

Introduction

The Unity Softphone (Business Communicator) allows you to interact with the LSE phone system from your PC. You'll be able to accept calls, make calls and change settings such as call forwarding options and remote office without having to touch your desk phone, or have the Telephony Toolbar software running on your computer.

Please note that the exact options and features available will vary depending on your service pack licence. Contact telecoms@lse.ac.uk for advice on the service pack you are assigned.

INSTALLATION

To install the software, please visit the Softphone download and installation page on the LSE website.

Windows

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

OS X

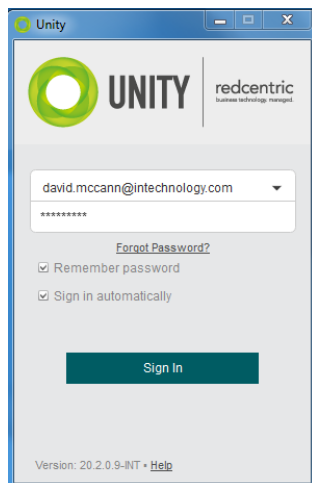
- Double-click the disk image.
- Copy the application into the Applications folder.
- Launch Unity.

Acknowledge any warnings following the install prompts. You can accept all defaults.

LOGGING IN

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

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



Enter your username and password.

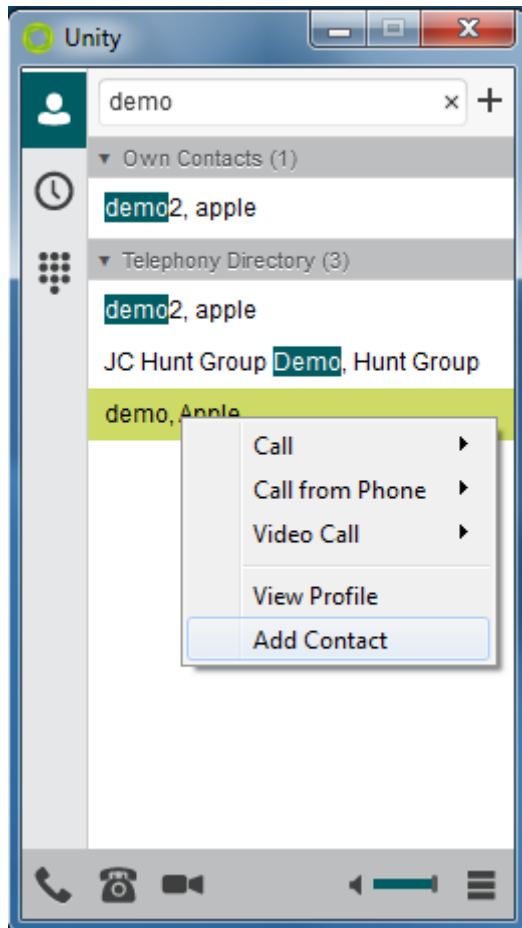
Username: Your LSE email address. For example: A.N.Other@lse.ac.uk

Password: Your Telephony Toolbar password. This will have been emailed to you directly by the Telecoms team upon migration to the new telephony system. If you are unsure, please contact telecoms@lse.ac.uk

When you have entered all of your information, click the **Sign In** button to begin using the Softphone application.

MAIN WINDOW







When you start Unity 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.



	My Information – View and update your information, for example, your presence, avatar, and location.
	My Room – This is your permanent communication room. Participants can dial in to your audio bridge.
	Contacts – View your contacts.
	Communications History – View previous chats and calls.
	Full Enterprise Directory – Show all contacts of the directory.
	Dial Pad – Make calls, it is integrated with the main window.
	Chat – Start an instant message conversation with a selected contact.
	Call – Make an IP audio call to a selected contact.
	Call from Phone – Make a Click-To-Dial call from your desk phone (or secondary device).
	Video Call – Make a video call to a selected client (VoIP).
	Menu – Open Call Settings, Preferences, and Help.
	Call settings menu – Use for quick access to call settings such as call forwarding.
	Add – Add a contact, group, or conference.

PRESENCE

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

	The green presence icon indicates that the user is online and ready for communication.
	The yellow presence icon indicates that the user is online but has been idle or away from their computer for more than ten minutes.
	The red presence icon indicates that the user is busy and does not want to be disturbed.
	The grey presence icon indicates that the user is offline and the only available contact method is calling or chatting.
	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.

Unity can automatically update your presence to the following:

- *Busy – In Call*
- *Busy – In Meeting* (Windows only)

MAKE AUDIO OR VIDEO CALL

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

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

- When viewing a contact's profile, click the **Call**, **Call from Phone**, or **Video** button.



Call



Call from phone



Video call

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

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

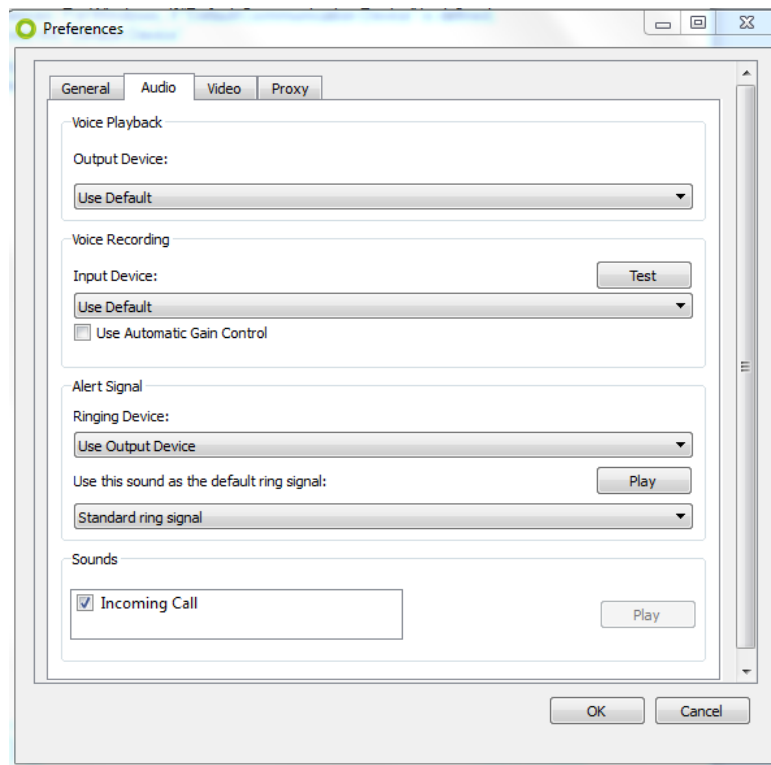
- 1) Click the Unity logo in the main window title bar.
- 2) Select *Preferences*.
- 3) Select *Audio*.
- 4) Set a playback device (speakers).
- 5) Set a recording device (microphone).
- 6) Click **OK**.

OS X

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

If “Use default” is selected, then Unity uses the default device set in the operating system preferences. For Windows, if “Default Communication Device” is defined, it is selected over the “Default Device”.

If you are using headsets, you can also select a separate device than the headset for alerting incoming calls.



CONTACTS

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

- *Contacts* – Actual people with whom you communicate.
- *Conferences* – Audio or video conference bridges that you use to communicate with others. Silent dialing into the bridge also applies to these contacts if enabled by your service provider.
- *Groups* – Containers of contacts and/or conferences.

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 Contact** button from the main window.

In the *Add Contact* dialog box, enter the contact's information and then click **Add Contact**. 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.

However, you can always share your presence information later by selecting *Subscribe* on the menu for that contact on the contact list (right-click the contact or arrow button). 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.

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. 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. 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.
- *Remove* 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.





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 as favourites or online contacts. 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.

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
	Enter additional digits using the dial pad at any time during the call (for example, to insert a conference number). The dial pad is movable and can be dragged around the <i>Video Call</i> screen to a location you set.
	Mute your microphone by clicking the mute icon.
	Adjust the volume bar to adjust the volume. Dragging it all the way to the left mutes your speakers. This is shown by a small red cross in front of the volume bar.
	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 “un-hold”. 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.
- Hide your own video.
- Add participants to the call.

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

Choose your video size from the *Preferences* and the *Video* tab. Your selection is used by default for future video calls. The available sizes are automatically presented based on your camera. The selected video size can be modified automatically depending on your CPU load and changing network conditions to optimize the video quality.

Call From Computer

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

Call From Phone

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

For remote calls initiated using the Unity, 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.

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 popup 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 popup window). If you decide to answer as voice only, the call is voice only.

Contact Name Lookup for Incoming Calls

Whenever the incoming call does not have a calling name associated with it, Unity can perform a local contact search. If the number matches one of the contacts on the Unity contact list, the name is shown on the incoming call screen along with the alert.

Whenever you retrieve your call logs/history and the call log does not have a calling name associated with it, Unity does a lookup in the local contacts and populates the name if a match is found.

Missed Call or Communication

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

Full Screen in Video Call

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

Exiting full screen mode is done by pressing the **ESC** key or the **Windows** button. Exiting full screen makes the video call go back to its original state (even if there was resizing of the window previously before going full screen).

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

Multiparty Sessions

You can have many participants in a call, either in an ad hoc multiparty call. 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.

Voice conferencing does not use a bridge but instead uses the Unity N-Way Calling supplementary service in a sequential fashion.

Call Waiting

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

Call Transfer

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

Message Waiting Indication and Voice Mail

The Message Waiting Indication (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 right-hand corner of the main window, Unity calls the predefined mailbox number to allow the user to listen to the voice mail or view the video mail.

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

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.

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.

Transfer an on-going VoIP call to a Call Park server and then retrieve it when needed. An on-going 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 Unity 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, the user has to 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.

Call Pull

Call Pull allows you to pull an on-going call from one of your devices to another one where the Call Pull feature is used. Call Pull can also be used with feature access codes (FAC), in this case, *11. In this release, user interface support has been added to the desktop so that an end user does not have to remember feature access codes.

Headset Support

You can control incoming and on-going calls from a compatible headset. The feature set supported is answer/hang up as well as mute/unmute and volume up/down. The following Plantronics headsets have been tested, although other Plantronics devices should also work:

- Voyager Pro UC
- Savi 700 series
- Blackwire C3xx, C4xx, C5xx, and C7xx
- Calisto 620
- Audio 628USB

Search

Unity supports a search of the enterprise directory. This takes place in the same *search* field that is used for both a local and presence-enabled contact list search.

Unity automatically searches the local contacts and presence-enabled contact list in addition to the enterprise directory at the same time. As soon as there are results from the enterprise directory, these results are shown on a separate list in the main window. Additionally, there maybe other search result groups from other search sources such as Lightweight Directory Access Protocol (LDAP) or Outlook.

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 (local contacts, Outlook, LDAP, or Unity telephony directory) that group is different in the user interface (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.

LDAP search (Corporate directory) needs to be enabled by Redcentric. In addition, you must 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 2007
- Outlook 2010
- Outlook 2013

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

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

Every minute, Unity 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 Unity 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, Unity 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 on-going 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. It has been tested with Outlook 2010 and Outlook 2007. 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 behaviour should be similar to 2007 and 2010, meaning the popup should not come up with Outlook 2007, 2010, and 2013. However, more tests are needed for this before official support for Outlook 2013 can be declared.

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*.

Full Enterprise Directory

Unity allows for the browsing of an entire Redcentric enterprise directory.

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

Communications History

The second icon from the top in the main window on the left-hand side of the navigation pane displays your messaging history. Double-clicking a conversation on the list opens it in a new window.

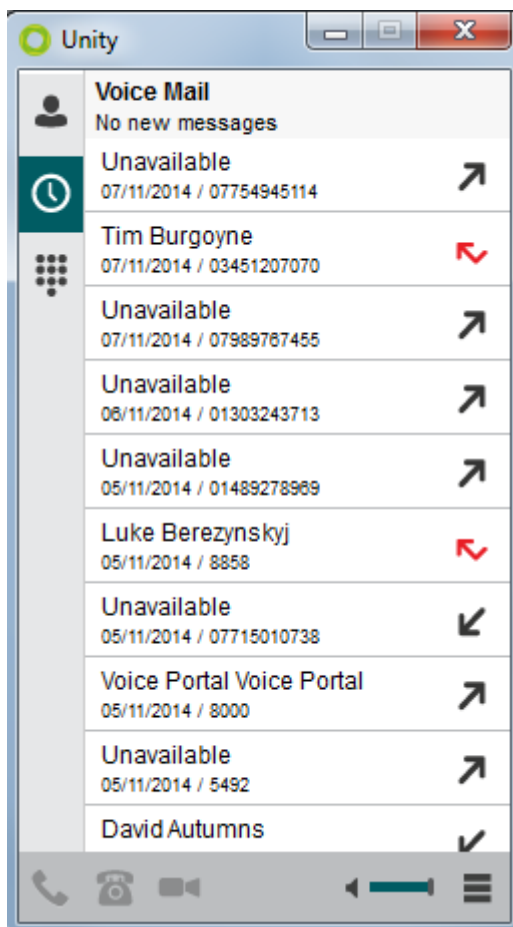
Unity saves a call history for placed, received, and missed calls. The call history makes it easy for you to redial and call back when you have missed a call or you want to easily dial a contact with whom you have recently spoken.

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

from presence-enabled contacts opens a chat window, from which a call can also be made.

To clear the missed chat indicator, you need to open the missed chat.

The *Communication History* missed communications badges can be cleared by using the right-click menu from the **Communication History** button on left-pane. The menu provides options to clear “All missed”, “Clear missed chats”, and “Clear missed calls”.



PREFERENCES

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

Windows

- 1) Click the Unity logo in the main window title bar.
- 2) Select *Preferences*.

OS X

- 1) Select Unity from the main menu.
- 2) Select *Preferences*.

Language

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

Log In

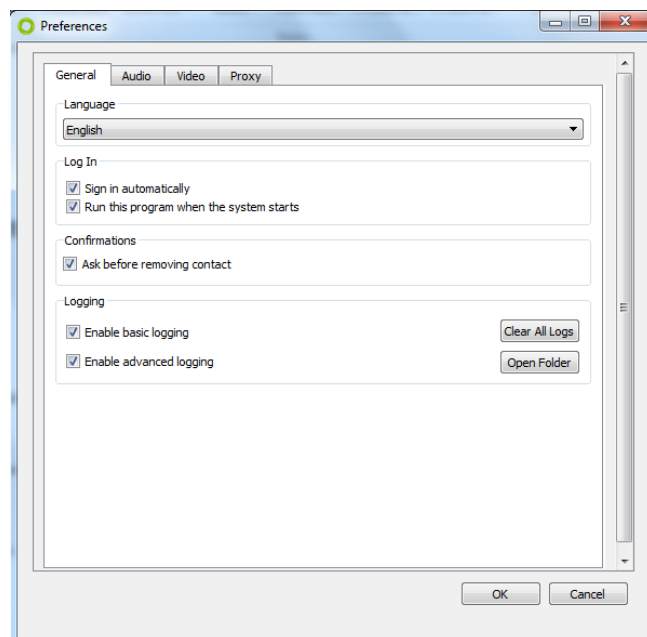
Enable or disable automatic sign-in when starting the application.

Confirmations

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

Logging

Logging is used for troubleshooting. You may be asked by Redcentric to turn on logging and then send a log file directory.



AUDIO

Output Device (Speakers)

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).

Voice Recording (Microphone)

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.

Alert Signal

Select the audio device and ring signal that is played when you receive an incoming call. The same signal is used for both voice and video calls. You can also select your own ring signal.

Sounds

Select which events cause a notification sound. To disable the sound, uncheck the check box. Select a sound event and then click **Play** to hear the sound.

VIDEO

Capture Device

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).

PROXY

Proxy Settings

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 Unity (client) proxy settings.

CALL SETTINGS

Unity supports the following service management features allowing supplementary services to be managed using the native *Unity Call Settings* window:

- Unity Anywhere
- Unity Remote Office
- Call Forwarding
- Do Not Disturb
- Hide Number (Calling Line Identification Presentation [CLIP]/Calling Line Identification Restriction [CLIR])
- Simultaneous Ring Personal

You can also use the call settings with a *Main Window* on the top of the window, if this feature is enabled. When enabled, this feature allows Unity Anywhere, Do Not Disturb, Remote Office, and Call Forwarding to be managed in the *Main Window* using single clicks or right clicks.

Unity 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 Edit icon and specifying a phone number to be used as the Remote Office number.

Forward Calls

Enter a number to which your calls should be forwarded. Different variants of call forwarding are supported, such as forwarding always, forwarding when busy, and forwarding when you cannot answer or when you are unreachable.

Do Not Disturb

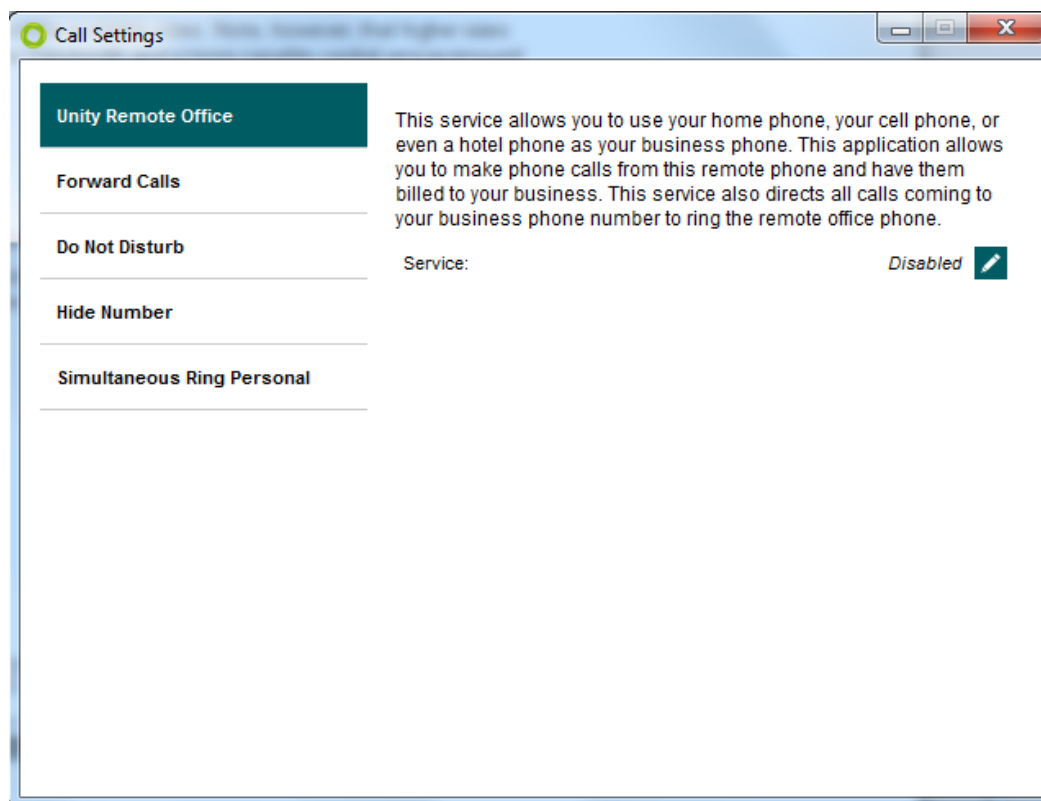
When you activate this service, all calls are typically blocked by the server and sent to voice mail. Enable this service by clicking the *Enable* check box.

Hide Number

You can hide or display your number when calling or communicating with other parties or contacts. Hide your number by clicking the *Enable* check box. To show your number, set this to “Disable”.

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.



SIGN OUT

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

Sign Out of Unity

To sign out, follow these steps.

Windows

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

OS X

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

Exit Application

To exit the application completely, follow these steps.

Windows and OS X Close the *Sign In* window.

Windows

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

OS X

- 1) Select *Unity* from the main menu.
- 2) Select *Quit Unity*.

NOTE: Closing the main window (not the *Sign In* window) rather minimizes the application to the system tray (Dock). receive calls and messages without having the *Contact List* window appearing on the desktop.

KEYBOARD SHORTCUTS FOR DESKTOP

The following table lists the currently supported keyboard shortcuts. You can use these keyboard shortcuts to quickly perform frequently used actions.

Shortcuts for Windows	Shortcuts for Mac	What it does
-	Cmd-Q	This quits the application.
CTRL+F4	Cmd-W	This closes the selected window (except for a contact card and the <i>About</i> windows).
CTRL+C	Cmd-C	This copies selected text from BroadTouch Business Communicator to the clipboard.
CTRL+V	Cmd-V	This pastes text from the clipboard to the location selected using the cursor in Unity.
Enter	Enter	<p>When in the <i>Communications</i> window, this sends a chat message (if the <i>Chat</i> view is visible).</p> <p>When in the contact list, this opens a chat with the selected contact.</p> <p>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.</p>
-	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.

