 Sound Window – Playback Tab

In this example, the user has a Plantronics BT300M (the USB dongle accompanying a Voyager Legend UC) connected to their PC.

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2. Click **Headset Earphone** to highlight the device and click on the drop-down arrow next to the **Set Default** button.

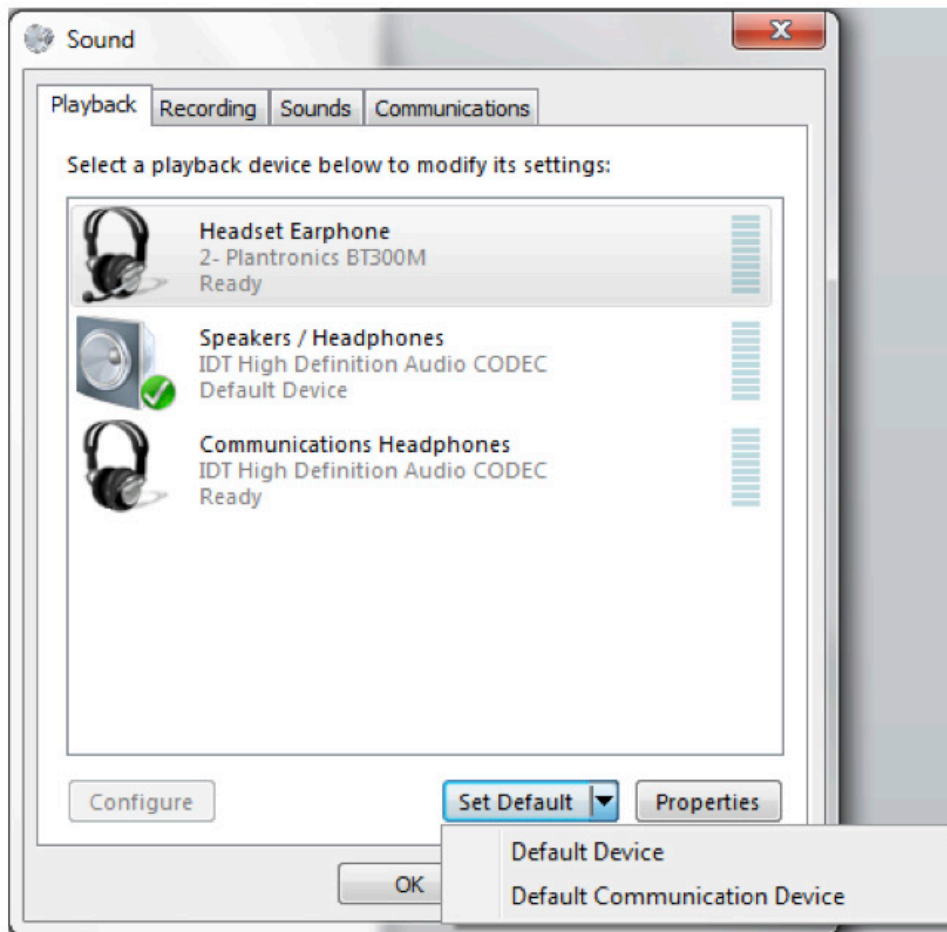


Figure 34 Sound Window – Playback Tab – Set Default

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3. Select *Default Communication Device*. The following screen is displayed.

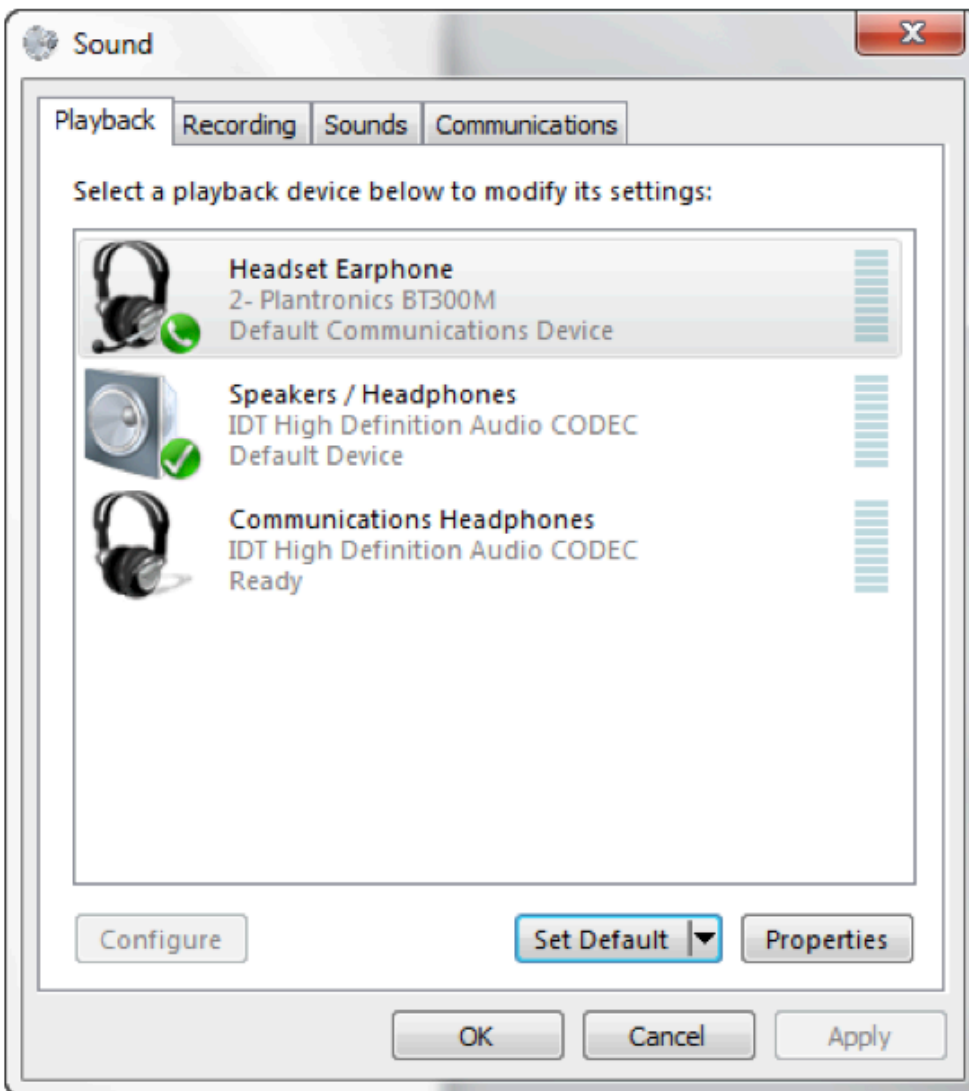


Figure 35 Sound Window – Playback Tab – Default Set

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- Again, click on **Headset Microphone**, which represents the connected Plantronics BT300M device, and click on the drop-down arrow next to the **Set Default** button.

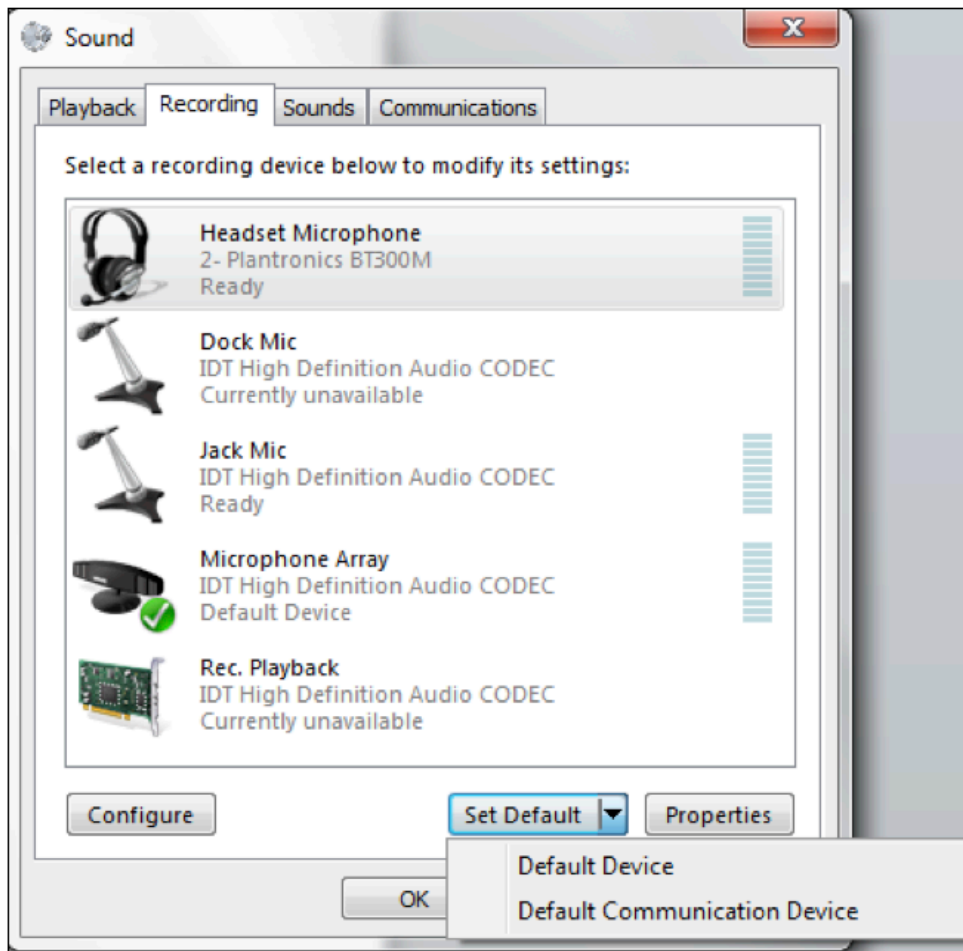


Figure 37 Sound Window – Recording Tab – Set Default

- Select *Default Communication Device*.

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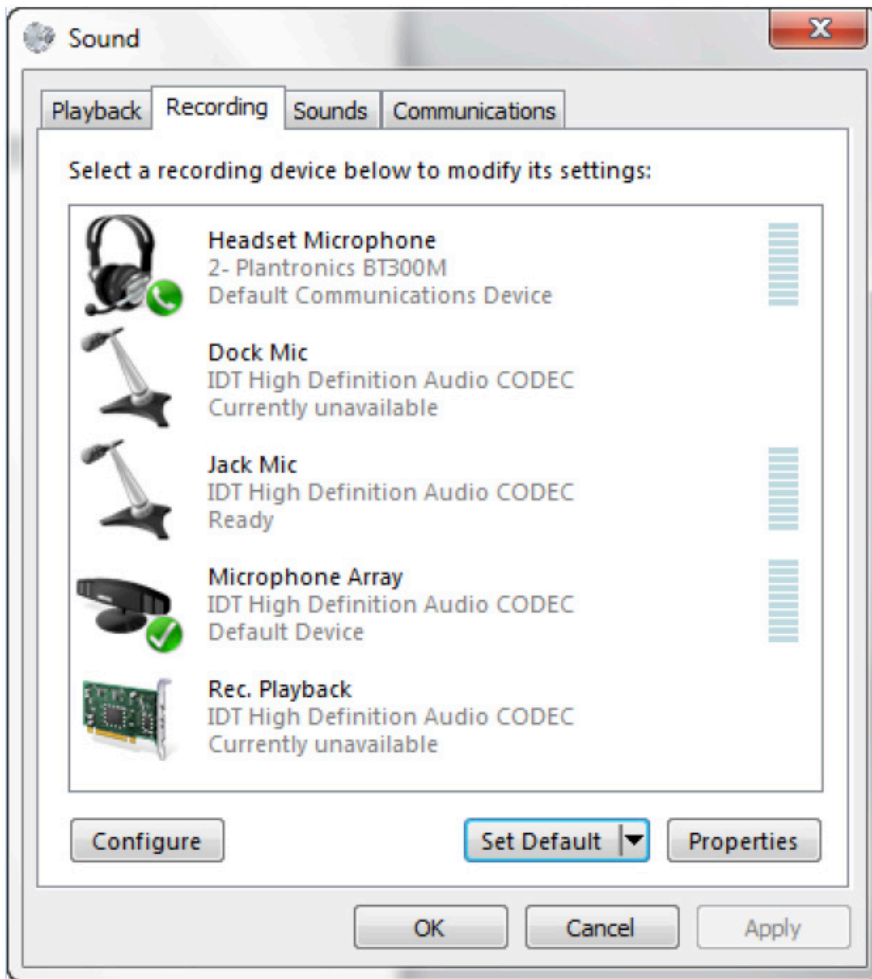


Figure 38 Sound Window – Recording Tab – Default Set

6. Click **OK** to save the changes. The *Sound* window is dismissed and your device is now ready to be used.

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Appendix C: Acronyms and Abbreviations

| | |
|--------|--|
| ACB | Automatic Callback |
| API | Application Programming Interface |
| CPU | Central Processing Unit |
| DND | Do Not Disturb |
| DTMF | Dual-tone multi-frequency |
| ECACS | Emergency Call Address Change Service |
| EULA | End-User License Agreement |
| FAC | Feature Access Code |
| FAQ | Frequently Asked Question |
| FMC | Fixed-mobile Convergence |
| HD | High Definition |
| HID | Human Interface Device |
| LDAP | Lightweight Directory Access Protocol |
| LGPL | Lesser General Public License |
| MWI | Message Waiting Indication |
| RAM | Random Access Memory |
| SIP | Session Initiation Protocol |
| UC | Unified Communications |
| UI | User Interface |
| URL | Uniform Resource Locator |
| UVS | BroadWorks Video Server |
| VoIP | Voice over IP |
| WebRTC | Web Real-Time Communication |
| XMPP | Extensible Messaging and Presence Protocol |
| Xsi | Xtended Services Interface |