UBITY UC DESKTOP —
WINDOWS EDITION USER GUIDE

UBITY UC DESKTOP Windows Edition User Guide — CONTENT

① STARTING UBITY UC DESKPTOP

Install Ubity UC Desktop

Verify the status of your extension on the Ubity web interface, **Studio** (https://admin.ubity.com), in **Management** > **Extensions** > **My extension**. Next to your extension you will see the UC symbol.

If the UC is not activated on your extension, please contact the administrator of your account so that he can place an email request to our technical support at support@ubity.com to activate it.

Note: The activation of UC can generate additional monthly costs.

Download the appropriate setup executable file of Ubity UC Desktop for your computer via **Install UC Software** and follow the prompts in the install wizard.

UC icon when it is activated, versus not activated:

Download the executable Ubity UC Desktop installation file from here.
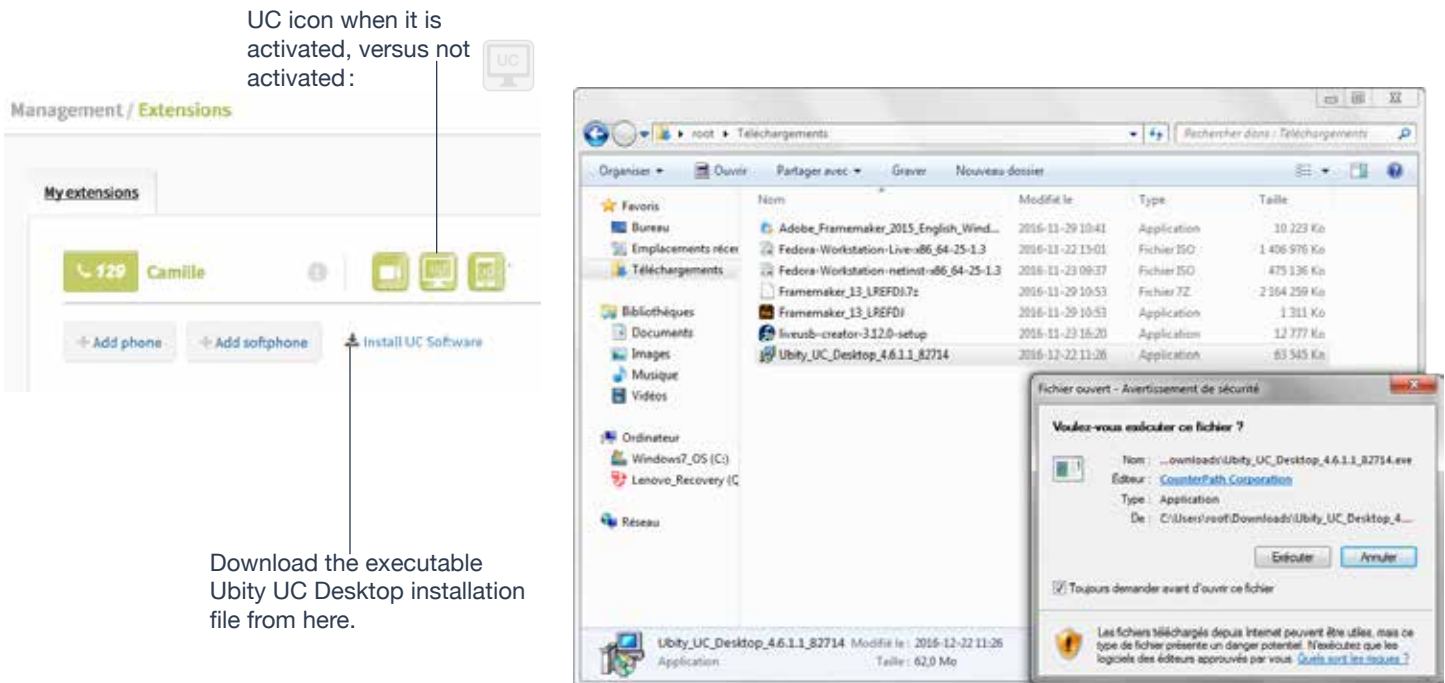
Start Ubity UC Desktop

Start Ubity UC Desktop as you would any other program: Use the Windows **Start menu** or double-click the desktop icon. The **Ubity UC Desktop** dialog appears.

Ubity UC Desktop icon

❷ IDENTIFY YOURSELF

Once the software is downloaded and installed, and you have started it by double-clicking the Ubity UC Desktop icon, you will be asked for a username and password. These credentials are the same as the ones you use on Ubity's web management portal, commonly referred as **Studio** (studio.ubity.com).

Username: the username used to log into the Ubity management portal

Password: the password used to log into the Ubity management portal

If you don't yet have a password, or can't remember your password, you will have to request a new one by clicking on the "**Recover your password**" link on **Studio**'s login page (at the address above).

Welcome to Ubity UC Desktop!
Please sign in using your Ubity UC Desktop credentials.

Username

Password

☐ Remember login information

☐ Sign in automatically

Sign In

Cancel

Forgot your password?

Help

By checking the **Remember password** box, you will be automatically logged in each time you launch the software, without having to enter your username and password.

③ TEST YOUR EQUIPMENT

It is important to make a test call to ensure that your microphone, your headset and/or your camera work correctly. If this is not the case, you should contact an IT manager to help you set them.
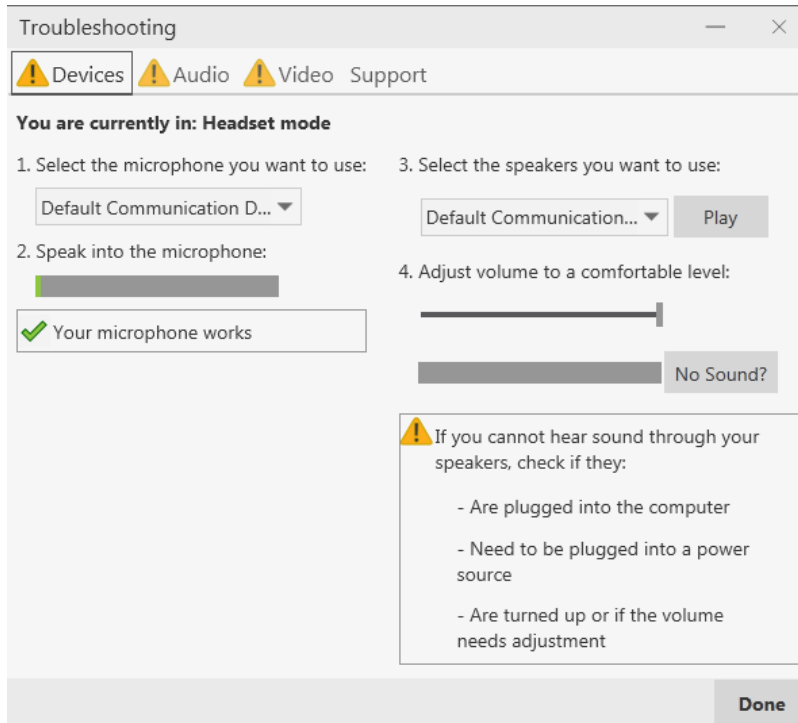
④ MAKING A FIRST CALL

Try making calls with your new phone (page 9).

Having Troubles?

Ubity UC Desktop includes these tools for helping you troubleshoot problems. From the menu, choose **Help** > **Troubleshooting** (page 46) to access these tabs.
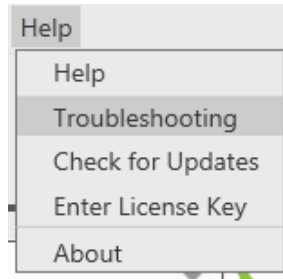
Verify your camera

You can verify that your camera is working by going to **Preferences** > **Devices** > **Test Camera**

Verify your microphone and speakers

You can verify that your microphone and speakers are working by going to the **Device** tab. You can set the volume to a comfortable level without having to actually place a phone call.

Verify that you are connected

You can verify that you are successfully connected by going to the **Audio** tab. While you are on a phone call, you can test the quality of the audio.

Ask costumer support

If none of the above help you solve your problem, go to the **Support** tab. You can create logs of your activity and send them to customer support.

⑤ QUITTING UBITY UC DESKTOP

To quit Ubity UC Desktop, choose **Softphone** > **Exit** or press **Control-Q**.
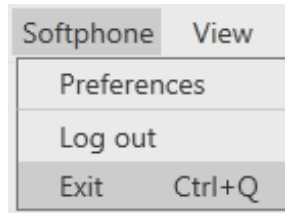
⑥ CHECKING FOR UBITY UC DESKTOP UPDATES

If you are in an enterprise, your system administrator should tell you about the policy for checking for and installing upgrades.

To check for updates to Ubity UC Desktop, choose **Help** > **Check for Updates**. The **Auto Update** window appears.
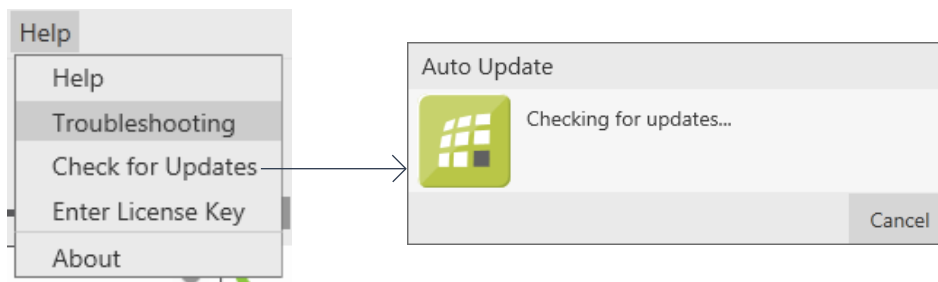
If a new version of the software is available, you can download it from this window.

If no newer version is available, this window informs you that your version is up to date.

1 THE ONSCREEN SOFTPHONE

Show/hide resources such as contacts, favorites and modules such as chat rooms.

Change layout of contact list and import contacts

Ubity UC Desktop menu. See below.

Close to system tray. This icon does not shut down Ubity UC Desktop

Call entry field. See page 13.

Missed calls indicator.

Minimize to system tray

Open the **Messages** window. See page 34.

Voicemail indicator. See page 27.

Detach the tab from the main window.
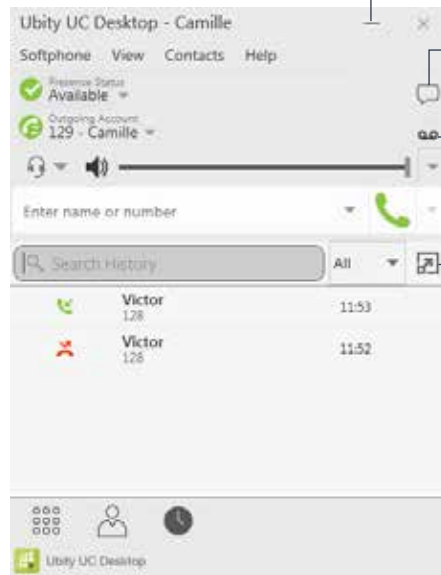
② THE UBITY UC DESKTOP MENU

Softphone

Preferences

These settings control the way that you work with Ubity UC Desktop and apply to all accounts. See "**Configuring Preferences**" on page 49.

Log Out

To log off and minimize Ubity UC Desktop to the system tray. If you click the Ubity UC Desktop icon in the status bar, the **Login** screen appears. This menu item does not appear if you have configured Ubity UC Desktop for no login.

Exit

Click to shut down Ubity UC Desktop. You can also exit by pressing **Ctrl-Q**.

View

Changes how Ubity UC Desktop looks. Also lets you view the messages (see page 34).

Contacts

Lets you work with contacts.

Help

Provides access to various service-related features.

Compact View

To create this compact view, go to Ubity UC Desktop, click **View** and hide all pannels (**Dialpad**, **Contacts** and **History**) by removing the check marks.

③ PLACING A CALL

Place the call as described in the table below. The outgoing call opens in its own **Call panel**, below any other **Existing call panels**. You will hear a ringing tone while Ubity UC Desktop attempts to make a connection.
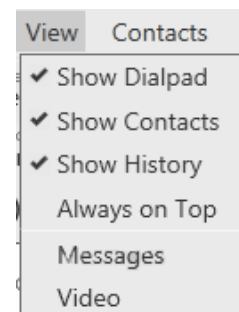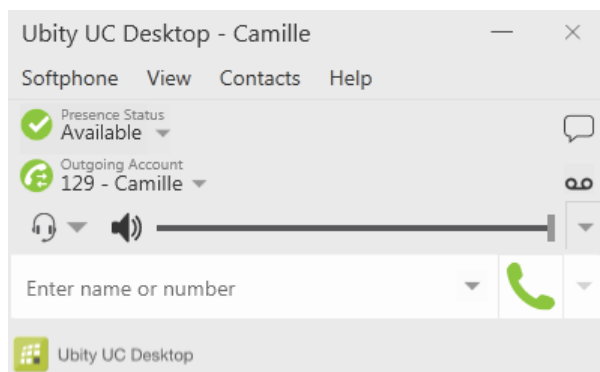
Option	From the...	Description
Keying	**Dialpad** or computer keyboard	**1** Enter the phone number in the call entry field using the dialpad or the computer keyboard. To turn letters to numbers, see page 12. As you type, a suggestion for completing the entry may appear. Choose the suggestion by using the **Up/Down key** and the **Tab key**, or keep typing. **2** Ubity UC Desktop makes a call as soon as you choose the suggestion. If you do not want to choose a suggestion, finish typing and click the **Call** button or press **Enter**.
Right-click a contact or previous call	**Contacts** or **History** tab	Right-click an entry from the **Contacts** or **History** tab and choose **Call**.
Double-click a contact	**Contacts** tab	Contacts have a "double-click" action (page 52) that either makes an audio phone call or starts an IM.
Single-click a contact	**Contacts** tab	Hover over the right side of the contact to reveal the **click-to-call** button. Click to place a call using the primary phone number for this contact.
Double-click a previous call	**History** tab	Double-click an entry. An audio call is placed.
Redial	**Redial** button	• When the call entry field is empty, click the **Call** button. • Or click the arrow in the call entry field and select a recent call. An audio call is placed.
Dialing	**Dialpad**	**1** If the dialpad is not visible, click the **Phone** button at the bottom left. **2** Click the numbers on the dialpad to enter the phone number. **3** Click the **Call** button or press **Enter**.

Option	From the...	Description
From an instant message	**Messages** window	Click the menu at the top right of the **Messages** window and choose **Call**.

The **Call** icon

Call entry field

For information on working with the call, see "**Handling an Established Call**" on page 16.

Clicking the down arrow gives you more call options, such as video call or conference call.

Auto Complete suggestions. Ubity UC Desktop makes a call as soon as you choose the suggestion. You can change this behavior so Ubity UC Desktop does not dial until the **Call** button is pressed (page 50).

Selecting the Account to Use

This information applies only if you have more than one Ubity UC number set up and enabled.

When you place a call, you can explicitly specify the account to use for that call.

The account selection options appear only if you have two or more Ubity UC numbers that are enabled and being used for phone calls.

Letters to Numbers

You can type letters and Ubity UC Desktop will convert the letters to numbers when placing the call:

Turn **Letter-to-numbers** on or off.

When you click **Call**, the call panel will open and the call will be placed. The call panel will show the phone number all in numbers.

Type the phone number using numbers and letters, as desired.

MAKING PHONE CALLS   **12**

Placing another Call

You can place another call. On Ubity UC Desktop, you can make up to five concurrent calls.

Place the call in the usual way
(see page 11).
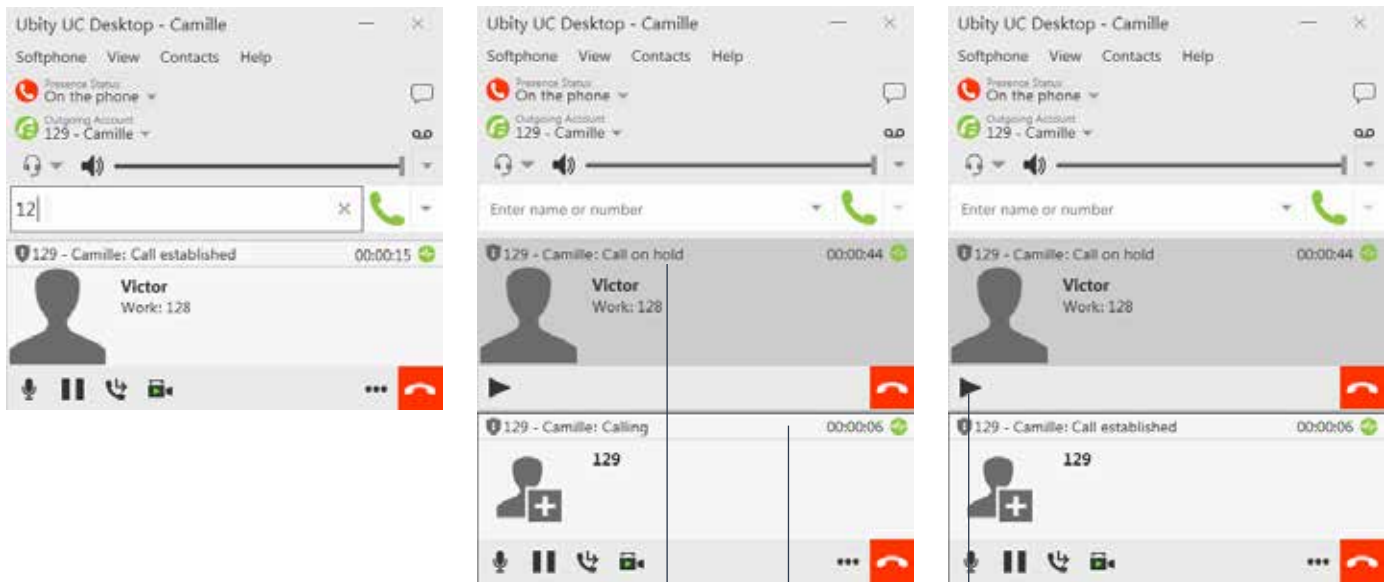
Existing call is automatically put on hold.

New outgoing call.

Switch between the different calls by clicking **Resume** on the desired call panel. That call becomes the active call and all other calls are put on hold.

Dialing additional numbers

Place your cursor below the contact's number to activate the extension entry field.

Type in the number of the option or the extension you wish to reach when you are invited to do so.

④ HANDLING INCOMING CALLS

Ubity UC Desktop must be running to answer incoming calls. It can be running in the system tray.(If Ubity UC Desktop is not running, incoming calls may be directed to voicemail.

The new call appears in its own **Call panel**. In addition, the **Call Alert** box appears. For information on setting call alert preferences, see page 53.
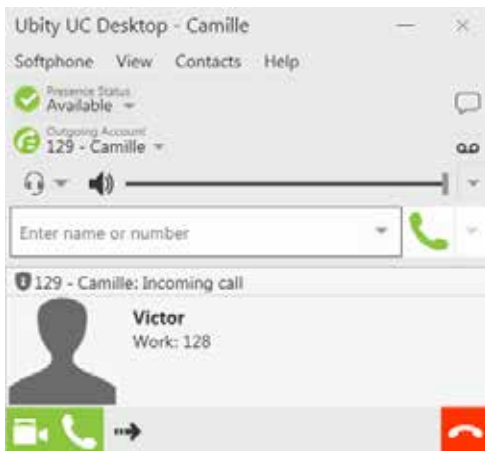
This is the alert for both audio and video calls:

Answer incoming call with audio only

Click to answer the call. If you are on another call, that first call is automatically put on hold. You are now talking to the new caller.


Answer incoming call and start sending my video
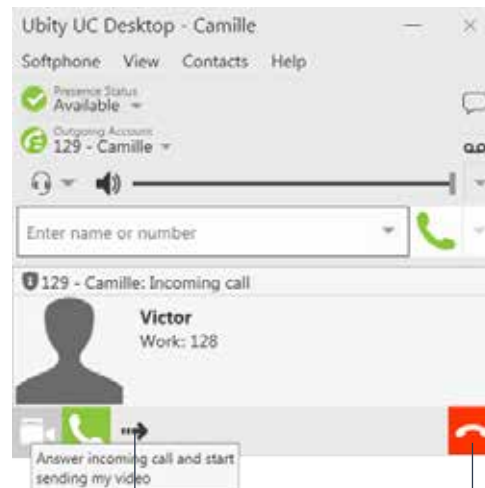
Or click **Forward**; a call entry field appears. Enter the name or number to forward to and click **Forward Now**.

Or click to refuse the call. The caller will hear a busy signal or the call may be directed to voicemail (if you have this service).

Auto Answer

Auto Answer is initially configured to auto- answer after one ring, and to send only your audio when the call is established. To change this configuration choose **Softphone** > **Preferences** > **Calls**.

Turn **Auto Answer** on or off.
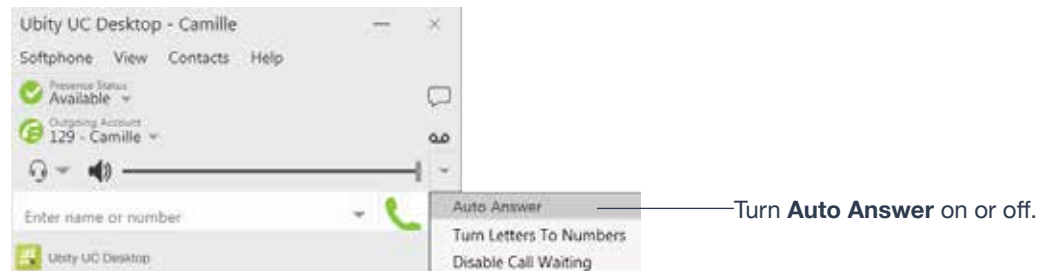
Auto Answer is turned off when you shut down or log off.

Disabling Call Waiting

You can turn on **Disable Call Waiting**. If on, when you are on a call, any new incoming call will go straight to voicemail or will ring as busy (to the caller). In this way, you are not distracted by incoming calls.

You can enable this feature even during a call, and it will take effect right away. The call will appear in the **Missed Calls** in the **History** tab.

Disable Call Waiting on or off
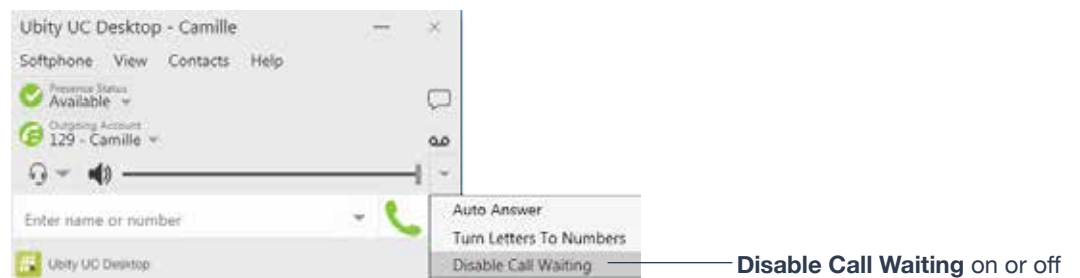
A check mark indicates the feature is enabled (no interruption during a call).

⑤ HANDLING AN ESTABLISHED CALL

Mute speaker or adjust speaker volume by using slider.

Use speakerphone (when yellow) or headset (when gray).

Place another call.

The current call is automatically put on hold. See page 14 for more information.

Mute your voice

Hold and resume.

Transfer. See page 17.

Start sending video. See page 19.

You can disable call waiting. See the previous page.

Add as **Contact**.
Add the current caller as a contact. See "**Managing Groups**" on page 38.

Conference Calls. See page 21
Instant Message. See page 29
Record the call as a WAV file (audio only). See page 25.

Ending a Call

Click the red **End** call button on the **Call** panel (the call can be active or on hold). The **Call** panel closes after a few seconds.

⑥ TRANSFERRING A CALL

Basic (Unattended) Transfer – Transfer this Call
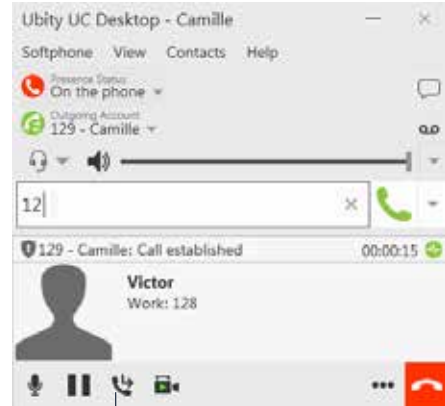
Click the **Transfer** button

The call is put on hold and a call entry field appears.

The call ends immediately.

Type a name or number, or drag a contact into the field.

Then click **Transfer Now**.

If the button does not show "**Transfer now**", click the down arrow and select **Transfer now**. You can also permanently change the option that appears on the button; see page 50.

Attended Transfer – Call then Transfer

You can first speak to the target (the person you are transferring the call to), then click **Transfer Now** to complete the transfer.

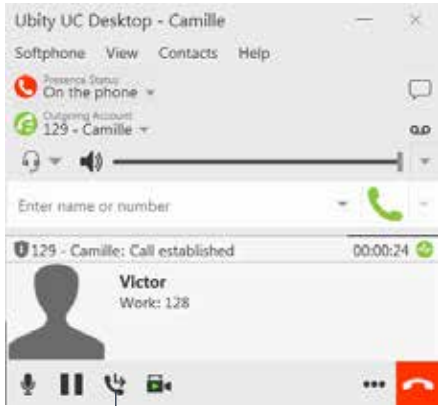The call is put on hold and a call entry field appears.

Click the **Transfer** button.

If the button does not show "**Call first**", click the down arrow and select **Call First**. You can also permanently change the option that appears on the button; see page 49.

Type a name or number, or drag a contact into the field, then click **Call First**.

Ubity UC Desktop phones the new person.

When the other person answers, the **Transfer Now** button is enabled.

You can hang up the second call and return to the first call.

Or if the other person does not want to take the call, click **Cancel** and return to the first call.

When you are ready, click **Transfer Now**. The **Call panel** closes.

⑦ HANDLING VIDEO CALLS

Placing a Video Call

Calls made with Ubity UC Desktop will work without a video camera, but a video camera is necessary to allow other parties to see your image. Ubity UC Desktop will work with most USB video cameras. This option needs to be enabled in Ubity's web management portal, **Studio**, in the extension settings.

From the Dashboard
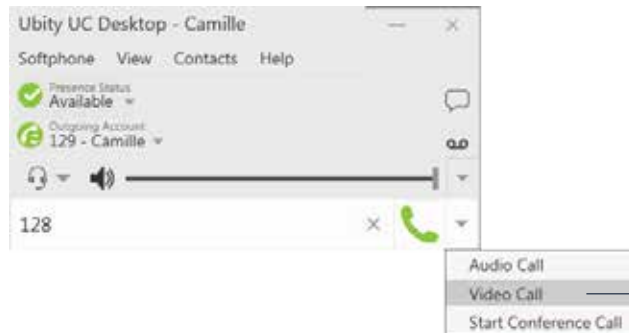
Type an number and click the down arrow and choose **Video Call**.

From the Contact List or History

Right-click the contact and Choose **Video Call**.

Adding Video

If you have a camera, you can add video to a call that started as an audio call.

Start or Stop sending your video.

Click **Start Video** in the **Call panel**. When you add video, the other party may (or may not) start sending their video to you.

Other Party Adds Video

If the other party starts their video, your video window automatically opens and the video is played. You can start sending your own video, if desired (and assuming you have a camera) by clicking **Start Video** ( ) in the **Call panel**.

Pausing and Resuming Video

Click **Stop Video** in the **Call panel** or close the video window to pause sending your video. Click **Start Video** to resume sending your video; the video window will open.

To view in full screen, hover over the video window and click the two-way arrow icon, or press **F11** when the focus is on the video window.

Display in full screen

Click to configure the camera.

⑧ CONFERENCE CALLS

Starting a Conference Call

You can start a conference call by :

- making a conference call from the dashboard,

- adding participants to an existing established call, or

- having two established calls and merging them to a conference call.

From the Dashboard
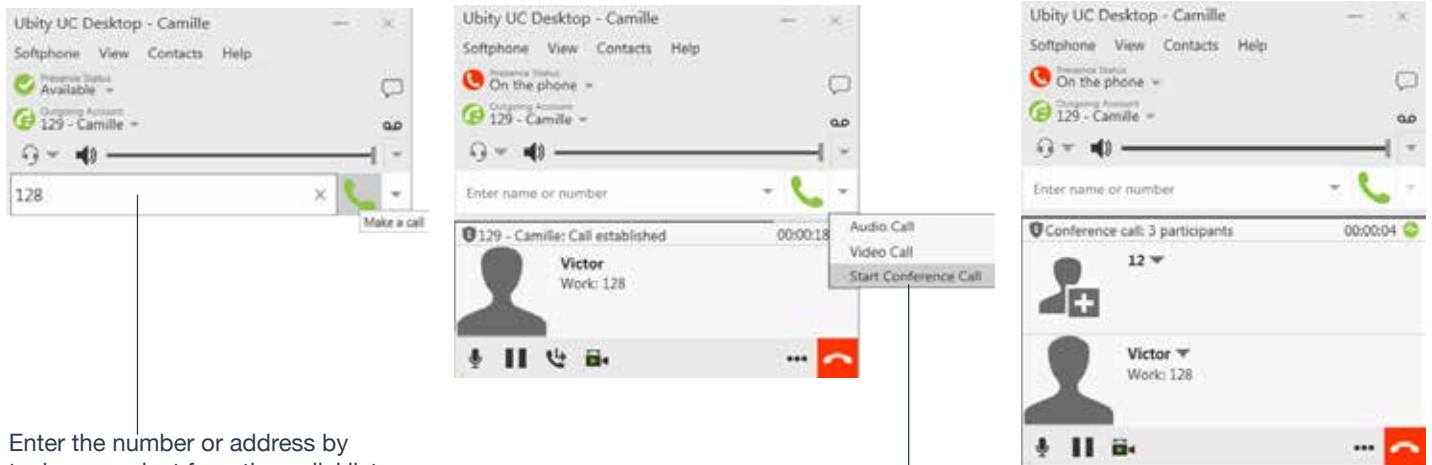
Enter the number or address by typing, or select from the redial list.

Click the down arrow and choose **Start Conference Call** and click click **Add**.

From an Existing Call

From One Established Call

You can add more participants from here.

From Two Established Calls

Invite to Conference Call will allows you to add a third person to the call.

You can merge two established calls.

Managing the Conference

Click the arrow for **Participant menu**.

Adding More Participants

You can add more participants to an existing conference in any of these ways:

• Right-click on a contact or history item and choose **Add to Conference Call**.
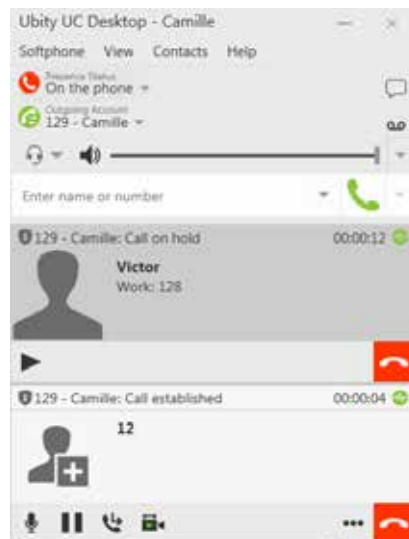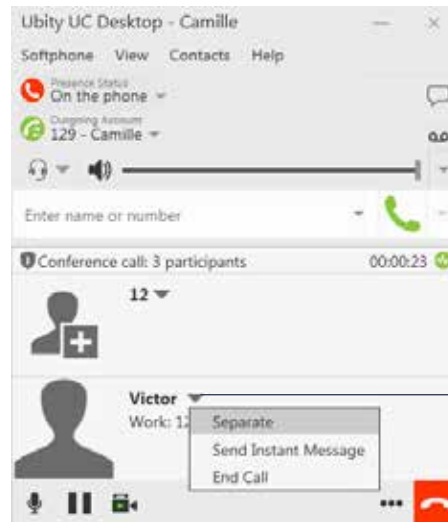
• In the conference call panel, click **Invite to Conference Call**, enter a name and click **Add**.

• Add in a separate call that is not part of the conference call: in the **Call panel** for the individual call, click the down arrow and choose **Merge Calls**. This call is added to the conference call.

Recording a Conference Call

Click the **More** (three dots) button to reveal the **Start Call Recording** menu. See page 26 for more details.

Sending an Instant Message

Click the down arrow beside a participant name and choose **Send Instant Message**.

Removing a Participant

To remove one call from the conference, click the down arrow beside a participant name and choose **Separate**. The call becomes a separate call.

Ending the Conference

To hang up on everyone, choose **End conference** from the conference menu.
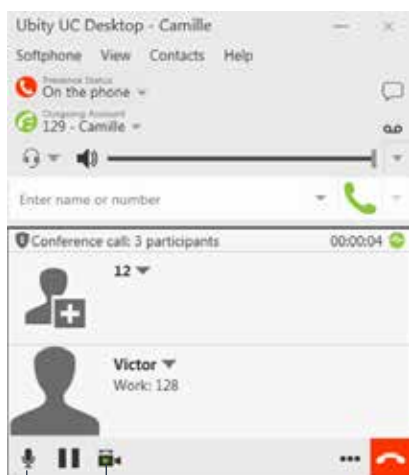
Suspending the Conference

To suspend the conference, choose **Hold** from the conference menu. All participants are put on hold.

If you need to speak to one participant separately, put the conference on hold, separate the one participant from the conference, take that person off hold. When done, merge the participant back into the call.
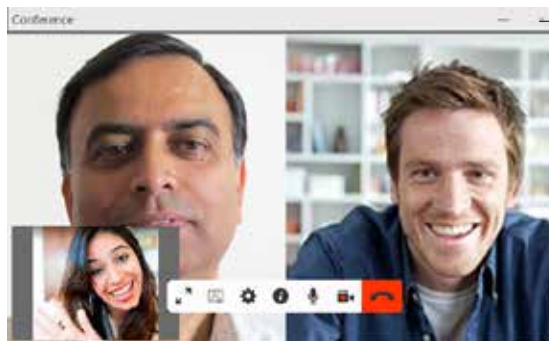
Video Conference Calls

Calls made with Ubity UC Desktop will work without a video camera, but a video camera is necessary to allow other parties to see your image. Ubity UC Desktop will work with most USB video cameras (This option must be enabled in **Studio**).

"**Video**" next to the contact name means this person has video. Otherwise, the person does not. To remedy this situation, stop video and start it again. Video will be sent to all the current participants.

Closing the video window stops sending video.

Mute   When you mute during a video call, you may also want to click **Stop Video** to stop the video feed.

Including Video in a Conference

When you start a conference from established calls, video is automatically included if at least one of the calls already includes video and is sent to all the participants.

When you start a conference from scratch, video is not included. You can open your video window and choose to add video at any time. Video is sent to all the participants.
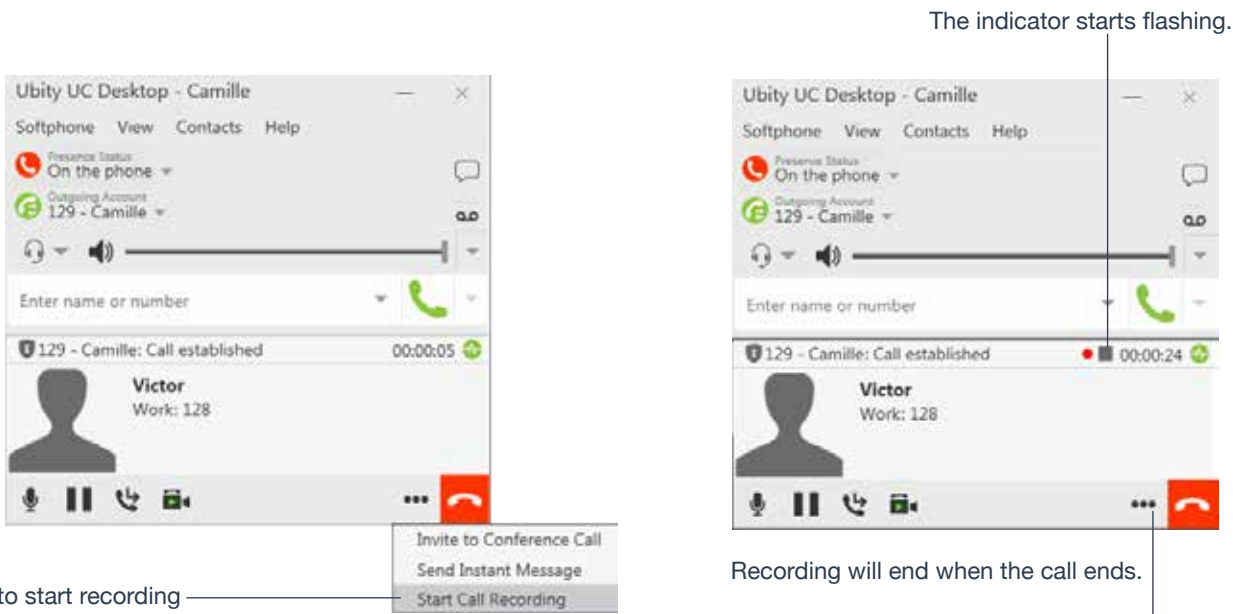
How Video is Shared

The conference host (the person who starts the conference) serves as the host for other video. Whatever the conference host is receiving will automatically be sent to the other parties.
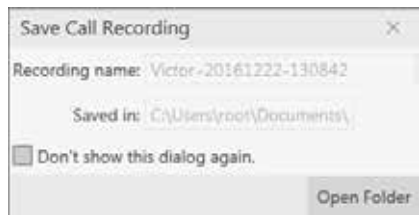
If the conference host pauses or stops video, other participants will no longer receive video.

⑨ CALL RECORDING

You can record the audio portion of a one-to-one call or a conference call. The recording will be saved as a **WAV** file on your computer.

The indicator starts flashing.

Click to start recording ——

Recording will end when the call ends.

To stop recording but continue with the call, click the square button beside the indicator, or click **More** and **Stop Recording Call**.

The dialog notifies where the recording is saved.

Files Created when Recording Conference Calls

Multiple files might be created depending on how and when you start recording.

If you start recording a conference call from the beginning, the recording will continue until the conference call ends. One file will be created.

If you separate a participant from a recorded conference call and eventually have a one-to-one call, the recording will continue until the one-to-one call ends. Two files will be created: one for the conference call, and the other for the one-to-one call.

If you are already recording individual calls, the following will apply:

• After merging individual calls to form a conference, all the individual recordings will be stopped and a new recording will be created for the newly formed conference.

• After merging individual calls to an existing conference call, all the individual recordings will be stopped. If the conference call is being recorded before merge, the recording of the existing conference call will continue.

For example, if you record two individual calls and merge them, three files will be created : one for the conference call, two for individual calls before merge.

⑩ VOICEMAIL
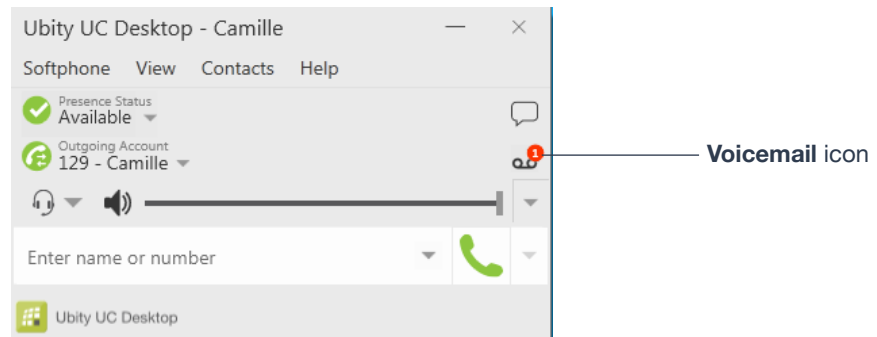
Voicemail icon

You can click the voicemail icon from the dialpad to automatically connect to voicemail and listen to any messages.

⑪ FORWARDING CALLS

During an incoming call, click the **Forward** button to forward the call.

Enter the number you wish to forward to, and click **Forward**.

1 INSTANT MESSAGING
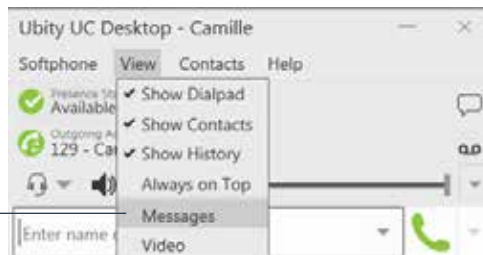
Sending an IM

1 You can send an IM to a contact who is in your company and is using Ubity UC Desktop or Mobile.

| From the Contacts tab	Right-click on the contact and choose **Send Instant Message**. The contact must have a softphone address. Or click on the IM icon that appears to the right of the contact name.
An active phone call	If the person is a contact, choose **Send Instant Message** from the call panel menu.
An active conference call	If the participant is a contact, choose **Send Instant Message** from the participant menu.
From the Messages window	Click the **New Conversation** icon beside the **Search** field, and type a number or name.

2 Type the message. Include emoticons and formatting (**Control**+**B**, **Control**+**I**, **Control**+**U**), as desired.

To insert a return in the message, press **Shift**+**Enter**. You can control the behavior of **Enter** and **Shift**+**Enter** on the **Softphone** > **Preferences** > **Application** panel.

Click here to open the **Messages** window.

3 Click the **Send** icon.

Click to select more actions.
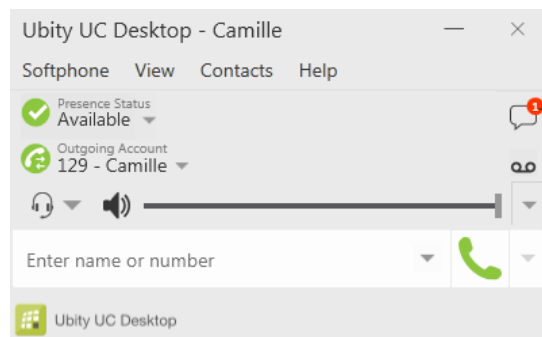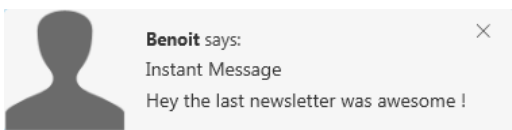
Send icon
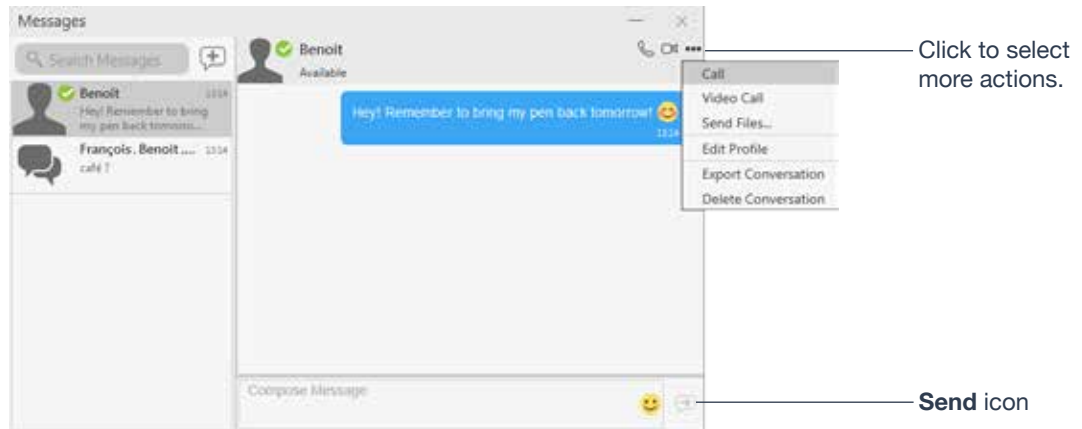
Receiving an IM

When an IM is received, either the **Messages** window or a **Call Alert** pops up. (To control which window appears, choose **Softphone** > **Preferences** > **Alerts & Sounds**.)

New Message alert:

Benoit says:
Instant Message
Hey the last newsletter was awesome !

New Message indicator. Click on this icon to open the **Messages** window.

② **GROUP CHAT (CONFERENCE IM)**

Group chat allows you to exchange instant messages with a group of people in the same session.

There is no limit to the number of participants in a group chat session.

Starting a Group Chat

1 Open the **Messages** window

2 Add the recipients you want to include in the group chat

3 Type a message and click the **Send** icon. Once a chat is started (first message has been sent), you cannot add or remove participants.

Select the desired contacts. Contacts must be online.
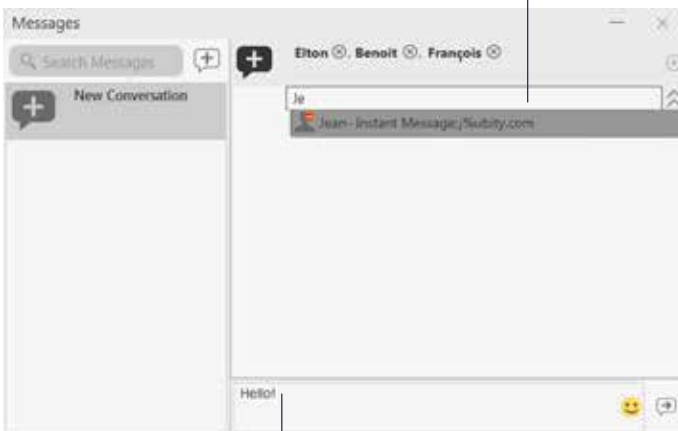
Type a message and click the **Send** icon.
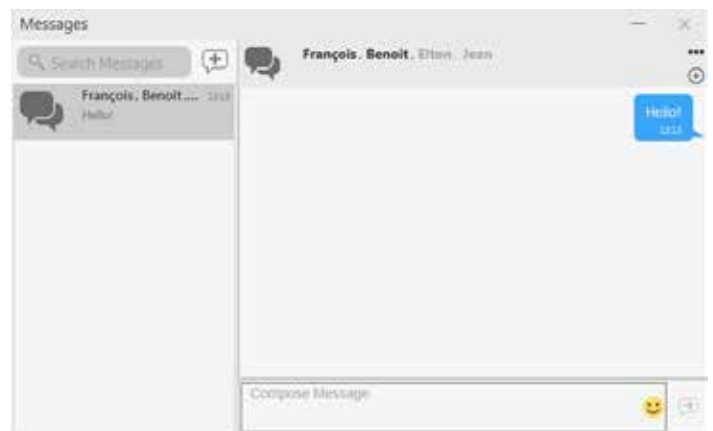
Once a chat is started (first message has been sent), you cannot add or remove participants.

Managing a Group Chat

Right-clicking on a contact shows actions you can take
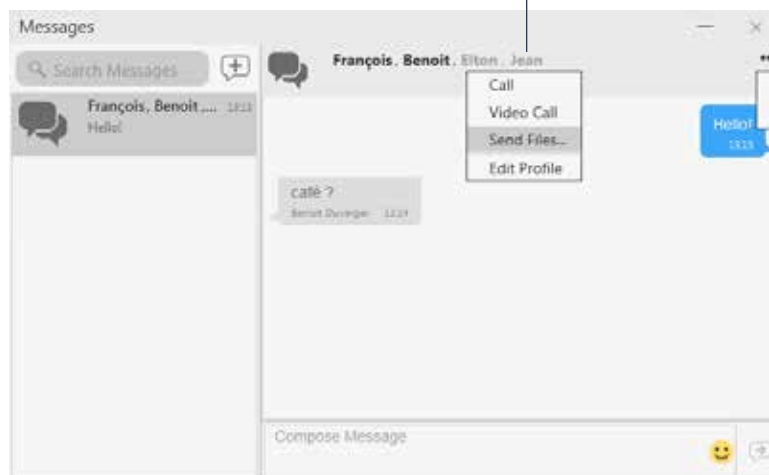
Clicking on the icon ⊕ allows you to export or delete the conversation.

Leaving a Group Chat

Log out lets you leave all the active group chat sessions. The session continues with the remaining participants. Once you leave a group chat, you will not be able to rejoin the session. The thread in the **Messages** window becomes inactive (grayed out); you can read chat history, but cannot participate or download unread messages.

Deleting a group chat session on the **Messages** window also lets you leave the session, but you will lose chat history.

③ VIEWING MESSAGES

To view your recent IM activity for any contact, group chat session, or chat room session, perform one of these actions:

- Click the **Messages** window icon:

- Click **Shift** + **Control** + **M**.

- On the menu, click **View** > **Messages**.

Search all messages

Clicking the **x** icon deletes the session.

You can copy the messages.

Right-click to save or delete a conversation.

The session may be grayed out. Typically it means that the account used for the session is not registered, or the group chat has ended.
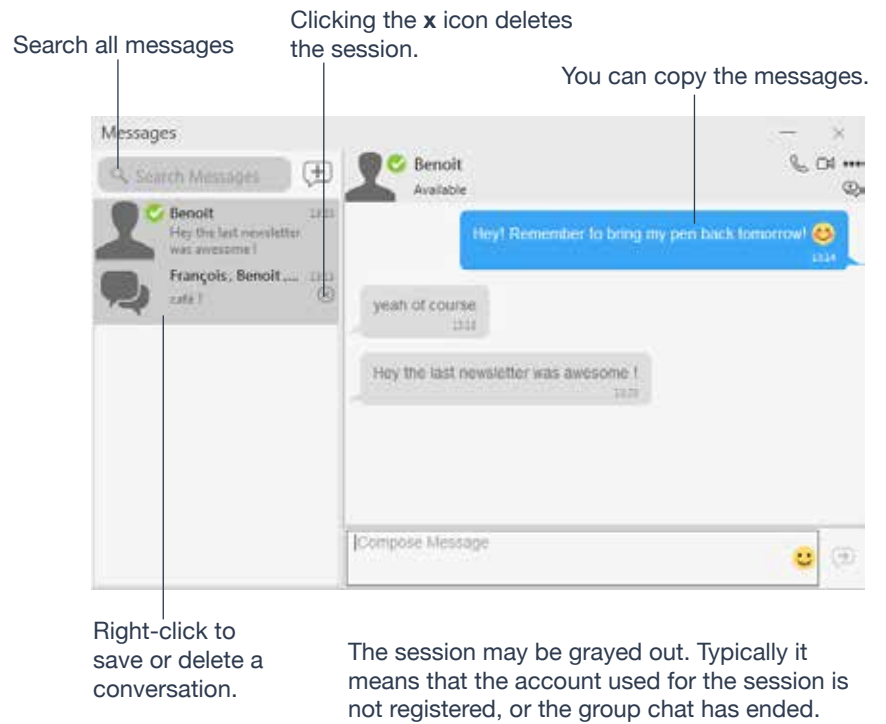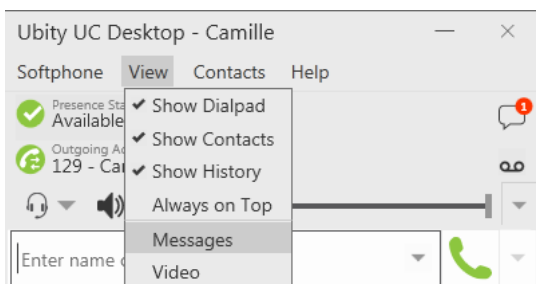
4 SENDING AND RECEIVING FILES

Sending Files

Choose one of these actions :

> • Right-click a contact and choose **Send Files** ; a standard **Open** dialog box opens. Select the files to send and click **Open**.

> • Drag a file from a folder to the IM session of the **Messages** window.

The **Send Files** dialog appears with a "**waiting**" message. To cancel the file transfer before the other person retrieves the files, click **Cancel**.

File Transfer	—	×
Waiting for Benoit to accept.		

0 %

Newsletter.png 0 bytes / 188,27 KB

☐ Close this dialog when done | Cancel

Receiving Files

File Transfer	—	×
Accept the following files from Benoit ?		

0 %

nimportequoi.txt 0 bytes / 5 bytes

☐ Close this dialog when done | Save… | Decline
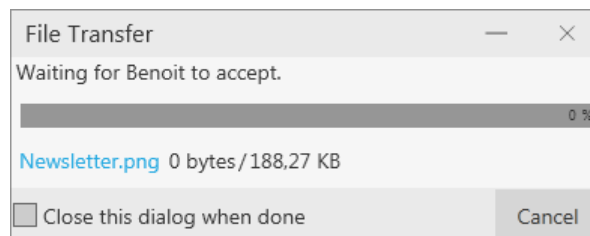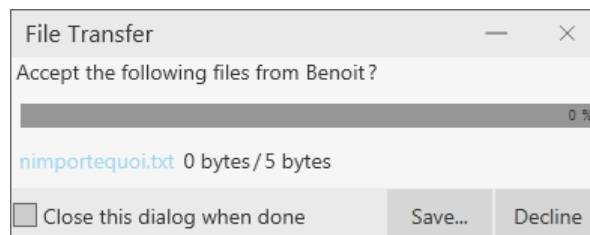
The file is saved to the location specified in **Preferences** > **Files & Webs** tabs.
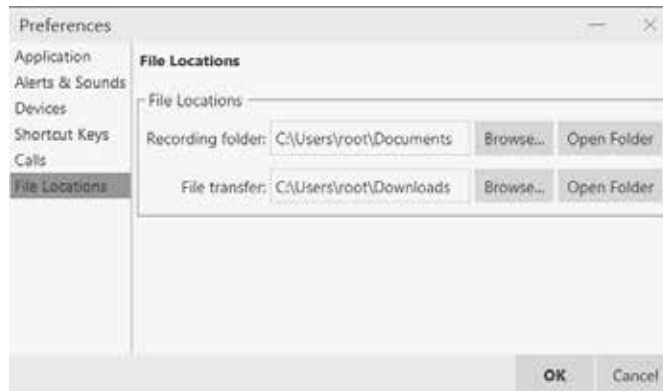
4 — CONTACTS

The **Contacts** tab displays your contacts. Each contact is shown with presence information and icons for single- click phoning and IMing.

If the **Contacts** tab is not showing, go to the main menu and choose **View** > **Show Contacts**.

Contacts are typically organized into groups. Ubity UC Desktop includes built-in groups. You can add more groups, as desired.

Search entire contact list ——————

Detach list from main window

Add a **Contact**

Contacts are typically organized into groups. Ubity UC Desktop includes built-in groups. You can add more groups, as desired.
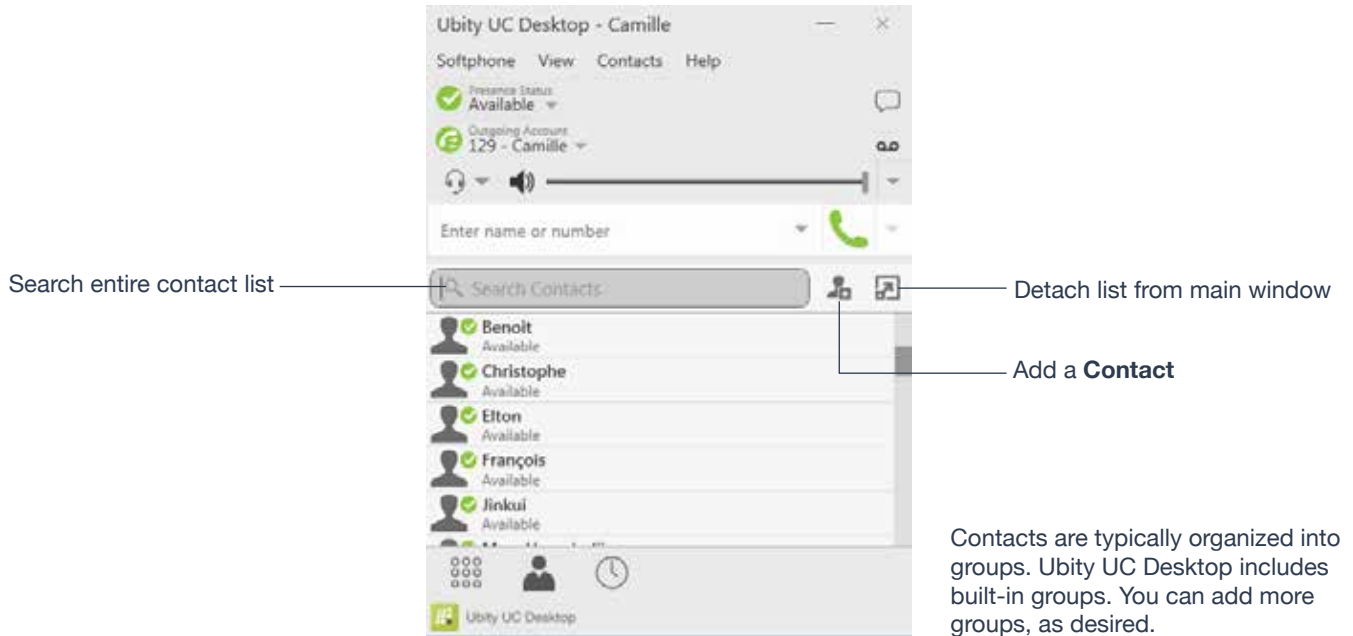
You can change the detail and layout of the contact list : from the main menu choose **Contacts** and set the desired options.
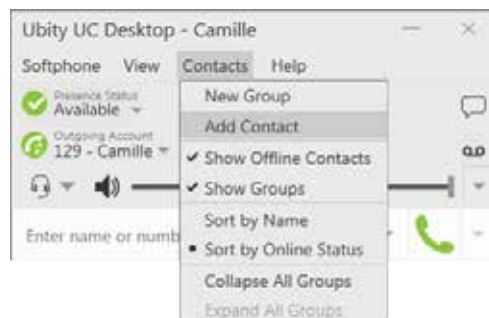
1 **ADDING A CONTACT**

Adding a Contact Using an Existing Address
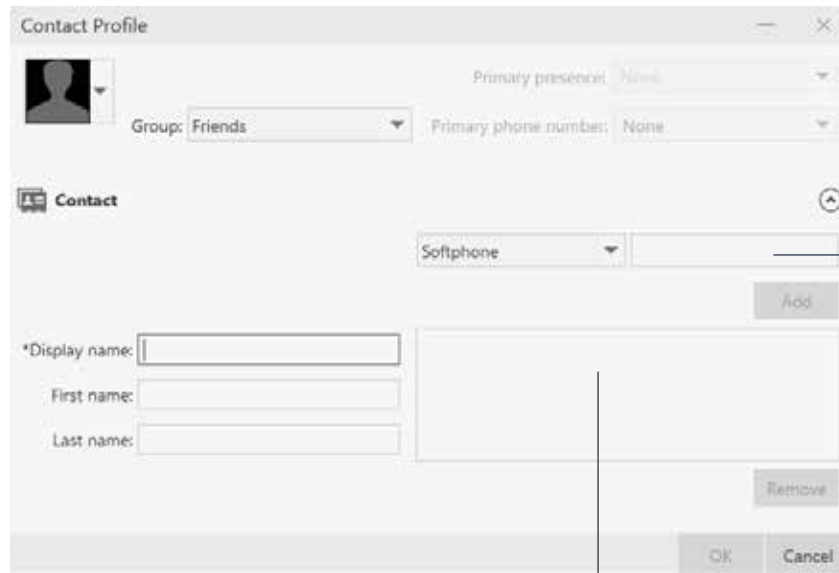
You can add a contact by capturing existing information:

• If you are on a phone call with a non-contact, click the **Add to Contacts** button in the **Call panel**.

• On the **History** tab, select an entry that is not a contact. Right-click and choose **Add as Contact**.

The **Contact Profile** dialog appears. Complete the dialog as desired and press **OK**.

Manually Adding a Contact

Click 👤 , or right-click a group and choose **Add Contact** to Group. The **Contact Profile dialog** appears.

To enter a phone number, select the type, enter the number, and click **Add**.

The new number appears in the list.

Contact Profile Summary

Field	Description
Display as	If several display names are available, choose the one that you want to show in the contact list.
Group	Click to show the list of groups. Check each group this contact should belong to.
Primary presence	The primary presence is used as follows: • The presence icon on the contact list shows the online status for this address. • The single-click and double-click actions for instant messaging use this address. You can still send IMs to this person at their other addresses, but you must right-click and choose from the context menu.
Primary phone number	If the contact has more than one number, select the primary number. This number will be used with single-click calling and double-click calling.

Other Sections

Field	Description
Display name (required)	The display name for this source of information.
First name, Last name	Optional.

Changing Contact Information

To change the information for a contact, right-click the contact and choose **Edit Profile**. The **Contact Profile** dialog appears (page 38).

Merging and Splitting Contacts

To merge contacts, you can drag one or more contacts to a contact. The dialog appears confirming that you want to merge contacts.

Moving or Deleting a Contact

• To drag one or more contacts to a different group, select them and drag to the title bar of the new group.

• To delete one or more contacts, select them, right-click, and choose **Delete Contact** or **Delete Selected**. The contacts are removed from this group. If a contact belongs to several groups, it is removed from all groups.

❷ MANAGING GROUPS

Ubity UC Desktop has built-in groups. A contact must belong to at least one group.

Adding, Deleting or Renaming Groups

Select any group, right-click, and choose the appropriate menu item.

③ USING CONTACTS

In the **Contacts** tab, you can:

• Double-click a contact to phone or IM (depending on how double-clicking is configured in **Preferences** > **Application**).

• Click a contact to view the flyout

• Right-click to show the menu, or

• Hover over a contact to revel icons for single-click phoning or IMing.
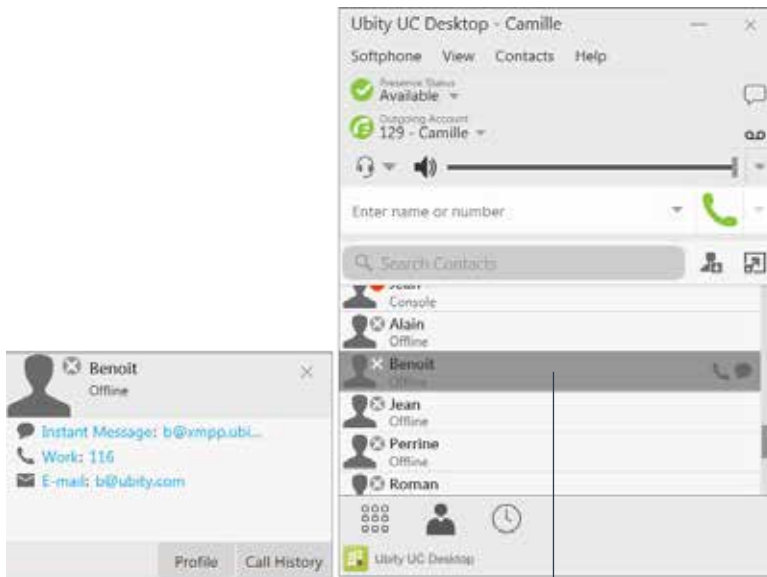
Hover to reveal icons.

Click the phone icon to call using the primary phone number.

Or click the IM icon to send an IM using the primary presence address for this contact.

Or right-click and choose from the menu.

Click a contact to view the flyout.

You can watch the contact's online status, if the contact is part of your company and uses a Ubity phone or softphone.

See the table on page 43 for the meaning of the online status icons.

See "**Sharing Online Status**" on page 42 for information on obtaining online status information.

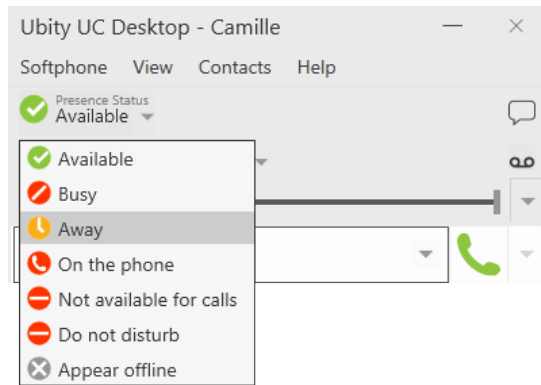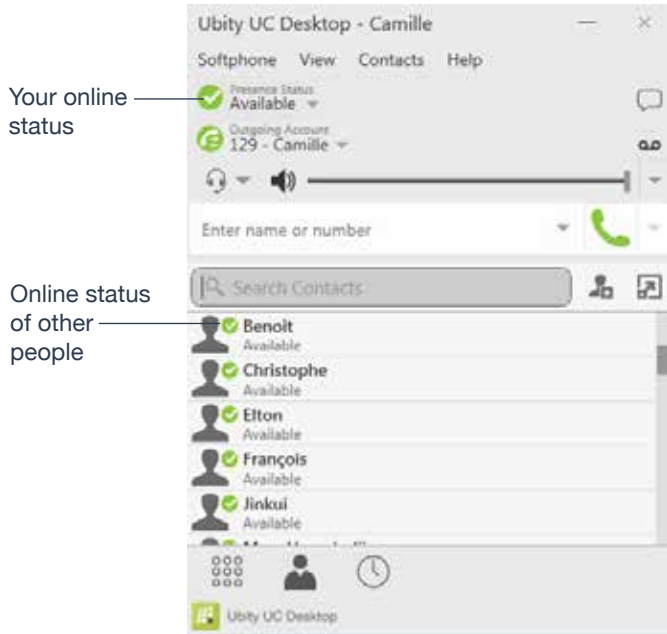**4**   **SHARING ONLINE STATUS**

Setting your Online Status

Changing your Status

Click the down arrow beside the online status indicator on Ubity UC Desktop, and select the desired online status.

Your online status

Online status of other people

Status Indicators

Indicator	Meaning for your Status	Meaning for Others' Status
🟢 **Available**	Either: • You have set your status to this value. • Ubity UC Desktop has determined that you are logged on but not **On the phone** or **Idle**. When you have this status, Ubity UC Desktop will automatically detect when you are idle or on the phone, and change the status to match.	You can contact this person.
🔴 **Busy**	You have set your status to this value. Ubity UC Desktop will never automatically switch you out of this status; you must switch yourself.	You can contact this person.
🟡 **Away**	You have set your status to this value. Ubity UC Desktop will never automatically switch you out of this status; you must switch yourself.	You can contact this person.
🔴 **On the phone**	Either: • You have set your status to this value. In this case, Ubity UC Desktop will never automatically switch you out of this status; you must switch yourself. • You started a phone call when your status was "Available". When your call finishes, your status reverts to "Available".	You can contact this person.
🔴 **Do not disturb**	You have set your status to this value. Ubity UC Desktop will never automatically switch you out of this status; you must switch yourself.	You cannot contact this person.
🔴 **Not available for calls**	You have set your status to this value. Ubity UC Desktop will never automatically switch you out of this status; you must switch yourself.	You cannot contact this person.
⚙️ **Appear offline**	You have set your status to this value. The other person sees you as offline, even though you are actually online. The other person cannot tell the difference between this status and you really being offline.	The contact is either not logged on or does not want to share online status.
No icon	Not applicable	You are not watching the other person's status.

⑤ ADDING CONTACTS TO THE ALERT LIST (BUDDY POUNCE)

You can add a contact to the **Alert List** in order to request to be notified when the online status of a contact changes.

Right-click the contact or contacts and choose **Add to Alert List**. The **Alert List** icon appears beside the contact:
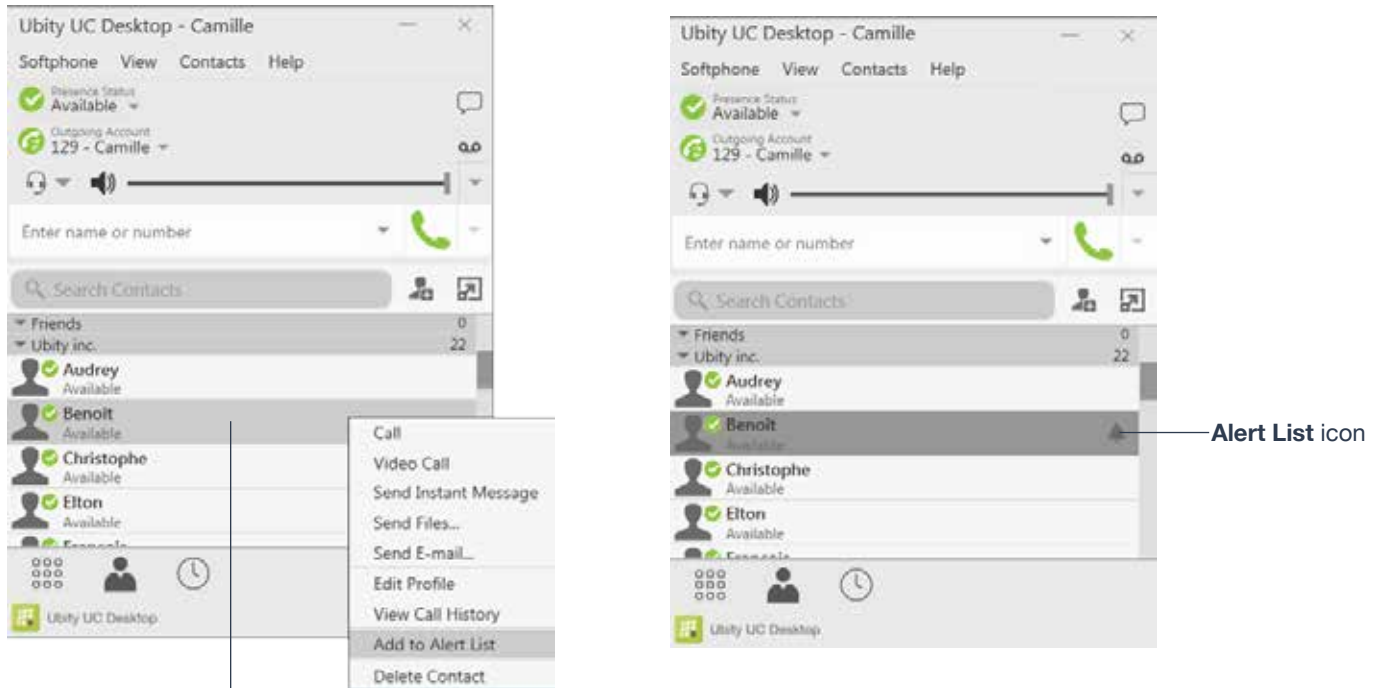
Right-click the contact or contacts and choose **Add to Alert List**.

Alert List icon

When the contact's status changes, a notification appears:

Click to keep the contact on the alert list; the next time the contact's status changes, another notification will appear. Or leave unchecked to stop receiving notifications.

The time at which the contact's status changed.

Click to phone or IM this person.
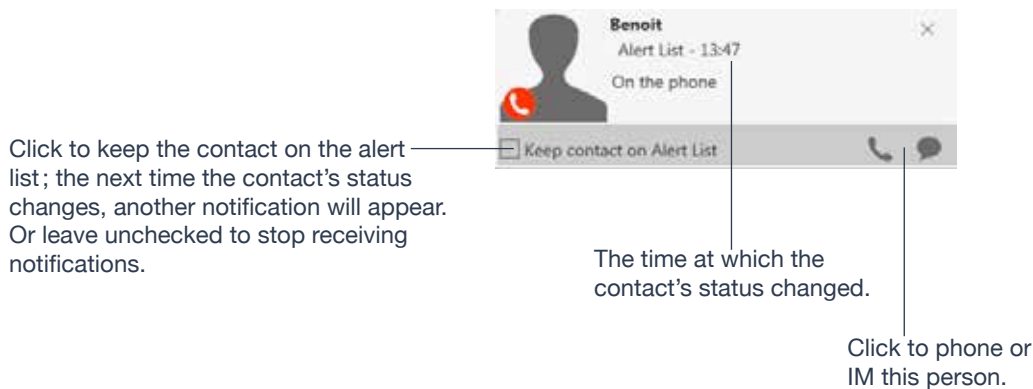
1 **HISTORY TAB**

To view the **History** tab, go to the main menu and choose **View** > **Show History**.

Detach list from main window.

Red: Incoming missed call

Up arrow: Outgoing call, either attempted or established

Down arrow: Incoming call that was answered
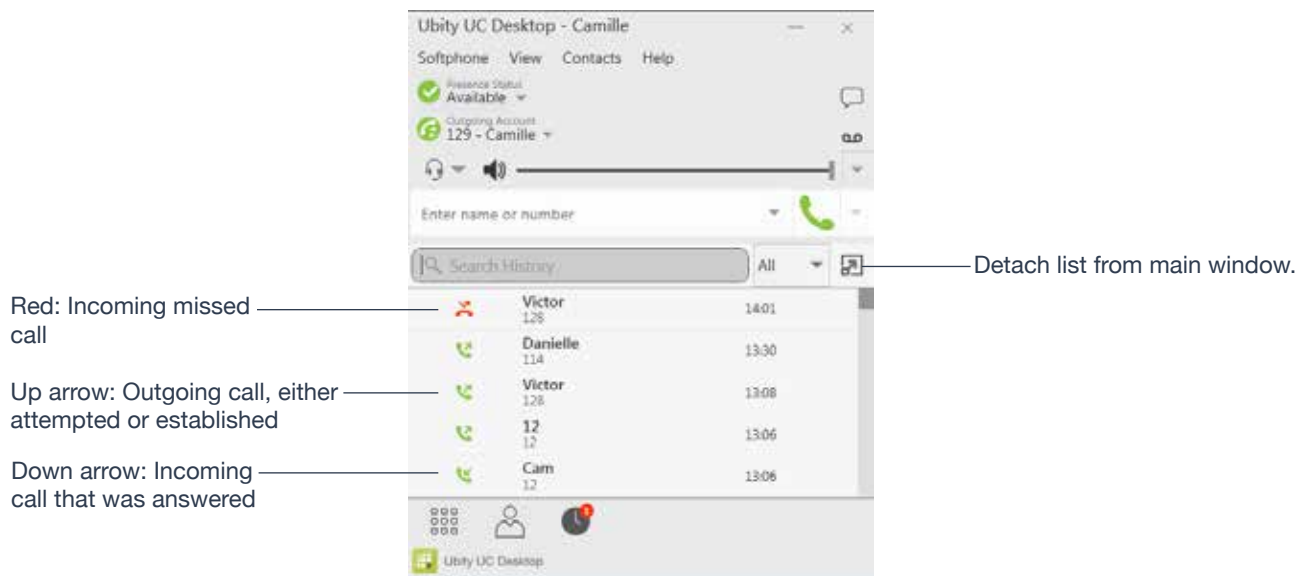
Managing the Lists of Calls

You can right-click on an entry in a list to:

- Delete the entry.

- Delete all entries in the list.

- Edit the profile if the entry is a contact.

- Add as contact. **The Contact Profile** appears (page 38).

Phoning from History

You can:

- Right-click on an entry to place a call to this person, using the contact method that was used for this call.

- Double-click to place an audio call.

- Place a call to this person and add them to a conference call that is in progress. For more information on conference calls, see page 22.

6 — TROUBLESHOOTING

Choose **Help** > **Troubleshooting** to display the **Troubleshooting** window.
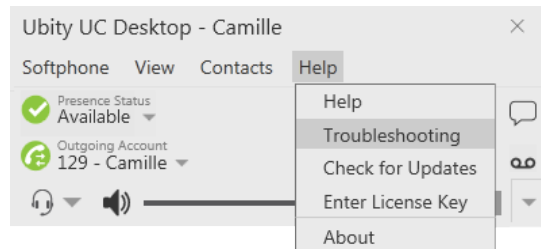
1 TESTING AUDIO DEVICES

You can verify that your microphone and speakers are working and can set the volume to a comfortable level without having to actually place a phone call.
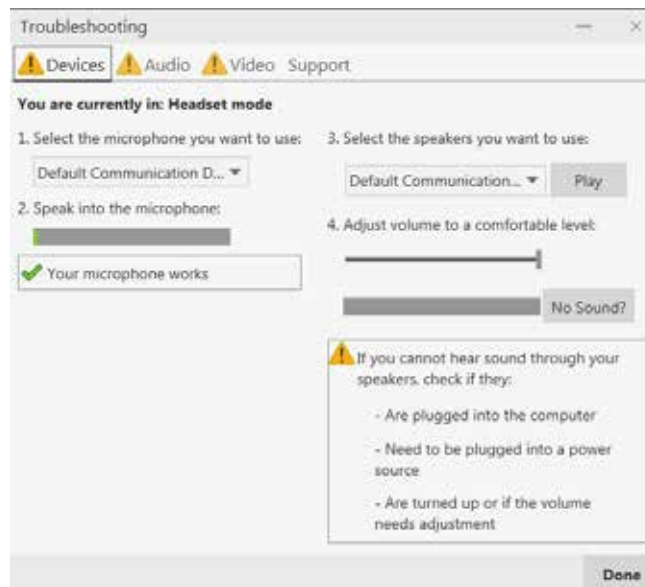
② **TESTING AUDIO QUALITY**

While you are on a phone call, you can test the quality of the audio. Note that to perform a valid test, you should be on an established call (not a call attempt).
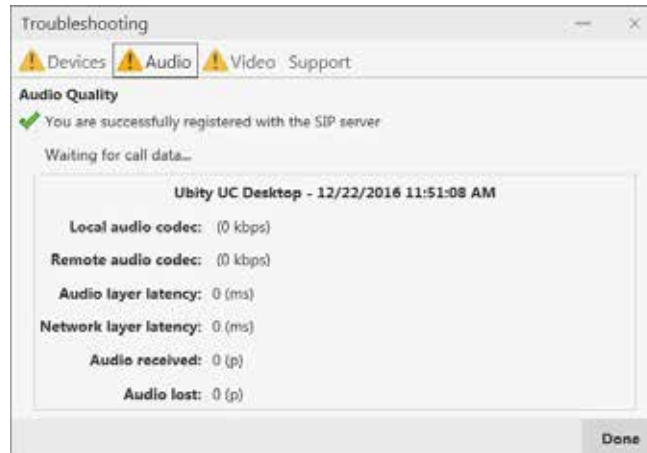
③ TESTING VIDEO QUALITY

While you are on a video call, you can test the quality of the video. Note that to perform a valid test, you should be on an established call (not a call attempt).
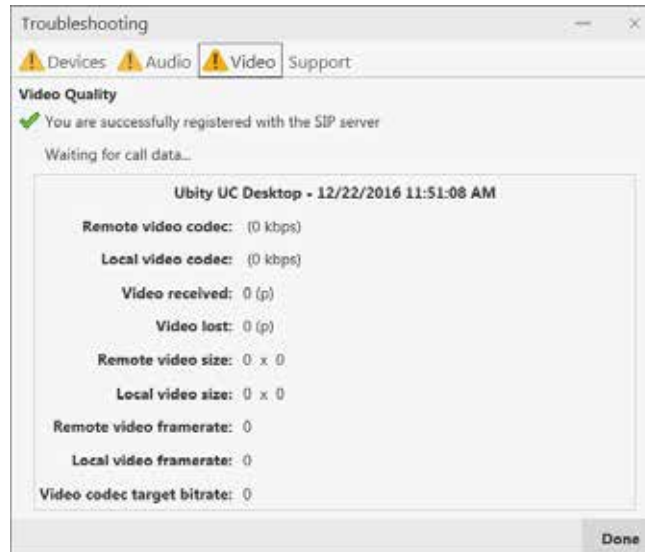
7 — CONFIGURING PREFERENCES

Choose **Softphone** > **Preferences**. The **Preferences** window appears.
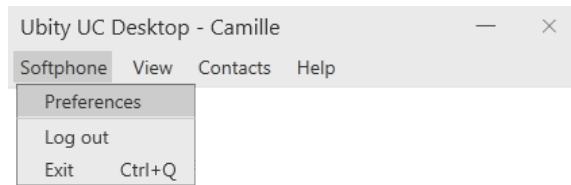
The **Preferences** panels let you control the way that you work with Ubity UC Desktop. It also contains fields to configure features that apply globally, rather than on a per-account basis.

① PREFERENCES – APPLICATION
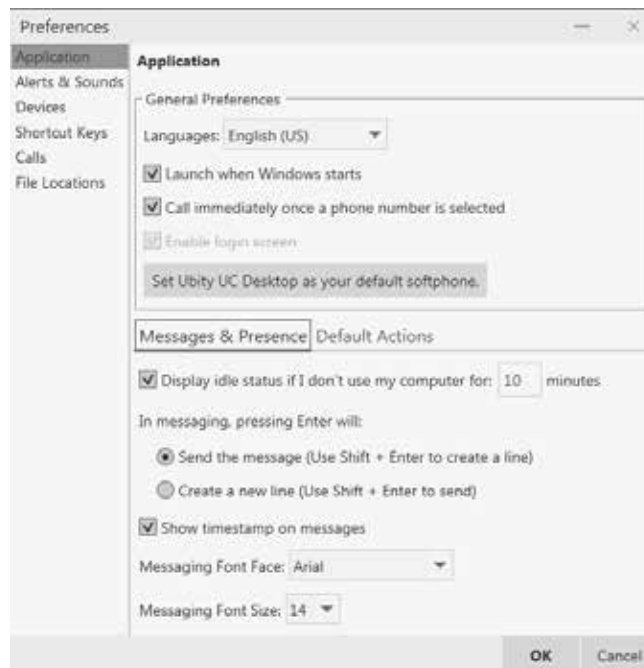
This panel lets you set your preferences for general GUI behavior and lets you set up for login.

Default Actions

This feature lets you control the action performed for two buttons:

• The green **Call** button at the top of the phone. For example, you can configure the button so that it makes a video call instead of an audio call.

• The **Transfer** button. For example, you can configure the button so that it initiates unattended (transfer now) transfer instead of an attended (call first) transfer.

② **PREFERENCES – ALERTS & SOUNDS**
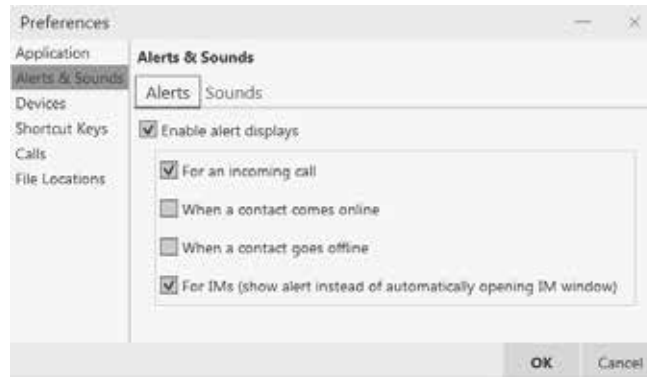
The tabs on this panel let you control the **Call Alerts** box and lets you assign sounds.

Alerts

You can control whether the **Call Alert** box is displayed in different situations.

You can also control how you are alerted to an incoming IM: either with a small **IM Alert** box or with the **Messages** window itself.

Sounds

You can assign specific sounds to a variety of actions or "**events**".

1 Select the **Enable** sounds check box and select the check boxes for each desired event, or clear the **Enable** sounds check box to disable all sounds.

2 You can change the sound for each event: select the individual event. The value in **Sound** preference will change. Select the desired sound.

You can import sounds; these will be added to the list of sounds you can choose from when assigning a sound to an event.

③ PREFERENCES – DEVICES
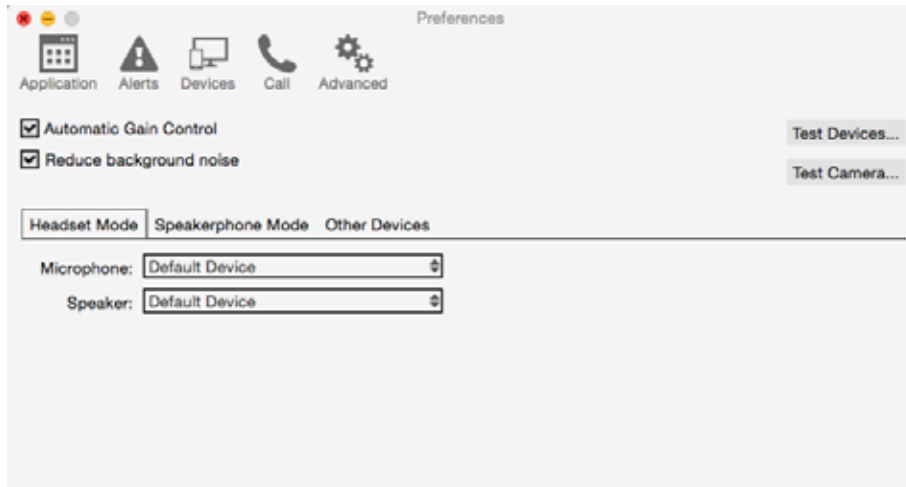
Ubity UC Desktop automatically detects devices at each startup, and selects the most appropriate device for each purpose. If you do not like this selection, you can override it on this panel.

If you override a selection, it will apply the next time you start Ubity UC Desktop, unless the device is no longer available, in which case Ubity UC Desktop will again select the device to use.

Field	Description
Automatic gain control	On to automatically adjust the audio gain.
Reduce background noise	Automatically attempts to remove background noise. Typically on for the speakerphone.
Test Devices	For information on the **Test Devices** button, see "**Application Hot Keys**" on page 59.
Test Camera	Click to check if Ubity UC Desktop can use your camera. The video window opens, and shows a message.

Field	Description
Headset Mode	
Microphone, Speaker	Change these fields only if you want to override the devices that Ubity UC Desktop automatically selected. In both these fields, select the headset you are using.
	The headset is the device that is usually used for the **Speaker** (the sound you hear) and **Microphone** (recording your voice). The only situation in which the headset is not used is when the **Speaker Phone** button on the dialpad is pressed.
	Therefore, unless you will always be using Ubity UC Desktop in **Speakerphone mode**, you must make a selection here.
	Select the headset in both the **Speaker device** field and **Microphone device** field.
Speakerphone Mode	
Speaker/Microphone	Same as headset mode, but for the device to use when speakerphone is one (on the toolbar).
	Select **None** if you do not have a speaker phone. The **Speaker Phone** button on the dialpad will be disabled.
	You can set different devices for the speaker and microphone: for example, you can set the speaker to the **Speaker Phone** and set the **Microphone** to your headset.
Reduce echos	Turning this feature on improves sound quality. This feature is typically on.
Other Device	
Ring On	The device where you want to hear the phone ringing.
	Change this field only if you want to override the devices that Ubity UC Desktop automatically selected.

Field	Description
Camera	This field appears only on versions of Ubity UC Desktop that include video functionality.
	Change this field only if you want to override the devices that Ubity UC Desktop automatically selected. Select the camera model.
Max Resolution	Leave at standard, or change the size as follows:
	• Set it to high if you have a good camera and a computer with a fast CPU. You will know that you have set the size too large if:
	Your computer slows down (the video is using too much CPU)
	The video shows black areas or is slow or jerky.
	• Typically set it to low only in special situations, for example, when using Wi-Fi in a hotel. You will know that you have set the size too small if the video is fuzzy.
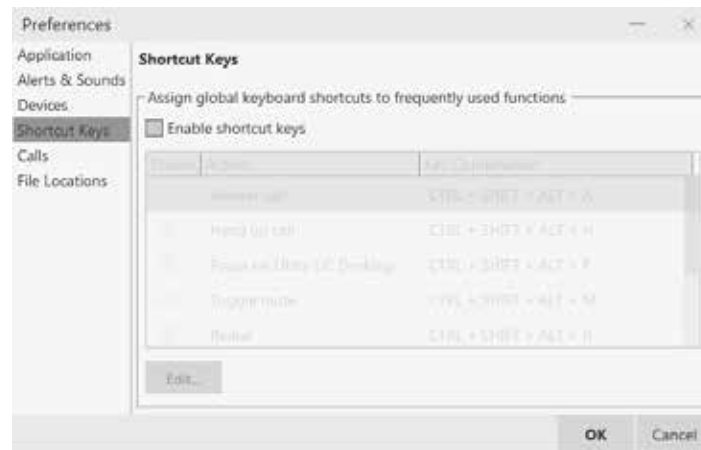
You can enable shortcut keys to several functions.

Customizing the **Shortcut Key Combinations**:

You can change the default key combinations.

1 Make sure **Enable shortcut keys** is checked and the action you want to change is enabled.

2 Select an **Action** and click **Edit**. The **Edit Shortcut Key** dialog appears.

3 Make sure there is a checkmark in the keys you want to use. You must turn on at least two keys.

4 Type the desired letter or number in the field. For example, the following creates the shortcut combination **Shift**-**Alt**-**U**.

The following rules apply:

• You cannot override standard Microsoft Windows combinations such as **Control**-**Alt**-**Delete**.

• The shortcut applies when Ubity UC Desktop is running, regardless of the application that is in focus. For example, if Ubity UC Desktop is running but another application has focus, pressing **Control**-**Alt**-**Shift**-**A** will answer an incoming call.

• If another application has the same shortcut combination, then which application was started later has control over that combination.

• If the shortcut is not valid at a particular moment, then it has no effect. For example, pressing **Control**-**Alt**- **Shift**-**A** has no effect if there is no incoming call in Ubity UC Desktop.

❺ PREFERENCES – CALLS
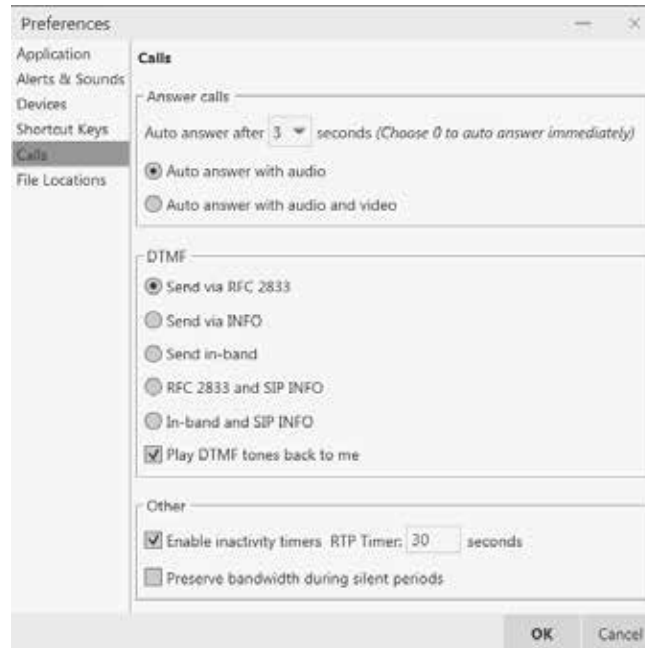
Field	Description
Answer Calls	These settings let you configure how you want auto answer to handle incoming calls, when **Auto Answer** is enabled. (To enable **Auto Answer**, see page 15)
DTMF	You may need to change the DTMF configuration if you cannot interact with interactive voice response systems (auto attendants, voice-activated menus, and so on). Contact Ubity's technical support or system administrator for the correct setting.

Field	Description
RTP	This timer controls how calls are disconnected when Ubity UC Desktop determines that there is a problem with the call and the other party has probably disappeared (assuming that you have not yourself detected the problem and hung up manually). Typically, the timer is enabled. It is recommended that you not disable it. You can change the length of the timer, but do not set it to less than 30 seconds.
Preserve bandwidth	When this feature is on, Ubity UC Desktop stops sending audio when you are not talking. When this feature is off, Ubity UC Desktop always sends audio, which uses more bandwidth but may result in better call quality. Typically off. However, if you are using a slow (dial-up or ISDN) connection, you may want to turn it on.

6 **PREFERENCES – FILES & WEB TABS**
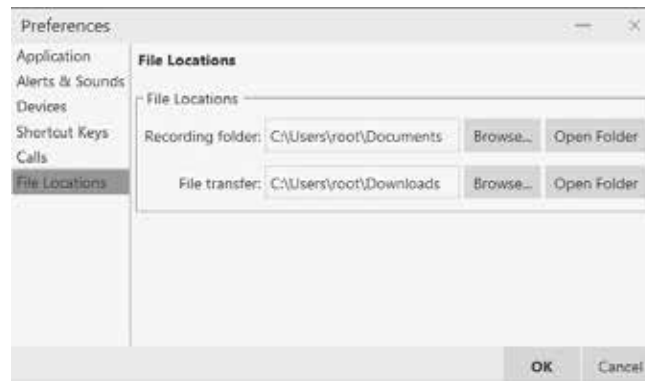
Field	Description
Recording folder	The folder where files for recording of phone calls will be saved.
Transfer folder	The folder where received files will be saved.

8 — APPLICATION HOT KEYS

Function	Keyboard Shortcut
Making or answering a call	
Answer an incoming call	**Control** + **N**
Decline an incoming call	**Control** + **D**
Redial the last dialed number	**Control** + **R** or **Control** + **R** then **Enter**
End the call End the conference call (hang up on all participants)	**Control** + **E**
During a call	
Mute your voice during a call	**Control** + **M**
Hold or resume the call when the focus is on the **Call** panel	**Control** + **H**
Transfer an established call when the focus is on the **Call** panel	**Control** + **T**
Turn volume up when the focus is on the **Call** panel	**Up key**
Turn volume down when the focus is on the **Call** panel	**Down key**
Display in full screen when the focus is on the **Video** window	**F11**
Opening a window	
Open the **Messages** window	**Shift** + **Ctrl** + **M**
Open the **Preferences** window	**F8**
Open **Troubleshooting Diagnostics**	**Ctrl + F9**
Open **Help** in a browser	**F1**
Exiting	
Quit Ubity UC Desktop	**Ctrl + Q**

If some hot keys seem to not be working, you may have to **Enable shortcut keys** by checking the box under **Preferences** > **Shortcut keys**.