



## FOR DESKTOP User Guide

Release 22.7.0  
Document Version 1

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## 1 About Unify for Desktop

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

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

## 2 Getting Started

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This section contains the essential information for getting started with Unify. End users need to ensure they are using valid drivers for video (for example).

### 2.1 Installation

Your service provider provides the download of the installer.

#### Windows

- Double-click the installer executable and follow the installation instructions.
- Launch Unify.

#### Mac OS

- Double-click the disk image.
- Copy the application into the Applications folder.
- Launch Unify.

### 2.2 Sign In

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

- 1) Enter the login Uniform Resource Locator (URL) provided by the service provider.
- 2) Enter your Unify user name and password.
- 3) Select whether you would like Unify to remember your password.
- 4) Select whether you would like Unify to sign you in automatically on subsequent launches.
- 5) 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 contact list upon subsequent Unify launches. Otherwise, you are presented with the Sign In screen.

After logging in, a pop-up dialog may appear informing you about emergency calls. You may also see a banner in the Main window related to emergency calls. Depending on your service provider settings, emergency calls may not be allowed. In this case, calling an emergency number displays a pop-up dialog. A notification message in the Main window may also display.

### 2.3 Main Window

When you start Unify for the first time, your Contacts list is empty. Use the search 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 and menus are visible. The dial pad is also integrated with the Main window.

Unify uses tabs for new chat sessions. The Search and Dial field allows searching for contacts as well as making calls using phone numbers or SIP URIs (native desktop only). SIP URIs must use the format user@domain or sip:user@domain. The table that follows the images describes the key icons used in the Main and Communications windows.

The screenshot displays the Unify desktop application interface. On the left, there is a sidebar with a search and dial field, a 'Favorites' list containing 'Sheppard, Seth', and a 'My Contacts' list with 23 entries including 'Barnes, Derick', 'Brewer, Tyler', 'Brewerton, Michael', 'Bryant, Sherry', 'Coggins, Richard', 'coticchik', 'Davis, Justin', 'Delaney, Nate', and 'Eskew, Daniel'. The main window shows a chat session titled 'My Room (Owner)' with a message history and a 'Test' button. On the right, there is a 'Room Info' panel with details like 'Dial-in Number +1-803-555-5555', 'Conference ID 658662', and 'Moderator PIN 191565'. Below the chat window, a table lists various icons and their usage.








Icon	Usage
	<b>My Information</b> – View and update your information, for example, your presence, avatar, and location.
	<b>Contacts</b> – View your contacts.
	<b>My Room</b> – This is your permanent communication room. Participants can dial in to your audio bridge.
	<b>Call History</b> – View previous calls.
	<b>Chat History</b> – View previous chats.
	<b>Full Enterprise Directory</b> – Show all contacts of the directory.
	<b>Dial Pad</b> – Make calls (it is integrated with the Main window).
	<b>Web Button</b> – Provides web content inside the Main window or browser.
	<b>UC-One Hub</b> – Provides micro-apps and contextual intelligence to chat tabs.
	<b>Preferences</b> – Use for quick access to preferences and Call Settings such as Call Forwarding.
	<b>Chat</b> – Start an instant message conversation with a selected contact.
	<b>Call</b> – Make an IP audio call to a selected contact.
	<b>Call from Phone</b> – Make a Click To Dial call from your desk phone (or secondary device).
	<b>Video Call</b> – Make a video call to a selected client (VoIP).
	<b>Share</b> – Share either the whole screen or an individual application.
	<b>Menu</b> – Open Communications options.
	<b>Add</b> – 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.
- Right-click the avatar to update your status (native desktop only).

**Presence**

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

Icon	What it means
	Automatic presence: This is the Available status where automated presence statuses such as Busy In-call override the Available status. Requires newer presence server (aggregated presence) to show.
	The green presence icon indicates that the user is online and ready for communication. This status is used until you change it and automated presence statuses such as In Call do not override.
	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 <i>Busy – In Call</i> status overrides the <i>Busy – In Meeting</i> status so this one is only seen if there is a meeting but no call.

Unify 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.

**2.4 Communications Window**

After starting communication with one or more contacts, a new tab is displayed for chat. The call window is also integrated with the Main window chat tab by default. You can separate a tab on to a different Communications window by dragging and dropping it outside of the Main window. From this view, 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
- Toggle between speaker and headset. You must specify different devices for a speaker and a headset in Preferences to use this feature.

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

As of Release 21.2.0, Unify 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 user 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.

## 2.5 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** menu item.
- On the Chat History list, double-click a chat entry.
- In a Communications window, click the **Chat** button (this does not open a new tab).
- In the Main window, click the **Add** button and in the resulting tab click the **Chat** icon.

## 2.6 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.

## 2.7 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.

## 2.8 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 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.

## 2.9 Share Your Application or Desktop

Share your desktop by following these steps:

- 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. This button is available when your service provider has enabled share on your account. 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.

In addition, participants can share when enabled by their service provider.

## 2.10 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 starting in Release 20.1.0, 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 tab 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.
- See call recordings.
- Park and retrieve calls.
- Set audio device to headset or speaker.

When enabled, you can use the button 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.

## 2.11 My Room

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



If you assign a conference bridge to your profile in Preferences - Credentials, then in your room, you and your attendees can click the **Call** or **Video** button to have Unify automatically dial in to the conference and enter the appropriate entry codes. Note, if your service provider has auto-provisioning enabled, then you cannot edit these details. If your service provider has silent dialing enabled, then you cannot hear any DTMF tones when dialing into My Room (the call is made automatically).

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 tab. You can also use the right-click menu on the My Room icon in the top-right corner of the Main window or the My Room information area to copy an invitation link for guest users (people without Unify). They can then click the link and join the meeting through a web browser. Guest users must be separately accepted for each session.

Contacts join your room by right-clicking your name on their contact list and selecting Join Room or by an invitation you sent.

Email My Room Invitation menu results in working links for guest users and Unify users if enabled by your service provider. Unify users are recommended to use "Copy Guest Link" invitation links; however, the btbc link part links when enabled by your service provider may not work in all applications as they were originally intended for Outlook.

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

In My Room calls, the owner can also see active speaker info with the Mute/Unmute icon.

## 2.12 Select Audio Devices

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 Unify logo in the main window title bar.
- 2) Select **File > Options**.
- 3) Select **Audio/Video**.
- 4) Set a playback device (speakers).
- 5) Set a recording device (microphone).
- 6) Click **OK**.

### OS X

- 1) Select Unify from the main menu.
- 2) Select **Preferences**.
- 3) Select **Audio/Video**.
- 4) Set a playback device (speakers).
- 5) Set a recording device (microphone).
- 6) Click **OK**.

### 3 Contacts

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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. Silent dialing into the bridge also applies to these contacts if enabled by your service provider.
- 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.

#### 3.1 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 **Add** button from the Main window (+ icon). In the resulting tab, you can select to add a contact, group, or other items.

In the Add Contact tab, 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.

If you are accepting contacts via a buddy request, you may see the contact card after accepting the buddy request, depending on the service provider settings. 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.

Choose the Add group menu option to add a new group to the contact list.

Contact card telephone number fields can also have SIP URIs (work, mobile, extension, personal, and conference bridge). Release 21.5.0 introduced support for additional contact card fields.

### 3.2 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. Note that depending on your service provider settings all or no contact card fields may be editable. Depending on your service provider settings, you may also see a button for synchronizing the contact card with the Telephony Directory or the synchronization may take place automatically (native desktop only). When the manual synchronization 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 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.

### 3.3 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.













Favorite filtering works slightly differently in Release 21.2.0 and later:

- When you make a contact your favorite, the favorite group shows on top of the contact list and cannot be hidden.
- 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.

## 4 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
	Automatic presence: This is the Available status where automated presence statuses such as In-call override the Available status. Requires newer presence server to show.
	The green presence icon indicates that the user is online and ready for communication. This status is used until you change it and automated presence statuses such as In Call do not override.
	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 seen if there is a meeting but no call.
	This icon indicates that the contact is only available on mobile Communicator.
	This icon indicates that the contact is only available on a compatible desktop phone, and not Communicator.
	This icon indicates that only the mobile client is online and in the away status. This was a Preview feature in Release 21.5.0.
	This icon indicates that the user is in a call but is not logged in to XMPP (presence and chat). This was a Preview feature in Release 21.5.0.

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 your avatar. 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 your service provider.

Have the Outlook calendar automatically change your presence to Busy – In Meeting by enabling this by going to file > Options or click on the gear on the lower left hand side.

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 avatar (if presence controls are not already expanded) and then the location icon to go to the manual location and change the view.

Snapshot of presence status is also available in search results and Communications window for contacts who are not buddies. This presence status is not updated after the search is done or after the communication session is set up.

#### **4.1 Automated Presence**

As a service provider option starting in Release 22.5.0, automated presence may be used. When used, contact addition no longer uses a buddy request dialog instead all presence subscriptions are automatically accepted by the network. This results in asymmetric presence relationships where you see the presence of the contacts you have added but they do not see your presence until they add you as a contact. This feature requires a newer server version (aggregated presence) to show.

## 5 Chat

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### 5.1 Chat View

When you initiate a chat, the Chat tab inside the Main 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 tab and open it again, sent chat messages are shown in the tab 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.

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. Depending on your history, some links may not be visible if there is no data to show. You can delete the history using the drop-down menu.

All sent and received chats are stored locally in the chat history and an optional message history feature provides multi-device enhancements so that messages sent or received in other own devices would also be shown.

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**.

The full set of Emojis is also supported and they are rendered as ordinary emoticons when received. Spell checking in US English is also supported and can be disabled in Preferences.

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 tab.

### 5.2 File Transfer

File transfer functionality is only accessible 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) From the dialog, select the file to be sent, and then click **Open**. You can also drag and drop a file into the Chat tab.
- 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.

### 5.3 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. Depending on your service provider settings, the right-click menu items may differ. Newer group chat deployments only have the My Room right-click menu item available for calls.

A group chat works the same way as a one-to-one chat in a tabbed view. 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. When the optional Message History feature is enabled by your service provider, messages sent from your other devices are also shown.





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.

## 6 Audio and Video Calls

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 <i>Call Options</i> menu. In the <i>Call Options</i> 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.
- 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.

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. Right-click the contact you want to call and select the Call menu item. 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.

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 or SIP URI of format user@domain or sip:user@domain in the combined Search and Dial field to make a call (native Desktop only). Once you type your numbers, Unify searches for contacts on both the local contact list and the enterprise directory.

You can also call circuit-switched network numbers such as Global System for Mobile Communications (GSM); however, this depends on the service provider network you are using; there is no technical limitation.

Choose your video size from the Options 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.

Unify does 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 used; this may result in the transferred call being reduced to audio.

You can also see a secure call icon when an encrypted call is taking place.

## 6.1 Call From Your Computer

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

## 6.2 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 desk phone instantly starts ringing and the call is established from your desk phone. This depends on your service provider configuration as other devices may also ring.

When your service provider is configured to also initiate a call from computer (SIP call) to the same machine that initiated a call from phone, that incoming (SIP) call will be accepted and will alert if it does not have the same identity as the call from phone.

For remote calls initiated using Unify, you can also have mid-call controls such as hold/resume, transfer, and add participant.

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

Depending on your service provider settings, it is also possible to control calls initiated without Unify 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.

### 6.3 Answer Call

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.

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.

### 6.4 Contact Name Lookup for Incoming Calls

Unify 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, Unify 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, Unify does a lookup in the local contacts and populates the name if a match is found.

### 6.5 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.

### 6.6 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 Mac OS) 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.

### 6.7 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. Ad hoc multiparty calling is slightly different in that each call party must be separately merged onto the call to be able to terminate failing calls to, for example, voice mail.

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 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. Unify dials out to all participants and takes everyone off hold after the last attendee answers.

In newer deployments with the Video Server (UVS), the ad hoc room created for the session has a limited lifetime and becomes inactive when idle for too long. In this case, participants are able to rejoin the ad hoc session if they drop out for some reason. A consequence of this is that, in ad hoc group calls, participants who are no longer in the call are still visible in the participant list.

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

### 6.8 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.

If Call Waiting is in the ringing state then new incoming calls are rejected.

### 6.9 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. You can also search for the transferred-to party.

## 6.10 Message Waiting Indication and Visual Voice Mail

Depending on your service provider settings, you can have either Visual Voice Mail (preview feature) or Message Waiting Indication (MWI) view in your client.

The MWI service allows you to receive a notification for a waiting voice mail or video mail. By clicking on the message icon in the upper part of the Main window, Unify calls the predefined mailbox number to allow the user to listen to the voice mail or view the video mail. With this view, you only have two history tabs: one for calls and another for chat.

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

When visual voice mail is enabled, a third tab is available, showing visual voice mails. Click on individual mails to listen to them. Video mail is supported as a preview feature if enabled by your service provider. The current design is that listening to the visual voice mail or marking it as read decreases the unread messages badge while just doing a single click does not. Visual voice mail view also indicates if the message is urgent or confidential.

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

You can see all voice mails in a list and play them inside the Main window.

The following settings are needed on CommPilot portal to have visual voice mail:

- Voice messaging enabled
- “When message arrives, use unified messaging” option enabled
- “Use Phone Message Waiting Indicator” option enabled

Auto-deleted voice mails are cleaned once a day.

## 6.11 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).

Transfer an ongoing VoIP call to a Call Park server and then retrieve it when needed. 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.

A parked call is visible on your desktop in the Active Communications area so that you can easily retrieve it, but only for the duration of the Call Park announcement. After the announcement is over, the parked call disappears from the Active Communications area (since the triggering call is disconnected). After the call disappears from the Active Communications area, 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.

### 6.12 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 FACs, in this case, \*11. User interface support has been added to the Desktop so that an end user does not have to remember FACs.

### 6.14 Moderator Controls

You can control the functionality available to participants if you are the owner of the session in My Room. You can do the following:

- Dismiss one or more participants. This ends all sessions (group chat, audio, video, and share) when the participant is using Unify for Desktop.
- Mute one or more participants.
- Lock or unlock the room (when locked, no additional participants can join).
- See active talker indication.
- See full audio participant list.
- Choose who can join without separate authorization (moderated My Room):
  - Require only guests to request access
  - Require everyone to request access
  - Allow everyone to join automatically

To invoke the features, you can use the right-click menus or you can click on the moderator control icons of a participant. Note that most features are not available via icons. To dismiss or mute all participants or lock the room, use the right-click menus available for your own icon at the top of the participant list.

If you are not the owner, you can only see the XMPP (chat) participant list or the full participant list along with mobile participants (depending on your settings).

### 6.15 Forced Logout

Depending on your service settings, 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 Unify to track similar online client instances and only allow one of them to be online at the same time. When Unify notifies the client to log out, all connections are terminated and client returns to the login window.

### 6.16 Echo (Test) Service

Use this Main window menu option to make a test call to verify voice and video quality. The echo service asks you to record a message and plays that message back immediately before hanging up. The echo service may be available in different languages depending on your service provider settings.

## 6.17 Headset Support

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 Unify 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 Add-ins tab.

In addition to the standard HID Add-in developed, headset vendors can develop their own add-ins that can replace the Standard HID Add-in for all devices. Some of these add-ins (for example, Jabra or Sennheiser) cannot be used at the same time with the standard HID Add-in so either the Unify Standard HID Add-in or the vendor-specific add-in must be disabled via Preferences in the Unify client if one of the two is not automatically disconnected. Add-in installers should copy the required add-in dlls into the UC-One add-in folder so they become visible in Preferences.

These vendor-specific add-ins are typically installed during new headset installation; however, the Unify Standard HID Add-in should remain in the preferences list. If for some reason it 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 want 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. Re-login is necessary to take the new add-in into use.

Some USB headsets may have additional functionality offered by the vendor-

specific add-in such as answering the call directly when taking the USB headset off dock. See the USB headset documentation for details of such functionality.

If you are using many different headsets, the Unify Standard HID Add-in offers a default add-in that can always be used.

### 6.18 Team Telephony

Team telephony is comprised of a team telephony window showing the pre defined team members and their related call states (native desktop only). For a ringing call, the only action is to pick it up.

Each team telephony member can have four call states: available, busy in call, ringing, and offline. The status for a team telephony member is shown in the team telephony window. When a line is ringing, you can see the caller ID in the respective lines tooltip if configured by your service provider. All team members can see the full list of team members in the team telephony window. A double-click on the team member performs the default action towards the contact. You can drag and drop people from the contact list to the team telephony window or vice versa to transfer or conference calls.

The corresponding server side service must be provisioned and assigned by the service provider for the client to work. Usual call management options are available once the call has been answered.

### 6.19 Executive-Assistant

The Executive-Assistant service allows an assistant to operate on behalf of an executive to screen calls, answer calls, and place calls as the “executive” (the caller ID is the one of the executive) (native desktop only). The provisioning of the executive and assistant roles takes place on the server side and cannot be modified on the client.

One assistant can have many executives and it is possible to:

- Select the desired role when making a call using a pull down menu in the Main window.
- Answer an incoming call on behalf of an executive and then push the call to the executive. The incoming call is presented as a call to the executive. In addition, all the usual call management options are available.
- See that an incoming call is actually for the executive.

The caller ID format is dependent on your service provider settings and cannot be changed on the client side.

## 6.20 Presence Rules and Silent Alerting

You can combine call processing with presence statuses (native desktop only). For instance, the “Busy” status can be combined with call forwarding so that when the “Busy” presence status is used, calls are forwarded. It does not matter how the presence status is invoked, via automation or manually.

All presence statuses can have presence rules:

- Available
- Busy
- Away
- Offline

The following Unify call processing services can be used:

- Silent alerting
- Call forwarding to number
- No rules

If presence rules are used, all your client devices should have this service enabled to avoid side effects. Silent Alerting is supported whenever an incoming call has that feature enabled. Silent alerting can only be enabled via presence rules in Unify but various settings can also be altered via web provisioning.

## 6.21 Personal Assistant

Personal Assistant allows you to use and configure additional predefined presence status to specify how long the status is enabled, what is the call transfer number for incoming calls during that status, and if ring splash is used.

Ring splash (Silent alert) plays a short audio tone on your desk phone when an incoming call is transferred. Your presence status with its duration is also played out to the caller when these additional presence statuses are used.

Supported new statuses are:

- Business Trip
- Gone for the Day
- Training
- Lunch
- Meeting
- Temporarily out
- Out of Office
- Unavailable
- Vacation

When the duration for the selected presence state is set to last “End of day”, Unify sets the expiration to the next day in the morning at 8 A.M. (0800 hours).



Note that your OS locale defines the language in which the day is shown in the Personal Assistant status “Gone for the Day”.

The following table depicts the default validity times for the presence statuses.

Presence Status	Default Duration
Business Trip	End of the Day
Gone for the Day	
Training	
Lunch	1 hour
Meeting	
Temporarily Out	
Out of Office	Never
Unavailable	
Vacation	

**6.22 Call Center Agent Login**

You can also log in to your call center queues if you are a call center agent (native Desktop only). You can do the following:

- View your call queues.
- Join your call queues.
- Set the Automatic Call Distribution (ACD) status so that you get incoming call center calls. However, this is dependent on your license settings.

With suitable ACD status such as “Available”, incoming calls to the queue are routed to your client. With “Unavailable” ACD status, the Unify Do Not Disturb (DND) state can also be selected or “Personal Call”. Each ACD status indicates with text if you are to receive incoming call center calls.

Dynamic ACD status updates are not supported if the ACD status is changed somewhere else.

**6.23 Remote Control Event Package**

Remote Control allows you to answer a call, put it on hold from a receptionist, or call center client while the results are seen in your Unify Desktop client. Answer and hold/resume buttons are visible in Receptionist/thin client to perform call management operations.

This feature must be enabled by your service provider for it to be used.

**6.24 Auto-Answer**

Release 21.5.0 introduced support for auto-answering incoming SIP calls for call center scenarios. The incoming call notification is identical to the usual incoming call notification.

### 6.25 Web Pop

Web pop allows you to get more information about an incoming call by clicking on the web pop button of the incoming call toaster. You can also do the same for outgoing calls using menus.

This opens your default web browser with a predefined URL that provides more information about the other party.

You can also change this URL in Preferences, if allowed by the service provider.

This feature is not available for Team Telephony or the assistant in Executive-Assistant calls.

### 6.26 Hide Communications Window Notifications and Tones

Depending on your service provider settings, Unify notifications and tones in the Communications window can be hidden.

## 7 Application or Desktop Share

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To share your desktop or individual application:

- 1) In the Communications tab, 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. For participants without Unify, use the separate Desktop Share Invitation link, if available, by right-clicking the **My Room** button. Share selector is not dynamically updated while the selector is open and minimized applications are not available in the list of applications to share.

As a participant, you can also zoom in and out during the share. As the share owner, incoming message toasters are suppressed during share, but the missed message badge is incremented and the incoming message sound is played when enabled.

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.

Depending on your service provider settings, you may have to provide desktop share credentials manually.

In addition, participants can share when enabled by the service provider by clicking on the Share button; however, the room owner can prevent this at any time. Only one person can share at any one time in a session. Only one share at a time is supported if you have sessions with many users at the same time. Share passing is only supported in My Room.

Participants do not have to take any action to accept the share invitation. It is automatically accepted. The same also applies to share passing. That is, the owner does not have to take action for the participant to start sharing.

When video and share are used at the same time, the different views cannot be resized. Instead, the primary view can be selected from the bottom of the window via thumbnails.

In deployments using the older web collaboration solution, clicking the Share button opens an external browser window where share can be viewed.

## 8 My Room

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My Room is started by clicking on the **My Room** icon on the top 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 tab or the Conference menu. Otherwise, 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.

To use the full functionality of My Room (desktop sharing, conferencing, and chat combined), you may have to manually enter your desktop sharing credentials, your conferencing number, and your PIN in the Preferences - Credentials window. This depends on your service provider settings.

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 **Options** icon (three dots) on the right-hand side of the My Room tab for Room Info.
- 2) To modify credentials and conference bridge information, select Configure to go to the preferences. If your service provider has automatic provisioning enabled, then this menu item is not present.

- 3) Select Copy Guest Link 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 a meeting invitation email to allow Unify participants to join the conference in one click from, for example, Outlook, or Office applications. Note that some applications may not recognize the Unify (btbc:) link.

You can also copy the My Room Invitation to the default email client (this text does not contain the Unify link) and go to the My Room preferences via a right-click menu option.

The link has two parts: one for Unify users and another one for users with some other client. Depending on your service provider settings, 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 Unify. The desktop share link, when available, allows anyone to join a desktop share session from a standard web browser. In addition, the Unify group chat session is supported with the web collaboration session. For guest user links, see the next section.

The **My Room** info area indicates the conference bridge details of your My Room. You can also export the attendee list using the related participant menu available via the options icon (three dots).

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

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, additionally, you cannot transfer or conference My Room calls.

You can also define that all users or only guest users need to be authorized to access My Room or that all users can automatically join. My Room invitations sent by you cannot be canceled in this release.

My Room calls cannot be conferenced or transferred.

## 8.1 Guest Client

Previously it was not possible to join a full My Room session with a web browser. Guest client allows you to do that.

This feature is especially intended for users outside of the company. Generate separate invitations for guest users using My Room right-click menu items as described in the previous section. My Room invitations are generated using separate menu items and are intended for Unify users.

Guest users can join a session with audio in the web browser by requesting a call back using the provided dial-in number and conference PIN as well as use group chat and sharing inside the web browser. However, guest clients do not have private chat possibility and they can see the chat history of messages that occurred after they joined the session.

The invitations persist until reset via a separate right-click menu item.

Individually accept each joining guest participant. Not doing this in a predefined period of time results in the invitation becoming obsolete and guests not being able to use the link to join.

After dismissing a guest user from share and chat, the audio/video portion can remain.

The following OS and browser combinations are supported if Web Real-Time Communication (WebRTC) is disabled by your service provider:

- Latest Chrome on Windows (Windows 7, Windows 8 [Classic], and Windows 8.1 [Classic]) and OS X (10.8 and 10.9)
- Internet Explorer 11 on Windows (Windows 7, Windows 8 [Classic], and Windows 8.1 [Classic])
- Safari 7 on OS X (10.8 and 10.9.)

The following OS and browser combinations are supported if WebRTC is enabled by your service provider:

- Latest Chrome on Windows (Windows 7, Windows 8 [Classic], and Windows 8.1 [Classic]) and OS X (10.8, 10.9, and 10.10)

## 9 Search

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Unify 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. The various directories have different purposes with the enterprise directory having the most data, and not all directories may be used in all deployments. 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.

Personal directory provides your own special contacts that are not in the enterprise directory, for instance, partner company's numbers while group common contains, for example, the group's contacts such as favorite pizza taxi.

Unify 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 LDAP or Outlook (native

desktop only).

Unify also supports Hiragana characters in search for the Japanese market.

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

- If LDAP search (Corporate directory) or Outlook search are enabled, there are more result groups.
- If there are no results for a certain search source (for example, local contacts, Outlook, LDAP, or 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.

LDAP search (Corporate directory) must be enabled by your service provider. In addition, depending on your service provider settings, you may have to manually provide your LDAP credentials in the Preferences - Security tab. LDAP search results are provided in the Corporate directory group in the search results.

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 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, Unify 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 Unify 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.
- In the next minute, Unify 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 Outlook Object Security model was introduced in Outlook 2007; however, it is no longer supported in UC-One. It has been tested with Outlook 2010. For Outlook versions prior to 2007, the Allow/Deny pop-up window seen in previous releases should not be triggered. However, those versions are not officially supported. For Outlook 2013, the behavior should be similar to 2010, meaning the pop-up should not come up with Outlook 2010 and 2013 in Release 20.0.0 and onwards.

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.

## 10 Full Enterprise Directory

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Unify allows for the browsing of an entire Segra enterprise directory.

To view the Segra’s enterprise directory, click the **Directory** button on the left-hand side of the navigation pane (if available). This feature depends on the service provider configuration so it may not be visible in all clients.

## 11 Communications History

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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 one, two, or three tabs depending on your service provider settings. Possible tabs are:

- Calls
- Chat
- Visual voice mail

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 a visual voice mail downloads the message so you can play it.

Unify 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 in the list to call back directly (this calls back the same way you previously spoke, for example, if you were in a video call, double-clicking starts a new video call). Double-clicking an incoming call item in the Calls tab makes a call.

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”.

Depending on your service provider configuration, call history may also display call duration as well as hunt group or other call forwarding information.

## 12 Click-to-Call (Highlight Text)

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This release introduced support for Click-to-Call using highlighted text and global keyboard shortcuts. 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 Mac OS, 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.

## 13 Callto, Tel URL, and Other URL Schemes

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You can use Unify for making calls using Callto, and Tel URL links anywhere in your machine, but you need to register Unify as the primary application for that purpose in the operating system. Additionally, depending on your service provider settings, other URL schemes may also work.

On Windows, at first login there is a dialog asking if you would like Unify 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 Unify. If another application should afterwards take precedence in Windows settings, you can again make Unify the primary calling application from Preferences, Outgoing Calls tab.

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

## 14 XMPP Security

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Depending on your configuration, Unify supports blocking of unauthorized file types in file transfer in order to support service provider IT policies (native desktop only). When sending a file with of an unauthorized type, there is an error message showing the cause of the file transfer failure.

Similarly, clickable links in chat may be disabled; however, you can still copy the link into a browser.



## 15 Options

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Options provide access to available settings for Unify. Follow these steps to access Options.

### **Windows and Mac OS**

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

or

### **Windows and Mac OS**

- 1) Go to the Unify accessibility menu.
- 2) Select Options.
- 3) Select the desired view from the drop-down.

### 15.1 General

#### **Language**

Select your language and then click **OK** or **Apply** and the change takes effect immediately. Note that the number of languages depends on your service provider.

#### **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**

Enable pop-up errors allows Unify 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 reads 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.

## 15.2 Audio

### Headset

Here you can specify what are the output and input devices used for the headset 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.

### 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. If Alert Info service is used, the network may instruct a certain ringing tone to be played.

### 15.3 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.

### 15.4 Incoming Calls

For the list of available call management services for incoming calls, see section Call Settings. If Alert Info service is used, the network may instruct a certain ringing tone to be played.

### 15.5 Outgoing Calls

For the list of available call management services for outgoing calls, see section Call Settings. This release introduced support for the Review feature that you can enable in Preferences - Outgoing calls. Review brings you to the dial pad with the called number pre-populated so that you can modify or review it when you are using the default call type by for instance double-clicking a call history item. In addition, highlight to call and Register to call settings are available in Outgoing calls.

### 15.6 Voice Mail

You can specify various voice mail settings, such as which calls are sent to voice mail, what kinds of notifications you receive when voice mail arrives as well as controlling how fast the voice mail greeting is played and if callers are allowed to leave voice mails. In addition, you can control how callers can end up going to voice mail.

### 15.7 Services

In this release, this section is reserved for presence rules and Hub settings. For more information on presence rules, see section Presence Rules and Silent Alerting.

### 15.8 Extensions

Select how incoming add-in requests are handled, whether they are automatically accepted or not or if incoming requests are allowed at all.

Depending on your service provider configuration, you can also manage extensions using the Unify Application Programming Interface (API), which is used by third-party applications such as the Outlook Add-in or compatible headsets. You can allow such third-party applications to obtain information from Unify and enable or disable confirmation pop-up notifications when third-party applications request information from Unify. You can also choose default

behavior to always reject or accept requests from third-party applications and allow or reject individual third-party applications.

## 15.9 Advanced

The Advanced view contains three different subsections:

- Troubleshooting
- Proxy
- Credentials

### Troubleshooting

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 as well as enable and disable Google Analytics.

### 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 Unify (client) proxy settings.

### Credentials

Credentials section in the Preferences may be empty depending on your service provider configuration. If the Login window has an embedded configuration URL (see below), the credentials or the configuration URL are not visible.

### Configuration URL

If the Device Management configuration URL is available to be viewed, it appears here.

### IM Address

If XMPP credentials are available to be viewed, they appear here.

### Unify ID

This is the username you use to log in.

## 16 Call Settings

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Unify 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
  - Unify Anywhere
  - Unify Remote Office
  - Forward Calls
  - Do Not Disturb
  - Simultaneous Ring Personal
  - Anonymous Call Rejection
  - Call Waiting
- Voice Messaging
- Outgoing Calls
  - Block My Number (Calling Line Identification Presentation [CLIP]/Calling Line Identification Restriction [CLIR])
  - Automatic Callback
  - Highlight to call
  - Register to call

You can also use the call settings with a Main window toolbar on the top of the window, if this feature is enabled. When enabled, this feature allows Unify Anywhere, Do Not Disturb, Remote Office, and Call Forwarding to be managed in the Main window using single clicks or right clicks. The Call Settings toolbar is an icon in the left pane with right-click menus.

### 16.1 Unify Anywhere

Unify Anywhere allows service providers to offer fixed-mobile convergence (FMC) services today without additional equipment.

Unify Anywhere simplifies communications for on-the-go users and remote users by extending the features of a desk phone to any other fixed or mobile device, regardless of the network or handset manufacturer. Callers dial one number and can reach you on any phone the user chooses. A desk phone, cell phone, and/or a soft phone may ring simultaneously.

Experience voice call continuity with the ability to move live calls from one device to another without hanging up.

Add locations (numbers) that can be used in the service via the Add Number field. Use the Alert all locations simultaneously check box to activate parallel ringing. Click on the “+” icon to see more options.

The Don't divert check box prevents a call from ending up as a voice mail, which can be problematic in, for example, conference call situations.

Select Answer Confirmation to receive a separate audio prompt when answering a call from that number (location). It may be useful in cases where, for example, mobile numbers are being used to prevent incoming calls going to mobile voice mail since the call will be ended without going to voice mail if the answer confirmation is not provided.

Select the Call Control check box to enable the server platform to provide mid-call services such as Call Transfer and Conferencing for that number (location).

### 16.2 Segra 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.

### 16.3 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.

### 16.4 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.

### 16.5 Hide Number

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".

### 16.6 Simultaneous Ring Personal

Add up to ten 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. This service is an older variant of Segra Anywhere.

### 16.7 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 Unify or forwarding to email.
- Enable notifications of new messages via email.
- Email a carbon copy of new voice mail.
- 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.

### 16.8 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.

### 16.9 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.

### 16.10 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 Outgoing Calls tab. If you disable Call Waiting, the second incoming call is not connected and the caller hears an announcement that the call cannot be completed. Before you answer the first incoming call, the second incoming call will be rejected.

## 17 Sign Out

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Signing out of Unify sets your status to “Offline” for your contacts and displays the Sign In screen.

### 17.1 Sign Out of Unify

To sign out, follow these steps.

#### **Windows**

- 1) Click the Unify logo in the main window title bar.
- 2) Select **Sign Out**.

#### **Mac OS**

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

### 17.2 Exit Application

To exit the application completely, follow these steps.

#### **Windows and Mac OS**

Close the Sign In window.

#### **Windows**

- 1) Select the Unify logo in the main window title bar.
- 2) Click **Exit**.

#### **Mac OS**

- 1) Select Unify from the main menu.
- 2) Select Quit Unify.

**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.



## 18 Multi-Device Support

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Unify 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. Your service provider can control how long messages are stored on the server.
- 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.

Unify keeps track of its own presence status as well as the status of other devices and deduces the combined presence based on these.

When Mobile Unify and Unify Desktop are used together, the automated presence feature is recommended to be used to have presence shown fully in both clients as Connect does not use XMPP.

When Mobile Unify and Unify Desktop are used together, there are also some rules about location. Mobile applications have a concept of background and foreground mode to save device resources. When Connect comes to the foreground, it updates its location.

The Desktop client does not have separate state for being on foreground; it only detects general usage of the device. The client can be on the background or foreground and based on idle detection it can drop to away. This requires that the computer is not used at all; moving the mouse/using keyboard triggers resuming to available again and it also resets the idle timer. Today, idle detection (or returning from idle) does not trigger location update on Desktop in this release.

When both clients are set to automatic, the last one to publish location “wins”. As mentioned, Mobile Unify updates the location in automatic mode when coming to the foreground while Desktop does not have a similar concept. In addition, the last location update, initiated by you, manual or automatic, “wins”.

## 19 System Requirements

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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 SP1, Windows 8/8.1, or Windows 10 (Classical view only).
- The installation footprint is approximately 125 megabytes (MB) on Mac OS 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

## 20 Troubleshooting

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### **Why are my Emojis showing as black boxes?**

The Segoe UI font is required for the Emojis to appear correctly. For more information to install the Segoe UI font, see the following article:

<https://support.microsoft.com/en-us/help/4021341/emojis-are-not-diplayed-in-of-ficeapplications-in-windows-7>

### **Why did I lose chat history after an upgrade to a renamed Unify?**

When installing a Unify version that has a different application name, the history is specific to that application name. If the application name remains the same in the upgrade, the previous history is available.

### **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 service provider.

### **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.

### **Why can't I have more video resolutions available?**

You can choose your video resolution from Preferences 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 service provider. The exception is login password expiry. When it expires, you can change the password in a separate dialog window.

In Preferences, the client only supports changing credentials when enabled by the service provider. Desktop sharing credentials may also be changed, depending on your service provider settings.

### **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. Starting from Release 21.3.0, when the optional (Preview mode in Release 21.3.0 and fully supported in Release 21.4.0) message history feature is enabled by your service provider, messages sent from other devices are also shown.

**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. Starting from Release 21.3.0, when the optional (Preview mode in Release 21.3.0) message history feature is enabled by your service provider, messages sent from other devices are also shown.

**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. Unify is working with the mapping provider to improve the accuracy of the location. You can also manually change the location by clicking the avatar and changing the location icon.

**Why can't I start desktop sharing?**

To share your desktop, you need to have valid credentials, either by manually entering desktop sharing credentials in the Preferences–Credentials window, or by using auto-provisioning to enable the desktop sharing menu items and icons. However, you can participate in desktop sharing sessions even without any sharing credentials. Your service provider settings dictate if auto-provisioning is enabled or not.

**Why can't My Room participants share the desktop?**

Only the owner of the room can share the desktop before Release 21.2.0. Starting in Release 21.2.0, participants can also share when enabled by the service provider. This applies to both My Room and ad hoc sessions.

**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 Mac OS), 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 feature enabled by your service provider.
- 3) If your USB headset uses its own add-in, the standard HID Add-in from Unify must be disabled, as both cannot be used at the same time. In addition, you must have "Allow 3rd party extensions" check box checked in Preferences – Extensions tab.

- 4) After upgrading Unify, some USB headset add-ins may get deleted causing call control to not work and the add-in to not be visible in Preferences. As a workaround, repairing/re-installing the add-in software corrects this.

## 21 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 <i>About</i> window).
CTRL+C	Cmd-C	This copies selected text from Communicator to the clipboard.
CTRL+V	Cmd-V	This pastes text from the clipboard to the location selected using the cursor in Communicator.
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 <i>Chat</i> 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 Communicator.
-	Alt-Cmd-H	This hides other windows other than Communicator.
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 email-sending window using the default email 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.
CTRL-delete	Cmd-delete	This deletes the selected contact.

Shortcut for Windows	Shortcut for Mac	What it does
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 Communicator.
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 Mac OS. 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 <i>Main</i> 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.