Unigy 4.3

IQ/MAX Omni User Guide

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Table of Contents

Preface 7

Chapter 1: Introducing IQ/MAX Omni 9

1.1 IQ/MAX Omni 9
1.2 Voice services 13
1.3 Unigy Soft Client online help 15
1.4 Keyboard shortcuts... 16
1.5 Free seating 19
1.6 Voice recording 19

Chapter 2: Working with IQ/MAX Omni 21

2.1 Microphones and headsets...21
 2.1.1 Install and configure a microphone or headset...21
2.2 Log in...21
2.3 System tray controls 23
2.4 Define user preferences..24
2.5 Set presence information 25
2.6 CLI... 26
 2.6.1 Configure CLI settings for line buttons.. 28
 2.6.2 Retrieve CLI information 28
 2.6.3 Toggle CLI display 29
 2.6.4 Suppress outgoing CLI values 29
 2.6.5 Sign out...30
 2.6.6 Shut down 30
 2.6.7 Navigate the IQ/MAX Omni user interface 31
2.7 Line buttons... 36
 2.7.1 Line status...37
2.8 Hoot channels and Open Connexions.. 38
2.9 FastFind 39
 2.9.1 Use FastFind... 39
2.10 Directories...41
 2.10.1 Use the *Directories* application.. 42
 2.10.2 Navigate directories... 45
 2.10.3 Display your personal directory 46
 2.10.4 Add a preferred point of contact to the Button Sheet 50
 2.10.5 Manage local Outlook contacts 50
2.11 Button Sheet and Favorites 52
 2.11.1 Use the Button Sheet 52
 2.11.2 Fixed button area 55

2.11.3 Floating button areas 57
2.11.4 Pagination 57
2.11.5 Use the Favorites application....58
2.12 History 60
2.12.1 Configure history preferences 61
2.12.2 Use the *History* application.... 62
2.12.3 View call history event details 65
2.13 Use voice mail 68
2.14 Device applications 69
2.14.1 Use a device application.... 69
2.15 Communication Barrier status messages.... 69

Chapter 3: Initiate, answer, and release calls....71

3.1 Line activation 71
3.2 Make a call 72
3.2.1 Place a call from the Button Sheet....72
3.2.2 Signal on a private line 73
3.2.3 Make a call from the *Home* application 74
3.2.4 Hunt 74
3.2.5 Make a call from a contact 75
3.2.6 Use QuickDial 75
3.3 Barge in....77
3.3.1 Barge in to a call.... 77
3.4 Call answering.... 78
3.4.1 Auto answer 79
3.4.2 Answer a call.... 79
3.5 Intercom.... 80
3.5.1 Make an intercom call.... 81
3.5.2 Intercom group calls 82
3.6 Release a call 86

Chapter 4: Manage calls....89

4.1 Adjust microphone, speaker, ringer, and call volume....89
4.2 Mute and unmute outgoing handset audio 91
4.3 Audible alerts 91
4.3.1 Record warning tone....92
4.4 Active call options.... 93
4.4.1 Privacy 93
4.4.2 Hold 95
4.4.3 Transfer a call.... 97
4.5 Diversion....98
4.5.1 One-button diversion.... 98

4.5.2 Diversion status display 99
4.5.3 Line diversion 99
4.5.4 Intercom diversion 99

Chapter 5: Speakers application 101

5.1 Use the *Speakers* application 102
5.2 Assign a line to a speaker channel 105
5.3 Speaker groups 106
5.3.1 Configure speaker groups 106
5.4 Turn speaker on and off 107
5.5 Set speaker volume 107
5.6 Mute and unmute speaker channels 108
5.7 Talk on a speaker channel or group 109
5.8 How call muting controls affect speaker users 110

Chapter 6: Manage multiparty calls 113

6.1 Conferences 113
6.1.1 Make a conference call 113
6.1.2 Unsupervised conferences 114
6.1.3 Conferencing scenarios 115
6.2 Simplex broadcast 117

Chapter 7: Button programming 119

7.1 Add a line button 121
7.2 Add a function button 122
7.2.1 Function buttons 123
7.3 Add a point of contact button 124
7.4 Add a DICM button 125
7.5 Add a speed dial button 126
7.6 Add a simplex broadcast button 127
7.7 Add an intercom diversion button 128
7.8 Add a direct dial line diversion button 129
7.9 Edit a button 131
7.10 Copy a button 132
7.11 Move a button 132
7.12 Swap buttons 132
7.13 Remove a button 133

Appendix A: Installation and administration 135

A.1 Hardware and software requirements for the Unigy Soft Client 135

A.2 Installation, upgrade, rollback, and uninstall procedures........ 135
A.2.1 Install the Unigy Soft Client software........ 135
A.2.2 Remote Soft Client installation........ 137
A.2.3 Upgrade the Unigy Soft Client software – Microsoft Windows 32-bit........ 140
A.2.4 Upgrade the Unigy Soft Client software – Microsoft Windows 64-bit........ 142
A.2.5 Roll back the Unigy Soft Client software – Microsoft Windows 32-bit........ 143
A.2.6 Roll back the Unigy Soft Client software – Microsoft Windows 64-bit........ 144
A.2.7 Uninstall the Unigy Soft Client software........ 146
A.2.8 Configure the Soft Client network connection........ 147
A.2.9 Determine the current Soft Client software version........ 148
A.3 Registration........ 149

Appendix B: Differences between desktop devices and Soft Clients........ 151

Index........ 163

Preface

About this Guide

This guide provides information for users of IQ/MAX Omni. It explains how to manage voice communications, and describes IQ/MAX Omni features, applications, call management tasks, and button programming. It also provides installation and administration details.

Copyright notices

Document Conventions

This topic describes the typographic conventions used in this manual:

- To indicate a user interface item to select or click:

  Click **Help**. The *Help* dialog box opens.

  Style Note: This is a **san-serif bold** font.
- To indicate a sequence of UI clicks:

  Click **File ➤ New ➤ Command**.

  Style Note: This is a **san-serif bold** font.
- To indicate window, screen, or panel names:

  The *Help* dialog box opens.

  Style Note: This is an *italicized* font.
- To indicate text to be typed or entered for **`user input`** or `command names`:

Type **install** at the prompt and press **Enter**.

Style Note: This is a **Fixed-Width Bold** font.

Type ls -al at the prompt and press **Enter**.

Style Note: This is a Fixed-Width Bold font.

- To indicate variables to be typed or entered:

  Type ***yourPassword*** and press **Enter**.

  Style Note: This is a ***Fixed-Width Bold Italic*** font.

- To indicate screen text such as prompts:

  At the Enter your password prompt, type your password.

  Style Note: This is a Fixed-Width font.

- To indicate file and directory names:

  The error.log file is stored in /var/log.

  Style Note: This is a Fixed-Width font.

- For references to other documents:

  Refer to the *Security Administrator Guide*.

  Style Note: This is an *italicized* font.

Space Designator

When the user needs to type a space in a command, a single space is used in the command text.

Key Combinations

Many instructions include key combinations where it is necessary to press two keys simultaneously. For example, when **CTRL+C** is specified, it means press and hold down the **Control** key and press **C** at the same time.

Note styles

Note

This is a Note and is used to alert you to important information.

Tip

This is a Tip and is used to provide helpful suggestions or hints.

Caution

This is a Caution and is used to alert you to any procedures in which extreme caution must be used.

Warning

This is a Warning and is used to alert you to dangerous situations or procedures that must be completed in a specific manner to prevent a dangerous or damaging situation.

1 Introducing IQ/MAX Omni

1.1 IQ/MAX Omni

IQ/MAX Omni is a licensed Unigy Soft Client product that provides communication services through a computer's audio interface.

IQ/MAX Omni is a software communications portal that provides access to dial tone lines, intercom, speaker channels, private wires, and hoots. It can be used to manage contacts, view communications history, program buttons, and manage presence information from the desktop.

Note

The Unigy Soft Client does not support Remote Desktop access from a remote computer into a computer where the Soft Client software is installed. You must perform all actions locally on your Soft Client computer.

Applications

IQ/MAX Omni provides access to features through the following applications:

- **Home:** Hotlist access to frequently used contacts and function keys. The *Home* application can be used to search, view contact details, make calls, and execute functions.
- **Favorites:** Quick access to contacts used on a regular basis, based on points of contact defined in the Button Sheet.
- **Directories:** Contact details, including point of contact information. The *Directories* application includes information from the Unigy enterprise directory, a personal directory, and local contacts that are managed through Outlook.
- **History:** Detailed information about all of the communication events for the user.
- **Speakers:** Access to speaker channels and hoots.
- **Button Sheet:** A Button Sheet layout that resembles the Button Module on a turret. The Button Sheet is used to access lines, contacts, speed dials, functions, and other programmable features through the Button Sheet.

Note

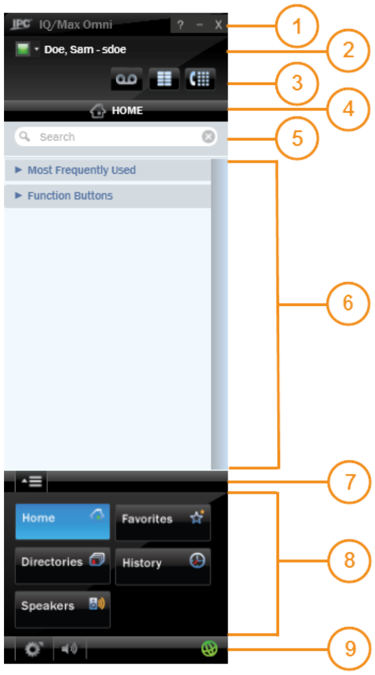
Any authorized device applications are displayed below the standard application buttons.

IQ/MAX Omni user interface

The IQ/MAX Omni main window displays on the desktop after logging in. By default, the *Home* application displays in the main window when IQ/MAX Omni starts, and the *Activity* display is displayed in the upper right corner of the desktop.

The following figure shows the elements of the IQ/MAX Omni main window when the *Home* application is displayed.

Figure 1: IQ/MAX Omni main window



1	**Title bar:** Identifies IQ/MAX Omni and provides window controls.
2	**Message area:** Shows messages or presence information.
3	**Toolbar:** Provides general controls. From left to right, the icons in this area access voice mail, launch the Button Sheet, and open the Dial Pad.
4	**Application title:** Displays the name of the active application.
5	**Search box:** Provides an entry form for searches.
6	**Application display area:** Displays information for the active application. Right-click options on entries in this area are used to perform actions for an entry.
7	**Resize control:** Mouse over the top of the application menu bar. When the resize pointer is displayed, click and drag the pointer up or down to resize the application display area.
8	**Application area:** Provides control and status information for the active application. The menu icon at the left provides access to the application menu; the menu options will differ depending on the application. This area may also show status information for the active application. **Application buttons:** Provide access to the applications. To display another application, click the application button.
9	**Main menu bar:** Provides general controls for IQ/MAX Omni. The left side of the menu bar displays the **Tools** icon that provides access to the *Tools* menu, which enables you to configure preferences, select audio devices and adjust their volume, access help, and sign out. Next is the **Volume** icon that displays the *Sound Preferences* dialog box for selecting audio devices and adjusting volume settings. The globe icon indicates whether IQ/MAX Omni is connected to a Unigy zone. Mouse over the icon to see the zone's virtual IP address (VIP) or click the icon to display this information in the message area.

The following control icons are included on IQ/MAX Omni:

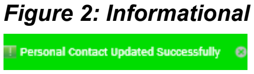
Table 2: Control icons

Icon	Description	Location
	**Presence icon:** Click on the arrow to choose a status value or enter a custom message. Mousing over the presence icon displays the custom message.	Message area
	**Voice Mail:** Click to access voice mail.	Toolbar
	**Button Sheet:** Display the Button Sheet.	Toolbar
	**Dial Pad:** Click to display the Dial Pad and make a call on any available dial tone line, or dial digits during a call.	Toolbar
	**Application menu:** Click to display menu options for the current application.	Application menu bar
	**Tools menu:** Click to display general options for IQ/MAX Omni (user **Preferences**, **Sound**, **Help**, and **Sign Out**). Hovering over the icon displays *Tools*.	Main menu bar
	**Volume:** Click to open the *Sound Preferences* dialog box within which you can select the microphone, speaker, and ringer audio devices that you will use for IQ/MAX Omni. You can also adjust the microphone and speaker volume. This is the same dialog box that is displayed when you select the **Sound** option in the **Tools** menu.	Main menu bar
	**Server connection:** Mouse over the globe icon to see server information, or click to view server information in the message area.	Main menu bar

Messages

The message area in the main window shows informational messages or prompts (in green) and error or alert messages (in red).

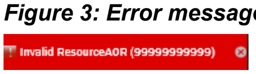
Figure 2: Informational message



Note

You see a `Contact Updated` message in the message area when you save changes to a contact entry, or when a contact entry is updated through Unigy administration.

Figure 3: Error message



When no messages are displayed, the message area shows a presence indicator and login name.

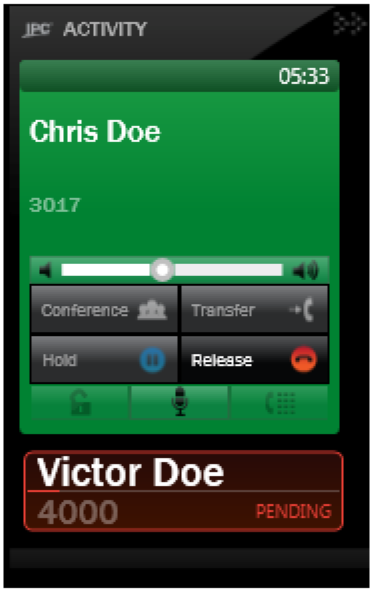
Figure 4: Presence display

A drop-down menu beside the presence indicator enables each user to set a presence status to Do Not Disturb or to create a custom message.

Activity display

The *Activity* display provides call controls and displays information about current call activity, such as incoming or pending calls, active calls, calls on hold, and other ongoing activity.

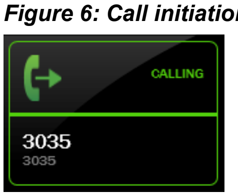
Figure 5: Activity display



Active, pending, and held calls are listed in order of arrival, with a duration bar to indicate how long a pending or held call has been waiting.

When a call is initiated, a call initiation display appears briefly in the center of the desktop.

Figure 6: Call initiation display



Once the call is established, call information appears on the *Activity* display.

FastFind

FastFind is a licensed feature that may not be available to all users. If licensed, FastFind is available from any part of IQ/MAX Omni, providing an instant search capability for contacts, speaker channel entries, history, and applications, and enabling actions for all, except Speakers, directly from the search results.

Figure 7: FastFind

QuickDial

QuickDial is a licensed feature that can be used with IQ/MAX Omni to dial a number that has been selected in a Microsoft Windows application that can access the Clipboard (such as Notepad, Word, Excel, or Outlook). The feature is initiated by using a preconfigured keyboard shortcut. By default, this shortcut is **Ctrl+D**, but your Unigy administrator might have configured a different key combination.

Configuration and customization

Users can also add personal contacts and local Outlook contacts, add favorites, add and rearrange buttons, and set preferences (some tasks require special privileges).

Users can customize IQ/MAX Omni preferences through the **Preferences** option on the main menu. For more information, see *Define user preferences* on page 24.

Note

Access to system resources and features is preconfigured in a user profile. Changes to user profiles can be made by a Unigy administrator. The user profile is stored on the Unigy system, so that it is available from any location where IQ/MAX Omni is accessed.

1.2 Voice services

Voice services provide the capability of making and managing different types of calls. Some features are not available on all communications device interfaces (CDIs).

Table 3: Voice services

Feature	Description
Barge	Enables users to join existing, non-private calls to form a bridged call.
Broadcast calls	Broadcast calls are instant conference calls on multiple private lines. Unigy supports preset (also called conference or duplex conference) and simplex broadcast calls for turrets and IQ/MAX Sync, and simplex broadcast for IQ/MAX Omni. • Preset broadcasts support up to five lines; all parties can speak and listen. • Simplex broadcasts support up to 24 lines; the call initiator can speak, and the other parties can only listen. Calls can be answered automatically or manually according to the end user configuration.
Calling Line Identifier (CLI)	Displays basic information about the parties on a call. CLI information is displayed for every call that permits display of this information. For incoming calls, the CLI information can be configured to use the information sent in the packet from the caller or to use information found in the Unigy database. The CLI display on the turret is filtered based on user preference and can show the caller number, the caller name, can toggle between number and name, or show the first matching speed dial button label. The CLI display can also include the caller's company name. Function buttons can be programmed to retrieve CLI information or toggle between name and number. For outgoing calls, the call initiator can request that CLI information be suppressed (not displayed) at the far end; but the far end can ignore the request and display the information. CLI is always sent, so that it is available to 911 responders in the event of an emergency. The Suppress CLI function can be programmed on a function button. Line buttons can be configured to display CLI or not to display CLI (including dialed digits). Private line calls do not provide CLI information.

Table 3: Voice services (continued)

Feature	Description
Conference calls	Allows users to join multiple lines together to form a conference. Conference calls are not broadcasts; all parties in a conference can speak on the call.
Diversion	Enables users to forward incoming calls to other lines (DDI diversion) or extensions (ICM diversion). Users can specify when and where the system diverts calls.
Hold	Hold allows users to suspend and retrieve a call on a dial tone or private line. Exclusive hold (privacy plus hold) prevents other users from retrieving a call that a particular user placed on hold.
Hunt	Enables a user to start a new call without explicitly choosing a dial tone line. It automatically searches for and seizes a line from a hunt group, or if a user does not have access to a hunt group, from the user's available personal extension appearances.
Intercom	Enables a user to make point-to-point calls to any user on the Unigy network. These include intercom group calls: • One-way intercom broadcasts • Group answer calls (becomes a point-to-point call with the first party to answer) • Group talkback calls (any party can answer and speak) A CDI user can have a personal extension for line calls and an intercom extension, using the same number or different numbers. Calls can be answered automatically or manually according to the end user configuration in the UMS.
Internal calls	Internal calls use internal lines to reach an extension, and are initiated by dialing another user without selecting **ICM** first. Internal and external calls default to the handset instead of the speaker. Internal lines cannot be included in broadcasts.
Lines	Resource elements used to establish external calls between users.
Line status	Displays the status of lines to which a user has access.
Momentary privacy	Briefly turns privacy on for the first user to answer a call. This prevents a second person from answering the same incoming call within a specified interval after the first person answers. The interval is set by a Unigy administrator; the default is one second.
Mute	Allows a user to mute incoming and outgoing call audio streams. For IQ/MAX Omni and Pulse Enterprise, the mute control on the *Activity* display mutes outgoing audio for the active call. Speaker muting controls set in user profiles may affect the ability of speaker users to listen or speak on a call. For more information, see *How call muting controls affect speaker users* on page 110.
Privacy	Makes an active call session private, preventing other users from barging in to the call. Privacy is not applicable for intercom calls.
Signal	Transmits an audible signal on a manual ring-down (MRD) line to alert the distant end that a call is coming in on the line.
Transfer	Transfers an active dial tone line call to another line or personal extension. Intercom calls cannot be transferred.

1.3 Unigy Soft Client online help

The Unigy Soft Client products offer user interface (context-sensitive) help that provides product information and guidance to help you understand and use the features of each product. This topic describes the help and how to access the help topics.

Two types of end users use the Soft Client products. Traders who interact with customers (IQ/MAX Omni and IQ/MAX Sync) and those who support these users (Pulse Enterprise). The Soft Client user interface is very similar for all of the Soft Client products, but each has its own view.

For more detailed information, refer to the user guide for your product; that is, the *IQ/MAX Omni User Guide* , *IQ/MAX Turret User Guide* , *IQ/MAX Edge Turret User Guide* , *IQ/MAX Sync User Guide*, or *Pulse Enterprise User Guide* .

The following types of help are available:

- Full help system
- User interface help

Full help system

The full help system provides access to all of the user interface help topics. It includes the following options on the menu bar:

- **Contents**: hierarchical table of contents based on the Soft Client UI structure
- **Index**: locate information through alphabetized index entries
- **Search**: full-text search engine that searches on text strings
- **Print**: print individual help pages

You can access this help from the Soft Client *Login* window and main window by clicking the help icon (**?**) in the title bar, or by pressing **Shift** + **?** on the keyboard. You can also access this help by clicking the **Show Tripane** link in each user interface help topic.

To locate or print help information, do the following:

- To locate a help topic in the Contents list, click the **Contents** tab, then navigate through the list to find the topic. Click the expand button (**+**) to display the topics within a content bookmark. Click the collapse button (**-**) to hide the topics.
- To search for information based on keywords, click the **Search** tab, type one or more search terms, then click **Search**. To highlight the search terms in the search results, select the **Highlight** check box.
- To locate information through index entries, click the **Index** tab, scroll to the index entry, then click the entry link.
- To print the current help topic, click the **Print** tab, select a printer, specify any print properties, then click **Print.**

User interface help

User interface help provides contextual information for each of the Unigy Soft Client user interface elements, including windows, displays, panels, and dialog boxes. It also provides information on the components that comprise these interfaces including fields, icons, buttons, and menu options. You can access this help by clicking or pressing the associated help control. The control you use is based on the type of interface as described in the following table. The system displays the help in a browser window.

Note

Your user account might not have the licenses required to access some of the interface elements described in this table.

Table 4: Ways to display user interface help

User interface element	How to access the help
Login window	Click within a field in the *Login* window then press **F1**.
Main window	Click within the main window then press **F1**.
Application displays (Home, Favorites, Directories, History, or Speakers)	Click an application button then click the Main Menu icon ( ) within the Main window menu bar and click the **Help** option. The Favorites application is displayed in the Main window, but is not available for Pulse Enterprise.
Panels associated with the applications, such as contact Details and event Details, and the ancillary panels such as Add or Edit	Click within the panel then press **F1**. For panels in which you can add or edit data, click within one of the fields then press **F1**.
Button Sheet	Click within the *Button Sheet* then press **F1**.
Dial Pad	Click within the *Dial Pad* display then press **F1**. When you click within the Dial Pad, do not click a number button or the **Call** button because doing so initiates a call.
User Preferences	Click within the *User Preferences* display then press **F1**.
Volume Control	In the *Volume Control* menu bar, click **Help ➤ Help Topics**. This displays the Microsoft Windows Volume Control help.
Activity display	Click within the *Activity* display then press **F1**.
FastFind	Click within the *FastFind* display then press **F1**.
Unigy Config Viewer	Click the **Help** button in the title bar.
Microsoft Outlook Contact dialog box	Click the Help icon (**?**) to display Microsoft Outlook help.

1.4 Keyboard shortcuts

Keyboard shortcuts enable you to easily display features or perform operations without the need to navigate menus.

These shortcuts use a combination of up to two modifier keys, including **Ctrl**, **Shift**, **Alt**, or **Windows**, and one of the following virtual keys: **Esc**, **Space**, a function key (**F1** to **F12**), left or right mouse button, or an alphanumeric character (a to z or 0 to 9), to directly perform an operation. The following table shows the Soft Client functions for which you use keyboard shortcuts and the default key combinations:

Table 5: Keyboard shortcuts

Function	Default	Custom keyboard shortcut	Notes
Launch FastFind.	**Ctrl+Spacebar**		This shows the FastFind display. When you use this keyboard shortcut, if FastFind is not visible, use the keyboard shortcut that shows the Soft Client *Main* window or click the Unigy Soft Client icon in the Microsoft Windows taskbar to change focus and display the *Main* window, FastFind, and the *Activity* display in front of any other open windows. FastFind is available only when you are logged in to the Soft Client. To use this feature, a FastFind license must be assigned to your user account.
Hide FastFind.	**Ctrl+Spacebar**		This hides the FastFind display. If you do not use this keyboard shortcut to hide FastFind, the system hides it automatically after the time period specified in the **FastFind Hide Delay** property in your preferences. FastFind continues to run in the background.

Table 5: Keyboard shortcuts (continued)

Function	Default	Custom keyboard shortcut	Notes
Initiate a call with QuickDial.	**Ctrl+D**		This dials a call to the selected number. When you use this keyboard shortcut, if the call initiation display is not visible, use the keyboard shortcut that shows the Soft Client *Main* window or click the Unigy Soft Client icon in the Microsoft Windows taskbar to change focus and display the *Main* window, call initiation display, and the *Activity* display in front of any other open windows. It is not necessary to see the call initiation display to make a call, but this can be useful if the call fails or to confirm that the correct number is being dialed. If the format of the number is not correct or the number is not available in the clipboard, the system displays an error message in the message area at the top of the *Main* window. QuickDial is available only when you are logged in to the Soft Client with IQ/MAX Omni or IQ/MAX Sync. To use this feature, a QuickDial license must be assigned to your user account.
Show or hide the Soft Client *Main* window.	**Alt+U**		This toggles to show or hide the Soft Client *Main* window and *Activity* display. Depending on the current window focus, you might have to activate this keyboard shortcut twice to display the *Main* window. You can also show and hide the *Main* window by clicking the Unigy Soft Client icon in the Microsoft Windows taskbar; however, when you use the icon to hide the *Main* window, the *Activity* display remains visible.

To use a keyboard shortcut, press the keys in the order specified; for example, to activate the keyboard shortcut CTRL+ALT+L, press and hold the **Ctrl** key, **Alt** key, then **L** key. To activate the keyboard shortcut CTRL+ALT+LEFT MOUSE, press and hold the **Ctrl** key and **Alt** key then click the left button on your mouse.

A Unigy administrator can customize the keyboard shortcuts to avoid conflicts with pre-defined or custom operating system or application shortcut keys. If you find that a keyboard shortcut does not work properly or overrides a keyboard shortcut you use for a different operation within an application, contact your Unigy administrator. If the administrator changes the default keyboard shortcuts, print this page, and in the **Custom keyboard shortcut** column, enter the specific key combinations for your reference. If a Unigy administrator changes one or more keyboard shortcuts from the Unigy Management System while you are logged in to the Soft Client, log out then log in to update your profile.

Note

The Microsoft Surface Pro on-screen keyboard does not include some of the keys that are assigned to the default Soft Client keyboard shortcuts. If you cannot use the keyboard shortcuts, either add an external keyboard or ask your Unigy administrator to change the keyboard shortcuts to use compatible keys.

1.5 Free seating

Free seating is the ability for an end user to log in to any turret within a Unigy enterprise and get the same user profile as on the user's own turret. User preferences, controls, directories, and communication history are available to an end user from any turret.

1.6 Voice recording

Unigy supports recording of intercom calls and call sessions between CDI users and distant end callers over dedicated private lines and dial tone lines. The recording system records, archives, and allows playback of the recorded conversations.

Voice recording is a critical requirement in financial trading environments, which typically record all sessions for regulatory compliance. The recorded sessions can be used for dispute resolution and business analytics.

The Unigy administrator might have configured the system to record call sessions on handsets, speakers, or both. A record warning tone can be played to indicate that recording is in progress. To ensure uninterrupted voice recording, the recording system can include two recording servers, one of which continues to record calls if the other server fails.

2 Working with IQ/MAX Omni

2.1 Microphones and headsets

Use a microphone or headset connected to your computer for all calls. External audio devices that are USB 2.0-compliant can be used.

You can use an attached microphone or headset for line, hoot, intercom, and speaker calls. Normally the microphone or headset is used for any active line and intercom calls; but when you press **Push-to-Talk** or **Push-to-Latch** on a speaker channel, the microphone or headset supports speaker channel transmission until you release the speaker channel talk path (you can still hear any active lines or intercom calls, but the microphone does not transmit on those calls).

2.1.1 Install and configure a microphone or headset

To use a microphone or headset, connect the microphone to your computer.

You can use a microphone or headset to transmit on active line and intercom calls, or on a speaker channel when you use Push-to-Talk (PTT) or Push-to-Latch (PTL).

Note

If you are using the Soft Client on a computer that is running the Microsoft Windows 7 operating system, the following restrictions apply for external microphone and headset use:

- The microphone or headset must be connected before you log in.
- If you remove the microphone or headset after logging in, the voice path might be broken.
- You cannot swap devices or audio connections while logged in.

Any connection changes you make to external audio devices while you are logged in might result in one-way voice communications until you log off and log in again. These restrictions apply only to Windows 7 systems, they are not applicable to Microsoft Windows XP systems.

---

1. Connect a microphone or headset to your computer.
2. If necessary, use the audio controls for your computer to configure the microphone.

2.2 Log in

Logging in provides access to all of the communication functions configured in your user profile.

After starting up, the system displays the *Login* window. If authorized, you can log in from any location that can connect to your Unigy enterprise. However, the Unigy Soft Client does not support Remote Desktop access from a remote computer into a computer where the Soft Client software is installed. You must perform all actions locally on your Soft Client computer.

Review the following log in considerations:

- You can log in to a Soft Client product with your login credentials from only one computer at a time.
- You cannot concurrently log in to a turret and IQ/MAX Omni or Pulse Enterprise.

- You can log in to only one voice communications device at a time. For example, if you log in while you have an active session on another device or another Soft Client, the system displays the **Force Login** button. You can cancel the log in request or perform a forced log in, which logs you off the original session and logs you in to a new session.
- If auto login is enabled, the system logs you in automatically using the stored credentials and product information you specified when you selected **Auto Login**. You can turn off auto login when you are logged in by right-clicking the **Unigy Application** icon in the Microsoft Windows System Tray and choosing **Disable AutoLogin**.
- If you can access both IQ/MAX Sync and IQ/MAX Omni, you can force a log off from IQ/MAX Sync by logging in to IQ/MAX Omni, which displays the message `Logged in Elsewhere`. Click the **Force Login** button to force a log off from IQ/MAX Sync and the associated turret and to log you in to IQ/MAX Omni.
- If you force a log off when there are active calls, the calls are dropped. This behavior is different from Alliance MX where forced log off is not permitted when there are active calls.
- If you are logged off due to a system failure or because you stopped the `UnigyClient.exe` process, wait approximately 30 seconds before logging in again. If you have not waited long enough, you will see the **Force Login** button in the *Login* window.
- The Unigy Soft Client does not support Remote Desktop access from a remote computer into a computer where the Soft Client software is installed. You must perform all actions locally on your Soft Client computer.
- In the following scenario, you will see unexpected behavior if you attempt to log in too soon: You have access to IQ/MAX Omni and IQ/MAX Sync and have **Auto Login** set to automatically log you in to IQ/MAX Sync when you log in to the Soft Client. You log in to a turret and IQ/MAX Sync. After working with IQ/MAX Sync, you decide you want to log in to IQ/MAX Omni, so you log off of IQ/MAX Sync and the turret. When you log in to IQ/MAX Omni, the system displays the message `Log on to turret and try again` because it attempts to auto log in to IQ/MAX Sync, but you are not logged in to a turret. You then click **Cancel** and immediately enter your login credentials. Instead of seeing a list of the available products, you again see the message `Log on to turret and try again`. To enable the Soft Client to display the list of available products so you can log in to IQ/MAX Omni, wait at least ten seconds after you click **Cancel** before you log in.
- You might be restricted from logging in to a Soft Client product if a BCP failover occurred and the backup zone login session capacity has been reached. If the system continues to reject your login attempts, contact your Unigy administrator.
- If you change the value in the **Primary** field in the Unigy Config Tool while you are logged in to the Soft Client, you must log out then log back in for the change to take effect.
- When you log in, if you see the message `Unexpected error occurred while startup`, the home zone software might have been rolled back to a previous version that is not compatible with the version installed on your computer. Click **OK** then right-click the Unigy Client icon in the system tray. If the **Rollback** option is displayed, roll back the software by performing the procedure *Roll back the Unigy Soft Client software – Microsoft Windows 64-bit* on page 144. If the **Rollback** option is not displayed, contact your Unigy administrator.

1. Start the Unigy Soft Client on your computer by clicking the Windows **Start** button then clicking **All Programs ➤ IPC Systems Inc ➤ Unigy Client**.

   If you do not have Microsoft Outlook open, the system displays the message `NOTICE: Please open Outlook to download local contacts`. You are not required to open Outlook; however, if you are using your Outlook contacts as local contacts within IQ/MAX Sync open Outlook to access these contacts. Click **OK** to continue with the log in.

If auto login is not enabled, the *Login* window opens; otherwise IQ/MAX Omni opens.

2. Type your user name in the **Name** field and your password in the **Password** field.

Note

The **Name** field is not case sensitive; but the **Password** field is.

---

3. If applicable, select either of the following check box options:
   - To use stored credentials and a specific license mode to log in automatically when you start the Soft Client, select the **Auto Login** check box. Selecting this option automatically enables the **Save Log On Credentials** option and saves your credentials and license mode selections for future logins. When you log in, the system does not display the *Login* window.
   - To store your login credentials so that you do not have to re-enter them each time you start the Soft Client, select the **Save Log On Credentials** check box. When you log in, the system displays the *Login* window so you can select the Soft Client product you want to access.
4. Click **Login**.
   If you have access to more than one Unigy Soft Client product, the **Available License Mode** field is enabled so you can select a product. If you have access to only one product, the product opens.
5. If applicable, choose the desired license mode and click **Continue**.
   IQ/MAX Omni opens and loads your user profile.

Note

If you selected **Auto Login**, the license mode used for login will be used automatically for your next login.

If your login is unsuccessful, you receive an error message.

2.3 System tray controls

When you start the Unigy Client, the system tray in the lower right corner of the Windows desktop displays a Unigy icon. You can right-click the Unigy icon to access Unigy Soft Client controls.

Note

The Unigy icon is not available until you start the Unigy Client.

The Unigy icon in the system tray includes the following right-click options:

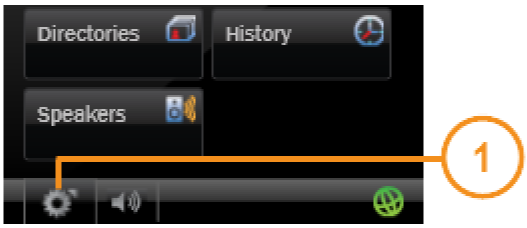
- **Unigy Config Viewer**: Access the *Unigy Config Tool* dialog to view or modify the connection to backroom resources.
- **Disable AutoLogin**: Turn off the **Auto Login** option if it has previously been enabled on the *Login* window.
- **Sign Out**: Log out of the Soft Client and return to the *Login* window.
- **Upgrade**: (only shown when an update is available) Remove the current version of the Soft Client and install an update. (Microsoft Outlook and Office Communicator must be closed.) This process does not affect any existing user configuration.

- **Rollback**: (if the server is an older version than the installed Soft Client) Remove the current version of the Soft Client and install the older version. (Microsoft Outlook and Office Communicator must be closed.)
- **Exit**: Exit the Soft Client completely and close all windows.

2.4 Define user preferences

You can define user preferences to control the operation of IQ/MAX Omni.

Figure 8: Tools menu icon

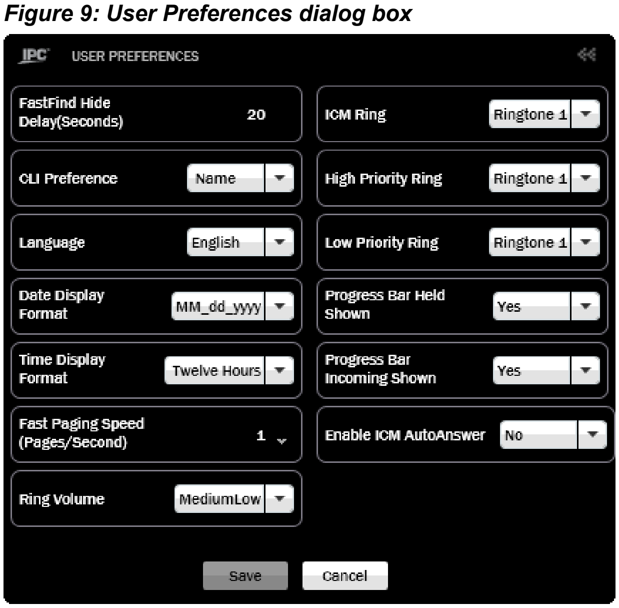


1	Tools menu icon

For details on the field values for the fields in this panel, refer to the Unigy Soft Client online help or the *Soft Client UI Guide*.

1. To display your user preferences, click the *Main* menu **Tools** icon at the bottom of the *Main* window and click **Preferences**.

Figure 9: User Preferences dialog box



2. Select or enter values for these fields:
   - **FastFind Hide Delay(Seconds)**: (6-60 seconds) Length of time FastFind is displayed without activity before the window is hidden.
   - **CLI Preference**: Display preference for active and incoming caller information (also affects call history displays):

    - **Name**: Display the contact name.
    - **Number**: Display the line number.
    - **Toggle**: Alternate between name and number displays. (Call history shows the name.)
    - **Match Label**: Display the label on a line button associated with the call. (Call history shows the label.)
- **Language**: Your language for display messages.
- **Date Display Format**: Format for date displays (also affects call history displays).
- **Time Display Format**: Format for time displays (also affects call history displays).
- **Fast Paging Speed**: (1-3 pages/second) Paging speed when the **Page Up** or **Page Down** control is held down in the Button Sheet.
- **Ring Volume**: Volume level at which the ringer is played when you receive a call.
- **ICM Ring**: Ringtone for incoming intercom calls.
- **High Priority Ring**: Ringtone for incoming high priority calls.
- **Low Priority Ring**: Ringtone for incoming low priority calls.
- **Progress Bar Held Shown**: (**Yes** or **No**) Whether to show a duration bar for held calls.
- **Progress Bar Incoming Shown**: (**Yes** or **No**) Whether to show a duration bar for incoming calls.
- **Enable ICM AutoAnswer**: Indicates whether intercom and broadcast calls are answered automatically or manually. This feature does not apply to IQ/MAX Sync and does not change HFM on a turret.

3. Click **Save** to save your preferences.

2.5 Set presence information

You can set your presence information from the main window.

Presence provides Unigy users with information about your availability. Presence information is shown only for contacts who are defined in the Unigy enterprise directory with an intercom point of contact.

Note

If you copy an enterprise directory contact that contains an intercom point of contact to create a new personal contact, that personal contact entry will also show presence information. If you create a personal contact entry directly, that entry will not show presence information.

Table 6: Supported presence states

Icon	State	Setting
(green)	Available	Automatic by system
(red)	Busy	Automatic by system
(amber)	Away	Automatic by system
(white bar on amber & red)	Do Not Disturb	User
gray with no icon	Logged out	

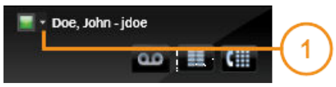
Presence information is normally based on the activity for each user. For example, if you are busy on a call, your presence information is automatically set to Busy. Depending on the line type and line configuration, Unigy system response to presence status during the call setup time will vary. After a call is connected, presence status is consistent for all line types.

To indicate that you are not available for calls when your phone is not in use, you can set your status to Do Not Disturb. You can also set a custom message to be displayed with your presence information.

1. To set your presence information, choose from the drop-down list next to your login name in the message area at the top of the main window.

   Access the drop-down list by clicking the down arrow next to the presence indicator:

   Figure 10: Presence menu

1	Drop-down menu for presence options

   The following options are available:

   - **Do Not Disturb**
   - **Reset Status** (refreshes your status information from the system)
   - **Custom Message**

2. To set a custom message, choose **Custom Message** from the presence settings.

   a) On the *Set Custom Message* dialog, type the message you want to display.

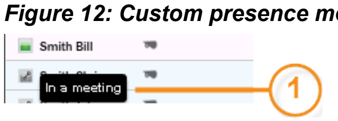
   Figure 11: *Set Custom Message* ***dialog***

   b) Click **Set.**

View a custom message for a contact by mousing over the presence indicator on a contact entry.

Figure 12: Custom presence message on a contact entry



1	Custom presence message on a contact entry

2.6 CLI

On IQ/MAX Omni, Calling Line Identification (CLI) displays the name, button label, or phone number of the party placing an incoming call. It may also display the calling party's company name. If the CLI feature is enabled and CLI information is available for the caller, the information is displayed based on user preference until the call is released. CLI information may not be available for some calls.

CLI information for a call is shown on a line button label. The CLI information can include the priority assigned to the line button associated with the call.

CLI information is also shown on the *Activity* display.

By default, CLI is enabled for all line buttons in the Unigy system. CLI display can be enabled or disabled on specific line buttons by user button programming or through system programming.

If a call is answered just after another user seizes the same line, the CLI information of the incoming party's line is displayed along with a barge-in indicator. If momentary privacy is in effect, the line cannot be seized, and an error message indicates the call is private.

Note

SIP private line ARD speaker calls may display the CLI (line resource AOR) of the far end when the user answers an incoming dial tone call on a speaker.

The following functions can be programmed on buttons to further control CLI display:

- **Retrieve CLI**
- **Toggle CLI**
- **Suppress CLI**

The following CLI user display preferences can be set for incoming dial tone calls:

- **Name**: The name of the caller (found in the packet) is displayed if this information is available; otherwise, the caller's telephone number is displayed. This is the system default setting. The label display allows 8 to 12 alphanumeric characters, depending on character widths. If the caller's name is longer than the allotted label field length, the name is truncated on the right and the missing letters are represented by an asterisk (*) .
- **Number**: The telephone number of the caller (found in the packet) is displayed if this information is available; otherwise, the caller's name is displayed. The label display allows 8 to 12 alphanumeric characters, depending on character widths. If the caller's telephone number is longer than the allotted label field length, the number display is truncated on the left and the missing numbers are represented by an asterisk (*) .
- **Toggle**: If both name and number are available in the packet, the display alternates between the caller's name and number for 40 seconds, then displays the name. Otherwise, the incoming call button label shows whatever CLI information is available.
- **Match Label**: Looks for a speed dial number on the user's button sheet that matches the CLI of the incoming call, and displays the speed dial button label. If multiple buttons match the incoming call, the display shows the label for the first matching button. If there is no match or no label is available for the button, the display shows the incoming caller's name if available; otherwise, it shows the caller's phone number.
- **Name Lookup**: Matches the CLI to a speed dial number in the Points of Contact (POCs) of the user's enterprise directory, personal directory, or on the user's button sheet and based on the match source priority configuration, displays the match to the user and optionally company name or a button label. If there is no match or no label is available for the button, the display shows the incoming caller's name if available; otherwise, it shows the caller's phone number.

Private line calls will always show the button label for CLI, regardless of the CLI display preference.

The type and font size for CLI information can be set through the turret's display preferences.

The following table lists line and connection types supported by Unigy with an indication of whether CLI information is supported for outgoing and incoming calls.

Table 7: CLI support for line types

Line or connection type	Connected party information (outgoing calls)	Calling party information (incoming calls)
Private manual ringdown	N/A	N/A
Private auto ringdown	N/A	N/A
Analog dial tone	not supported	not supported
DDI	name and number	name and number
DPNSS	not supported	number only
Euro ISDN	number only	number only
INS 1500	number only	number only
QSIG	name and number	name and number
NAPRI	not supported	number only
SIP	name and number	name and number

2.6.1 Configure CLI settings for line buttons

For each line button defined in your IQ/MAX Omni or IQ/MAX Sync Button Sheet, you can configure how CLI information should be displayed for an incoming call on that line.

Your preferences specify how calling line identity (CLI) information is displayed. You can also define function buttons to get CLI information for incoming calls (regardless of line button settings), toggle CLI displays between name and number, or suppress your CLI information for an outgoing call.

1. Navigate to a line button on the Button Sheet.
2. Right-click the button and choose **Edit Button** from the context menu.
3. Click **Adv Features** to display advanced line settings.
4. Choose one of the following options from the drop-down list of values for the **Priority Preference** field:
   - **high**: Display as a high priority call.
   - **low**: Display as a low priority call.
5. Choose one of the following options from the drop-down list of values for the **CLI Preference** field:
   - **CLI**: Display CLI information for active and incoming calls.
   - **No CLI**: Do not display CLI information for active and incoming calls. (CLI information is still stored in history events and is available when using the **Retrieve CLI** function.)

2.6.2 Retrieve CLI information

You can use a preprogrammed **Retrieve CLI** button to display the name or phone number for an incoming call.

When you receive a call, calling line or party information (CLI or CPI) is normally shown on the *Activity* display and line button for the call. If there is too much information to fit on the button, the CLI information may be truncated. If the line button is set to not display CLI information, the information may not appear at all.

You can press the **Get CLI** button to display information for the caller, even if the line button is set to not display CLI information.

The caller's name or phone number is displayed, according to your CLI display preferences. For more information, see *Define user preferences* on page 24.

For an active or ringing call, press the **Retrieve CLI** button.
If caller information is available, the *Activity* display shows full CLI information for the caller.

Note

If you have privileges to program buttons, you can program this feature on a function button, or it can be preprogrammed through Unigy administration. The function identifier to use when programming a button is **Retrieve CLI**. The default button label is **Retrieve CLI**; but you can change the label when programming the button. For information about programming function buttons, see *Add a function button* on page 122.

2.6.3 Toggle CLI display

Use a preprogrammed **Toggle CLI** button to switch from the current default CLI display (name or number) to the alternative CLI display.

When you receive a call, any calling line or party information (CLI or CPI) is normally shown on the *Activity* display.

To change the display for incoming calls, press the **Toggle CLI** button.
The CLI display for the incoming call switches from the current default setting (name or phone number) to the alternative option: from name to number, or from number to name.

Note

If you have privileges to program buttons, you can program this feature on a function button, or it can be preprogrammed through Unigy administration. The function identifier to use when you program a button is **Toggle CLI**. The default button label is **Toggle CLI**; but you can change the label when programming the button. For information about programming function buttons, see *Add a function button* on page 122.

2.6.4 Suppress outgoing CLI values

Before placing a call, you can use a preprogrammed **Suppress Outgoing CLI** button to suppress display of your calling party identification at the distant end.

You must press the **Suppress Outgoing CLI** button before a call. You cannot suppress CLI information for an active call, because the request to not display CLI is sent when the call is established.

Note

CLI suppression ends after each call. To suppress CLI information for new calls, you must enable the feature again.

---

1. To block your calling information for a call, press the **Suppress Outgoing CLI** button.
   The **Suppress Outgoing CLI** button is highlighted to indicate that the feature is enabled.
2. Initiate the call.
   No calling identity information appears at the remote end.

Note

If you have privileges to program buttons, you can program this feature on a function button through IQ/MAX Omni, or it can be preprogrammed through Unigy administration. The function identifier to use when you program a button is **Suppress Outgoing CLI**. The default button label is **Suppress Outgoing CLI**; but you can change the label when programming the button. For information about programming function buttons, see *Add a function button* on page 122.

2.6.5 Sign out

Sign out to return to the *Login* window without exiting.

Note

If you exit without signing out, the system automatically signs you out. See *Shut down* on page 30.

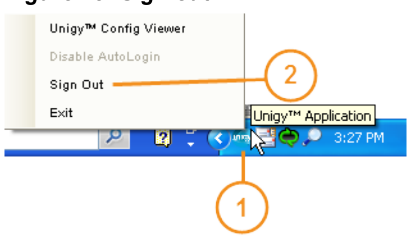
---

1. Do one of the following:
   - Click the **Tools** menu icon then click **Sign Out**.

   - Right-click the **Unigy Application** icon in the system tray at the bottom right of your desktop, and choose **Sign Out**.

     Figure 13: Sign out

1	**Unigy Application** icon
2	**Sign Out** option

   The system signs you out, then displays the *Login* window.

2. To shut down, right-click the **Unigy Application** icon in the system tray and choose **Exit**.

2.6.6 Shut down

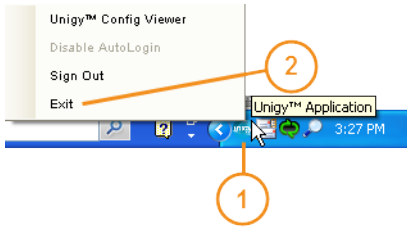
Shut down (exit) when you do not need to have turret emulation on your computer.

Note

If you exit without signing out, the system automatically signs you out. To sign out without exiting, see *Sign out* on page 30.

To shut down, right-click the **Unigy Application** icon in the system tray (at the bottom right of your desktop) and choose **Exit**.

Figure 14: Exit the Unigy Application



1	**Unigy Application** icon
2	**Exit** option

2.6.7 Navigate the IQ/MAX Omni user interface

The IQ/MAX Omni interface provides access to shortcuts, contacts, favorites, history, speakers, and buttons, and enables you to make calls and perform other actions. Buttons, icons, and menus help you manage communications.

The main window displays after you log in to IQ/MAX Omni. You can view different applications in the main window to access different types of information and controls. By default, the *Home* application displays within the main window when you start IQ/MAX Omni, and the *Activity* display appears separately in the upper right corner of the desktop. (The application that displays on the main window when you log in can be configured by your Unigy administrator.)

A search box is included on the main window to enable you to search entries within each application.

You can also use keyboard shortcuts to perform some operations. For example, if you are assigned appropriate privileges, you can use a keyboard shortcut (by default, **Ctrl + spacebar**) to open a FastFind dialog that can be used to search for all types of entries across IQ/MAX Omni. For more information, see *Keyboard shortcuts* on page 16.

For illustrations of the IQ/MAX Omni graphical user interface, see *IQ/MAX Omni* on page 9.

1. To display an application in the IQ/MAX Omni main window, click one of the following buttons:
   - **Home**
   - **Favorites**
   - **Directories**
   - **History**
   - **Speakers**

   Any authorized device applications appear below the standard application buttons.

   The selected application displays within the IQ/MAX Omni main window. Each of the applications displays entries that are specific to that application.
2. Click an entry to expand it.
   The entry expands to show more information and control icons.
3. To perform an action related to an entry on an application, right-click on the entry and choose an option for the entry from the context menu.

Note

You can also choose options from the application menu to perform actions for the application or for a selected entry.

4. To view your Button Sheet, click the **Button Sheet** icon in the Toolbar near the top of the main window.
   The Button Sheet displays in a separate window on the desktop. You can use buttons to make calls, view status information for a point of contact, or perform functions.

2.6.7.1 Use the *Home* application

The *Home* application shows shortcut entries for contacts and functions.

Figure 15: Home application

1	Most Frequently Used shortcuts
2	Function Buttons shortcuts
3	Application menu

The shortcuts that appear in the *Home* application are **Most Frequently Used** contacts and **Function Buttons**.

- The **Most Frequently Used** shortcuts include the 25 contacts that have been most frequently used.
- The **Function Buttons** shortcuts include the most frequently used function buttons defined for your user profile.

Note

You can use a shortcut entry to perform actions appropriate to the type of entry, such as calling a contact or executing a function.

1. To view shortcut entries, click the **Home** button.

The *Home* application displays shortcuts grouped by type under the following headings: **Most Frequently Used** and **Function Buttons**.

2. To collapse or expand a group of shortcut entries, click on the group heading.
3. To search for shortcut entries, enter search characters in the search field.
   As you type, entries that include the characters you have typed so far are shown. The matching characters are underlined in the results.
4. To sort entries by contact last name, click **Sort by A-Z** or **Sort by Z-A** on the *Home* application menu.
5. To view more information about a contact entry, click the entry.
   The entry expands to show additional details and displays control icons you can use to perform actions. You can also right-click an entry to display a shortcut menu.

2.6.7.2 Activity display

The *Activity* display shows call activity and provides call control options.

When you initiate or receive a call, a call initiation display appears briefly in the middle of the desktop as the call is established. Once the call is established, the *Activity* display provides information about the call and enables you to control the call.

Figure 16:** Activity **display

1	Active intercom call
2	Pending line call
3	Line active for another user (only shown if it is on your Button Sheet)

For an intercom call, the *Activity* display shows the name and extension for the other party on the call.

For a line call, the *Activity* display shows the line you use for the call and the name or number of the far end party. If the line used by the far end party is on your Button Sheet, the display also shows an indication that the line is active for another user.

For an active call, the *Activity* display provides the following controls.

Note

Depending on the type of call, some of these controls might not be available on the *Activity* display.

Table 8: Controls on the Activity display

Control	Description
	**Signal:** For manual ringdown (MRD) lines only, ring the distant end.
	**Volume control:** Drag the volume button on the slider to turn the receive volume up or down.
	**Conference:** Click to enter conference mode and add lines. (You cannot add intercom parties.)
	**Transfer:** Click to transfer an active line call. (You cannot transfer intercom calls.)
	**Hold:** Click to place an active line call on hold. If privacy is enabled, the call is placed on exclusive hold. (You cannot place intercom calls on hold.)
	**Release:** Click to end the call.
	**Privacy icon:** Click the lock symbol to enable privacy. The lock is closed when privacy is enabled and open when privacy is disabled.
	**Mute icon:** Click to mute or unmute the microphone.
	**Dial Pad:** Click to show or hide the Dial Pad during a call.

To answer an incoming call, click the button for the pending call. If you are already on a call, the current call is released.

The colors in the *Activity* display provide information about the call status:

Table 9: Colors on the Activity display

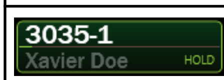
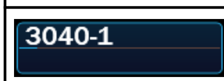
Example	Description
	**Green**: Active call (intercom).
	**Dark green:** On hold by you.
	**Blue:** Busy at another user.
	**Dark blue:** On hold by another user.
	**Red:** Incoming intercom call.

Table 9: Colors on the Activity display (continued)

Example	Description
	**Red:** High priority incoming call.
	**Brown:** Low priority incoming call.

2.6.7.3 Window management

The main window is the basic interface for IQ/MAX Omni; it is displayed after you log in.

You can move, minimize, or close the main window, display applications within the main window, and view or launch other displays that provide more information or controls. Other displays include slide-out panels attached to the main window and separate displays on the desktop.

Minimize a window

You can minimize any window that contains a standard minimize control (_) in the upper right corner. Click the control to minimize the window, and it collapses to an icon on the task bar. Click the icon in the taskbar to redisplay the window.

Resize the application display area in the main window

You can resize the application display area of the main window using the control at the top of the application menu bar. Click the control and drag up or down to change the height of the application display area.

Figure 17: Resize control for application display area

1	Resize control for application display area

Hide a panel

Slide-out panels, such as the *Dial Pad* or *Details* panels, slide out from the main window to show additional information. These panels include a Hide control that you can click to minimize the panel.

Figure 18: Hide panel control

1	Hide control for panels

Move a window or display

To move a window, click the bar at the top of the window, hold the mouse button down, and drag the window to the new location. Any panel that is attached to the main window will move along with it.

The Button Sheet can be moved independently of the main window.

Close a window

You can close any window that includes a standard close control (**X**) in the upper right corner.

If you close the main window, you can continue to receive calls, and if you have a license for QuickDial or FastFind, you can continue to use that feature. To restore the main window, double-click the **Unigy Client Application** icon in the system tray at the bottom right of the desktop, or press the Soft Client Common hot key (default is **Alt+U**). When the Soft Client is active, pressing this hot key overrides the corresponding global operating system hot key if one is defined.

2.7 Line buttons

You can program line buttons in the Button Sheet for making and receiving internal and external calls. Up to 600 buttons (including function buttons) can be programmed on IQ/MAX Omni.

Note

If you also use a turret, note the following limits:

- IQ/MAX can display 600 buttons.
- IQ/MAX Edge 100 can display 100 buttons.
- IQ/MAX Edge 200 can only display 200 buttons.

You can program any empty buttons to access:

- Private lines:
  - Internal hoot lines (which display Open Connexion icons on line buttons)
- Dial tone lines (up to 24 rollover appearances as configured in user profile)
- Speed dial numbers
- Broadcast (simplex for IQ/MAX Omni and preset or simplex for IQ/MAX Sync)

For turrets, Unigy provides one or more rollover appearances for each available line. A private line can have only one rollover appearance (one call at a time). Dial tone lines can have multiple rollover appearances (for different simultaneous calls using the same line). You can use any available rollover appearance of a line for calls. . Soft Client do not support rollover appearances.

Each rollover appearance of a line can be programmed on one or more line buttons in your Button Sheet; and the same rollover appearance can be programmed on multiple buttons.

Note

If you are using a line rollover appearance and it appears on multiple line buttons, the button that was selected to seize the line is green (indicating that you are active on the line), and the other buttons for the same line appearance are blue (indicating that the line is busy).

A line button definition includes a button descriptor (label), an identifier for the line, and additional calling line preferences. For more information, see *Add a line button* on page 121.

The following icons can appear in the top right corner of a line button to show line type information:

	Private line
	Open Connexion icon with no permission (no voice)
	Open Connexion with transmit permission
	Open Connexion without transmit permission

2.7.1 Line status

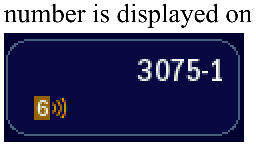
Line buttons show status information that indicates line use and activity. Line status information can appear on any line button, including fixed buttons, and is also shown on the *Activity* display.

If a line appears on the currently displayed page of a button sheet, status information appears on the line button. Line information is also shown on the *Activity* display.

The line button can show the following types of information:

- Type of line: private line, intercom, or Open Connexion (with no access, listen only, or listen and talk permission). Dial tone lines (including internal lines) do not show an icon.
- Type of activity on the line.
- Diversion. If immediate diversion is configured for a line, `DIVERTED` is displayed on the line button, provided that this feature is enabled and configured for the user in the UMS.

- Speaker numbers. If a line button is assigned the same line as a local speaker channel, the speaker number is displayed on the line button, provided that this feature is enabled and configured for the user in the UMS. If more than one speaker channel uses the same line, the lowest speaker channel number is displayed on the line button.



Each programmed line button shows the current line status. Changes in button color represent changes in a line's calling status. The following table summarizes the call status indicators on line buttons for various call states.

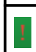
Table 11: Line button call status indicators

Call Status	Button Color	Display
Available line (idle)	Black	Button descriptor (label); private line icon (if applicable)
Active line: Line is busy (in use by you) i-Busy	Green	Button descriptor (label); private line icon (if applicable)
Hold (by you): Line is placed on hold by you i-Hold	Dark green	Button descriptor (label); blinking `Hold` indication; private line icon (if applicable); growing hold duration bar (if enabled in your user profile and preferences)

Table 11: Line button call status indicators (continued)

Call Status	Button Color	Display
Seized line (by another user): Line is busy (in use by another user) or in a broadcast call u-Busy	Blue	Button descriptor (label); private line icon (if applicable)
Hold (by another user): Line is placed on hold by another user u-Hold	Dark blue	Button descriptor (label); blinking `Hold` indication
High priority incoming call	Red	Button descriptor (label); growing incoming duration bar (if enabled in your user profile and preferences)
Low priority incoming call	Amber	Button descriptor (label); growing incoming duration bar (if enabled in your user profile and preferences)
Button not available	Gray	Button is grayed out.

The following icons provide additional status information on the *Activity* display:

	Conference call
	Barged in
	Privacy enabled

2.8 Hoot channels and Open Connexions

A hoot private line channel is a dedicated, always-on connection that allows users to talk simultaneously with everyone able to hear the discussion.

A call on a hoot private line channel can be many users listening to a single audio source with no talkback, or an open call with many people listening and speaking. For example, a hoot could be used for news feeds, for a morning call in which traders listen to the head trader, or to distribute audio to multiple branches.

Hoot lines support privacy and global muting controls and other call features (such as conferencing, hold, etc.). Users connect through speaker channels, with separate call muting controls for each. For more information about global muting, see *How call muting controls affect speaker users* on page 110.

The label for a hoot channel can describe the intended use of the line; for example, **`Morning call`**.

Open Connexion is similar to a hoot but does not support privacy, global muting and other call features (such as conferencing, hold, etc.). If the Privacy setting is turned on for a device, an Open Connexion cannot be accessed from that device. A message in the Handset Status area indicates `Line Busy` and the messaging area states `Privacy call rejected, line busy`.

Open Connexion supports local muting and permissioning. It was originally designed to provide hoot functionality for users within a Unigy enterprise and now supports bridging of external sources (SIP and Media Gateway trunks). Users and trunks are assigned to Open Connexion channels to either listen only or to speak and listen. Additionally, Open Connexion channels can be monitored through voice activity and moderated by an administrator.

Icons on line buttons, speaker channels, and call activity displays indicate the permissions:

	Open Connexion icon with no permission (no voice) - only possible if a line was assigned and permissions were removed afterwards
	Open Connexion icon with no transmit permission (listen only)
	Open Connexion icon with transmit permission (listen and talk)

If an Open Connexion line is connected on a speaker channel:

- A user who has Speaker permission on this line can listen and talk by using the Push-to-Talk (PTT) function. Only local muting is supported.
- A user who has Listener permission on this line can listen only. Push-to-Talk and Push-to-Latch functions are disabled and local muting is not available.

If an Open Connexion line is connected on a handset, a user who has Speaker permission can talk and listen; a user who has Listener permission can listen only.

2.9 FastFind

FastFind provides an instant search capability for all entries that can be displayed by IQ/MAX Omni, and enables you to view or take action on any entry among the search results.

FastFind is a licensed feature that might not be available to all end users. Licenses are assigned by Unigy administrators.

FastFind is available even when the *Main* window is closed.

By default, the maximum number of search results shown is 20; however, an administrator can configure your user profile to display up to 50 results. If more items are returned than can be displayed, you can scroll through the additional items.

FastFind searches are based on the starting point of the search:

- If the Home or Directories application is open, FastFind searches through the entire Directories tree.
- If the Favorites application is open, FastFind searches through all the Favorites entries.
- If the History application is open, FastFind searches through all the History categories (missed calls, incoming calls, outgoing calls).
- If the Speakers application is open, FastFind searches through all the Speakers entries.

When invoked, the FastFind search box remains open for the time interval specified in the **FastFind Hide Delay** in user preferences. (See *Define user preferences* on page 24.) After the specified time expires without activity, the search box closes. You can also hide the search box by pressing the hide shortcut key combination.

2.9.1 Use FastFind

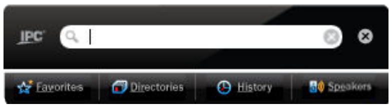
Use FastFind to perform an instant search across all entries that can be displayed by IQ/MAX Omni.

Note

The default keyboard shortcuts to show and hide the FastFind search box (**Ctrl+spacebar** for both) can be changed in your user profile. For more information, see *Keyboard shortcuts* on page 16. To request changes to keyboard shortcuts, contact your Unigy administrator.

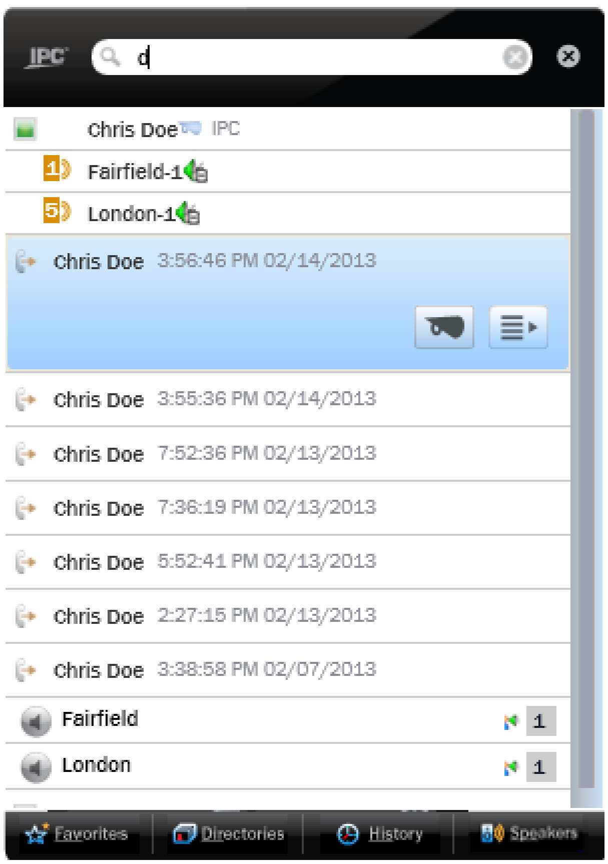
1. To display the FastFind search box, press the keyboard shortcut (by default, **Ctrl + spacebar**).

   Figure 19: FastFind search box

2. Type any alphanumeric characters into the search box to search for favorites, directory entries, speaker channel entries, or call history events.
   Search results are adjusted dynamically as you type, displaying entries in which the name or label includes the characters you have typed so far. The results display resizes dynamically to display all search results. If there are too many results for the size of the display, you can scroll to see additional entries.

   Figure 20: FastFind results display

3. To access an application, click one of the buttons at the bottom of the search box (**Directory**, **Favorites**, **Speaker**, or **History**) or click the associated button within the *Main* window.
4. Click a search result entry to expand the entry.
5. To perform an action on a search result (does not apply to Speaker results), perform one of the following actions:

- To perform the default action, double-click an entry. For example, the default entry for a line or contact is to place a call.
- To choose an action, right-click an entry and choose from the context menu.

You can navigate among search results using arrow keys, and press **Enter** to perform the default action for a selected entry.

The right-click context menu for each entry displays options that are appropriate for the type of entry. You can also click an entry to expand it and display icons you can use to perform actions (such as making a call or viewing details in a contact entry).

After you perform an action, the search box and results close.

6. To clear the search box, click the **X** symbol within the search box.
7. To hide the FastFind search box, click the Hide shortcut key (by default, **Ctrl+spacebar**).

2.10 Directories

Directories provide access to contacts, including point of contact details and a search capability. You can place calls to contacts through any directory entry that has a point of contact (POC) entry for a line, intercom, or speed dial number. Within the *Directories* application, you can view contact information from enterprise, personal, and local directories. You can add, edit, and delete contacts for your personal and local directories.

Note

A private line cannot be called through the directory unless the line is available on the Button Sheet.

The Unigy system provides the following levels of contact data:

- **Enterprise Directory**: An organizational directory that includes contacts throughout the Unigy enterprise and any system-defined counterparties. Within the *Directories* application, you can display the enterprise directory to view contact entries for any contacts that your user profile enables you to access. Contacts can be organized through categories.

  Note

  The enterprise directory is created and maintained within the Unigy Management System. You cannot add or modify contact information in the directory. If a Unigy administrator adds or removes directory categories, you must log off then log on to see the changes.

  The default name for this directory is "Default Directory," but the name can be configured.

- **Personal Directory**: Personalized subset of copied enterprise directory entries, plus any personal contacts that you add.

  If you copy a contact record from the enterprise directory to create a new personal contact record, the personal record is not updated when changes are made to the original in the enterprise directory, and any changes you make to a personal contact are not reflected in the enterprise directory.

  Your personal directory is stored centrally, so that it is available wherever you log in.

  Note

  Personal directories are only for your use, and cannot be viewed by other users. The personal directory has a flat structure; it does not support folders or groups.

- **Local Contacts** folder: You can also have a folder of local contacts from Microsoft Outlook. The Local Contacts folder is only available when running on a computer where Outlook is installed and running.

Within directories, contact entries provide a record for a particular Unigy user or counterparty. Multiple contact records within the Enterprise directory for the same person can exist if the records are included in different folders or included in multiple directories (such as Enterprise and Personal directories).

Contact records include the following information:

- First name
- Last name
- Company name
- Point of contact (POC) information
- Notes
- Address information

The Soft Client displays address information for a single address from the UMS, if the address exists, in this order: Other, Business, and Home.

Within the contact record, you can have up to 10 points of contact. Points of contact can include Private Wire, ICM (intercom), and Speed Dial.

Buttons on the Button Sheet or entries in the *Favorites* application can refer to specific points of contact. A point of contact assigned to a button must be defined as a contact entry in your Personal directory or the Enterprise directory. Buttons can have labels that are set independently of contact entries, or can use default labels.

2.10.1 Use the *Directories* application

You can view user information in contact entries through the *Directories* application, or from a contact entry in any other application.

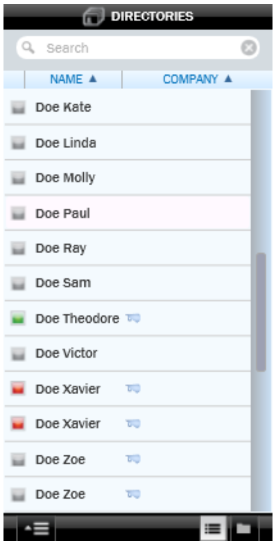
Note

- Some options may only be available when viewing a contact record in the *Directories* application.
- You see a `Contact Updated` message in the main window message area when you save changes to a contact entry, or when a contact entry is updated through Unigy administration.

---

1. To view user directory information, click the **Directories** button on the main window.
   The *Directories* application displays user contact entries in a summary format. You can scroll up and down to see additional entries.

Figure 21: Directories application



The summary format displays a presence icon (if the entry has an intercom point of contact), the contact name, the preferred point of contact (not actionable), and the company name.

2. To display additional user information, click an entry.
   The entry expands to show the presence icon, contact name, the preferred point of contact (a phone or intercom icon), company name, and a **View Contact Details** icon.

   Click the preferred point of contact icon to initiate a call with the contact. The intercom icon can be used to make an intercom call, and the handset icon can be used to initiate a speed dial or private line call.

   Figure 22: Intercom icon

   Figure 23: Handset (line) icon

3. To search for entries by contact name, type characters in the search box.

   Figure 24: Search box

   The list is updated as you type to show entries that include the characters you have typed. The matching characters are underlined in the results. Click the **X** icon in the search box to clear the search string.

4. To view additional details, click the **View Contact Details** icon.

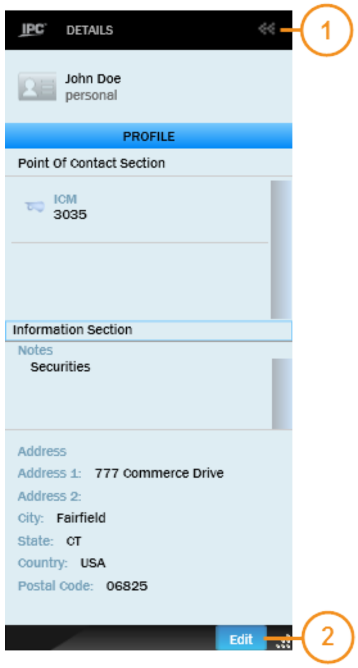
   Figure 25: View Contact Details icon

   The contact details are presented as a separate *Details* panel that slides out from the main window. The *Details* panel provides contact profile information such as phone numbers, address information, and notes.

   For personal contacts, an **Edit** button enables you to make changes to the entry. (You cannot edit enterprise directory entries.) For more details, see *Edit a personal contact* on page 49.

Figure 26: Personal contact details



1	Hide control for panels
2	**Edit** button (only for personal contacts)

Note

When you click the **View Contact Details** icon for a local contact, the Outlook *Contact* window opens.

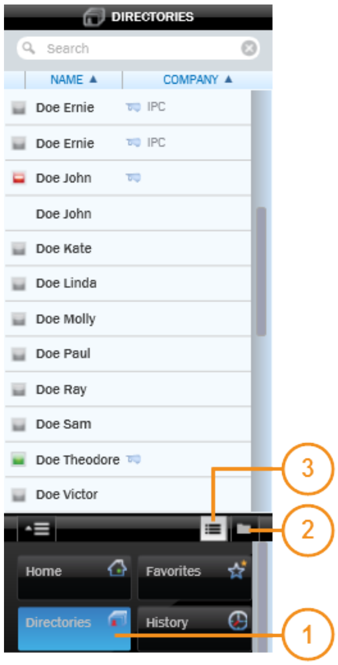
5. To hide the contact details, click the **<<** icon at the top right of the *Details* panel.
6. The following options are available by right-clicking a contact entry:
   - **View Contact Details**: View the details of the current contact including name, company, points of contact, notes, and address information.
   - **Call**: Call the contact using the preferred point of contact.
   - **Add to Personal Directory**: Add the contact to your personal directory (available only for enterprise contacts).
   - **Add Preferred POC to Favorites**: Add the contact's preferred point of contact to a button in your Button Sheet. Click the option then click the button to which you are adding the POC.
   - **Select to add to POC button**: Use this option when you add a point of contact button. When you add the button, right click the contact you want to add to the button then click this option to assign the contact's POC to the button.
   - **Delete Contact**: Delete the selected contact (available only for personal contacts).
7. The following options are available from the *Directories* application menu:
   - **Add New Contact**
   - **Sort A-Z** (by last name)
   - **Sort Z-A** (by last name)

2.10.2 Navigate directories

Within the *Directories* application, you can view contact information from enterprise, personal, and local directories.

The following figure shows the key controls for the *Directories* application:

Figure 27: *Directories* ***application controls***



1	**Directories** button
2	**Folder View** icon
3	**List View** icon

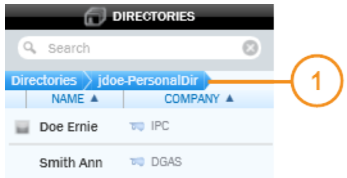
1. From the main window, click the **Directories** button to display contact information.
   The application displays contacts from all directories.
2. Click the **Folder View** icon in the application menu bar.
   The *Directories* application displays a list of the directories that are available to you.

Note

The names of directories and their organization into subdirectories are defined centrally, and are likely to be different in different organizations.

3. Click a directory.
   The *Directories* application displays any subdirectories, as well as the contact entries in the selected directory. A breadcrumb display above the entries shows which directory you are viewing and where it is in the directory structure (for example, **Directories >** ***`UserName`*****-PersonalDir**).

Figure 28: Breadcrumb display



1	Breadcrumbs

4. After displaying a directory, you can change views:
   - To view contacts from all directories, click the **List View** icon.
   - To view contacts from the currently displayed directory, click the **Folder View** icon.
   - To navigate within the directory folders, click a folder in the list or a path component in the breadcrumb display.

2.10.3 Display your personal directory

The personal directory provides information about your personal contacts.

Navigate to the personal directory folder view of the *Directories* application to display only your personal contacts.

Note

Personal contact entries appear the same as enterprise directory contacts in the *Directories* application list view. You can identify personal contacts in the following ways:

- The **Delete Contact** right-click option is only available for personal contacts.
- Personal contacts have an **Edit** button on the *Details* panel.

1. From the main window, click the **Directories** button to display contact information.
   The application displays contacts from all directories.
2. Click on the **Folder View** icon in the application menu bar.
   The application displays a list of the directories that are available.
3. Click the personal directory.
   The application displays all personal contact entries (subfolders are not supported). A breadcrumb display above the entries shows which directory you are viewing and where it is in the directory structure (for example, **Directories>*`YourLogin`*-PersonalDir**).
4. To revert to the list view, click the **List View** icon in the application menu bar.
   The *Directories* application display lists contacts from all directories.

2.10.3.1 Add a personal contact

You can add a personal contact from the *Directories* application.

A personal contact is a contact that you own. You can copy contact entries from the enterprise directory as described in *Copy a contact from the enterprise directory* on page 48, or create new entries for contacts not included in the enterprise directory as described here.

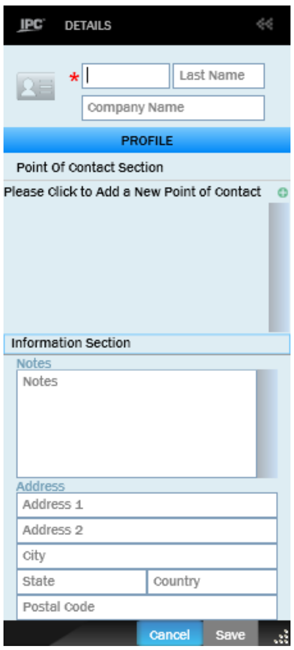
Note

If you copy an enterprise directory contact that contains an intercom point of contact to create a new personal contact, that personal contact entry will also show presence information. If you create a personal contact entry directly, that entry will not show presence information.

You can add up to 10 POCs per personal contact.

1. Click the *Directories* application.
2. Click the Application menu icon below the *Application Area* then click **Add New Contact**.
   A *Details* panel slides out to the right of the main window.

   Figure 29: Details panel for a new personal contact

3. Within the *Details* panel, provide the following information:
   - First Name
   - Last Name
   - Company Name
4. In the *Point of Contact* section, click the green icon to the right of **`Please Click to Add a New Point of Contact`**.
5. Enter the following information for each point of contact (POC):
   a) Click the up or down arrows to the left of the **Description** field to specify the resource type:
      - PrivateWire (must be available on the Button Sheet)
      - ICM
      - SpeedDial

   b) Enter a label for the POC in the **Description** field.

   c) For a speed dial number, click the up or down arrows to the left of the **Number** field to specify an icon to be displayed for the contact type:

    - Mobile
    - Work
    - Home
    - None (do not display an icon)

   d) Enter the line number, extension, or phone number in the **Number** field.

   Note

   A speed dial number is not validated. Private wire and intercom numbers are validated after entry or when you click **Save**.

   If you enter an invalid number, an error message displays in the message area on the main window and the POC number is discarded. Enter a valid number to continue.

   You may need to click in another field in order to enable the **Save** button.

   ---

6. To identify the preferred point of contact, click the radio button to the left of the POC entry.

   By default, the first POC is preferred.
7. To add another point of contact, click the green **+** button.
8. To delete a point of contact, click the red **-** button to the right of the corresponding POC.
9. In the Informational Section, enter information in the following fields:
   - Notes
   - Address:
     - Address 1
     - Address 2
     - City
     - State
     - Country
     - Postal Code
10. Click **Save** to save the entry in your personal directory.

   Note

   You cannot save a contact with an empty POC entry. Delete any empty POC entries before saving.

2.10.3.2 Copy a contact from the enterprise directory

Copy a contact from the Unigy enterprise directory to create a new contact entry in your personal directory.

You can copy an enterprise directory entry from the *Directories* application.

Note

If you copy an enterprise directory contact that contains an intercom point of contact to create a new personal contact, that personal contact entry will also show presence information. If you create a personal contact entry directly, that entry will not show presence information.

Personal contacts can be edited or deleted. Any changes you make to a personal contact do not affect the enterprise directory contact from which it was copied, and a personal contact entry is not updated if the corresponding enterprise directory contact is edited.

1. Right-click a directory entry and choose **Add to Personal Directory**.
   The message area indicates that the personal contact entry was created. The enterprise directory contact entry is copied and creates a new contact entry in your personal directory. The personal contact uses the same label; in the main directory list view the copy looks the same as the original enterprise contact.
2. To differentiate the personal contact, you can edit it and change the name or company values.

2.10.3.3 Edit a personal contact

Edit a personal contact through the *Directories* application.

You can make changes to a personal contact entry that appears in the main *Directories* application display or in the personal directory folder view.

Note

- For personal contacts that were copied from the enterprise directory, any changes you make to the personal contact do not affect the enterprise directory contact from which it was copied.
- You cannot make any changes to contacts from the enterprise directory; the **Edit** button is not available for enterprise directory contacts.

---

1. Right-click a personal contact entry and choose **View Contact Details**.
   A *Details* panel slides out to the right of the main display.
2. Click **Edit** on the *Details* panel.
3. Make any necessary changes to the information on the *Details* panel.
   - To add a point of contact (POC), click the green **+** button. You can have up to 10 POCs for each contact entry.
   - To delete a POC, click the red **-** button to the right of the corresponding POC.
   - To edit a POC, change the value in the **Number** field.

   Note

   If you enter an invalid POC number (except a Speed Dial number), the system displays the message `Invalid User AOR`, disables the **Save** button, and retains the valid POC, but displays the invalid POC. You can click **Cancel** to close the **Details** panel, then verify the new number for the POC and click **Edit** on the *Details* panel to enter it.

   By default, the first POC is the preferred point of contact. You can change the preferred POC by clicking the radio button next to a POC.
4. Click **Save** to save the changed entry in your personal directory.

   You may need to click in another field to enable the **Save** button.

2.10.3.4 Delete a personal contact

You can delete personal contacts through the *Directories* application.

Your personal directory stores contact information that you have copied from the enterprise directory, as well as contacts you have added. You can delete personal directory contacts through the main *Directories* application display or through your personal directory.

Note

You cannot delete contacts from the enterprise directory. The **Delete Contact** option is not available for enterprise directory contacts.

---

1. (optional) To be sure you are working with a personal directory entry, you can display the personal directory:
   a) On the *Directories* application display, click the **Folder View** icon in the application menu bar. The application displays a list of the available directories.
   b) Click your personal directory. The application displays the contacts in your personal directory.
2. Right-click the contact entry to be deleted and choose **Delete Contact** from the shortcut menu. The application presents a message asking you to confirm the removal of the contact and all associated points of contact.
3. Confirm that you want to remove the contact.

The contact is removed from your personal directory.

2.10.4 Add a preferred point of contact to the Button Sheet

From a contact entry, you can add a preferred point of contact button to your Button Sheet.

1. Open the Button Sheet and navigate to a page with an empty button.
2. Open the *Directories* application and navigate to the contact entry that contains the point of contact to be added.
3. Right-click the directory contact entry and choose **Add Preferred POC to Favorites** from the context menu.
   All empty buttons are highlighted.
4. Click the button to which you want to add the POC
   The button is populated with information from the contact entry and the message `Button Updated Successfully` is displayed..

2.10.5 Manage local Outlook contacts

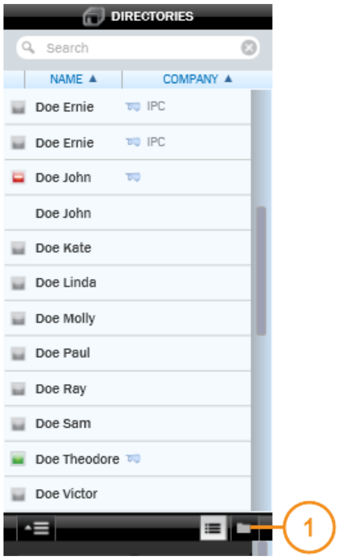
With Outlook integration, local Microsoft Outlook contacts are automatically available through the *Local Contacts* folder in the *Directories* application. You can go through the IQ/MAX Omni interface to add, edit, or delete existing local contacts in Outlook.

If Outlook is open when you log in, any contacts defined in Outlook are available as contacts in your local directory. If Outlook is not open or configured on your computer, local contacts are not available.

Your local Outlook contacts are only available to you, and are not added to the Unigy enterprise directory.

1. In the *Directories* application, click the **Folder View** icon in the application menu bar.

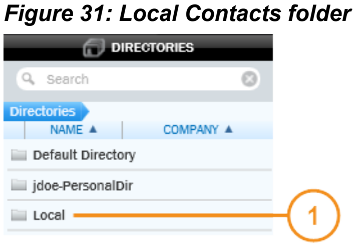
Figure 30: Folder View icon



1	**Folder View** icon

A list of directories displays.

Figure 31: Local Contacts folder



1	Local Contacts folder

2. Choose **Local Contacts**.
   The application displays your local contacts.
3. To sort directory entries, choose **Sort A-Z** or **Sort Z-A** from the *Directories* application menu.
4. To add an Outlook contact, choose **Add New Contact** from the *Directories* application menu while viewing the Local Contacts folder.
   An Outlook *Contact* window opens.

Note

If you use **Add New Contact** in the personal directory or in List View, the application presents a *Details* panel you can use to create a personal contact entry, instead of going through Outlook to create a local contact.

5. Add user information in Outlook and save.
   The contact is added to Outlook and appears as a contact in your local directory the next time you log in.
6. To edit an existing local entry, right-click the entry and choose **View Contact Details** from the context menu.

An Outlook *Contact* window opens. You can edit the information as needed.

7. To delete an existing local entry, right-click the entry and choose **Delete Contact** from the context menu.
   If you click **Yes** on the confirmation dialog, the entry is deleted from your Local Contacts folder and Outlook.
8. To call a local contact, right-click the entry and choose **Call** from the context menu.

2.11 Button Sheet and Favorites

IQ/MAX Omni displays button information on the Button Sheet and in the *Favorites* application.

Button Sheet: The Button Sheet contains programmed buttons that you can use to place calls or perform functions. Buttons can be preprogrammed for you through Unigy administration; or if you have permission, you can program buttons yourself. Access the Button Sheet by clicking the **Button Sheet** icon on the main window.

Favorites **application:** The *Favorites* application lists points of contact (POCs). The list is generated automatically from button definitions on your Button Sheet that include a valid point of contact, including speed dial buttons, private line buttons and direct intercom buttons. Dial tone lines (including voice mail resources) are not included. Access the *Favorites* application by clicking the **Favorites** button on the main window. The Favorites application is displayed, but is not available for use within Pulse Enterprise.

Note

If the description for a button is longer than the system can display within the boundaries of the button, the description is truncated and the remaining characters are represented by an asterisk (*); for example, the description **Mary Smith - Office Phone** will be displayed in Favorites as **Mary Smith - Offic*** (18 characters) and in the Button Sheet as **Mary Smi*** (8 characters), or if the text for your buttons is set to wrap to a second line, as **Mary Smith - O*** (14 characters). The number of characters displayed varies based on the character width and whether the description includes spaces or special characters; for example if you remove the spaces and hyphen from the description illustrated above, the description displayed in Favorites is **MarySmithOfficeP*** (16 characters) and in the Button Sheet as **MarySmit*** (8 characters), or with text wrapping enabled, **MarySmithOfficePho*** (18 characters).

2.11.1 Use the Button Sheet

Within the *Button Sheet*, you can add, edit, and delete various types of buttons.

The Button Sheet mimics the appearance of a Button Module on a turret. It displays a list of buttons in a two-column view with a variable number of rows. IQ/MAX Omni supports up to 600 buttons, shown in pages.

Each buttons page has three sections, separated by a blue divider:

- The top section shows buttons in numerical sequence for the current page of the Button Sheet (at least six rows). The number of rows shown on each page depends on the number of rows for fixed and floating buttons.
- The second section is the fixed button area. Depending on the size of the fixed button area, the last ten buttons defined in the Button Sheet (591 through 600) are shown in the same location on the display as you page through the Button Sheet. For more information, see *Fixed button area* on page 55.

- The third section displays floating buttons. On turrets, floating buttons display status information for calls associated with a button that is not currently displayed on a Button Module. The float area is not used by IQ/MAX Omni. For more information, see *Floating button areas* on page 57.

You can adjust the number of rows shown in each section by dragging the borders between the sections. No more than six rows can be used for fixed and floating buttons.

The following types of buttons are supported:

- Line
- Function
- Point of Contact
- Speed dial
- Direct ICM
- Diversion

For more information, see *Button programming* on page 119.

You can arrange buttons to meet your needs by dragging and dropping a button to a new position on the same page, copying and pasting buttons, or swapping a button with another button.

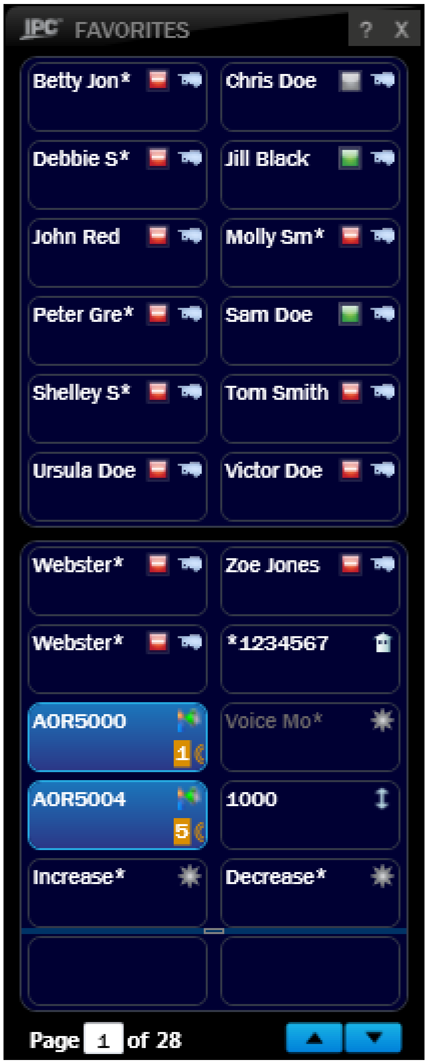
1. To open the Button Sheet, click the **Button Sheet** icon in the *Main* window Toolbar.

   Figure 32: Button Sheet icon

1	**Button Sheet** icon

The Button Sheet opens in a separate window on the desktop.

Figure 33: Button Sheet



The information shown on each button depends on the type of button:

- For contact buttons, the button shows the contact name or label and presence status. When you have a call on a contact button, the button may also show calling line or party identification and other call status information (for example, privacy, conference, or barged in).
- For line buttons, the button shows the line information and line status. If the button is programmed with the same line as a speaker channel and the user account is configured appropriately, the speaker number is displayed in orange. If multiple speaker channels have the same line, the lowest speaker channel number is displayed on the button. If the button is programmed with immediate diversion, diversion is enabled, and the user account is configured appropriately, `Diverted` is displayed in red. When you have a call on a line button, the button might also show calling line or party identification and other call status information (for example, privacy, conference, or barged in).

- For function buttons, the button shows the function name. Depending on the function, the button may also provide status information (for example, a Do Not Disturb button is highlighted when the function is enabled).

2. To scroll through the Button Sheet, click the **Page Down** or **Page Up** icon.

   A page number indicator on the bottom left of the window shows the currently displayed page within the Button Sheet.

3. To go to a specific page, enter the page number in the page number box at the bottom of the window and press **Enter**.

4. To perform the action for a button, click the button.

   The action performed depends on the button type:

   - Seizes a line (line button).
   - Performs a function (function button).
   - Initiates a call (speed dial, Point of Contact, or broadcast button). – broadcast calls are supported only for IQ/MAX Sync
   - Enables a feature (diversion button).

5. Right-click options for buttons include:

   - **Call** (line, Direct Intercom, or POC button): Place a call.
   - **View Contact Details** (for Point of Contact buttons): Display the contact profile.
   - **Copy Button**: Copy an existing button definition and paste it to an empty position on any page of the Button Sheet.
   - **Move Button**: Move an existing button assignment to another button.
   - **Remove Button**: Remove an existing button assignment.
   - **Edit Button**: Change settings for an existing button definition (not available for diversion buttons).
   - **Add Button** (only for an empty button): Add a button definition.
   - **Paste Button** (only for an empty button): Paste an existing button definition (selected by using **Copy Button** or **Move Button**) into an empty position on any page of the Button Sheet.

6. To close the Button Sheet, click the (**X**) control in the upper right corner.

2.11.2 Fixed button area

The fixed area of the Button Sheet displays buttons that appear in the same position on the display for every page of the Button Sheet.

The fixed area is located in the second section of the Button Sheet, separated from the top and bottom sections by blue dividers.

Figure 34: Fixed and floating button areas

1	Fixed button area
2	Floating button area

The fixed button area remains in the same location on the display when you use the **Page Up** or **Page Down** buttons to scroll through the pages on your Button Sheet. For more information, see *Pagination* on page 57.

The number of rows in the fixed and float areas is initially configured in your user profile. You can adjust the fixed area size from zero to five rows (displaying up to ten buttons) by dragging the blue dividers above and below the fixed area. (If you only see one blue line, drag it up to set the combined fixed and float area, then drag it down to adjust the fixed area. You will then see two blue lines.) No more than six rows can be used for the fixed and floating button areas.

The last ten buttons of the Button Sheet (591 through 600) are designated to display in the fixed button area for every page of the Button Sheet. If you display fewer than ten buttons, the buttons closer to the end of the Button Sheet will be shown. For example, if you display only two buttons in the fixed area, buttons 599 and 600 will be shown.

Note

If any buttons among the last ten are not shown in the fixed area, they are only available through pagination.

Any type of button can be on the fixed area. The fixed area can have buttons programmed in your user profile or, if you have privileges to program buttons, you can program them yourself. For more information, see *Button programming* on page 119.

An existing button definition can be copied or moved to a button that displays in the fixed area.

2.11.3 Floating button areas

The float area of the Button Sheet corresponds to the floating area on a turret's Button Module. On turrets, depending on the user configuration, floating buttons display status information for calls that are not associated with a button on the currently displayed page of a Button Module. The float area is not used by IQ/MAX Omni, but is reserved for consistency with turret displays.

The float area is at the bottom of the Button Sheet, separated from the fixed area by a blue divider.

Figure 35: Fixed and floating button areas

1	Fixed button area
2	Floating button area

The float area has a minimum of one row with two floating buttons. By dragging the blue borders above the floating button area, you can adjust the floating button area size up to six rows (up to twelve floating buttons). (If you only see one blue line, drag it up to set the combined fixed and float area, then drag it down to adjust the fixed area. You will then see two blue lines.)

2.11.4 Pagination

You can page through the Button Sheet to view, use, or program buttons.

Each page of the Button Sheet shows buttons, which can be blank or have line, feature, or function assignments. Blank buttons are available for assignments.

Figure 36: Pagination controls on the Button Sheet

1	**Page number** box
2	**Page Up**/**Page Down** controls

You can navigate through pages of the Button Sheet by pressing the **Page Up** and **Page Down** controls, or by entering a page number in the **Page number** box and pressing **Enter**. If you click and hold down the **Page Up** or **Page Down** control, the pages change according to the paging speed set in your user preferences.

Buttons are listed in sequence on each page, from the first page to the last, except that the lower part of the Button Sheet is reserved for fixed and floating buttons, separated by blue borders.

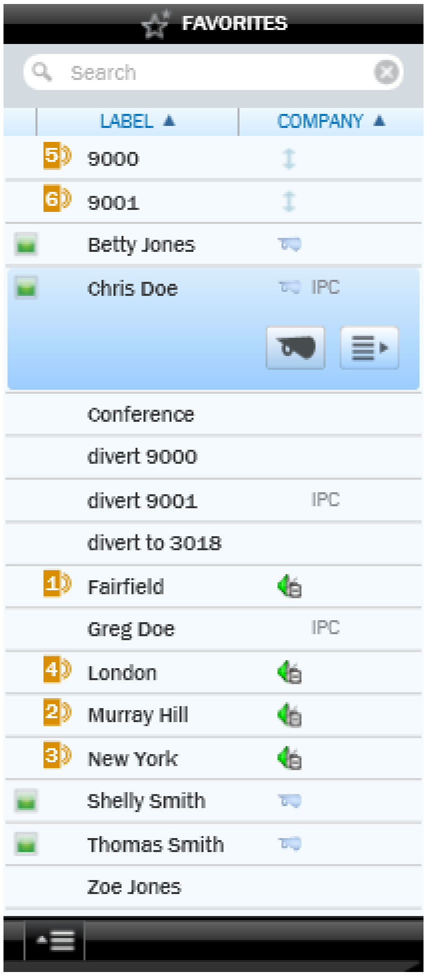
The number of buttons displayed on each page of the Button Sheet varies, depending on the number of rows reserved for the fixed button area and floating buttons (up to six rows total).

Button assignments are associated with a user rather than a particular device, making them available on any turret or IQ/MAX Omni. If you use both IQ/MAX Omni and a turret, the same rows are assigned for the fixed button area and floating buttons in both interfaces.

2.11.5 Use the Favorites application

The *Favorites* application provides a list view of your favorite points of contact (POCs). The list shows any valid points of contact from your Button Sheet, including speed dial buttons, private line buttons, and direct intercom buttons. Dial tone lines (including voice mail resources) are not included.

Figure 37: Favorites application



The *Favorites* application enables you to:

- View favorite points of contact
- Search by contact name
- Sort the list of favorites (does not affect the sequence on the Button Sheet)
- View the contact details
- Place calls to a favorite

You can add, edit, or remove favorites through the Button Sheet. For more details see *Use the Button Sheet* on page 52. You can also add a preferred point of contact to Favorites by choosing **Add Preferred POC to Favorites** from a Directories contact entry.

1. To open the *Favorites* application, click the **Favorites** button on the main window.
   The *Favorites* application is displayed. The application displays favorite contact entries in a summary format.

   If there are more entries than fit on the application display, you can scroll up and down to view additional entries.
2. To search favorite entries, type characters in the search box.

As you type, the list of favorites that include the characters you have typed adjusts dynamically. The matching characters are underlined in the results.

3. To make a call to a favorite using the default point of contact, double-click the entry.

   You can also make a call by clicking the entry, then clicking the point of contact icon on the expanded entry, or by right-clicking an entry and choosing **Call** from the context menu.

4. To expand a favorite entry and display more information, click the entry.
   The entry expands.

5. The *Favorites* application menu includes the following options:

   - **Sort A-Z**: Sort favorite entries in ascending alphabetical order by the favorite label.
   - **Sort Z-A**: Sort favorite entries in descending alphabetical order by the favorite label.

   Note

   You can also sort entries by clicking the **Label** or **Company** column header. Click the heading to toggle between ascending and descending order by the label or company name.

6. The following context menu options are available by right-clicking a point of contact entry:

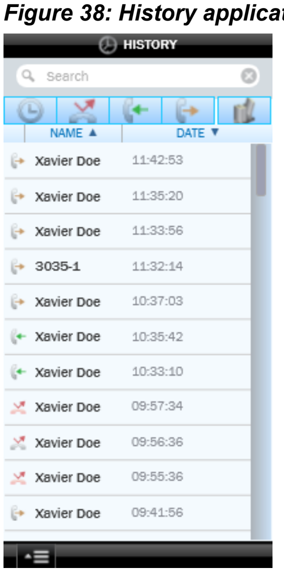
   - **View Contact Details**: The contact details are presented as a separate panel that slides out from the main display. The *Details* panel shows point of contact details for the contact: phone numbers, address, and notes.
   - **Call**: Call the contact using the preferred point of contact.

2.12 History

The *History* application displays information for recent communication events.

History data is stored centrally, enabling you to view your call history, even if you log on to IQ/MAX Omni from a different computer.

Figure 38: History application



You can use the history feature to perform the following operations:

- View events that used any media or interfaces to which you have access.
- Sort or filter by call categories such as missed, received, and initiated calls, or date range, line type, and priority.
- Search all events or events by call categories using the Search box.
- Place a call to the point of contact associated with an event.
- Use call history records to create a contact or add a point of contact to an existing personal contact.

The following call categories are logged:

- Missed
- Received (includes calls answered at a speaker even if the status remains idle)
- Initiated calls (includes ARD, MRD, and Hoot lines, which are logged when the line is seized, but not dial tone lines, for which the far end is not known until a number is dialed and the call is established)

Up to 600 of the most recent events are displayed, including missed, incoming, or outgoing calls. Older history is saved for each end user for a configured period of time (3 months by default). As additional events are logged, the oldest events are replaced by the new events. You can use the **Search** box to find results in stored history. The search is based on the type of history selected; for example, if you click the **All Calls** icon, the search is across all call history events, but if you select the **Missed Calls** icon, the search is only within the events categorized as missed calls.

The following restrictions affect how events are captured:

- History does not capture dialed digits after a call is established.
- Calls are not logged until they are completed.
- Calls that are made but not answered are logged.
- For conference calls, a single history record is created.

The display format for history events is affected by your user and line preferences. For more information, see *Configure history preferences* on page 61.

When you are viewing history, the display is updated dynamically as new call events are logged.

2.12.1 Configure history preferences

To configure your history preferences, define line preferences for which lines will create history records.

To set or change line buttons, you must have the appropriate privileges defined in your user profile.

To define history preferences for a line:

1. Navigate to the line button in the Button Sheet.
2. Right-click the line button and choose **Edit Button** from the context menu.
3. Click the **Adv Features** button to display line preferences.
4. For **CLI Preference**, select **CLI** to display CLI information in the history events for the line. Select **No** to not display CLI information.

   If you select **No**, CLI information is stored in the history events, but is not displayed.

   To display calling line identification (CLI) information in history events, you must also set the user preference for **CLI Preference** to **Name** or **Number**. For information on changing this preference. refer to *Define user preferences* on page 24.

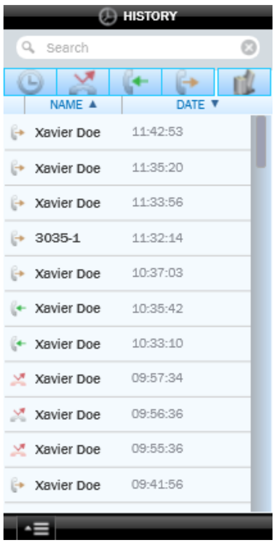
5. For **History Preference**, select **Yes** to display the line in the history events or No to not display the line in history.
6. Click **Save** to save the line preference settings.

2.12.2 Use the *History* application

You can view communications and event history information through the *History* application.

1. To view history information, click the **History** button in the main window.
   The *History* application displays history information in a summary format. The top row of the *History* display shows icons for all calls, missed calls, incoming calls, and initiated calls.

   Figure 39: History application

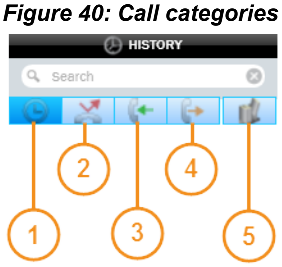
   

   Each entry displays an icon showing the type of communication, the contact name or number, and the time (for calls received the same day) or the date.

   By default, missed calls are displayed, with the most recent entries at the top of the list. You can sort entries by clicking the **Name** or **Date** column header.

   You can scroll up or down to see additional entries.
2. To view calls by category, click the corresponding icon at the top of the *History* display.

   Figure 40: Call categories

1	**All Calls**: Displays up to 200 of your most recent call events. Older events can be displayed by using Search.
2	**Missed Calls**: Displays missed calls. This is the default view.

3	**Incoming Calls**: Displays incoming calls.
4	**Outgoing Calls**: Displays calls you initiated.
5	**Filter Options**: Provides more filtering options.

The icon for the category you are viewing is highlighted.

Each event listed in the History application has an icon that indicates the type of event:

	High priority missed call (red)
	Low priority missed call (gray)
	High priority incoming call (red)
	Low priority incoming call (gray)
	Outgoing call (low or high priority)

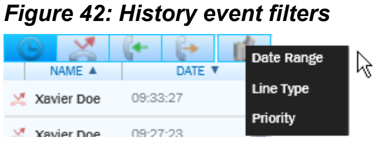
3. To filter the call list, click the **Filter Options** icon at the top of the *History* display and choose one of the following from the list:

   Figure 41: History filter icon

   - **Date Range**: Choose a date range to view events in that range.
   - **Line Type**: Choose **Private**, **Dialtone**, **Intercom**, or **All**.
   - **Priority**: Choose **All**, **High**, or **Low.**

   Figure 42: History event filters

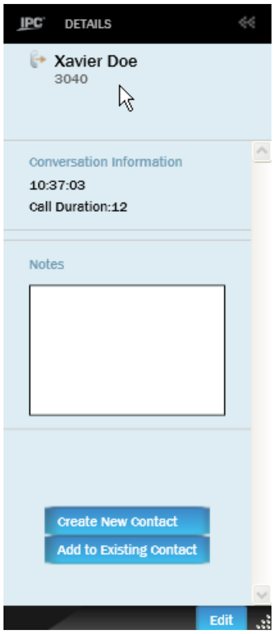
   

Note

After you apply a filter, those filter settings persist as you view different types of calls.

4. To search for history entries, enter search characters in the search field.
   As you type, entries that include the characters you have typed so far are shown. The matching characters are underlined in the results. Results can include events that are older than the last 200 events that are shown by default.
5. To view details for an entry, click the entry.
   The entry expands to show an additional line that contains a point of contact (POC) icon and an icon that you can click to view event details.
6. To initiate a call to a contact, right-click a history entry and choose **Call** from the context menu, or expand the entry and click the point of contact icon.
7. To view event details, right-click an event entry and choose **Open Event Details** from the context menu.

Figure 43: History** Details **panel

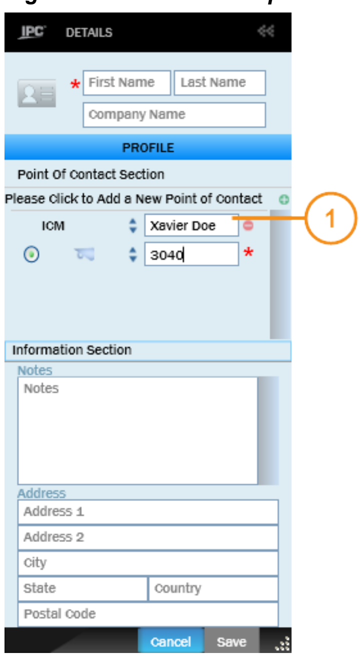


8. To create a new personal contact entry from an event record:

   a) Click **Create New Contact**.

   The application presents a *Details* panel on which you can enter or edit contact information.

   Figure 44: Event Details panel



1	POC description field

Note

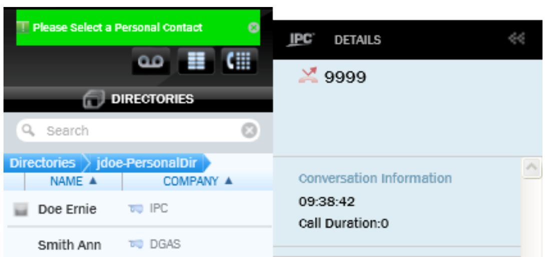
By default, the first and last name for the contact associated with the history event are both included in the POC description field (not in the **First Name** and **Last Name** fields). You can change the description and enter the first and last names into the appropriate name fields for the personal contact; you must enter at least a first name for the contact.

b) Make any desired changes on the *Details* panel, then click **Save**.

9. To add the contact method as a new point of contact for an existing personal directory entry:

a) From the *Details* panel for the call event, click **Add to Existing Contact**.
The application displays a list of personal contacts you can select in the main window.

Figure 45: Add History event point of contact to an existing contact



b) Click a personal contact entry.

c) To add the POC from the history event as the preferred POC for the contact, click **Yes** on the confirmation dialog. Click **No** to add the POC as an additional POC.

The POC for the history event is added as a POC for the selected personal contact.

Note

To be added to the **Number** field, the POC number must be shown in the CLI information for the history event.

10. The following options are available on the *History* application menu:

- **Sort A-Z**
- **Sort Z-A**

2.12.3 View call history event details

You can view detailed communications event history through the *History* application.

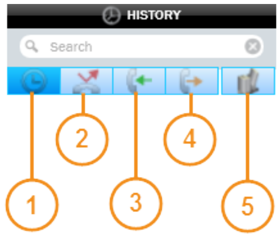
1. To view history information, click the **History** button on the main window.
The *History* application displays communications history information in a summary format. Each entry shows an icon showing the type of communication, the contact name or calling line identifier, and the date or time.

   The top row of the *History* application display shows a clock icon (click to view all calls), and icons for missed calls, incoming calls, and outgoing calls. By default, missed calls are shown when you first access the *History* application.

2. To redial a contact from a history event, right-click the event record and choose **Call** from the context menu, or expand the entry and click the point of contact icon.

3. To view calls by category, click the corresponding icon at the top of the *History* display.

Figure 46: Call categories



1	**All Calls**: Displays up to 200 of your most recent call events.
2	**Missed Calls**: Displays missed calls. This is the default view.
3	**Incoming Calls**: Displays incoming calls.
4	**Outgoing Calls**: Displays calls you initiated.
5	**Filter Options**: Provides more filtering options.

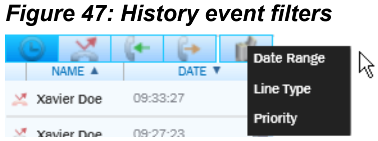
The icon for the category you are viewing is highlighted.

Each event listed in the History application has an icon that indicates the type of event:

	High priority missed call (red)
	Low priority missed call (gray)
	High priority incoming call (red)
	Low priority incoming call (gray)
	Outgoing call (low or high priority)

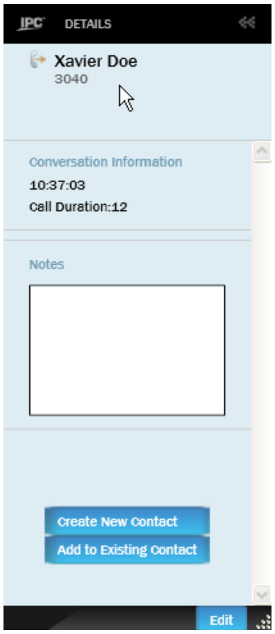
4. To filter the call list, click the **Filter Options** icon at the top of the *History* display and choose one of the following from the list:
   - **Date Range**: Choose a date range to view events in that range.
   - **Line Type**: Choose **Private**, **Dialtone**, **Intercom**, or **All**.
   - **Priority**: Choose **All**, **High**, or **Low.**

   Figure 47: History event filters

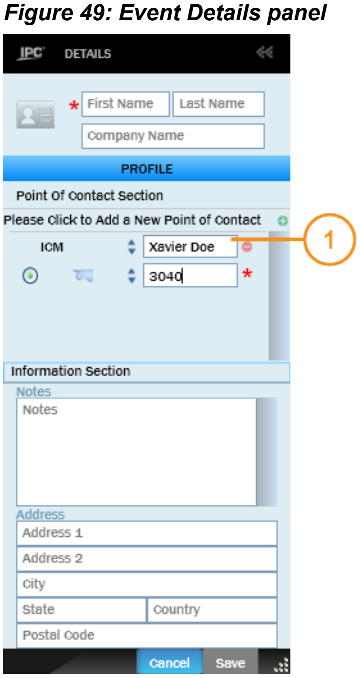
5. To view event details, right-click an event entry and choose **Open Event Details** from the context menu.

Figure 48: History event details



6. To add notes to the event, click the **Edit** button.
7. To create a new personal contact entry from the communication event record:
   a) Click **Create New Contact**.
   The application presents a *Details* panel on which you can enter or edit contact information.

Figure 49: Event Details panel



1	POC description field

Note

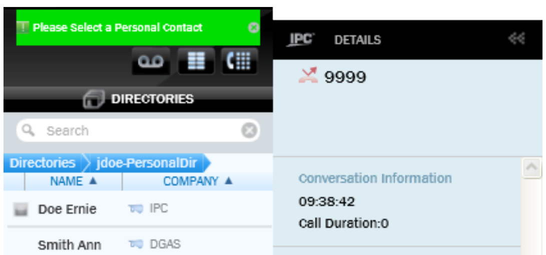
By default, the first and last name for the contact associated with the history event are both included in the POC description field (not in the **First Name** and **Last Name** fields). You can change the description and enter the first and last names into the appropriate name fields for the personal contact; you must enter at least a first name for the contact.

b) Make any desired changes on the *Details* panel, then click **Save**.

8. To add the contact method as a new point of contact for an existing personal directory entry:

a) Click **Add to Existing Contact**.
The application displays a list of personal contacts you can select in the main window.

Figure 50: Add History event point of contact to an existing contact



b) Click a personal contact entry.

c) To add the POC from the history event as the preferred POC for the contact, click **Yes** on the confirmation dialog. Click **No** to add the POC as an additional POC.

The POC for the history event is added as a POC for the selected personal contact.

Note

To be added to the **Number** field, the POC number must be shown in the CLI information for the history event.

2.13 Use voice mail

Access voice mail using the **Voice Mail** button on the main window or a preprogrammed function button on the Button Sheet.

To use voice mail, you must have a voice mail provider configured for your Unigy system through Unigy administration. Any personalization is done through the voice mail system.

The **Voice Mail** button provides access to messages.

Figure 51: Voice mail button

1	**Voice Mail** button (enabled)

If voice mail is not enabled or if no messages are available, the voice mail button is grayed out.

When new messages are waiting, the voice mail button is green:

Figure 52: Voice mail messages waiting

A **Voice Mail** button can be configured on your Button Sheet through Unigy administration. When you have a message waiting, the *Favorites* button displays `Voice Mail Waiting`.

1. To access voice mail messages, click the **Voice Mail** button on the main window or on the Button Sheet.
2. Follow the prompts in the voice mail system to play messages or perform other voice mail functions.

2.14 Device applications

Device applications are third party applications that can increase productivity by giving users fast access to custom tools and applications.

Unigy administrators can configure device applications and make them available to specific users and groups. If application settings are changed, you must sign out and log in again to see the updates.

2.14.1 Use a device application

Click an application button on the main window to use a device application.

Only one device application can run at a time. If a device application is already running and a second device application is opened, the first device application is closed before the new one launches.

If a device application is configured, the application icon is displayed below the standard application buttons on the main window. If too many device applications are included to fit, use the scroll bar to display them.

1. To use a device application, click the application button on the main window.

   See your administrator for details on using or closing a device application.

   The application runs in the application display area on the main window.
2. To change the size of the application display area, click the top of the application menu bar and drag the border up or down.

   When you sign out, the device application closes.

2.15 Communication Barrier status messages

For Unigy enterprises that are integrated with the IPC Compliance Policy Engine, communication barrier policies are enforced.

If a Unigy end user attempts a call or action that is restricted by a compliance policy, then an error message is displayed on the end user's CDI.

For example, if the end user attempts to call or transfer a call to a party that they are barred from communicating with, `Error Party Barred` will be displayed in the CDI's status area. Also, if the end user attempts to seize a barred line (directly or indirectly by joining a call that involves a barred line), then `Error Line Barred` will be displayed on the CDI.

3 Initiate, answer, and release calls

3.1 Line activation

When you access a line, the line becomes active. The response provided on the active line depends on the type of call and the type of line. This topic describes the general behavior expected for different types of lines and calls.

For a line to be accessible, it must be programmed on the Button Sheet by an administrator or an end user with sufficient privileges. Only lines that are on the Button Sheet can be used.

You can seize a line or join a call on a line that is in any of the following states:

- Idle
- Incoming (ringing if an audible ring is enabled)
- Busy in a call (unless call is in a privacy mode)
- On hold

When a line becomes active, IQ/MAX Omni provides feedback to indicate the line status and activity:

- For a public switched line, IQ/MAX Omni provides dial tone; dial to establish the call.
- For a Manual Ringdown (MRD) line, the private line is immediately connected to the destination. If the destination is configured to use a speaker, begin talking immediately. If the destination is configured to use a handset or there is no response, use **Signal** to ring the destination.
- For an Automatic Ringdown (ARD) line, the system automatically rings the destination. The destination must answer for an ARD call to connect.
- For a broadcast call, all lines assigned to the call are activated and audio is presented for those lines. If some destination lines are busy, those lines are not included. The lines that are connected are shown as I-busy.
- When users join a line in a call (barge in), the system displays a barge-in indicator and CLI information for the last person to join is shown to all users (including the barger). If the intrusion tone feature is enabled, users will hear a tone when a user joins the call. If a repeating intrusion tone is supported, users will hear the intrusion tone periodically throughout the call until the last person to barge in leaves the call.
- If a call is made from a handset or headset while one or more speakers are latched, the system unlatches the latched speakers.
- If a call is initiated by dialing a number on the Dial Pad, and implicit hunt is enabled, the system tries to find and activate an available line.
- For an incoming call, audio is enabled when the line is accessed.
- If the line is on hold, audio is enabled when the line is accessed.

When a call is active on a line, the line button displays line and call status information. Additional information and call controls are shown on the *Activity* display. Depending on the line and call type, the information can include the line type, button label, status, dialed digits, calling line or party information, or call duration bar. The preferences can be customized to provide the most useful information for each user.

When the line is released, the session ends. For multiparty line calls, the session ends when the last user releases the line.

3.2 Make a call

You can make a call from any contact entry, by clicking a Favorites button, by dialing, or by clicking a speaker channel.

Note

If you have an active call and switch from a wireless to a wired network connection, or from a wired to wireless connection, the call is dropped, an error message is displayed indicating that you need to log in again, and you are returned to the *Login* window.

If you make a call from a handset or headset while you have one or more speakers latched, the system unlatches the latched speakers. After you leave the call, you will have to relatch the speakers.

1. Initiate a call using any of the following methods:
   - To call a contact using the preferred point of contact, double-click a directory contact entry, or right-click on a contact entry and choose **Call**. You can also click the contact entry to expand it, then click on an active point of contact icon.

     To call using a different point of contact, right-click the contact entry, choose **View Contact Details**, and click the alternate point of contact on the contact profile.
   - Click a line, speed dial, point of contact, or broadcast button on the Button Sheet.

     To signal on a manual ringdown (MRD) line, click the **Signal** button on the *Activity* display after establishing the call.
   - Click the Dial Pad icon in the main window Toolbar, enter the number on the Dial Pad, and click the **Call** button or press **Enter**.

     You can choose **ICM** from the drop-down list at the top of the Dial Pad to make an intercom call. You can also initiate group intercom calls through the drop-down list. If you dial without first choosing **ICM**, the call is made on an internal line (using implicit hunt to find an available line).
   - Click the speaker activity icon for a channel entry in the *Speaker* application.
   - If you have a license for the QuickDial application, highlight a number in a Microsoft Windows application that can access the Clipboard (such as Notepad, Word, Excel, or Outlook), or highlight an Outlook contact, and press the QuickDial keyboard shortcut (by default, **Ctrl+D**).

   You can join (barge in to) an active call on a line if the call does not have privacy enabled.

   When you make a call, a call initiation display appears briefly in the middle of the desktop. Once the call is established, call information and controls appear in the *Activity* panel, and line status is shown on any associated line buttons that are displayed.

   If the line is already busy in a private call, the message area indicates that the call has been rejected.
2. To end the call, click the **Release** button.
   The call is removed from the *Activity* display, and any associated line buttons revert to idle state.

3.2.1 Place a call from the Button Sheet

You can make a call or seize a line by clicking a button on the Button Sheet.

1. To make a call using a button, click the button on the Button Sheet.

You can also right-click a button and choose **Call** from the context menu.

When you initiate a call, the line button is green to show that the line is active (in use by you), and call status and controls are shown on the *Activity* display.

Figure 53: Status on line button and Activity display

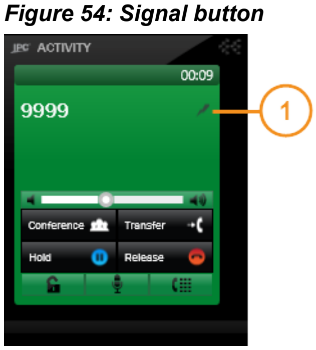
2. Click **Release** to end the call.

3.2.2 Signal on a private line

When you establish a call on a private line that does not automatically ring, you can use the **Signal** button to alert the far end.

Automatic ringdown (ARD) lines automatically signal the far end. A manual ringdown (MRD) line does not automatically signal the far end when you activate the line.

Figure 54: Signal button



1	**Signal** button

Note

If MRD lines are included in a conference, the **Signal** button is available only for the last MRD line added to the conference.

1. Access the line to initiate a call.
   The *Activity* display shows that the call is active.

2. Click the **Signal** button to signal the far end.

3.2.3 Make a call from the *Home* application

You can make a call from a contact shortcut entry in the *Home* application.

The *Home* application shows the 25 most frequently used contact shortcut entries under the **Most Frequently Used** header.

1. If necessary, click the **Most Frequently Used** header to expand it and show contact shortcut entries.
2. Click a contact shortcut entry to expand it.
   The contact entry expands to show additional details about the contact. The preferred point of contact icon is enabled.

   Figure 55: Intercom icon

   Figure 56: Handset (line) icon

   The intercom icon can be used to make an intercom call, and the handset icon can be used to initiate a speed dial or private line call.
3. Click the point of contact icon to initiate the call.

   Alternatively, you can double-click the collapsed contact shortcut entry to initiate a call, right-click the entry and choose **Call** from the context menu, or view the contact profile and choose a different point of contact.

3.2.4 Hunt

The hunt feature enables access to available line appearances for a call without choosing a specific line.

If hunt is enabled and a call is initiated using a hunt button or the dial pad without choosing a line, an *implicit hunt* is performed automatically to search for and seize an available line appearance. Depending on the digits dialed, the system locates a dial tone line or a Unigy extension. Hunt searches within a hunt group, or if access is not available to a hunt group, within a users's personal extension appearances. A hunt group is a predefined set of dial tone line appearances that are available to the hunt feature.

If the selected line appearance is shown on multiple line buttons, the button with the lowest number is green to indicate that the line appearance is being used, while other buttons that refer to the line appearance are blue, indicating that the line is busy. If no line is available, an error message is displayed.

The hunt function can be included in the definition for a speed dial button.

When you seize a line then press a hunt with speed dial, the CDI performs the speed dial on the seized line. It does not release the seized line, then hunt, then perform the speed dial.

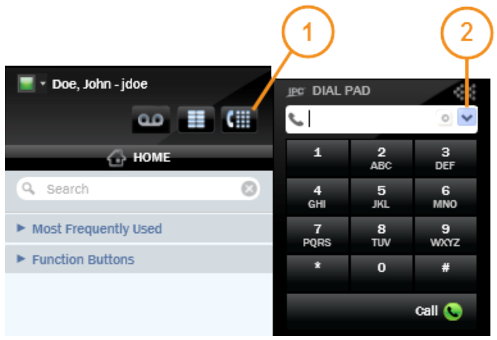
The implicit hunt capability is enabled or disabled in each user's profile settings. If implicit hunt is not enabled, a line appearance must be chosen before placing a call.

3.2.4.1 Make a call with automatic line selection

You can use the Dial Pad to make a call on any available line. If you do not choose a line first, IQ/MAX Omni hunts for an available dial tone line appearance automatically.

1. To place a call on any available line, click the **Dial Pad** icon in the main window Toolbar.
   The Dial Pad displays in a slide-out panel.

Figure 57: Dial Pad icon and drop-down options



1	Dial Pad icon
2	Drop-down list for the Dial Pad

2. Click **Dial**.
3. Enter the phone number on the Dial Pad.
   Call information (including the line) appears in the *Activity* display. If the line button is displayed on the Button Sheet, the line button is green to indicate that the line appearance is active (in use by you).

   If no line is available, the message area of the main window displays an error message indicating that no line appearance could be found.
4. Click **Call**.
5. To end the call, click **Release**.

3.2.5 Make a call from a contact

You can make a call from a contact entry in any application views or search results.

Each contact has a preferred point of contact (POC) that is normally used to place a call. Contact entries include point of contact icons that indicate the method used to place a call:

Figure 58: Intercom icon

Figure 59: Handset (line) icon

The intercom icon can be used to make an intercom call, and the handset icon can be used to initiate a speed dial or private line call.

1. To call a contact using the preferred point of contact, double-click the contact entry.
2. Alternatively, you can call a contact in the following ways:
   - Right-click a contact entry and choose **Call**.
   - Click the contact entry to expand it, then click the preferred point of contact icon.
   - To call using a different point of contact, right-click the contact entry and choose **View Contact Details**, then click the alternate POC on the contact profile.

3.2.6 Use QuickDial

QuickDial enables users to dial a number selected in Microsoft Windows applications (such as Notepad, Word, Excel, or Outlook) and other applications that can access the Clipboard.

QuickDial is a licensed feature that can be used with IQ/MAX Omni. Licenses are assigned by Unigy administrators.

To use the QuickDial feature, select a number in a document, then use the preconfigured keyboard shortcut to dial the number. The default keyboard shortcut is **Ctrl+D**, but your Unigy administration might have defined a different key combination. For more information, see *Keyboard shortcuts* on page 16.

When a number includes alphabetic or special characters, the application strips these characters from the phone number selected then dials the call with the numeric digits. For example, if the value **`1800888our#`** is selected, the application removes **`our#`** from the value then attempts to dial the number **`1800888`**. The same behavior is exhibited regardless of the location of the invalid characters. For example, the values **`our#1800888`** and **`1800our#888`** also result in the application dialing the number **`1800888`**. If the number is not valid, the application presents an error message, highlighted in red, in the message area at the top of the *Main* window.

Note

The QuickDial feature refers to the currently active document to find the number. If multiple applications are open, use the QuickDial feature immediately after highlighting the number, and without navigating to any other application.

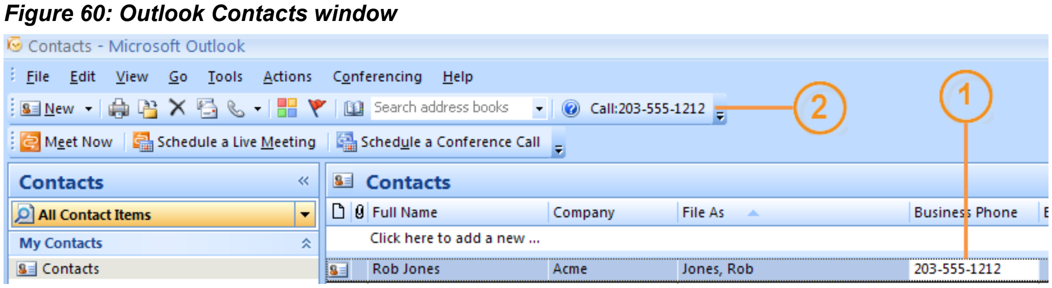
---

1. Select a number or contact to dial:
   - Highlight a number in a document.
   - To call an Microsoft Outlook 2007 contact, select the contact in Outlook. The Outlook add-in shows the contact number; clicking the contact initiates the call.

     A Microsoft Outlook call is made using the first of the defined phone numbers for the contact.

     The Call display at the top of the Outlook *Contacts* window shows the number that will be called.

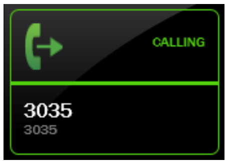
     Figure 60: Outlook Contacts window

1	Selected Outlook contact
2	Number to be dialed

     To call using a different contact phone number, open the Outlook contact record and highlight the number.
2. Press the QuickDial keyboard shortcut (by default, **Ctrl+D**).
   The highlighted number is dialed.

Figure 61: Call initiation display



If the number format is not valid, the message area at the top of the *Main* window presents an error message, highlighted in red.

3.3 Barge in

You can join a call in progress (barge in) if privacy is not enabled on the line.

When a call is in progress, additional users can barge in, creating a multiparty call. This can occur in the following situations:

- A user joins a point-to-point call.
- New users join an established conference call.
- Two users answer the same incoming call. When momentary privacy is enabled, one of the two users will be able to barge after the configured interval (by default, 1 second).

If the call is on a line that has privacy enabled, new users cannot barge in. You cannot barge in to intercom calls.

When you join a call in progress and the intrusion tone feature is enabled, status information is displayed in the *Activity* display and on the associated line button and an intrusion tone is played. If you barge into a call from a handset or headset while you have one or more speakers latched, the system unlatches the latched speakers. After you leave the call, you will have to relatch the speakers.

If more users join the call, the status shows the most recent person to join.

When you barge into a call, everyone on the call who is using a handset sees a barge in indication (**!**).

The intrusion tone feature is enabled or disabled for each zone. If intrusion tones are enabled at the zone level, a Unigy administrator can enable or disable the feature for individual end users. If the intrusion tone feature is not enabled, the tone is not played and the barge information is not displayed. Intrusion tones are generated for handset line calls, private line, and dial tone calls under the following conditions:

- Handset call when only handsets are used on the bridge.
- Handset and speaker calls when the handsets on the call globally mute pending speakers. An intrusion tone is not played for speaker calls.

The intrusion tone frequency and cadence are defined in the country base. For most countries it is a single short duration tone, however, for some countries, the tone is repeated periodically. A repeating tone stops playing when all callers who barged in to the call leave the call.

3.3.1 Barge in to a call

You can join (barge in to) an active line call if the call is not in privacy mode.

When a call is in progress, additional users can barge in, creating a multiparty call. You can join both point-to-point and conference calls, but cannot barge in to an intercom call.

When another user has an active call on a line, the line button on the Button Sheet is highlighted with a blue background to indicate that the line is busy.

To join an active call, click the line button for the call.

You can also join a call by accessing a busy line through the contact record associated with the line.

A barge in indicator is shown on the line button and in the *Activity* display, and the *Activity* display provides call information. If the intrusion tone feature is enabled, you and other parties on the call hear the tone when you join the call.

	Barge in indicator

If the call has privacy enabled, your attempt to join the call is rejected. If the line is a dial tone line, you might momentarily see the call initiation display, and the color for the line on the associated line button and in the *Activity* display change from blue to green, then back to blue (busy for another user).

3.4 Call answering

Answer incoming calls using the *Activity* display or a line button.

When you receive a call, the *Activity* display indicates that a call is coming in, and a ring tone is generated. Different ringtones are generated for high and low priority calls, and up to 8 different ring tone overrides are supported for different lines (set through your user profile or by programming on a line button). Pending calls are highlighted in red (high priority) or amber (low priority). If the Auto Answer feature is enabled for intercom person-to-person and broadcast calls, the calls are answered automatically and if a splash tone is enabled, the splash tone is played to indicate that audio is being transmitted.

Figure 62: *Activity* ***display***

1	Active call
2	Incoming (pending) call
3	Line active for another user (only shown if it is on your Button Sheet)

Buttons associated with incoming calls show line status information when those buttons are displayed on your Button Sheet.

When there are multiple incoming calls, they are queued in the order received. A duration bar indicates how long the call has been waiting.

If there is an existing active call, you can place the currently active call on hold before answering. If you answer an incoming call without placing the current call on hold, the previous call may be dropped or placed on hold, depending on administrative settings.

Note

If diversion is enabled for your extension (by you or by a Unigy administrator), calls might not ring through to you. Calls can divert immediately, when you do not answer within a specified number of rings, or when you are busy.

3.4.1 Auto answer

When auto answer is enabled, intercom calls are answered automatically.

A call that is answered automatically is accompanied by a splash tone if the tone is configured in the UMS and the master volume is not muted. A splash tone alerts a call recipient of an automatically connected incoming intercom call.

If there is an active intercom call when a new call comes in, the incoming call is queued and must be answered manually.

3.4.2 Answer a call

To answer an incoming call, click the button for the call.

If the Auto Answer feature is enabled, the call is answered automatically unless there is an active call on the handset or an active speaker channel is transmitting audio; that is, push to talk is pressed or latched on an active speaker channel. In these situations, the call pends in the call queue within the *Activity* display to be answered manually.

Note

If an incoming internal line call is ringing when you log in, the line button for the caller's line might not show as busy on your Button Sheet.

1. To answer a call, click the incoming call in the *Activity* display or click the associated line button.

   Note

   Do not double-click. Double-clicking causes the call to fail.

Figure 63: *Activity* **display showing incoming call**

1	Active call
2	Incoming (pending) call
3	Line active for another user (only shown if it is on your Button Sheet)

The call is established. A busy status indicator appears in the call status area for the line. The *Activity* display shows call information (including the call type) and indicates that a call is in progress. A call timer in the top right corner of the *Activity* display shows the duration of the call.

If any non-active calls are shown on the *Activity* display, a duration bar is displayed to show how long the new call has been waiting or on hold.

2. To end the call, click the **Release** button.

3.5 Intercom

Intercom enables end users to make calls to other end users in the same enterprise without using a line. Any end user who has an assigned intercom extension and is logged into the system can place and receive an intercom call.

Note

An end user's intercom extension and personal extension can be the same (this is the system default), but a Unigy administrator can configure them to be different. For example, in a migration scenario a customer may wish to retain existing extensions as personal and also create new intercom extensions for their users. Personal extensions and intercom extensions can only contain numeric values.

A Unigy intercom extension can have up to 20 digits. The number of digits to dial for an intercom call in the enterprise is set in the UMS.

On IQ/MAX and IQ/MAX Edge turrets, when dialing an intercom extension that has fewer digits than the number of digits specified in the UMS, pad the number with leading zeros. On IQ/MAX TOUCH turrets, padding is optional. On Pulse devices and Soft Clients, do not pad the number.

If your personal extension is greater than 9 digits, you cannot free seat to a communication device that has not been upgraded to Unigy v2.0.1.5 or later. Also, if you have an intercom extension greater than 9 digits, a communication device that has not been upgraded to at least Unigy v2.0.1.5 cannot place or receive an intercom call for you. Enterprises with communication devices running Unigy v2.0.1 code should limit the maximum number of digits for an intercom call to 9 until the entire Unigy enterprise is upgraded to Unigy v2.0.1.5 or later.

If the Unigy enterprise interops with an Alliance MX site, the intercom extension must meet the Alliance MX limit of 2-6 digits for an extension.

Intercom calls can be placed using the directory, call history, programmed intercom buttons, or by dialing the intercom extension as an intercom call.

Note

If an intercom extension is dialed without selecting the **ICM** function, the call is established as an internal line call. If the user's intercom extension is different from the personal extension, be sure to use **ICM** and the intercom extension number.

The following restrictions apply to intercom calling:

- Only one intercom call can be active at a time.
- Intercom calls cannot be put on hold.
- Intercom calls cannot be transferred.
- Parties cannot be added or conferenced into an intercom call.

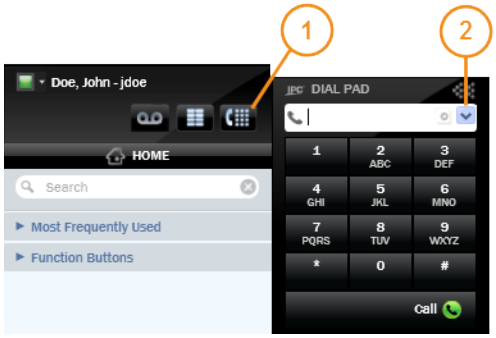
For information about group intercom calling, refer to the UMS online help (or *Intercom group calls* on page 82).

3.5.1 Make an intercom call

You can make an intercom call by using an intercom point of contact in a directory entry, or by specifying an intercom connection when using the Dial Pad. This topic describes how to use the Dial Pad to make an intercom call.

When using the Dial Pad, you can click the down arrow in the number entry box to access a drop-down list of options, including **ICM** (intercom).

Figure 64: Dial Pad icon and drop-down options



1	Dial Pad icon
2	Drop-down list for the Dial Pad

1. To dial a call, click the Dial Pad icon in the main window.
   The Dial Pad slides out to the right.
2. Click the down arrow for the Dial Pad drop-down list and choose **ICM** (intercom).
3. Enter the intercom extension number in the number entry box.

   Note
   A user can have a different personal extension number for internal line calls.

4. Click **Call** or press the **Enter** key.

   If you are calling a turret, Pulse, Pulse Enterprise, or IQ/MAX Omni end user and the **Auto answer ICM calls** feature is enabled, the call is answered automatically. If the **Intercom Splash Tone** feature is enabled, a splash tone is played to announce the incoming call.

   If the call cannot be completed (for example, if the number is invalid or a user is not logged in), an error message is displayed in the message area on the main window.

The call is established using an intercom connection.

3.5.2 Intercom group calls

An intercom group call connects all members of a predefined internal user group (broadcast group) simultaneously.

An intercom group call can reach any Unigy users who are logged in and able to answer. Users can be included in a call even if they are logged in somewhere other than their usual location.

You can initiate an intercom group call with different options for answering the call:

- Group call (No answer back): Only the call initiator can talk (one-way audio only).
- Group answer (GANS): Only the call initiator can talk until the first person answers. Then the call becomes a point-to-point intercom call with the first user who answers. All other users are dropped.
- Group talk back (GTBK): Anyone on the call can answer and use the Push-to-Talk control to talk and be heard by everyone else. All users remain on the call, and any number of users can talk.

Intercom group calls do not pend. To receive a group intercom call, a user must:

- Not be on an intercom call.
- Have hands-free mode (HFM) speaker enabled and idle.
- Have an available talk path.

Otherwise the user cannot receive the call, and has no way to know the group intercom call was missed.

Be aware of the following:

- A user who initiates an intercom group call will know that a call is connected only when at least one user has answered that call.
- If two users dial a group call to the same group number at the same time, this might result in creating two group calls and users receiving the group call will be randomly divided between the two calls.

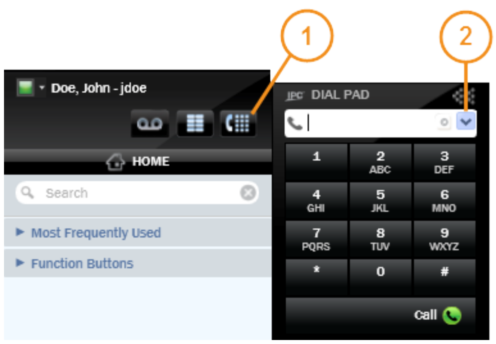
Intercom group calls differ from preset and simplex broadcast calls.

3.5.2.1 Initiate an intercom group call (broadcast)

You can place a call to an intercom group using the Dial Pad on the main window. By default, an intercom group call is a broadcast call, in which only the initiator can speak and the remote parties can only listen.

When using the Dial Pad, click the down arrow in the number entry box to access a drop-down list of options, including **Group**.

Figure 65: Dial Pad icon and drop-down options



1	Dial Pad icon
2	Drop-down list for the Dial Pad

A call to an intercom group establishes a call to an internal intercom broadcast group.

1. To dial a call, click the Dial Pad icon in the main window.
   The Dial Pad slides out to the right.
2. Click the down arrow for the Dial Pad drop-down list and choose **Group**.
   The message area prompts you for a group ID.
3. Enter the group ID number in the number entry box.

   The group must be configured in the Unigy system.

   If you enter a group ID that is not already configured, you will receive an error message in the message area of the main window.
4. Click **Call**.

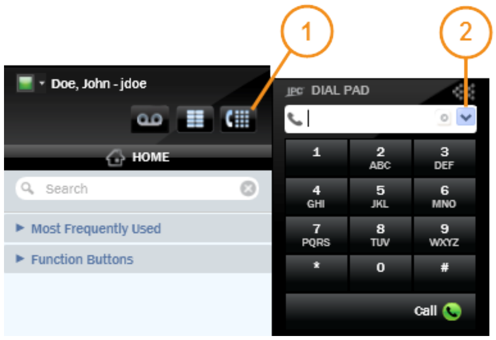
   The call is established, and audio (receive only) is enabled for all of the group members.

3.5.2.2 Initiate a group answer intercom call

You can place a group answer call to an intercom group. A group answer call is a broadcast intercom call to a predefined internal group. It enables a remote listener to change the call to a point-to-point call with the initiator, dropping all other parties from the call.

When using the Dial Pad, click the down arrow in the number entry box to access a drop-down list of options, including **GANS** (group answer).

Figure 66: Dial Pad icon and drop-down options



1	Dial Pad icon
2	Drop-down list for the Dial Pad

1. To dial a call, click the Dial Pad icon in the main window.
   The Dial Pad slides out to the right.
2. Click the down arrow for the Dial Pad drop-down list and choose **GANS**.
   The message area on the main window prompts for a group ID.
3. Enter the group ID number in the number entry box.

   The group must be preconfigured in the Unigy system.

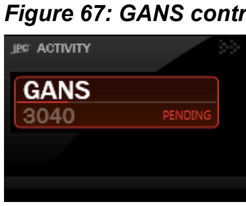
   If you enter a group ID that is not already configured, you will receive an error message in the message area of the main window.
4. Click **Call**.
   The call is established, and audio is enabled for all of the group members.

3.5.2.3 Answer a group answer intercom call

Answer a group answer intercom call by clicking the **GANS** button and enabling Push-to-Latch.

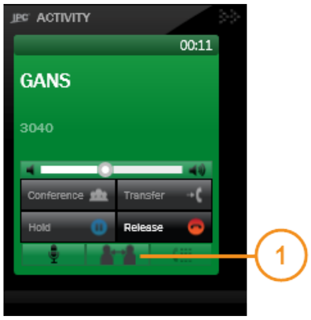
When a group answer intercom call arrives, you see a **GANS** button in the *Activity* display.

Figure 67: GANS control



1. Click the **GANS** button in the *Activity* display.
   The *Activity* display changes to show a **Push-to-Latch** button.

Figure 68: Push-to-Latch button for a GANS call



1	GANS **Point-to-Point** button

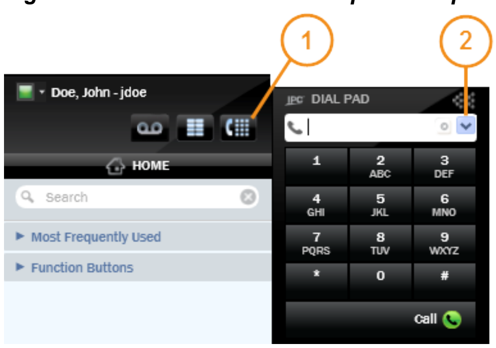
2. Click the **Point-to-Point** button.
   The call becomes a point-to-point call between you and the call originator. All other listeners are dropped.

3.5.2.4 Initiate a group talk back intercom call

You can place an intercom call with group talk back enabled. A group talk back call is a broadcast intercom call to a predefined internal group. It enables multiple parties on a group intercom call to talk at the same time.

When using the Dial Pad, click the down arrow in the number entry box to access a drop-down list of options, including **GTBK** (group talkback).

Figure 69: Dial Pad icon and drop-down options



1	Dial Pad icon
2	Drop-down list for the Dial Pad

1. To dial a call, click the Dial Pad icon in the main window.
   The Dial Pad slides out to the right.
2. Click the down arrow for the Dial Pad drop-down list and choose **GTBK**.
   The message area prompts for a group ID.
3. Enter the group ID number in the number entry box.

   The group must be preconfigured in the Unigy system.

If you enter a group ID that is not already configured, you will receive an error message in the message area of the main window.

4. Click **Call**.
   The call is established, and audio is enabled for all of the group members.

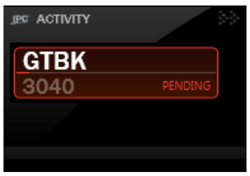
   Call recipients see a **Group Talkback** control: a **GTBK** control on the *Activity* display or, for turret users, a floating **GTBK** button on the Contextual Call Display.

3.5.2.5 Answer a group talk back intercom call

Answer a group talk back intercom call by clicking the **GTBK** button.

When a group talk back intercom call is pending for you, the *Activity* display shows a **GTBK** control:

Figure 70: GTBK control



1. To answer the call, click the **GTBK** control in the *Activity* display.
   The call is established, and you can hear the caller. The *Activity* display provides buttons you can click to talk on the call.
2. Click one of the following buttons to talk on the call:

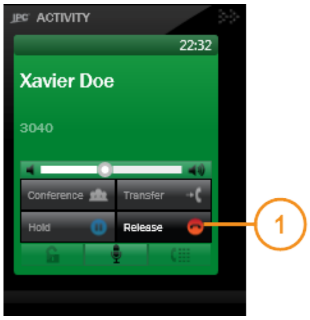
   Figure 71: Push to Talk and Push to Latch buttons on a GTBK call

1	**Push to Talk** button (click and hold down while talking)
2	**Push to Latch** button (click to talk; click again when finished talking)

3.6 Release a call

You can end a call by clicking the **Release** button in the *Activity* display.

Figure 72: Release button



1	**Release** button

The Soft Client does not automatically release calls that fail or time out. You must do this manually by clicking **Release**.

If you are on a conference call, there is a **Release** button for each line on the call as well as a master **Release** button.

Figure 73: Release buttons for conference lines

1	**Release** buttons for individual lines in a conference

1. Click the **Release** button in the *Activity* display during an active call.
   The line is released, ending the call.
2. To release lines in a conference call, do one of the following:
   - Click the **Release** button next to a line to release the line.

     The conference continues with the remaining lines. This is also the case if a distant user exits the conference.
   - Click the master **Release** button to release all lines and end the conference.

     All lines are released and the conference ends, unless there is another turret or Unigy Soft Client user on the conference. In that case, that turret or Soft Client user assumes ownership of the conference, which continues until the last turret or Soft Client user releases the call.

4 Manage calls

4.1 Adjust microphone, speaker, ringer, and call volume

Use the IQ/MAX Omni interface to select the appropriate microphone, speaker, and ringer audio devices on your computer and to adjust the microphone, speaker, ringer, and call volume to meet your specific needs.

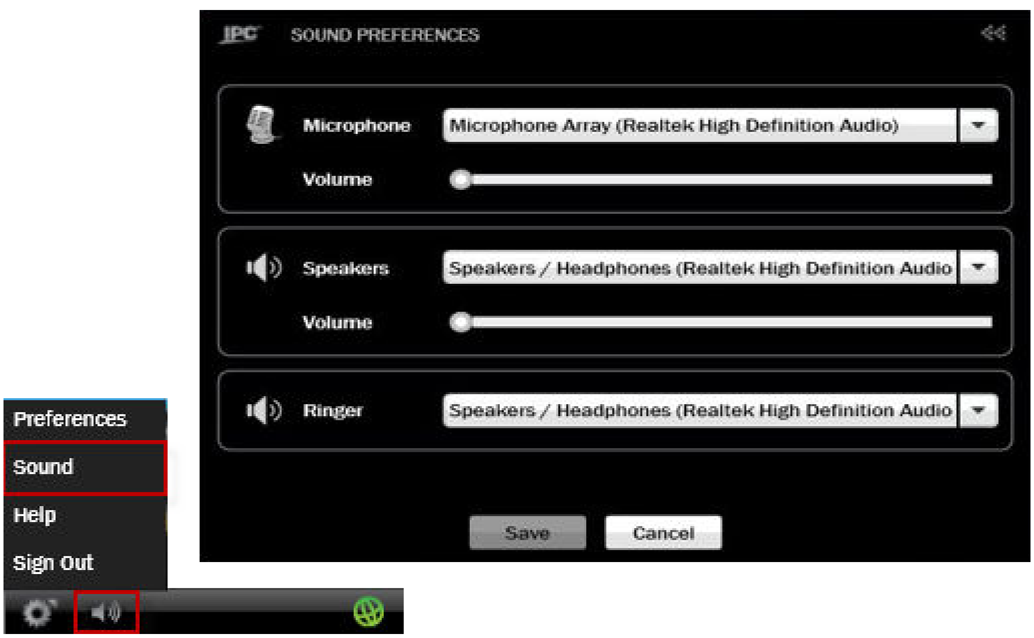
The audio devices on your computer, such as microphones and speakers, have an audio controller and associated set of properties that control the audio input or output volume, sound quality, and enhanced features. If your computer has multiple device types; for example the microphone array built into your laptop and an external microphone or headset connected to the audio jack on the computer, you can select the device you want to use for IQ/MAX Omni. The available options display the name of the audio device and the associated controller as shown in the illustration below.

1. To select the microphone, speaker, and ringer audio devices and adjust the microphone and speaker volume, do the following:

   a) Access the *Sound Preferences* dialog box by doing one of the following:

   - Click the **Tools** icon in the *Main* menu bar then click **Sound**.
   - Click the **Volume** icon in the *Main* menu bar.

   Figure 74: Sound Preferences



   b) Select the preferred audio device for your Soft Client microphone, speaker, and ringer.

   c) Adjust the default volume for the microphone and speakers by clicking and sliding the volume control in the **Volume** bar to the left or right to lower or raise the volume.

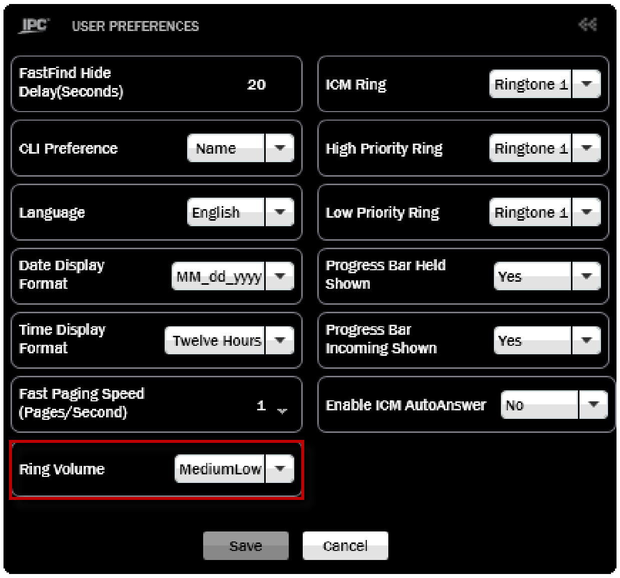
To adjust the ringer volume, use the **Ring Volume** option within the **Tools ➤ Preferences** menu described below.

d) Click **Save**.

2. To adjust the ringer volume:

a) Click **Tools ➤ Preferences**.

Figure 75: User Preferences: Ring Volume



b) Within **Ring Volume**, select the appropriate volume for your situation:

- Off
- Low
- MediumLow
- Medium
- MediumHigh
- High

c) Click **Save**.

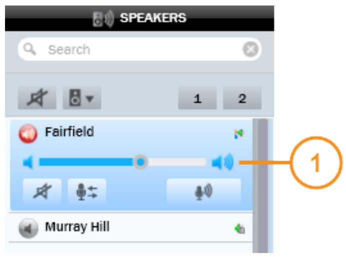
3. To adjust the receive volume for an active call in the *Activity* display, click the volume button at either end of the volume bar or click and slide the volume control to the left or right to lower or raise the volume.

Figure 76: Volume control in Activity display

1	Volume control for active call

4. To adjust the receive volume on an active speaker channel, expand the speaker channel entry for the speaker channel in the *Speakers* application display then click the volume button at either end of the volume bar or slide the volume control.

Figure 77: Volume control on speaker channel



1	Speaker volume control

4.2 Mute and unmute outgoing handset audio

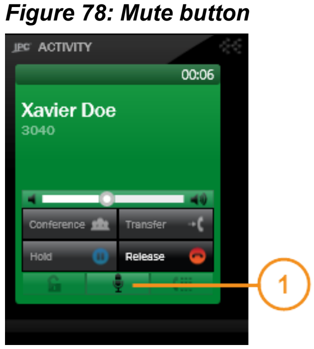
Mute outgoing audio on a handset call by clicking the **Mute** button on the *Activity* display.

Note

For information about muting controls for speaker calls, see *Mute and unmute speaker channels* on page 108 and *How call muting controls affect speaker users* on page 110.

When a call is active, the *Activity* display provides call controls.

Figure 78: Mute button



1	**Mute** button

1. To mute audio on a call, click the **Mute** button.
   Outgoing audio is muted. The button is highlighted when muting is active.
2. Click the **Mute** button again to unmute.

4.3 Audible alerts

Audible alerts are used for communication activities that require the user's attention.

CDIs provide the following types of audible alerts:

- Alerts for incoming calls:
  - Inbound PSTN ring tone
  - Inbound private wire (PW) ring tone
  - Inbound intercom ring tone
  - Intercom connect splash tone
- Blocking tone: The user is trying to use Push-to-Talk on a line that is unavailable.
- Intrusion tone: A new user has barged in to an established call.
- Record warning tone: Indicates call is being recorded.

The ring tone preferences for each user are stored in the user's profile. Users can set ring tones for different call types in user preferences. Users can also configure different ring tones for each line button.

In addition to alerts, Unigy provides audible indications of call progress, such as dial tone, busy signals, ringing, and audible cues that a call is established.

4.3.1 Record warning tone

A record warning tone (RWT) notifies parties in a call when the session is being recorded.

The record warning tone is played to all handset users on the call; it is not played on speaker channels. The record warning tone is not played for Alliance lines, intercom calls, or Open Connexion calls. Device-generated warning tones for handset or speaker calls are not present in digital recordings (IP and E1).

There is an inbound and an outbound record warning tone:

- Inbound tone - Played locally by the turret.
- Outbound tone - Played by the turret during point-to-point calls. During multi-party calls, the Media Manager plays the outbound tone.

The record warning tone is optional. It is configured by an administrator through the UMS.

In order for the Record Warning tone to play, several conditions must be met:

- The record warning tone is enabled for the zone.

  Click **Configuration ➤ Enterprise ➤ System ➤ Zones**. Select the zone and check the **Record Warning Tone** checkbox.

  This overrides all of the following configurations in the zone when disabled.
- The line is set for recording AND its active zone is one where the record warning tone is enabled.

  Click **Configuration ➤ Enterprise ➤ Lines and Extensions**and then either **Private Lines** or **Extension**. Select a line and view the line details to ensure the **Is Line Recorded** checkbox is checked.

  Click the *Zones* tab and check the active zone.
- Record Warning Tone is enabled for the user.

  Click **System Designer ➤ End User Configuration**. Select the user. On the *Trader Features* tab, check the **Record Warning Tone** checkbox. Use the legacy (Flash) UMS (`https://`***`<your_VIP>`***`/ums/UMSClient.html`) or Mass Edit Client to accomplish this task.
- The user has a recording profile.

Click **System Designer ➤ End User Configuration**. Select the user. Select the *Audio* tab. Set a **Record Mix Profile**. Use the legacy (Flash) UMS (https://***<your_VIP>***/ums/UMSClient.html) or Mass Edit Client to accomplish this task. This configuration change requires a turret log off/log on to take effect.

Assuming the record warning tone is enabled for the zone and subject to the configuration of lines, intercom, record on demand settings, and the recording mix profile:

- The end user record warning tone setting controls the inbound record warning tone. It has no bearing on the outbound record warning tone.
- The outbound record warning tone is controlled by the zone setting.

When a call transitions between various call states (such as adding parties, transfers, transition between handset and HFM), the record warning tone will restart. In these cases, you might hear the RWT more frequently than expected.

Note

If a user with no recording profile barges into a source line, then no inbound RWT is played. But if a user barges into a destination line, the Media Manager plays the RWT for the user because the user is part of the destination line. The source of the tone (inbound or outbound) is not identifiable to the user.

4.4 Active call options

4.4.1 Privacy

The privacy feature prevents other users from intruding during a call.

This feature keeps conversation private during the call and while a call is on hold.

Note

Point-to-point intercom calls are always private.

Key features include:

- Privacy can be turned on or off during a point-to-point line call.
- Privacy is only valid for two-party handset calls.
- Privacy turns off after a PBX transfer is cancelled.

Privacy cannot be used for:

- Internal transfer
- Simplex broadcasts
- Open Connexions
- Speaker-line calls
- A line that is being used by more than two parties

Momentary privacy

Momentary privacy turns on privacy when the first user answers a call. Momentary privacy is invoked whether a call has privacy enabled or not. The default duration is 1 second, configurable through the UMS.

This feature is useful during peak periods, when there is the potential for two or more users to answer the same ringing line. If each user assumes they have barged into an active conversation, they could all release control of the call, thus abandoning the call.

To compensate for these types of situations, momentary privacy is turned on for a short time when the first user answers the call. The length of this momentary privacy period is configurable, and the privacy expires after the configured period of time. When momentary privacy expires, the call can be barged into normally.

When momentary privacy is active:

- The privacy icon does not indicate that privacy is enabled.
- Calls put on hold do not go on exclusive hold.
- Momentary privacy works regardless of how privacy is set.
- The privacy feature is unaffected by momentary privacy, such that privacy can be enabled at any time.

4.4.1.1 Use the privacy feature

You can set privacy on a call to prevent other users from joining the call.

When privacy is enabled on a call, the call display includes a privacy icon in the *Activity* display and on the line button associated with the call:

	Privacy icon

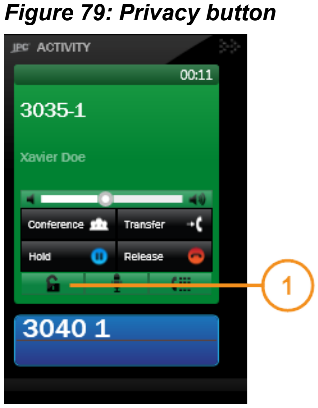
You can set privacy only during an active call. When you end a call, the privacy setting reverts to off.

Note
If you place a private call on hold, only you can retrieve the call (exclusive hold).

Note
The Unigy system provides momentary privacy when any user picks up an incoming call.

1. Place a call.
   The *Activity* display shows controls for the call.

   Figure 79: Privacy button



1	**Privacy** button

2. Click the **Privacy** button in the *Activity* display.
The *Activity* display shows that privacy is enabled on the call (the lock closes).
3. To remove privacy from the call, click the **Privacy** button again.

4.4.2 Hold

The hold feature enables a user to suspend and retrieve a call on a dial tone or private line. A user can also place calls on hold and have them retrieved by other Unigy users.

When you place a call on hold, the call displays on a dark green background on the *Activity* display and on the associated line button, and the line button displays a flashing Hold indicator. If a hold duration bar is enabled in your user profile and your user preferences, a duration bar shows how long the call has been on hold. For calls placed on hold by other Unigy users, the call displays on a dark blue background on the *Activity* display and the associated line button, and the line button displays a flashing Hold indicator.

If privacy is enabled on a call and the call is put on hold, only the user who put it on hold can retrieve the call. For more information, see *Exclusive hold* on page 96.

Note

- Intercom calls cannot be placed on hold.
- Open Connexion lines cannot be placed on hold.
- A call cannot be put on hold if any Unigy user moves the line to an active speaker, because the speaker keeps the line active.
- If a call is put on hold by a distant user external to the Unigy system, there is no indication of the hold in Unigy. Only the distant user can retrieve the call.
- If another Unigy user barges in on a line, the line cannot be put on hold.

4.4.2.1 Put a call on hold

You can place any active call on a dial tone or private line on hold, including external and multiparty calls. Open Connexion lines cannot be placed on hold.

When a call is on hold, you can initiate another call or perform any other call activities.

If you enable privacy for a call, putting the call on hold results in an exclusive hold; only you can retrieve the call. If privacy is not enabled, any Unigy user can retrieve the call.

Calls placed on hold by other users appear on line buttons with a dark blue background and a blinking Hold indicator.

You can place a conference call on hold if it only includes lines. If other internal users are on the call, you are removed from the call but it is not placed on hold. If no other internal users are on the call, the lines on the conference are placed on hold individually; to re-establish the conference you must click the **Conference** button and add each of the lines back.

1. To place a call on hold, click the **Hold** button in the *Activity* display.
The currently active call is placed on hold. The call information in the *Activity* display collapses, showing identifying information for the call on a dark green background with a Hold indicator. The associated line button also has a dark green background and a blinking Hold indicator. If enabled in your user profile and preferences, a duration bar shows how long the call has been on hold.

Figure 80: Call on hold

2. To retrieve a call from hold, click the button for the held call in the *Activity* display.

   If the call is not on exclusive hold, another user can retrieve the call. When a call is retrieved by another user, your line button indicates a line status of busy (dark blue background) rather than Hold.

4.4.2.2 Exclusive hold

If privacy is enabled on a call, placing the call on hold puts it on exclusive hold.

Only the user who places a call on exclusive hold can retrieve it.

If other users try to pick up the held call, they receive a message indicating that the call is private and are not allowed to access the line.

A line on exclusive hold appears as a call on hold (dark green), with a privacy icon, for the user who placed it on exclusive hold. To other users, the line displays a busy indication (blue).

Note

- When a call is retrieved from exclusive hold, privacy is not enabled by default; privacy must be re-enabled either before or after retrieving the call.
- Privacy and exclusive hold are not available for multiparty calls.

A line on exclusive hold can be released without retrieving it in the following ways:

- The line is released at the other end. (This requires a line that supports forward disconnect.)
- The user logs off and logs back on.
- A forced line clear is performed on the line.

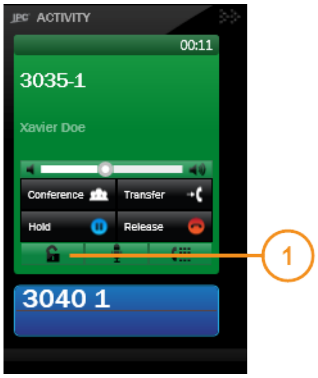
4.4.2.2.1 Use exclusive hold

You can put a call on exclusive hold by enabling privacy on the call, then placing it on hold. When you place a call on exclusive hold, only you can retrieve it.

A line you placed on exclusive hold displays in dark green with a privacy icon. To other users, the line displays a busy indication (blue).

1. Establish a call.
   The *Activity* display shows call information and controls.
2. Click the **Privacy** icon in the *Activity* display.

Figure 81: Privacy button

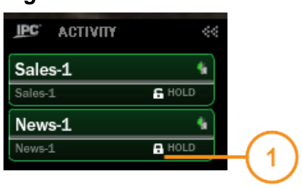


1	**Privacy** button

The **Privacy** icon changes to a closed lock to indicate that privacy is enabled.

3. Click the **Hold** button.
   The call is placed on exclusive hold for you.

Figure 82: Call on exclusive hold



1	Call on exclusive hold

4. To retrieve the call, click the held call in the *Activity* display.
   When you retrieve the call, privacy is not enabled by default; you must re-enable privacy after retrieving the call.

4.4.3 Transfer a call

You can transfer any dialed call to another extension or to any line to which you have access. Transfers can be announced (supervised) or unannounced (unsupervised).

As part of Unigy administration, lines are configured to use PBX transfer or hookflash transfer. (Hookflash is used on analog PBX extensions. PBX transfer is over QSIG or an older equivalent.) If you are transferring a call to a line that requires a hookflash transfer, you may need to listen and respond to PBX or central office prompts to complete the transfer.

Note

An active Unigy private line call cannot be transferred.

1. To transfer an active call, click the **Transfer** button in the *Activity* display.
   The active call is placed on hold.
2. Place the call to the person who will receive the transfer.
3. Make sure there is at least one ring to ensure that the call is going through.

4. If you are transferring a call to an analog line, listen and respond to PBX or central office prompts to complete the transfer.
5. To announce the call, remain on the line until the destination party answers.

   To retrieve the call without completing the transfer, click the button for the original call in the *Activity* display. The transfer is canceled, and you are back on the original call.
6. To complete the transfer, click **Transfer** again (or click **Release**).

4.5 Diversion

Incoming dial tone line and intercom calls can be diverted to another destination.

Diversion can be programmed by users (with appropriate privileges) or in the UMS by an administrator.

Only one diversion for the same extension and diversion condition (such as **Busy**) can be turned on at one time. Enabling diversion for the same extension and an identical or overlapping condition (such as **Busy or ring no answer**) cancels the previous setting. For lines, a dual diversion button can be programmed to specify different destinations for the **Busy** and **Ring no answer (RNA)** conditions.

Note

- A user may need to enable both line and intercom diversion to ensure that all calls to that user are diverted. Depending on administrative settings, a user can have different personal and intercom extensions.
- Only line calls can be diverted to voice mail.

Supported diversion types include:

- **Immediate**: All incoming line and intercom calls are immediately forwarded.
- **Busy**: Incoming intercom calls are forwarded when the user is on a call. If the Do Not Disturb function is enabled, intercom calls are not diverted; they pend without ringing.
- **Ring no answer (RNA)**: Incoming line calls are diverted after ringing for a specified period of time without an answer when Do Not Disturb is enabled. Calls pend for a preset amount of time when this condition is enabled.
- **Busy or ring no answer (BRNA)**: Incoming line calls are diverted if the user is on a call or does not answer after the specified number of rings when Do Not Disturb is enabled. Calls pend for a preset amount of time when this condition is enabled.
- **Dual Divert**: Divert line calls to different destinations for busy and ring/no answer conditions. Dual divert applies to line diversion only.
- **No diversion**: All incoming calls go to the extension.

4.5.1 One-button diversion

A preprogrammed diversion button can be used to turn diversion on and off for calls to Unigy extensions or for intercom or line calls. A button can be programmed for each diversion condition: immediate, busy, ring no answer (RNA), or busy ring no answer (BRNA).

With one-button diversion, the same button turns diversion on and off for a particular condition and extension. Each diversion button is specific to an extension or line, diversion type, and diversion destination.

A **no diversion** button can also be set up to turn off all types of diversion for an extension with a single button press.

When multiple users have buttons for identical line diversions (same type, destination, and extensions), any of the users can use the button to enable diversion for all users of the line. For example, if all of the users in a group attend the same daily meeting and have the same line diversion button settings for the meeting, any users in the group can set diversion for the entire group by pressing the diversion button on their button sheet.

Diversion can also be configured on the device, without the use of buttons, through Settings.

4.5.2 Diversion status display

When a button is programmed for diversion and turned on, the button is highlighted to indicate that diversion is enabled; a label can be provided for the button to indicate the type of diversion. The button is highlighted only if it exactly matches the diversion in effect (line, type, and destination).

When one-button diversion is turned on for the Unigy Soft Clients, the diversion button has a blue background. If diversion is turned off, the button is not highlighted.

Note

One-button line diversion is not available for Pulse.

For a diversion button that is added for a line, if the **Diversion Type** is **Immediate**, diversion is enabled, and the user account is configured appropriately, *DIVERTED* is displayed in red on the button.

If multiple users have the same diversion programming, the diversion buttons at all extensions display the same highlighting.

4.5.3 Line diversion

Users can divert incoming dial tone line calls from their extensions to another destination. This feature is also known as *call forwarding*.

Using line diversion, calls can be diverted from a user’s extension to any phone number or another extension.

Diversion can be preprogrammed in each user's profile. If a user has the necessary privileges, the user can also program diversion through their device. Each diversion button is specific to a line, diversion type, and diversion destination.

The maximum number of diversion hops is set through Unigy administration. After a maximum number of hops that are not answered, a caller is diverted to a destination number for the Unigy system, or to the original user’s voice mail, depending on administration settings.

4.5.4 Intercom diversion

A point-to-point intercom call can be diverted to another Unigy end user on a local site or on a remote site that is available through a direct global intercom connection.

Intercom calls can be diverted only to other Unigy intercom users who can receive an intercom call.

Intercom diversion cannot be used for the following types of calls:

- Group answer (GANS)
- Group talkback (GTBK)

- Group calls

With appropriate privileges, end users can program diversion at their devices, or a Unigy administrator can program diversion. End users can program intercom call diversion only for their own extensions.

Note

The maximum digits for intercom is an automatic system setting, equal to the intercom extension length.

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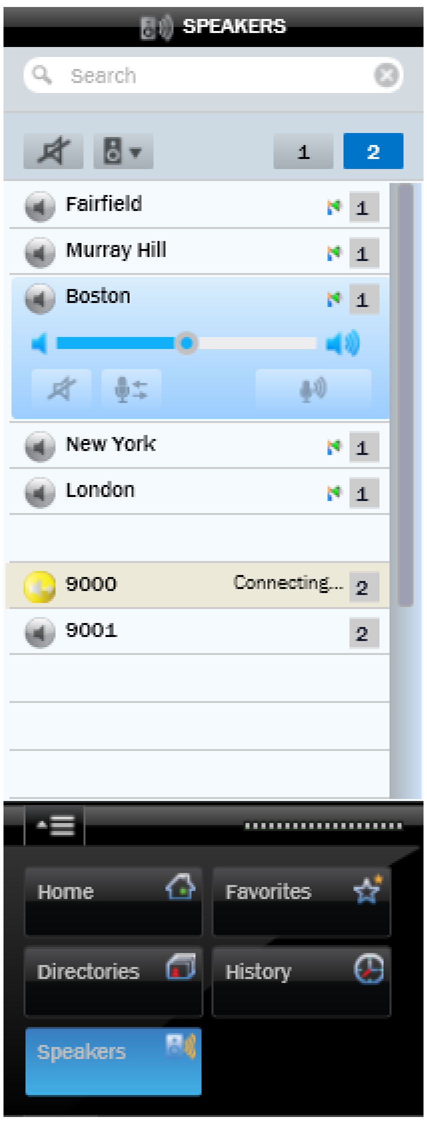
5 Speakers application

The *Speakers* application provides access to private wire, hoot, and speaker channels. All voice audio is mixed into a single audio channel and delivered over the computer's media hardware.

The top section of the *Speakers* application display provides a global mute control for all channels, a control that can be used to expand and collapse all speaker channel entries, and Push-to-Latch controls for speaker groups. The body of the *Speakers* application display shows summary information for each of the speaker channels.

Figure 83: Speakers application



Each user's speaker channel layout, access to speaker channels, and ability to talk on specific speaker channels are defined in the user profile.

The *Speakers* application supports up to 16 speaker channels. Unassigned speaker channels are empty.

Note

Recording of speaker channels is set up through Unigy administration and is based on the assignment of speaker channels to recording mix profiles. The user interface does not provide any indication that a channel is or is not being recorded. If speaker channel assignments are changed by users, that can result in lack of recording coverage for some speaker channels. Users should consult a Unigy administrator before changing their default speaker channel assignments.

Activate a speaker channel by clicking the speaker activity icon for an entry. Clicking an entry expands it to show additional information and options. Active speakers provide incoming audio, voice activity indicators, mute and volume controls, and Push-to-Talk controls (if a user profile provides talk capability on a channel). Speaker entries also show the group memberships for each channel. Mouse over a speaker entry to see a tool tip that displays the speaker number.

Depending on access privileges and licensing, users can perform the following actions for speakers:

- Display the *Speakers* application in the main window.
- Expand and collapse speaker channel entries, both individually and collectively.
- View, scroll, and search speaker channel entries.
- Turn speaker channels on and off.
- Adjust the volume of individual speaker channels, or access the computer's volume control dialog through the main menu bar.
- View speaker status.
- Push to talk on a speaker channel (talk while holding down the Push-to-Talk button down).
- Push to latch a speaker channel or a group of speakers open (talk path is enabled until the channel is unlatched).
- Mute a speaker channel or all speakers.
- Access a speaker group.

For all active speaker channels, the speaker activity icon blinks when there is voice activity, whether the lines are muted or not (unless muting is set by another user). This enables users to identify lines that are broadcasting.

Note

If a speaker channel is accessed by a handset call with global muting, the speaker channel is muted for all other speaker users and no voice activity is shown for the channel. For more information, see *How call muting controls affect speaker users* on page 110.

5.1 Use the *Speakers* application

The *Speakers* application provides access to speaker channels and groups on the main window.

Depending on your user profile, you can have up to 16 speaker channels and up to 2 speaker groups.

Note

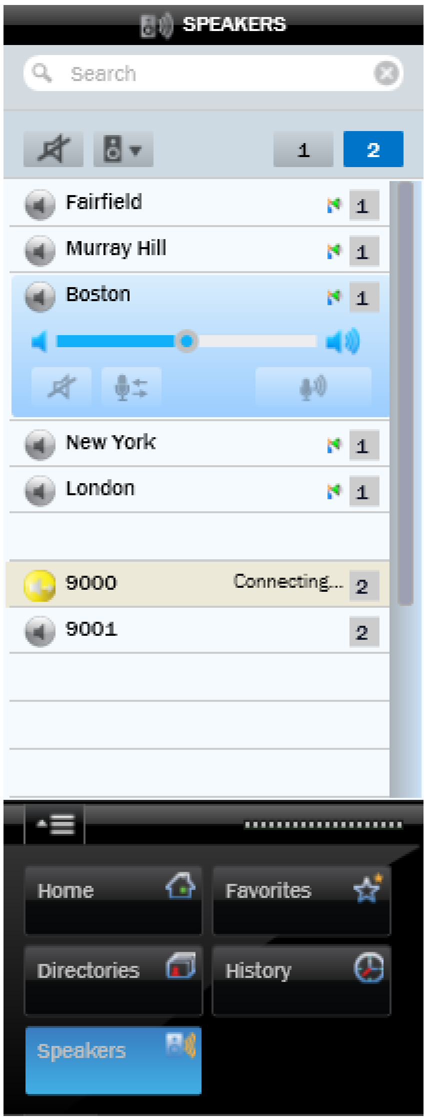
If the **Speaker** button is grayed out, contact your Unigy administrator to ensure that you have speaker channel licenses assigned.

When the *Speakers* application is not displayed, an activity indicator appears on the **Speaker** button on the main window to show voice activity on active speaker channels. When the **Speakers** application is displayed, the indicator moves to the control and status bar on the *Speakers* application display. By default, speaker channels are off until you activate them.

Note

If a speaker channel is accessed by a handset with the muting option enabled, or by another user enabling a global mute, the speaker channel is muted for all other speaker users and no voice activity is shown for the channel.

Figure 84: Speakers application



1. To open the *Speakers* application, click the **Speaker** button on the main window.

   The *Speakers* application is displayed.

   The middle of the *Speakers* application display lists speaker channel entries in a summary format. Each summary entry shows a speaker activity icon, the speaker channel name, and up to two group membership icons. The group membership icons indicate the groups to which each speaker channel belongs. If you mouse over an entry, a tooltip shows additional information for the channel.

2. You can perform the following actions through the *Speakers* application:
   - Use the global controls at the top of the application display:
     - Mute or unmute all speaker channels.
     - Expand or collapse all speaker channels.
     - Talk to (latch) Group 1 speakers.
     - Talk to (latch) Group 2 speakers.
   - To access the computer's volume control dialog and adjust sound for all audio on the computer, click the speaker icon in the main menu bar or choose **Sound** from the main menu.
   - Scroll up and down to view additional entries.
3. To search speaker channel entries for a specific channel name, type characters in the search box. As you type, the list of entries is dynamically filtered to match entries that include the characters you have typed so far. Matching characters are underlined in the search results.
4. Click an entry to expand it.

   You can click the entry again to collapse it.

   To collapse or expand all entries, click the **Collapse All** or **Expand All** icon (a toggle control) in the global controls for speakers.

   The first line of an expanded entry shows the speaker activity icon, channel name, and group membership icons. The second line has a volume control for that speaker channel, and the third line has icon controls for **Mute** (receive), **Push-to-Talk**, and **Push-to-Latch**.
5. To turn a speaker channel on or off, click the speaker activity icon. The speaker activity icon is red when the speaker channel is active, and is gray when the channel is off. The icon for an active channel blinks when there is voice activity on the channel.
6. You can use the following icon controls for an expanded speaker channel:
   - Click the **Mute** icon on a speaker entry to turn sound for that speaker on or off. Voice activity on the speaker is still shown when it is muted. The speaker activity icon blinks blue when it is muted.
   - Click and hold the **Push-to-Talk** icon to talk on the speaker channel while you continue to hold down the button. When you release the mouse button, the microphone turns off.
   - Click the **Push-to-Latch** icon to turn the microphone on for this channel. The speaker activity icon is green when the channel is latched. The microphone stays on until you click the icon again.
7. Right-click an entry to bring up a context menu. The context menu provides the **Programming Mode** option for adding or changing settings for a speaker channel. For more information, see *Assign a line to a speaker channel* on page 105.
8. To display the *Speakers* application menu, click the menu icon in the application menu bar. The *Speakers* application menu provides the following options:
   - **Expand All**
   - **Collapse All**
   - **Sort by Name**

5.2 Assign a line to a speaker channel

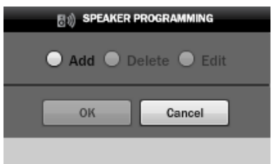
You can assign a private or dial tone line to a speaker channel. Open Connexion hoot lines require that you have permission to listen on the line or to listen and speak.

Before you can assign a line to a speaker channel, the line must be defined as a line button on the Button Sheet.

You can assign any of the lines you can access to a speaker channel in the *Speakers* application, up to the number of speakers channels you have licensed.

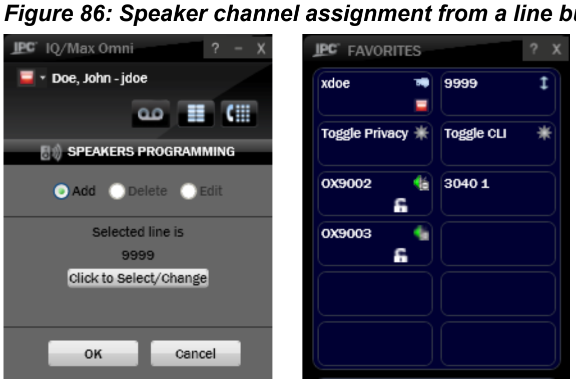
1. Display the *Speakers* application.
2. Right-click a blank row on the *Speakers* application display and choose **Programming Mode** from the context menu.
   The application displays a *Speaker Programming* dialog.

   Figure 85: Speaker Programming dialog

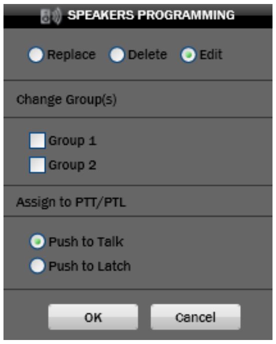
3. Click the radio button for the **Add** option.
   The Button Sheet displays if it is not already open. When assigning a line to a speaker channel, a timer starts after you click **Add** or **Replace**. If you do not select a line before the timer expires, a **Click to Select/Change** button appears on the *Speaker Programming* dialog, and you must click that button to select a line.
4. Navigate to the button for the line you want to add on the Button Sheet, and click the button.
   The associated line is added on the *Speaker Programming* dialog.

   Figure 86: Speaker channel assignment from a line button

5. Click **OK**.
   The line you selected is assigned to the speaker channel.
6. To make changes to the default settings for the speaker channel, right-click the speaker channel entry and choose **Programming Mode** from the context menu.
   The *Speakers Programming* dialog displays options for an existing channel entry.
7. Click **Edit**.

Figure 87: Edit speaker channel settings



8. As needed, select the group check boxes to make speaker group assignments for this channel.

Note

You can also edit the latch settings for the speaker channel on this dialog. Latch settings only apply to turret operation, and do not affect IQ/MAX Omni (which has separate buttons for Push-to-Talk and Push-to-Latch).

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9. Click **OK**.

5.3 Speaker groups

Speaker groups enable you to talk to the active speaker channels in a group. They are another form of broadcast group.

When speaker channels are assigned to a speaker group, you can talk on all of the active channels in the group with a single button press. For IQ/MAX turrets, Pulse devices, IQ/MAX Omni, and Pulse Enterprise, up to two speaker groups are supported.

Speaker groups can be defined by an administrator for your user profile. You can adjust speaker group assignments.

5.3.1 Configure speaker groups

A speaker channel can be added to one or both speaker latch groups by editing a speaker channel assignment.

Use Programming Mode to edit an existing speaker channel and add or change group assignments.

1. Click the **Speaker** button to display the *Speakers* application.
2. Right-click an existing speaker channel entry and choose **Programming Mode** from the context menu.
   The main window displays a *Speaker Programming* dialog.
3. Click **Edit**.
   The *Speaker Programming* dialog shows the existing settings for the channel.
4. Add group assignments by selecting one or both of the **Group 1** or **Group 2** checkboxes.

   Group assignments always function as Push-to-Latch. When the channels in a group are latched, the Push-to-Talk options for those channels are disabled.

Note

You can also edit the latch settings for the speaker channel on this dialog. Latch settings only apply to turret operation, and do not affect IQ/MAX Omni (which has separate buttons for Push-to-Talk and Push-to-Latch).

When you activate a speaker group by clicking the group icon in the global controls for the Speakers application, you can talk on all of the active speaker channels in the group.

5.4 Turn speaker on and off

Use the speaker icon on a speaker channel entry to turn the channel on and off.

You can activate a speaker channel from the *Speakers* application.

1. Click the speaker icon on the speaker channel entry you want to activate.
   The message `Connecting` displays on the channel until the connection is established. If a connection cannot be established, the `Connecting` message continues to display for a few seconds, or in some cases until the channel is turned off. On a turret, you would see the message `Failed, Retrying` instead. If you are unable to access a speaker channel, contact your Unigy administrator.

   When the connection is established, the speaker icon turns red to indicate that the channel is active, and the channel volume control is enabled. If you have talk permission on the channel (required for Open Connexion), your Push-to-Talk and Push-to-Latch icons are enabled. When there is voice activity on the channel, the icon blinks.
2. To release the speaker call, click the speaker icon again.
   The speaker icon turns gray to indicate that the channel is not active.

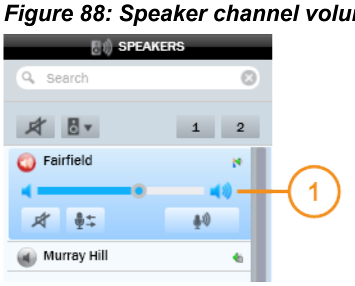
5.5 Set speaker volume

Use *Speakers* application controls to set the volume for individual speaker channels, or to access the computer's volume control dialog.

The *Speakers* application provides the following types of volume controls:

- Individual speaker channel volume control on expanded speaker channel entries.

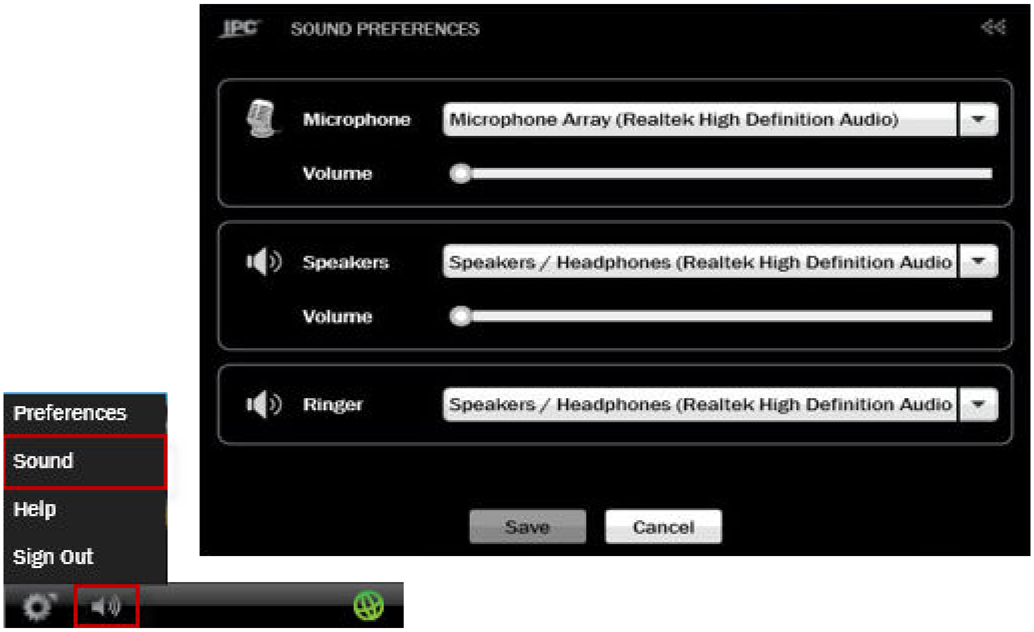
Figure 88: Speaker channel volume control



1	Speaker volume control

- Computer volume controls: Access the computer's volume control dialog by clicking the speaker icon on the main menu bar or by choosing **Sound** from the main menu.

Figure 89: Sound option from the main menu



Note

You can adjust speaker channel volume when a speaker is on or off.

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1. To set the volume for an individual speaker channel, click a speaker channel entry on the *Speakers* application to expand the entry.
2. Click the button on the volume control slide bar and drag it right or left to turn the volume up or down.
   As you drag the control, a popup indicator shows the volume level (0-100).

5.6 Mute and unmute speaker channels

On the *Speakers* application display, you can mute all speaker channels or individual active channels.

For information about muting outgoing audio for regular calls, see *Mute and unmute outgoing handset audio* on page 91.

When you mute a speaker channel, you are turning off received audio for the channel at your CDI.

By default, your microphone is muted unless you use **Push-to-Talk** or **Push-to-Latch**. For more information, see *Talk on a speaker channel or group* on page 109.

For information about general muting controls for speaker calls, see *How call muting controls affect speaker users* on page 110.

1. To mute all speaker channels, click the **Mute** button at the top of the *Speakers* application display.
   The **Mute** button is highlighted. You can click it again to turn off muting.
2. To mute an individual channel, click the **Mute** button within the speaker channel entry.
   The **Mute** button is highlighted. You can click it again to turn off muting for the channel.

5.7 Talk on a speaker channel or group

When you are on a speaker channel call, you can click the channel's **Push-to-Talk** or **Push-to-Latch** button to enable your microphone. For speaker groups, you can latch all of the channels in a group with a single button press.

- Push-to-Talk (PTT) enables your microphone while the button is held down.
- Push-to-Latch (PTL) enables your microphone until the button is pressed again to turn it off.

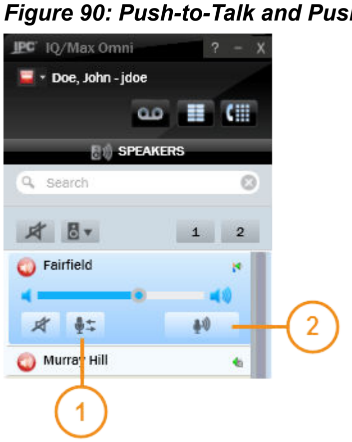
Note

If you are not authorized to transmit on a particular channel, you will receive an error message. If another user has applied a global mute to a channel, you will see an external mute indicator.

If you make a call or barge in to a call from a handset or headset while you have one or more speakers latched with PTL, the system unlatches the latched speakers. After you leave the call, you will have to relatch the speakers.

1. Click a speaker channel on the *Speakers* application display to expand it, then click the speaker icon in the top left corner of the entry to activate the channel.
   The speaker channel is enabled and the speaker channel entry is expanded.
2. To use PTT or PTL:
   - To talk on the channel, click and hold the **Push-to-Talk** icon.
   - To latch the channel and keep the microphone enabled, click the **Push-to-Latch** icon.

   Figure 90: Push-to-Talk and Push-to-Latch controls

1	**Push-to-Latch** icon
2	**Push-to-Talk** icon

3. To turn off the microphone:
   - End Push-to-Talk by releasing the **Push-to-Talk** icon.
   - Unlatch the speaker channel by clicking the **Push-to-Latch** icon again.
4. To latch a speaker group open or unlatch an open group, click the group icon (1 or 2) at the top of the *Speakers* application display.

   The group icon is highlighted when it is latched.
5. To turn off the speaker channel, click on the speaker icon again.

5.8 How call muting controls affect speaker users

Call muting controls determine whether users can talk and listen on speaker calls. Call muting features are used to prevent feedback between speakers (local muting) or restrict audio to handset users only (global muting). Separate muting controls are provided for handset callers and speaker users, but only speaker users experience muted voice or audio.

Muting controls are defined for lines or users through the UMS (user settings may be based on group templates). Settings are configured in the UMS and are not configurable by end users.

The behavior of the call muting controls varies depending on how a user joins a call; settings are determined based on whether a handset or device speaker starts the call first:

- A user who joins a call by dialing or using a line button is a ***handset caller.*** Handset callers can always speak and listen. Settings for handset users take priority over settings for device speaker users.
- A user who joins a call by accessing a speaker channel is a ***speaker user.*** If the speaker user is not affected by more restrictive options, the user can listen on the call and speak by using the **Push-to-Talk** button.

Note

Rules applied to the microphone depend on whether it is used for handset callers or speaker users.

The following **Line** and **User** muting options are available for both handsets and device speakers:

- **No:** Does not silence any device speakers. All handsets and speakers function normally. This is the least restrictive **Line** or **User** option. If the line is set for ***No***, the device speakers using the line are never silenced. If the line is set for ***User***, and a user with no muting accesses the line, the muting option is overridden when users with more restrictive muting options participate in the call.
- **Local:** Silences the user's own device speaker but not other device speakers. A user with this setting can talk by using the **Push-to-Talk** button (if not silenced by another caller), or by using a handset. All other handsets and speakers function normally. This prevents feedback from audio coming out of the user's speaker while the user is talking. The Local setting is available for a user only, and not for a line.
- **Global:** Restricts audio to the handsets; audio is not broadcast over device speakers. This option might also be used to improve audio quality when local muting is not sufficient. This is the most restrictive option, and takes precedence over other muting options when a line is set for ***User*** and users with different options access the line. The Global muting options for handsets and speakers work differently:
  - **For handset callers:** Silences all device speakers; no audio is transmitted. When a user with this setting accesses a line on their handset, the user can talk to the call initiator, but all other speaker users cannot hear the conversation or talk on the channel.

    Any other handset callers on the line can participate in the call. After all globally muted handset callers disconnect from a call, all device speakers resume functioning according to the mute settings of the remaining participants.
  - **For device speaker users:** When a user with this setting accesses a line by activating a speaker channel, the user can talk to the call initiator. The other speaker users cannot hear the conversation or talk on the call until they press Push-to-Talk or latch the speaker channel; at which time the speaker users can hear and are heard by the far end.

Any handset users on the line can participate in the call. After all globally-muted microphones disconnect from a call, all device speakers resume functioning according to the mute settings of the remaining participants.

- **User:** If the line is set to **User**, the user's muting properties apply, and the user with the most restrictive options takes precedence over the line.

Note

Internal hoot channels using Open Connexion and internal lines support only local muting controls (not global muting).

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6 Manage multiparty calls

6.1 Conferences

The conference feature enables lines to be added to an active call. The conference feature is for lines only, and cannot be used with intercom calls.

While in conference mode, lines can be added by a handset user, or removed by the user who added the line. Users who barge in to a conference cannot be removed by the conference initiator.

Note

- Only one conference of any kind can be conducted per handset.
- Any Unigy handset user in a conference can add a line to the conference, except in the case where a call between Unigy users is placed using an internal line (only the caller can add lines).
- A conference cannot be created from a speaker call; only handset users can add a dial tone line to a conference.

The maximum number of parties and dial tone lines that can be included in a conference are determined by system configuration; ask your Unigy administrator for this information.

6.1.1 Make a conference call

Make a conference call by adding lines to an existing call.

Note

- Conference is for dial tone lines and private lines only; it cannot be used with intercom calls.
- If a conference call is placed on hold, the result depends on whether unsupervised conferences are enabled, as described in *Unsupervised conferences* on page 114. If the unsupervised conference feature is not enabled, the conference ends and all lines are placed on individual holds; you must re-enter conference mode and add the lines to re-establish the conference.

1. While on an active call, click the **Conference** button in the *Activity* display.
2. Click additional lines to add to the conference.

   To add a dial tone line, seize a dial tone line and dial using the Dial Pad on the main window. (The dial pad on the *Activity* display is used only to send digits on an active call.)

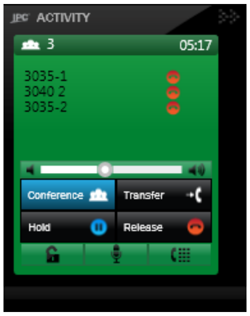
   You can continue to add parties to a conference call until you release the call.

   Note
   In a conference call, you can signal only the last manual ringdown (MRD) line added to the conference.

   As lines are added, the *Activity* display shows the following information:

- On the top row, a conference indicator, the number of attendees, and the elapsed time for the conference.
- For each line, a row that includes a **Release** button for that line.

Figure 91: Conference Activity display



Lines in the conference appear as busy on line buttons.

3. To remove a line that you added from a conference call that you initiated, click the **Release** button next to the line.

   You can also click the associated line button to remove a line from the conference.

   The conference continues with the remaining lines. This is also the case if a distant user exits the conference.

4. To exit the conference call, click the main **Release** button on the *Activity* display.
   All lines are released and the conference ends, unless there is another turret or Unigy Soft Client user on the conference. In that case, that turret or Soft Client user assumes ownership of the conference, which continues until the last turret or Soft Client user releases the call.

6.1.2 Unsupervised conferences

The unsupervised conference feature places a conference of multiple dial tone or private lines on hold, while enabling the far end parties to continue the call. A conference call becomes an unsupervised conference call when the conference call is put on hold by a Unigy user and there are no other Unigy users on that call.

The unsupervised conference feature is configured at the zone level through the Unigy Management System using the *Zone Configuration* panel (**Configuration ➤ Enterprise ➤ System ➤ Zones**).

Note

In a multizone Unigy enterprise, IPC recommends configuring unsupervised conference the same in all zones. If the zones are configured differently, the unsupervised conference feature will only function properly when all lines and end users participating in the conference are from zones that have the unsupervised conference setting enabled.

If unsupervised conference is enabled, pressing the Hold key places the conference in a simulated hold condition, but leaves the lines in the call active and bridged together so that all parties in the call can continue to talk with each other.

If unsupervised conference is not enabled, pressing the Hold key puts each line on hold individually, and the parties cannot continue talking to each other. To re-establish the conference, a user must press the Conference key again and add each of the lines.

During an unsupervised conference, the status of the lines appears as active (U-busy) on the extension of the user who initiated the conference, as well as for all other users. If the conference line supports forward disconnect, when a party on the call releases a line, the conference status is updated to indicate that the line is no longer part of the conference.

After placing the call on hold, the call initiator can rejoin the call by pressing the Conference key or by selecting any of the lines included in the conference. Other Unigy users can barge in to the conference or resume the unsupervised conference by pressing the button of one of the lines in the call.

The following rules apply to this feature:

- If a conference includes another Unigy user who has barged in to the call, the conference call cannot be put on hold and become an unsupervised conference. For example, if there are one or more barged users on the conference and a user attempts to place the conference on hold, that user is removed from the conference, the call is not placed on hold, and the conference continues as a normal conference.
- If a conference call initiator places a conference on hold and then rejoins the conference, the initiator can continue to add and remove lines for that conference.
- Lines in an unsupervised conference can only be removed by a user that added the line. The lines that the initiator added cannot be removed by others. A Unigy user who barges in to an unsupervised conference can add lines and remove only the lines that they added.
- Preset and simplex broadcast do not support unsupervised conferences. Conferences placed on hold are supervised conferences, even if unsupervised conference is enabled for all of the zones in the enterprise. If a conference starts as a preset or simplex broadcast conference, when hold is activated, the system places all lines in the call on individual hold (I-Hold). Simplex broadcast is supported for IQ/MAX Omni, but preset broadcast is not. Neither preset nor simplex broadcast are supported for Pulse Enterprise.
- Only one conference of any kind can be conducted per handset. For example, if a user places a conference call on a left handset and then puts it on hold, the conference continues as an unsupervised conference. The user can make another call on that handset (including a simplex broadcast), but cannot create another conference.

6.1.3 Conferencing scenarios

This topic describes Unigy conferencing scenarios that involve feature interactions such as barge in and unsupervised conference and explains the resulting status indication of the lines participating in the conference. It also discusses permissions for adding and removing lines while in a conference.

These scenarios are applicable to:

- Both turret and Soft Client end users.
- All line types (that is, dial tone and private lines).

Note

References to *users* in these scenarios means a Unigy end user. When referring to a far-end call party, it could be either a Unigy or a non-Unigy user.

Terminology for button status indication:

- **I-Busy**: I am busy on a call using a button representing a selected line. A line button representing an I-Busy line is green.
- **U-Busy**: You are busy on a call using a button representing a selected line. This is the status indication for a line on which someone else is active, or has put a call on exclusive hold. It indicates the line is in use by another user. A line button representing a U-Busy line is blue.

- **I-Hold**: I placed a call on hold using the line represented by the button. A line button representing an I-Hold line is flashing dark green.
- **U-Hold**: You placed a call on hold using the line represented by the button. A line button representing a U-Hold line is dark blue.
- **Idle**: The line is available for use. Note, however, that for speakers the line can show idle even if the line is in use. This would occur if the line's **Display Status When on Speaker** property is not enabled. This setting is generally used for private lines.
- **Incoming**: An indication that there is an incoming call for the line represented by the button. There is an option for this display, high priority indication and low priority indication.

Scenario 1: Rules for adding and removing lines in a conference

1. User A makes a call on Line 1.

   Result: Line 1 shows I-Busy to User A and U-Busy to all others in the system.
2. User A conferences in Line 2, which creates a conference call.

   Result: Line 2 shows I-Busy to User A and U-Busy to all others in the system.
3. User B barges in to Line 1.

   Result: Line 1 also now shows I-Busy to User B. Line 2 continues to show U-Busy to User B.

Both User A and User B have the ability to add lines to this conference. User A can remove the lines that User A has added. User B can remove the lines that User B has added.

Scenario 2: Conference creator puts conference on unsupervised hold, then creator resumes the conference

1. User A creates a conference with 3 lines on the left handset.

   Result: All lines show I-Busy to User A and U-Busy to all others in the system.
2. User A presses hold and an unsupervised conference is created.

   Result: All lines show U-Busy to User A and all others in the system.
3. User A resumes conference by pressing left conference or one of the 3 line buttons.

   Result: All lines show I-Busy to User A and U-Busy to everyone else.

User A can remove any line from the conference since User A was the unsupervised conference creator.

Scenario 3: Conference creator puts conference on unsupervised hold, then a different user resumes the conference

1. User A creates a conference with 3 lines on the left handset.

   Result: All lines show I-Busy to User A and U-Busy to all others in the system.
2. User A presses hold and an unsupervised conference is created.

   Result: All lines show U-Busy to User A and all others in the system.
3. User C resumes conference by pressing one of the 3 line buttons.

   Result: All lines show I-Busy to User C and U-Busy to everyone else.

User C cannot remove any line from the conference since User A added those line to the conference.

Scenario 4: Barging a conference, then conference creator removes the line

This scenario describes the status indications that result after a user barges a conference and then the conference creator removes that line from the conference.

1. User A makes a call on Line 1.

   Result: Line 1 shows I-Busy to User A and U-Busy to all others in the system.

2. User A conferences in another user on Line 2.

   Result: Line 2 now also shows I-Busy to User A and U-Busy to all others in the system.

3. User B barges in to Line 1.

   Result: Line 1 now also shows I-Busy to User B.

4. User A removes Line 1 from the conference.

   Result: Line 1 is removed from the conference and goes idle in the system. However, Line 1 continues to display as I-Busy to User B. While User B remains on the call, status changes on Line 1 are not displayed to User B. When User B releases from that call, the system status of the Line 1 is updated and represents subsequent status changes.

Scenario 5: Barging a conference, then far-end drops

1. User A makes a call on Line 1.

   Result: Line 1 shows I-Busy to User A and U-Busy to all others in the system,

2. User A conferences in Line 2.

   Result: Line 2 shows I-Busy to User A and U-Busy to all others in the system.

3. User B barges in to Line 1.

   Result: Line 1 now also shows I-Busy to User B.

4. The far-end of Line 1 releases, which drops the line out of the conference.

   Result: Line 1 is dropped from the conference and goes idle in the system and for User A. User B continues to be in the conference call with User A and the far-end of Line 2. User B continues to see the status of Line 1 as I-Busy. While User B remains on the call, status changes on Line 1 are not displayed to User B. When User B releases, User B then sees the system status of Line 1 and any subsequent changes to it.

6.2 Simplex broadcast

A simplex broadcast is an instant conference call that broadcasts to as many as 24 lines simultaneously. Only the broadcast initiator can transmit; other parties can only listen and cannot talk to the initiator or to each other. It uses one-way audio.

A simplex broadcast connects multiple parties with a single button press. Only the following types of lines can be included in the broadcast:

- Automatic ringdown (ARD)
- Manual ringdown (MRD) configured to auto-signal
- Manual ringdown (MRD) with the speaker on at the distant end

If a line in the broadcast is not configured to signal, the speaker must be on at the distant end to be included in the conference, because there is no way to dial or signal the far end when a preset or simplex broadcast button is pressed.

Note

- Once a broadcast call is established, additional lines cannot be added or removed. The original set of lines cannot be removed except by ending the call.
- Privacy is not available for broadcast calls.
- A simplex broadcast is different than all the other conference types in that no one can barge into the call. Handsets and speakers are both rejected when they try to barge in.

Simplex broadcast must be enabled for an end user group or a specific end user through Unigy administration.

When this feature is enabled for the system and you have user privileges to program buttons, you can program the feature on the Button Sheet.

You must have line buttons on your Button Sheet for the lines you want to add before you can create a simplex broadcast button that includes those lines.

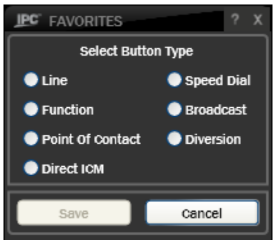
Simplex broadcast does not support unsupervised conferences. Conferences placed on hold are supervised conferences, even if unsupervised conference is enabled for all of the zones in the enterprise. If a conference starts as a preset or simplex broadcast conference, when hold is activated, the system places all lines in the call on individual hold (I-Hold).

Simplex broadcast calls are available for turrets, IQ/MAX Sync, and IQ/MAX Omni.

7 Button programming

If you have appropriate privileges, you can program up to 600 buttons on the Button Sheet. You can add and update lines and call functions as needed to accommodate the communication needs of your business environment.

Figure 92: Add a button



You can program the following types of buttons on the Button Sheet:

- Line (See *Add a line button* on page 121.)
- Function (See *Function buttons* on page 123 and *Add a function button* on page 122.)
- Point of Contact: a shortcut to a point of contact from a selected directory entry (See *Add a point of contact button* on page 124 and *Add a preferred point of contact to the Button Sheet* on page 50.)
- Direct intercom (See *Add a DICM button* on page 125.)
- Speed Dial (See *Add a speed dial button* on page 126.)
- Diversion (See *Add a direct dial line diversion button* on page 129 or *Add an intercom diversion button* on page 128.)

Figure 93: Button Sheet showing various button types

1	Left button is a point of contact (POC) button. Right button is a speed dial button.
2	Two POC buttons.
3	Left button is a POC button. Right button is a Direct Intercom (DICM) button.
4	Four line buttons.
5	Two private line buttons.
6	Two diversion buttons.
7	Two function buttons.
8	The right button is a diversion button. The left button is a broadcast button.

Button editing capabilities enable you to:

- View and edit button parameters or settings (See *Edit a button* on page 131.)
- Copy a button (See *Copy a button* on page 132.)
- Move an existing button (See *Move a button* on page 132.)
- Swap the position of buttons on the button sheet (See *Swap buttons* on page 132.)
- Remove a button (See *Remove a button* on page 133.)

Button descriptions that exceed the display length for a button are truncated and the hidden characters are represented by an asterisk. Alphanumeric values are truncated on the right; for example, `Do Not Disturb` is displayed as `Do Not Di*`. Numeric values are truncated on the left; for example, `12031234567` is displayed as `*1234567`. The number of characters displayed is based on the font type and size.

You can continue to respond to incoming calls while programming buttons.

7.1 Add a line button

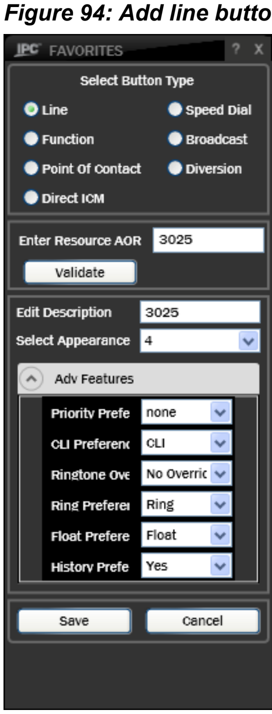
You can add a line button on the Button Sheet.

If you add a line button that is assigned the same line as a speaker channel and your user account is configured appropriately, the speaker number is displayed on the button. If more than one speaker is assigned the same line, the lowest speaker number is displayed.

For a diversion button that is added for a line, if the **Diversion Type** is **Immediate**, diversion is enabled, and the user account is configured appropriately, *DIVERTED* is displayed in red on the button.

1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Line** option.

Figure 94: Add line button



4. Enter the identifier for the line in the **Enter Resource AOR** field.

   The identifier must be a resource address of record (AOR) that has been defined through Unigy administration. For information about resource AORs, contact your Unigy administrator. You can enter a line number or a known personal extension number (not intercom if it is different from the personal extension).

5. Click **Validate** to verify that the line identifier is valid.
   If validation fails, error messages are displayed in the main window message area and next to the **Validate** button on the button programming dialog.

   The button programming dialog displays additional fields, including **Edit Descriptor**, **Select Appearance**, and a button for **Adv Features**.

6. Enter the button label in the **Edit Descriptor** field.

7. If you are creating a button for a dial tone line or extension, you can select an appearance number using the **Select Appearance** field.

8. To program line preferences, click the **Adv Features** button.

9. Set advanced line preferences as follows:

   - **Priority Preference**: (**low** or **high**) Priority for calls originating on this line.
   - **CLI Preference**: (**CLI** or **No CLI**) Display or suppress CLI information for the line. (If you choose **No CLI**, CLI information is still stored in history events.)
   - **Ringtone Override**: (**No Override** or **Ringtone 1** - **Ringtone 18**) Specify a ringtone to override the default ringer, or **No Override** to use the default ringtone.
   - **Ring Preference**: (**Ring**, **Single Ring**, or **No Ring**) Settings for incoming calls on the line.
   - **Float Preference**: (**Float** or **No Float**) Display calls from this line on a floating button if the line button is not currently displayed (only affects turrets).
   - **History Preference**: (**yes** or **no**) Whether to include calls on this line in call history records.

10. Click **Save**.

Result: The line button is added.

7.2 Add a function button

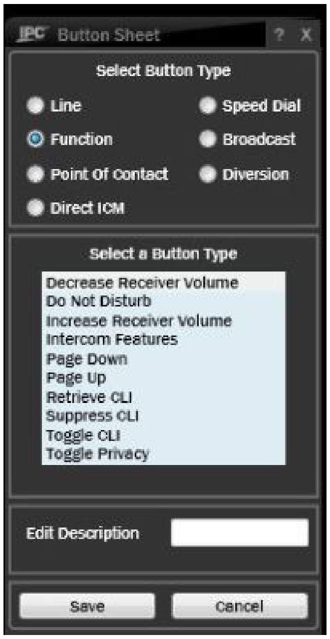
Program function buttons in the Button Sheet.

For information on the functions you can assign to buttons, refer to *Function buttons* on page 123.

1. Right-click an empty button in the Button Sheet and choose **Add Button** from the context menu.
   The *Button Sheet* displays the button programming dialog box.

2. Under **Select Button Type**, click the radio button for the **Function** option.
   The system displays a list of functions you can assign to the button.

Figure 95: Add a function button



3. Select the appropriate function.
   When you select a function, the function name is displayed as the default button label in the **Edit Descriptor** field.
4. If you want to change the label, type the appropriate value.
5. Click **Save**.
   The system adds the function button with the label specified.

7.2.1 Function buttons

You can assign functions to buttons in the Button Sheet. When you press a function button before placing a call or during a call, it performs a special action.

The following table lists the functions you can assign to a button:

Table 18: Assignable functions

Function	Description
Decrease Receiver Volume	Decrease the handset receiver volume.
Direct Page	Go directly to a page in the Button Sheet.
Do Not Disturb	Prevent line and intercom calls from ringing when you do not want to be disturbed.
Increase Receiver Volume	Increase the handset receiver volume.
Intercom Features	Display the Dial Pad with the **ICM** option selected so you can dial an intercom call without having to select this option.
Page Down	Page down through the Button Sheet.
Page Up	Page up through the Button Sheet.

Table 18: Assignable functions (continued)

Function	Description
Retrieve CLI	Show calling line identification (CLI) for a button configured for **No CLI** or show the full CLI if it is too long.
Suppress CLI	Block your calling line identification from being displayed at the distant end.
Toggle CLI	Change from your default CLI (name or number) to the other option. Stops default toggle and changes it manually.
Toggle Privacy	Turn Privacy on or off for the current call.

For more information, see *Add a function button* on page 122.

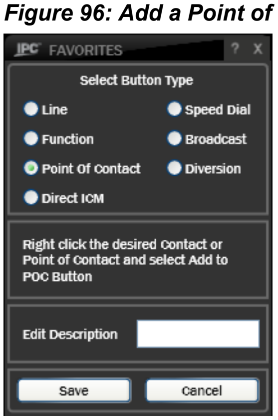
Buttons can also be programmed for you by your Unigy administrator.

7.3 Add a point of contact button

You can add a point of contact (POC) button on the Button Sheet, to enable you to use a particular method (such as a cell phone or home number) to call a contact.

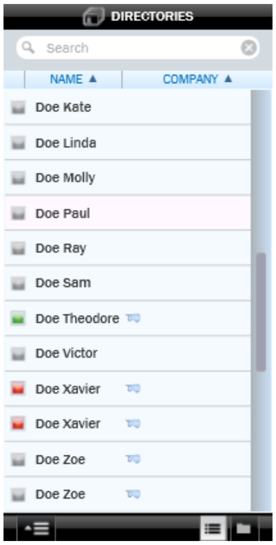
1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Point of Contact** option.

Figure 96: Add a Point of Contact button



The main window displays the *Directories* application.

Figure 97: Directories application



4. Use one of the following methods to add a point of contact:
   - To add the preferred point of contact, right-click a directory entry and choose **Select to add to POC button**.
   - To add any point of contact:
     1. Expand a directory contact entry.
     2. Click the **View Contact Details** icon on the contact entry to display the contact profile.
     3. Right-click any point of contact on the contact profile and choose **Select to add to POC button**.
5. Enter the button label in the **Edit Descriptor** field.
6. Click **Save**.

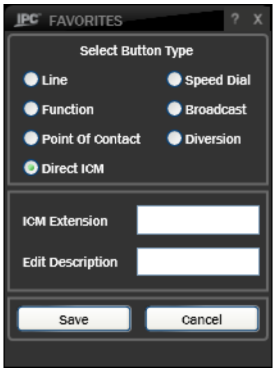
Result: The point of contact button is added.

7.4 Add a DICM button

Add a direct intercom (DICM) button to dial an intercom extension with a single button press.

1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Direct ICM** option.

Figure 98: Adding a Direct ICM button



4. Enter the extension number in the **ICM Extension** field.
5. Enter the label for the button in the **Edit Description** field.
6. Click **Save**.

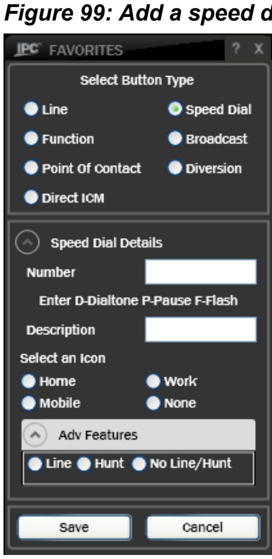
Results: You can click the programmed button to place an intercom call to the programmed extension. Status information and call controls are shown on the *Activity* display.

7.5 Add a speed dial button

You can add a speed dial button on the Button Sheet to enable you to dial a number with a single button press.

1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Speed Dial** option.

Figure 99: Add a speed dial button



4. Enter the speed dial number.

   You can include the special function `P` (Pause) in the number. This pauses dialing while call processing is completed.

5. Enter the label for the button in the **Edit Descriptor** field.
6. To add an icon that identifies the type of number, click one of the radio buttons: **Home**, **Work**, **Mobile**, or **None**. If you click the radio button for **None**, no identifying icon is associated with the speed dial button.
7. To specify a line or the hunt function, click the **Adv Features** button and click a radio button for one of the options.
   - **Line**: After choosing the **Line** option, enter the resource AOR for the line, then click **Validate**. Once the line is validated, the dialog displays a **Select Appearance** field that you can use to specify the appearance number for a dial tone line.
   - **Hunt**: Hunt for any available line.
   - **No Line/Hunt**
8. Click **Save.**

The speed dial button is added.

7.6 Add a simplex broadcast button

To initiate a simplex broadcast, configure a broadcast button on your Button Sheet.

Note

Pulse Enterprise does not support simplex broadcast buttons.

Only private wire lines (including both hoot and non-hoot lines, but not Open Connexion lines) can be added to a simplex broadcast (up to 24 lines per broadcast).

1. Open the Button Sheet by clicking the **Button Sheet** icon in the main window Toolbar.
   The Button Sheet opens in a separate window on the desktop.
2. If necessary, go to a page that contains an empty button.
3. Right-click an empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
4. Under Select Button Type, click the radio button for the **Broadcast** option.
   The button programming dialog displays selectors for broadcast types.
5. Click the radio button for **Simplex Broadcast**.
   The dialog displays a button that enables you to add private lines.
6. Click **Select Private wire Lines**.
   The view changes to the Button Sheet.
7. Page through the Button Sheet and select any private lines to be added to the broadcast group.
   The line buttons are highlighted as you choose them. To deselect a selected line re-click the button.

   Note

   To exit without selecting lines, right-click and choose **Finished**, then within the button programming dialog, click **Cancel**.

   ---
8. After selecting or deselecting the lines, right-click a button that is not one of the private line buttons you selected then click **Finished** to return to the button selection panel. Wait until the button programming dialog displays the list of private lines you selected.
9. To make additional changes to line selections:

- Click the **x** symbol on a line to remove it from the group.
- Click **Select Private wire Lines** again to add more lines.

10. Enter a label for the broadcast in the **Edit Descriptor** field.
11. Click **Save**.

The broadcast group is saved to the button. You can initiate a call to the group by clicking the button.

7.7 Add an intercom diversion button

You can add an intercom diversion button in the Button Sheet.

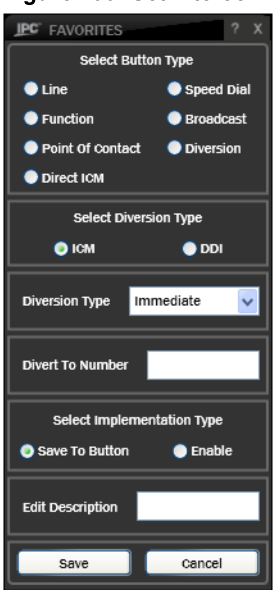
Note

- If intercom diversion (busy) is enabled for an extension when intercom calls are active or pending at the extension, only new intercom calls will be diverted.
- If you do not have a free button, you cannot enable diversion.

---

1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Diversion** option.

   Figure 100: Set intercom diversion



4. Under Select Diversion Type, click the radio button for **ICM** (intercom).
5. Specify the ICM Diversion Type:
   - **No Diversion**
   - **Immediate**
   - **Busy**

- **Ring/No Answer**
- **Busy/Ring/No Answer**

6. In the **Divert To Number** field, enter the intercom extension number to which calls should be diverted.
7. Under Select Implementation Type, click one of the radio buttons:
   - **Save to Button**: The diversion properties you set are saved to a button. The button can be used to enable the programmed diversion, and is highlighted when diversion is enabled.

     For this option, enter a button label in the **Edit Description** field (required).
   - **Enable**: The specified diversion is enabled when you save the settings, but not saved to a button. This option does not provide an indication that diversion is enabled.
8. Click **Save.**
9. To enable diversion, click the programmed button (or use this procedure with the **Enable** option).

7.8 Add a direct dial line diversion button

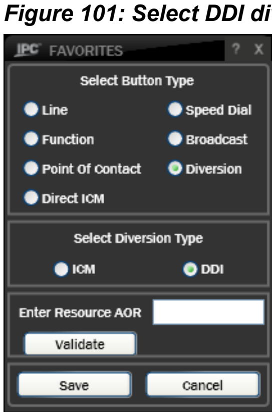
You can add a line diversion button on the Button Sheet.

Note

If you do not have a free button, you cannot enable diversion. Diversion can be enabled on a spare button without saving the diversion settings to the button, in which case the button remains available.

1. Navigate to an empty button on the Button Sheet.
2. Right-click the empty button and choose **Add Button** from the context menu.
   The Button Sheet displays a button programming dialog.
3. Under Select Button Type, click the radio button for the **Diversion** option.
4. Under Select Diversion Type, click the radio button for **DDI** (a direct dial line).

   Figure 101: Select DDI diversion



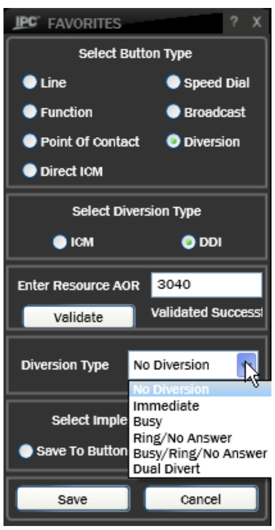
5. Enter an identifier for the line in the **Enter Resource AOR** field.
6. To verify that the identifier for the line is valid, click **Validate**.
   If the line is not valid, an error message is displayed. You must enter a valid line ID to continue.

   If the line is valid, additional fields are displayed that enable you to specify the diversion type and choose how to implement the diversion.

Figure 102: DDI diversion implementation type

7. Click the down arrow for the **DDI Diversion Type** field and choose one of the following diversion types:

   Figure 103: DDI diversion types



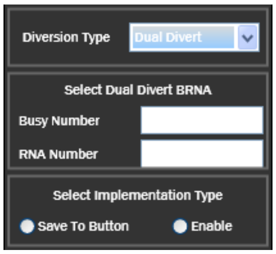
   - **No Diversion**
   - **Immediate**
   - **Busy**
   - **Ring/No Answer**
   - **Busy/Ring/No Answer**
   - **Dual Divert**

8. Enter the diversion destination:
   - For the **Immediate**, **Busy**, **Ring/No Answer**, or **Busy/Ring/No Answer** options, enter the number in the **Divert To Number** field.

Figure 104: Diversion number

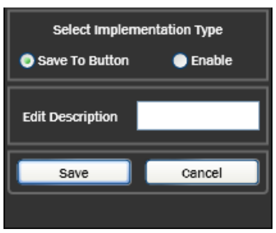
- For the **Dual Divert** option, enter destination numbers for both conditions:

  Figure 105: Dual diversion numbers

9. For the **Select Implementation Type** section, click one of the following radio buttons:

   Figure 106: Diversion button descriptor

   - **Save to Button**: The diversion properties you set are saved to a button. The button can be used to enable the programmed diversion, and is highlighted when diversion is enabled.

     For this option, enter a button label in the **Edit Description** field (optional).
   - **Enable**: The specified diversion is enabled when you save the settings, but not saved to a button. This option does not provide an indication that diversion is enabled.
10. Click **Save**.
    If you did not enter a button label, an error dialog is displayed. Close that dialog, enter a description, and click **Yes** to confirm and save the button.

The line diversion is added. If you saved to a button, you can click the button to enable the diversion programmed on the button.

7.9 Edit a button

You can edit programmed buttons on the Button Sheet for lines, functions, points of contact, speed dialing, and broadcasts.

Note

You cannot edit a diversion button.

---

1. Navigate to the button to be edited on the Button Sheet.
2. Right-click the button and choose **Edit Button** from the context menu.
   The Button Sheet displays the settings for the button.

3. Make changes to settings as needed.

   For information about settings, see the topic on adding the appropriate type of button.
4. Click **Save**.

7.10 Copy a button

You can copy a button on the Button Sheet and paste it onto an empty button.

Copying a button may be useful when assigning an existing button to your fixed button area, or when creating a copy on any page that makes accessing the button more convenient.

1. Navigate to the button to be copied on the Button Sheet.
2. Right-click the button and choose **Copy Button** from the context menu.
3. Navigate to an empty button.

   You can copy the original button to an empty button on any page of the Button Sheet (including a fixed button).
4. Right-click the empty button and choose **Paste Button** from the context menu.

The original button is copied to the new button, but the original is not affected by the copy operation. Both the original and the new button have identical settings.

7.11 Move a button

You can move a programmed button on the Button Sheet to an empty button on any page, including a fixed button displayed on any page.

1. Navigate to the button to be moved on the Button Sheet.
2. Use one of the following methods to move the button:
   - Drag the button to an empty button on the same page.
   - To move the button to an empty button on any page:
     1. Right-click the button and choose **Move Button** from the context menu.
     2. Navigate to an empty button on any page.
     3. Right-click the empty button and choose **Paste Button** from the context menu.

Results: The original button definition is moved to the new button. The original button is blank and available for reassignment.

7.12 Swap buttons

You can swap the positions of existing buttons on the Button Sheet.

You can swap buttons only if they are on the same page of the Button Sheet.

1. Navigate to the page of the Button Sheet that contains the buttons to be swapped.
2. Click and hold down one of the buttons, then drag it onto the other button.

Results: The positions of the buttons are swapped.

Note

If you drag the button onto an empty button, the original button definition is moved to the new button instead of being swapped with another button.

7.13 Remove a button

You can delete a programmed button on the Button Sheet.

1. Navigate to the button to be deleted on the Button Sheet.
2. Right-click the button to be deleted and choose **Remove Button** from the context menu.
3. On the confirmation dialog, click **Yes**.

Results: The button assignment is removed. The button is blank and available for new assignments.

A Installation and administration

A.1 Hardware and software requirements for the Unigy Soft Client

The Soft Client can be installed on various Microsoft Windows-based devices that have sufficient storage and memory resources.

Hardware requirements

The following hardware is required to support the Soft Client software on a Windows-based desktop or laptop computer:

- Sound card (as supported by the operating system). This is not required for a VM computer.
- Network card (as supported by the operating system).
- Hard disk with at least 100 MB of free space for stored files plus 2 GB of space while running the Soft Client.
- RAM with at least 3 GB of available memory.

Running the Soft Client on Microsoft Surface Pro 3 and Surface Pro 4 is also supported.

Note

The Microsoft Surface Pro on-screen keyboard does not include some of the keys that are assigned to the default Soft Client keyboard shortcuts. If you cannot use the keyboard shortcuts, either add an external keyboard or ask your Unigy administrator to change the keyboard shortcuts to use compatible keys.

Software requirements

The following software is required to support the Soft Client products:

- Microsoft Windows 7, 8.1, or 10 (32-bit or 64-bit)
- Microsoft .NET Framework 4.5
- Microsoft Outlook 2010 or 2013 (32-bit or 64-bit) – required only for integration with Outlook contacts

  The Microsoft Outlook add-in supports dynamic update of local contacts. If you find that the changes are not updating dynamically, log out of the Soft Client then log in to see the contact changes.

For the latest software requirement information, refer to the *Unigy Product Compatibility Matrix* (available only to IPC personnel).

A.2 Installation, upgrade, rollback, and uninstall procedures

A.2.1 Install the Unigy Soft Client software

The Soft Client is installed on desktop or laptop computers, that are running the Microsoft Windows operating system, to provide communication services through the computer’s audio interface.

Prerequisites: Before installing the Soft Client software, complete the following tasks:

- Because the Soft Client software can be installed programmatically by an administrator, determine whether it is already installed by clicking **Start ➤ All Programs**. If **IPC Systems Inc ➤ Unigy Client** is in the *Start* menu, the software is installed.
- Review the *Hardware and software requirements for the Unigy Soft Client* on page 135 and ensure that your computer has the required resources.
- Ensure that you can log in to the computer with an account that has administrator privileges.
- Determine whether the client computer has the Microsoft Windows 32-bit or 64-bit operating system.
- Obtain the IP address or virtual IP address (VIP) for the zone from which you are installing the Soft Client software.
- Obtain the Soft Client home zone IP address or VIP.

Installation options

The following installation options are available. Both can run interactively, initiated by each end user, or silently as a background process initiated remotely by a Unigy administrator. For information on remote installation, refer to *Remote Soft Client installation* on page 137.

- **Full installation**: Installs all Soft Client components. This topic describes the full installation procedure.
- **Upgrade**: Update packages provide fixes, new features, and other changes. An automated update module checks periodically for updates. When the system detects a new update, a black box is displayed in the lower right corner of the Unigy Application (Soft Client) icon in the Microsoft Windows System Tray. For more information on installing updates, see *Upgrade the Unigy Soft Client software – Microsoft Windows 32-bit* on page 140 or *Upgrade the Unigy Soft Client software – Microsoft Windows 64-bit* on page 142.

You can uninstall the software by rerunning the Soft Client installer program or from the Microsoft Windows **Remove a program** utility within the Control Panel. The **Uninstall** process removes all Soft Client files, folders, and shortcuts. For information on this procedure, refer to *Uninstall the Unigy Soft Client software* on page 146.

To perform an interactive full installation:

1. In a browser, access the Soft Client installer `.msi` file with one of the following URLs:
   - Microsoft Windows 32-bit: **`https://`*`ip_or_vip`*`/image/UnigyClientInstaller-x86.msi`**
   - Microsoft Windows 64-bit: **`https://`*`ip_or_vip`*`/image/UnigyClientInstaller.msi`**

   `ip_or_vip` is the IP address of the appliance in a Unigy standalone zone or the virtual IP address (VIP) of the HA zone from which you are installing the software.
2. Click **Run** to initiate the installation, or **Save** to download the `.msi` file to your computer.

   If you download the file, double-click it to start the installation.
3. When you are prompted to confirm that you want to run the program, click **Run**.
   The *Welcome to the Unigy(TM) Client Setup Wizard* window is displayed.
4. Click **Next**.
5. In the *End user License Agreement*, read the terms of use, select the **I accept the terms in the License Agreement** check box, then click **Next**.

   If any prerequisites have not been completed, the wizard prompts you to complete them before continuing.

6. In the *Destination Folder* window, confirm the default installation location or use the **Change** button to specify a new location then click **Next**.
7. In the *Install Options* window, select one, both, or neither of the following options then click **Next**:
   a) Select the **Create Shortcut on Desktop** check box if you want the system to add a **Unigy Client** (Soft Client) shortcut to the desktop in addition to the shortcut it creates in the Microsoft Windows *Start* menu.
   b) Select the **Install Outlook Add-in** check box to provide dynamic integration with Microsoft Outlook contacts.
8. In the *Ready to install Unigy(TM) Client* window, click **Install**.
9. If you see the *User Account Control* message box, click **Yes**.
   The installation begins. After it completes, the *Completed the Unigy(TM) Client Setup Wizard* window is displayed indicating that the installation is complete. After a brief delay, the *Unigy Config Tool* dialog box is displayed.
10. In the *Unigy Config Tool* dialog box, configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
11. In the *Save* message box, click **OK**.
12. In the *Unigy Config Tool* dialog box, click **Close**.
13. In the *Completed the Unigy(TM) Client Setup Wizard* window, click **Finish**.

Results:

- The installer creates the **IPC Systems Inc** folder and **Unigy Client** and **Unigy Client Configuration Tool** short cuts in the Microsoft Windows **Start ➤ All Programs** menu. Use the **Unigy Client** shortcut to run the Soft Client and use the **Unigy Client Configuration Tool** shortcut to change the configuration or to redirect the Soft Client to a different zone if a BCP plan is activated.
- If you selected the **Create Shortcut on Desktop** option, the system adds the shortcut to the desktop.
- If you selected the **Install Outlook Add-in** option, the system installs and enables the add-in within Microsoft Outlook.

Note

Restarting the client computer after the installation is not required.

A.2.2 Remote Soft Client installation

To eliminate the need for Unigy Soft Client end users to install and upgrade the Soft Client software on their computers, you can create a script or run commands that use a shell tool to silently install and configure the software on each user's computer. You can also use this process to upgrade or uninstall the software.

In the interactive Soft Client installation procedure, each end user runs the `UnigyClientInstaller-x86.msi` program (32-bit) or the `UnigyClientInstaller.msi` program (64-bit) from a browser, responds to the installation wizard prompts, then enters the IP address of a Unigy standalone zone or the VIP of an HA zone with which the Soft Client communicates for configuration and call processing. The wizard prompts include the license agreement, location to which the software is installed, whether the installation is for all users of the computer or only the current user, whether the user wants a Soft Client desktop shortcut, and whether the user wants to install the Microsoft Outlook Add-in. This procedure is quick, simple, and straightforward, but it can be automated to allow the end users to focus on their primary job responsibilities rather than installing software.

The installer programs support silent installation, which installs and configures the software without the need for end user interaction. If a version of the software is already installed, you can use a script to upgrade or uninstall the current version. By default, the silent installation uses the default installation responses to the installation wizard prompts; that is, it accepts the license agreement, installs the software to `C:\Program Files (x86)\IPC Systems Inc\Unigy Client` for all users of the computer, installs the Microsoft outlook Add-in, and does not add a desktop shortcut (however, it adds the Unigy Client and Unigy Config Viewer executables to the Microsoft Windows *Start* menu).

You can run the silent installation command from within a shell tool to install the Soft Client software on end user computers from a remote location, or if you do not have access to these tools, you can use the command to install the software locally on each computer without the need to respond to the installation wizard prompts.

Verify the following requirements before you run the installation commands:

- The client computers must meet the Soft Client hardware and software requirements specified in *Hardware and software requirements for the Unigy Soft Client* on page 135.
- The client computers must be accessible at the time the script runs, or the script must be programmed to run the installation when the client computers become available.
- If the commands are run from a Microsoft Windows command prompt, they must be run with Administrator privileges.

The installation command includes the following options and information:

- Command option that specifies whether the command installs or uninstalls the software.
- URL that identifies the location of the installer file. You can specify one of the following:
  - Standard installation URL, **`https://`*`ip_vip`*`/image/UnigyClientInstaller-x86.msi`** (32-bit) or **`https://`*`ip_vip`*`/image/UnigyClientInstaller.msi`** (64-bit), where ***`ip_vip`*** is the IP address of the appliance in a standalone zone or the VIP of an HA zone from which you are installing the software.
  - Folder on a network drive or a local drive on the computer running the script. Copy the installer file from the CCM or ACCM to this location.
- Command option and associated parameters that specify that the installation is to run in silent (quiet) mode with no user interface displayed, and no user interaction required.
- IP address or VIP of the home zone that provides configuration and call processing support. The installation program writes this value to the Unigy database. After the installation completes, end users can view, and if necessary, change the value with the Unigy Config Viewer tool.
- The following optional parameters:
  - INSTALLDESKTOPSHORTCUT: creates a desktop shortcut. The default is **""** (false). Specify **1** to create the icon.
  - INSTALLOUTLOOKADDIN: installs the Microsoft Outlook Add-in for dynamically synchronizing local contacts. The default is **1** (true). Specify **""** to prevent installation of the Add-in.
- Logging parameter that specifies the name of the installation log file. The log files are stored in `%LOCALAPPDATA%\IPC Systems Inc\UDA\logs`. The installation log records the installation process, displays messages, and at the end, indicates the success or failure of the installation. Do not include spaces in the log file name. The following success or failure messages are displayed in the log file for an installation or uninstallation:

- When an installation succeeds, the log includes this message at the end of the file: *`Product: Unigy Client -- Installation completed successfully`*.
- When an uninstallation succeeds, the log includes the message *`Product: Unigy Client - Removal completed successfully.`*
- If the installation fails because the client computer does not have the required software prerequisites, the log includes messages that inform you what software needs to be installed or upgraded.
- If a previous version of the software is installed, the log contains a message that instructs you to uninstall the software before you install the new version.
- If Microsoft Outlook, Office Communicator, or Microsoft Lync are open when you run the uninstall command, the log includes a message that instructs you to close these applications before running the installation.
- If the command contains invalid parameters, the installation fails and no information is written to the log file.

Sample commands are described in the following sections:

Installing the Soft Client software

The following sample commands use Microsoft's `msiexec` utility to perform different types of installations. The examples use the 64-bit installer.

- This command runs the installation in silent mode, installs the Microsoft Outlook Add-in, and writes the installation events to a log file.

```
msiexec /i msiLocation/image/UnigyClientInstaller.msi /qn ccsip=ip_vip /
log logFile
```

- This command runs the installation in silent mode, adds the Unigy Client icon to the desktop, installs the Microsoft Outlook Add-in, and writes the installation events to a log file:

```
msiexec /i msiLocation/image/UnigyClientInstaller.msi /qn ccsip=ip_vip
INSTALLDESKTOPSHORTCUT=1 /log logFile
```

- This command runs the installation in silent mode, adds the Unigy Client icon to the desktop, prevents installation of the Microsoft Outlook Add-in, and writes the installation events to a log file:

```
msiexec /i msiLocation/image/UnigyClientInstaller.msi /qn ccsip=ip_vip
INSTALLDESKTOPSHORTCUT=1 INSTALLOUTLOOKADDIN="" /log logFile
```

In these commands, ***`msiLocation`*** is the location of the installer file, ***`ip_vip`*** is the home zone IP address, VIP, or FQDN, and ***`logFile`*** is the name of the installation log file. The log file is a text (.txt) file. The IP address, VIP, or FQDN must be specified as the Common Name or Alternate Name in the client certificate.

Upgrading and Uninstalling the Soft Client software

To upgrade the Soft Client software, you must uninstall the current version then install the new version. The following command uninstalls the software and writes the process events to a log file:

```
msiexec /log logFile /passive /uninstall
{4F08922F-22F9-4082-8B36-3E6D150317E4}
```

logFile is the name of the log file and the product ID, **{4F08922F-22F9-4082-8B36-3E6D150317E4}**, is a unique GUID that identifies the installer file. The value must be enclosed within braces.

Important

When you uninstall the software, Microsoft Outlook, Office Communicator, and Microsoft Lync must be closed on each client computer before you run the script.

Pushing the Soft Client software to one or more computers

To push the Soft Client software to one or more end user computers, or to uninstall the software from these computers, use a remote shell tool such as Microsoft's PsExec, or ssh tools such as OpenSSH, copSSH, or WinSSHD. The following example illustrates the use of PsExec to install the software onto three end user computers.

Note

You can download and extract the PsExec files from the Microsoft SysInternals website. If you download the files to `C:\Windows\System32\`, you will not have to specify a file path when you run the commands.

---

1. Open the Microsoft Windows Command Prompt.
2. Run `PsService.exe` to start the PsExec server service.
3. To start PsExec and instruct it to run the installation program on the end user computers, type the following command then press **Enter**.

   ```
   PsExec \\computer1,computer2,computer3 cmd -w
   ```

   For ***computer1***, ***computer2***, and ***computer3***, enter the computer name or IP address of each computer on which you are installing the software.
4. Type the silent installation command that was described previously then press **Enter**:

   ```
   msiexec /i msiLocation/UnigyClientInstaller.msi /qn ccsip=ip_vip /log
   logFile
   ```

The log file is created on the end user computers.

You can use the same procedure for uninstalling the software. Substitute the uninstallation command for the installation command.

A.2.3 Upgrade the Unigy Soft Client software – Microsoft Windows 32-bit

This topic describes how to upgrade the Soft Client software on a Microsoft Windows 32-bit client computer.

For information on upgrading the Soft Client software in a Microsoft Windows 64-bit environment, refer to *Upgrade the Unigy Soft Client software – Microsoft Windows 64-bit* on page 142.

When you access the Soft Client, if a new software version is available, the **Unigy Client** icon in the Microsoft Windows System Tray displays the upgrade indicator and the **Upgrade** option is displayed in the *Unigy Client* menu.

Figure 107: Unigy Client icon showing the upgrade indicator

Prerequisite:

Before you initiate the upgrade, close the Unigy Soft Client, Microsoft Outlook, Office Communicator, and Microsoft Lync, as applicable, to enable the system to uninstall the current software version before it installs the new version.

Note

To upgrade the Soft Client software on Microsoft Windows 32-bit systems, you cannot use the **Upgrade** option in the *Unigy Client* menu as you can with Windows 64-bit systems; instead you must manually uninstall the current version then install the new version.

---

1. Uninstall the current Soft Client software version by performing the procedure *Uninstall the Unigy Soft Client software* on page 146.
2. Install the new software from a browser by accessing the URL **`https://`*`ip_or_vip`*`/image/UnigyClientInstaller-x86.msi`**, where ***`ip_or_vip`*** is the IP address or virtual IP address (VIP) of the zone from which you are running the installation.
3. Click **Run**.
4. If you are prompted to confirm that you want to run the program, click **Run**.
   The *Welcome to the Unigy(TM) Client Setup Wizard* window is displayed.
5. Click **Next**.
6. In the *End-User License Agreement* window, read the Terms of Use, select the **I accept the terms in the License Agreement** check box, then click **Next**.
7. In the *Destination Folder* window, confirm the default installation location or click **Change** to specify a new location then click **Next**.
8. In the *Install Options* window, select one, both, or neither of the following options then click **Next**:
   a) Select the **Create Shortcut on Desktop** check box if you want the system to add a **Unigy Client** (Soft Client) shortcut to the desktop in addition to the shortcut it creates in the Microsoft Windows *Start* menu.
   b) Select the **Install Outlook Add-in** check box to provide dynamic integration with Microsoft Outlook contacts.
9. In the *Ready to Install Unigy(TM) Client* window, click **Install**.
10. If you see the *User Account Control* message box, click **Yes**.
    The installation begins. After it completes, the *Completed the Unigy(TM) Client Setup* window is displayed. After a brief delay, the *Unigy Config Tool* dialog box is displayed.
11. In the *Unigy Config Tool* dialog box, confirm or configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
12. In the *Save* message box, click **OK**.
13. In the *Unigy Config Tool* dialog box, click **Close**.
14. In the *Completed the Unigy(TM) Client Setup Wizard* window, click **Finish**.

A.2.4 Upgrade the Unigy Soft Client software – Microsoft Windows 64-bit

This topic describes how to upgrade the Soft Client software on a Microsoft Windows 64-bit client computer.

For information on upgrading the Soft Client software in a Microsoft Windows 32-bit environment, refer to *Upgrade the Unigy Soft Client software – Microsoft Windows 32-bit* on page 140.

When you access the Soft Client, if a new software version is available, the **Unigy Client** icon in the Microsoft Windows System Tray displays the upgrade indicator and the **Upgrade** option is displayed in the *Unigy Client* menu.

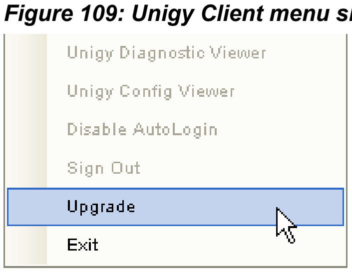
Figure 108: Unigy Client icon showing the upgrade indicator

Prerequisite:

Before you initiate the upgrade, close Microsoft Outlook, Office Communicator, and Microsoft Lync, as applicable, to enable the system to uninstall the current software version before it installs the new version.

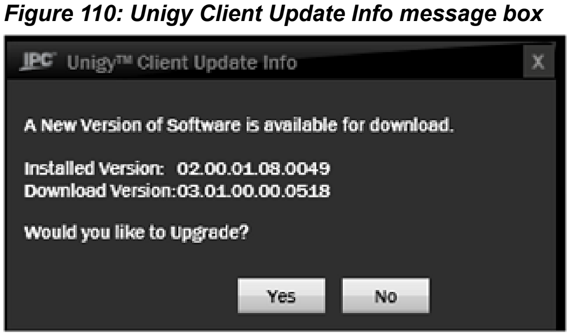
1. Access the Soft Client *Login* window by double-clicking the Unigy Client icon or by clicking **Start ➤ All Programs ➤ IPC System Inc ➤ UnigyClient**.
2. Within the Microsoft Windows System Tray, right-click the Unigy Client icon to display the available options.

   Figure 109: Unigy Client menu showing the Upgrade option

3. Click **Upgrade** to initiate the upgrade.
   The *Unigy Client Update Info* message box is displayed. The message shows the current version followed by the new version that is available for the upgrade.

   Figure 110: Unigy Client Update Info message box

4. Click **Yes** to proceed with the upgrade.
   Windows Installer begins the upgrade process.
5. If you see the *User Account Control* window requesting permission to allow the system to make changes, click **Yes**.

Windows Installer uninstalls the current software version then displays the *Welcome to Unigy(TM) Client Setup Wizard* window.

6. Click **Next**.
7. In the *End-User License Agreement* window, read the Terms of Use, select the **I accept the terms in the License Agreement** check box, then click **Next**.

Note

If you decline the upgrade, the upgrade indicator on the Unigy Client icon is cleared and the **Upgrade** option is removed from the menu.

If any prerequisites have not been completed, the wizard prompts you to complete them before continuing.

8. In the *Destination Folder* window, confirm the default installation location or click **Change** to specify a new location then click **Next**.
9. In the *Install Options* window, select one, both, or neither of the following options then click **Next**:
   a) Select the **Create Shortcut on Desktop** check box if you want the system to add a **Unigy Client** (Soft Client) shortcut to the desktop in addition to the shortcut it creates in the Microsoft Windows *Start* menu.
   b) Select the **Install Outlook Add-in** check box to provide dynamic integration with Microsoft Outlook contacts.
10. In the *Ready to Install Unigy(TM) Client* window, click **Install**.
11. If you see the *User Account Control* message box, click **Yes**.
    The installation begins. After it completes, the *Completed the Unigy(TM) Client Setup* window is displayed. After a brief delay, the *Unigy Config Tool* dialog box is displayed.
12. In the *Unigy Config Tool*, confirm or configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
13. In the *Save* message box, click **OK**.
14. In the *Unigy Config Tool* dialog box, click **Close**.
15. In the *Completed the Unigy(TM) Client Setup* window, click **Finish**.

A.2.5 Roll back the Unigy Soft Client software – Microsoft Windows 32-bit

If the Unigy software is rolled back to a previous version, you must roll back the Unigy Soft Client software on the client computers to the same version. This topic describes how to roll back the software on a Microsoft Windows 32-bit client computer.

For information on rolling back the Soft Client software in a Microsoft Windows 64-bit environment, refer to *Roll back the Unigy Soft Client software – Microsoft Windows 64-bit* on page 144.

When you access the Soft Client, if the Unigy software is at a lower version than the current Soft Client version, the **Unigy Client** icon in the Microsoft Windows System Tray displays the rollback indicator and the **Rollback** option is displayed in the *Unigy Client* menu. The system also displays the tool tip `Unigy - Roll Back to Old Version` when you move your mouse over the icon.

Figure 111: Unigy Client icon showing the rollback indicator

Prerequisite:

Before you initiate the rollback, close the Unigy Soft Client, Microsoft Outlook, Office Communicator, and Microsoft Lync, as applicable, to enable the system to uninstall the current software version before it installs the lower version.

Note

To roll back the Soft Client software on Microsoft Windows 32-bit systems, you cannot use the **Rollback** option in the *Unigy Client* menu as you can with Windows 64-bit systems; instead you must manually uninstall the current version then install the lower version.

---

1. Uninstall the current Soft Client software version by performing the procedure *Uninstall the Unigy Soft Client software* on page 146.
2. Install the lower software version from a browser by accessing the URL **`https://`*`ip_or_vip`*`/image/UnigyClientInstaller-x86.msi`**, where ***`ip_or_vip`*** is the IP address or virtual IP address (VIP) of the zone from which you are running the installation.
3. Click **Run**.
4. If you are prompted to confirm that you want to run the program, click **Run**.
   The *Welcome to the Unigy(TM) Client Setup Wizard* window is displayed.
5. Click **Next**.
6. In the *End-User License Agreement* window, read the Terms of Use, select the **I accept the terms in the License Agreement** check box, then click **Next**.
7. In the *Destination Folder* window, confirm the default installation location or click **Change** to specify a new location then click **Next**.
8. In the *Install Options* window, select one, both, or neither of the following options then click **Next**:
   a) Select the **Create Shortcut on Desktop** check box if you want the system to add a **Unigy Client** (Soft Client) shortcut to the desktop in addition to the shortcut it creates in the Microsoft Windows *Start* menu.
   b) Select the **Install Outlook Add-in** check box to provide dynamic integration with Microsoft Outlook contacts.
9. In the *Ready to Install Unigy(TM) Client* window, click **Install**.
10. If you see the *User Account Control* message box, click **Yes**.
    The installation begins. After it completes, the *Completed the Unigy(TM) Client Setup* window is displayed. After a brief delay, the *Unigy Config Tool* dialog box is displayed.
11. In the *Unigy Config Tool* dialog box, confirm or configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
12. In the *Save* message box, click **OK**.
13. In the *Unigy Config Tool* dialog box, click **Close**.
14. In the *Completed the Unigy(TM) Client Setup Wizard* window, click **Finish**.

A.2.6 Roll back the Unigy Soft Client software – Microsoft Windows 64-bit

If the Unigy software is rolled back to a previous version, you must roll back the Unigy Soft Client software on the client computers to the same version. This topic describes how to roll back the software on a Microsoft Windows 64-bit client computer.

For information on rolling back the Soft Client software in a Microsoft Windows 32-bit environment, refer to *Roll back the Unigy Soft Client software – Microsoft Windows 32-bit* on page 143.

When you access the Soft Client, if the Unigy software is at a lower version than the current Soft Client version, the **Unigy Client** icon in the Microsoft Windows System Tray displays the rollback indicator and the **Rollback** option is displayed in the *Unigy Client* menu. The system also displays the tool tip `Unigy - Roll Back to Old Version` when you move your mouse over the icon.

Figure 112: Unigy Client icon showing the rollback indicator

Prerequisite

Before you perform this procedure, close Microsoft Outlook, Office Communicator, and Microsoft Lync, as applicable, to enable the system to uninstall the current software version before it installs the lower version.

1. Access the Soft Client *Login* window by double-clicking the Unigy Client icon or by clicking **Start ➤ All Programs ➤ IPC System Inc ➤ UnigyClient**.
2. Right-click the *Unigy Client* icon in the Microsoft Windows System Tray then click **Rollback**.
   The *Unigy™ Client Info* message box prompts you to confirm that you want to roll back from the currently **Installed Version** to the **Download Version**.
3. Click **Yes**.
4. If you see the *User Account Control* message box requesting permission for the system to make changes, click **Yes**.
   The system uninstalls the higher version software then presents the Unigy Client(TM) wizard.
5. Perform one of the following procedures based on the software version you are rolling back to:
   - For versions prior to Unigy v3.0, do the following:
     1. In the *License Agreement* window, read the Terms of Use, click **I Agree** then click **Next**.
     2. In the *Welcome to the Unigy(TM) Client Setup Wizard* window, click **Next**.
     3. In the *Select Installation Folder* window, accept the default folder or click **Browse** to select a different folder. Also, select either **Everyone**, to install the software for all users who can log in to the client computer, or **Just me**, to install the software for only your use, then click **Next**.
     4. In the *Unigy Client*, window, select the **Create Shortcut on Desktop** check box if you want the installer to add a shortcut icon to your desktop, then click **Next**.
     5. In the *Confirm Installation* window, click **Next**.
     6. The installer begins the installation process.
     7. If you see the *User Account Control* message box requesting permission for the system to make changes, click **Yes**.

        The installer installs the software then displays the *Installation Complete* window. After a brief delay, followed soon after by the *Unigy Configuration Tool* message box with the message `Unable to resolve CCM IP through DHCP services. Please enter CCM IP manually. Reason: No data received from DHCP server!`
     8. In the *Unigy Configuration Tool* message box , click **OK**.
     9. In the *Unigy Config Tool* dialog box, configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
     10. In the *Save* message box, click **OK**.

11. In the *Unigy Config Tool* dialog box, click **Close**.
12. In the *Installation Complete* window, click **Close**.

- For Unigy v3.0 or higher, do the following:

1. In the *Welcome to the Unigy(TM) Client Setup Wizard* window, click **Next**.
2. In the *End-User License Agreement* window, read the Terms of Use, select the **I accept the terms in the License Agreement** check box, then click **Next**.
3. In the *Destination Folder* window, accept the default installation location or click the **Change** button to specify a new location then click **Next**.
4. In the *Install Options* window, select one, both, or neither of the following options then click **Next**:
   - **Create Shortcut on Desktop**: select this check box if you want the system to add a **Unigy Client** (Soft Client) shortcut to the desktop in addition to the shortcut it creates in the Microsoft Windows *Start* menu.
   - **Install Outlook Add-in**: select this check box to provide dynamic integration with Microsoft Outlook contacts.
5. In the *Ready to Install Unigy(TM) Client* window, click **Install**. The installer begins the installation process.
6. If you see the *User Account Control* message box, click **Yes**.

   After the installation completes, the *Completed the Unigy(TM) Client Setup* window is displayed. After a brief delay, the *Unigy Config Tool* dialog box is displayed.
7. In the *Unigy Config Tool* dialog box, confirm or configure the connection to the home zone or to a DHCP server as described in *Configure the Soft Client network connection* on page 147 then click **Save**.
8. In the *Save* message box, click **OK**.
9. In the *Unigy Config Tool* dialog box, click **Close**.
10. In the *Completed the Unigy(TM) Client Setup* window, click **Finish**.

A.2.7 Uninstall the Unigy Soft Client software

The uninstall process removes all Soft Client files, folders, and log files, deletes all update files and configuration files, and removes shortcuts from the **Start ➤ All Programs** menu and the desktop. You can uninstall the Soft Client software by rerunning the Soft Client installer program or through the **Uninstall a program** utility within the Microsoft Windows *Control Panel*. This topic describes how to remove the software by rerunning the `UnigyClientInstaller-x86.msi` (32-bit) or `UnigyClientInstaller.msi` (64-bit) file.

Prerequisite:

Before uninstalling the Soft Client software, close the Soft Client, Microsoft Outlook, Office Communicator, and Microsoft Lync, as applicable.

1. In a browser, access the Soft Client installer file that was used for the original installation with one of the following URLs, where ***ip_or_vip*** is the IP address of the appliance in the Unigy standalone zone or the virtual IP address (VIP) of the HA zone from which you are running the installer.
   - Microsoft Windows 32-bit: **https://*ip_or_vip*/image/UnigyClientInstaller-x86.msi**

- Microsoft Windows 64-bit: **`https://`*`ip_or_vip`*`/image/UnigyClientInstaller.msi`**

2. Click **Run** to initiate the uninstall or **Save** to download the installer file to your computer.

   If you download the file, double-click it to start the uninstall.
3. If you are prompted to confirm that you want to run the program, click **Run**.
   The system displays the *Welcome to the Unigy(TM) Client Setup Wizard*.
4. Click **Next**.

   a) The *Change, remove, or repair installation* window is displayed.
5. Click **Remove**.
   The *Ready to remove Unigy(TM) Client* window is displayed.
6. Click **Remove**.
7. If you see the *User Account Control* message box, click **Yes**.
   The system uninstalls the Soft Client software then displays the *Completed the Unigy(TM) Client Setup Wizard* window.
8. Click **Finish**.

A.2.8 Configure the Soft Client network connection

After installation of the Soft Client software, configure the network connection through which the Soft Client communicates with its home zone.

Unigy Soft Client provides two options for assigning the network connection to the zone with which it communicates for configuration and call processing purposes. Assignment of the connection varies according to the product for which you are configuring the connection. The option is selected at the time the software is installed, but can be changed at any time.

- **Static**: With this option, you specify the IP address, virtual IP address (VIP), or fully-qualified domain name (FQDN) of the zone that serves as the home zone for the Soft Client. If the product is registering with a single appliance zone, enter the IP address of the zone's ACCM appliance. If the Soft Client is registering with a High Availability (HA) zone, enter the zone's virtual IP address (VIP). For both zone types, you also have the option of entering the zone's FQDN. Obtain the appropriate value from your Unigy administrator. This option is available for all Unigy Soft Client products.
- **Dynamic**: This option automatically assigns the appropriate network address based on the value assigned on the DHCP server. It applies to all zones. The option is not available for Pulse Enterprise.

If your Unigy enterprise is licensed for Business Continuity Planning (BCP) for maintenance and disaster recovery purposes and your Soft Client is registered with a zone in a multizone enterprise, you can select a backup zone to which the system redirects the Soft Client if access to the home zone is not available. You enter this value at the time the BCP plan is activated. For Soft Clients, zone redirection is not automatic, you must manually initiate it. Obtain the appropriate zone from your Unigy administrator.

This dialog box is displayed automatically after an installation or upgrade. You can also display it at any other time to change the home zone address or to select a backup zone and initiate the zone redirection after activation of a BCP plan.

On a Microsoft Windows 7 system, you might have to select a specific **Network Adapter**.

If a remote installation or update is initiated by a Unigy administrator, the zone address will be updated as part of this process.

Important

Do not change any of the values within the **Advanced** tab.

1. If you are not accessing this dialog box as part of the software installation or upgrade procedure, click **Start ➤ All Programs ➤ IPC Systems Inc ➤ Unigy Client Configuration Tool**.
   The *Unigy Config Tool* dialog box is displayed.
2. In the **Primary** field, type the home zone IP address (single appliance zone), VIP (HA zone), or FQDN.

   The IP address, VIP, or FQDN must be specified in the client certificate.
3. The **Enable DHCP** check box indicates whether the zone IP address or virtual IP address (VIP) is automatically assigned by a DHCP server. It simplifies free-seating by eliminating the manual steps required to change the home zone when you log in to a turret and IQ/MAX Sync or log in to IQ/MAX Omni in a remote zone. Select the check box to enable automatic assignment of the value from a DHCP server. If you do not select this check box, you can manually change the zone VIP before you log in at the remote zone. This option does not apply to Pulse Enterprise.
4. Do not configure the **BCP** field or **Use BCP** check box when configuring the network settings.

   This field is used to select a backup zone to which the system redirects the Soft Client if access to the home zone is not available.
5. In the **Network Adapter** list, generally you accept the default value **Let Windows Choose**, however, if you cannot open the Soft Client, you might have to select a specific adapter.

   Obtain the appropriate adapter name from your Unigy administrator. If you manually change the adapter and your network connection changes, for example, if you access the Soft Client through a VPN connection, you must change the adapter value for the new adapter.
6. Click **Save**.
   The *Save* message box is displayed.
7. Click **OK**.
   The information you entered is saved, but the *Unigy Config Tool* dialog box remains open.
8. Click **Close**.

A.2.9 Determine the current Soft Client software version

The current version of the Unigy Soft Client software is available from the Soft Client Help menu and the Microsoft Windows *Uninstall or Change a Program* application.

1. To view the version within the Soft Client help menu:
   a) Log in to the Soft Client.
   b) In the *Main* window toolbar, click the Help icon (**?**) then click **About**.
   The version is displayed in the *About* information box.
2. To view the version in the Microsoft Windows *Uninstall or Change a Program* application:
   a) On the Microsoft Windows Desktop, click **Start ➤ Control Panel ➤ Programs ➤ Uninstall a Program**.
   b) Click the **Unigy(TM) Client** program.
   The version is displayed in the status bar at the bottom of the window.

A.3 Registration

When a CDI (turret, Pulse, Soft Client, or Pulse Mobile) starts, it registers with a Unigy zone for configuration and call processing purposes.

A Unigy administrator enables device registration for each zone in the enterprise through the Unigy Management System (UMS). When registration is enabled, new CDIs automatically register with a zone.

Registration information includes the extension, device type, communications policy, device name, device ID, location, and IP address. Unigy stores this information and associates it with your user login to establish a session or to close a session when you log out. Unigy uses registration information to manage all sessions associated with a device ID or user.

The zone that was initially assigned to a CDI is its home zone. This zone creates and manages the CDI record and provides services for the CDI. Administrators cannot change a CDI's home zone from the UMS. To change the home zone, the zone IP address or VIP must be changed on the CDI, the CDI must be removed from the database, and it must re-register with the new home zone.

The only time CDIs can connect to a zone that is not their home zone is when a BCP plan is activated; this is known as *CDI roaming*. It occurs when the home zone is not available and the CDIs are redirected to a backup zone. The system automatically redirects turrets and Pulse devices to the backup zone. Soft Client redirection is a manual process. You can log in to a CDI only if registration is enabled, your CDI is registered with a zone, the home zone or a backup zone is available and has not reached its maximum capacity, and your user account and device have the appropriate licenses assigned. If you cannot log in, contact your Unigy administrator.

B Differences between desktop devices and Soft Clients

This topic describes the call processing, application, programming, display, configuration, resiliency, and licensing differences between Unigy desktop devices (turrets and Pulse devices) and Unigy Soft Clients (IQ/MAX Omni, IQ/MAX Sync, Pulse Enterprise, and Pulse Mobile).

	Turrets	Unigy Soft Clients	Notes
Performance and capacity.	Refer to the capacity and performance section of the *Theory of Operation Manual* for this information.		
Handsets.	2	1	Dual handset features do not apply to Soft Clients.
Maximum number of speaker channels.	• IQ/MAX TOUCH: 32 (assigned by the IQ/MAX TOUCH 32 Spk User Application License) • IQ/MAX: 24 • IQ/MAX SU4: 4 • IQ/MAX Edge 100: 0 • IQ/MAX Edge 200: 4 • Pulse: 8	• IQ/MAX Omni: 16 • IQ/MAX Sync does not support speakers • Pulse Enterprise: 16 • Pulse Mobile: 8	

<table>
<tr><th></th><th>Turrets</th><th>Unigy Soft Clients</th><th>Notes</th></tr>
<tr><td>Speaker channel licenses (SCLs)
Each license supports four speaker channels.</td><td>Below are the number of SCLs included with a turret software license (TSL) for each device personality, and where applicable, the number of additional SCLs that a Unigy administrator can assign:
IQ/MAX TOUCH: no SCLs are included by default, can add up to 32 speaker channels.
IQ/MAX: includes 2 SCLs for 8 speaker channels, 4 additional SCLs can be added.
IQ/MAX Mini 4: includes 1 SCL for 4 speaker channels.
IQ/MAX Edge 100: no SCLs available.
IQ/MAX Edge 200: includes 1 SCL for 4 speaker channels.
Pulse: includes 1 SCL for 4 speaker channels, 1 additional SCL can be added.</td><td>No SCLs are included by default, so a Unigy administrator must assign the number of SCLs required. Below are the number of licenses available to assign for each product.
IQ/MAX Omni: 0 to 4 SCLs.
IQ/MAX Sync does not support speakers.
Pulse Enterprise: 0 to 4 SCLs.
Pulse Mobile: 0 to 2 SCLs.</td><td></td></tr>
<tr><td>Voice paths.</td><td>Multiple voice paths based on the number of handsets and speaker channels.</td><td>1 voice path
Handset and speaker calls share the same voice path. Received audio is a summation of all channels connected and transmit audio goes to all active calls.</td><td></td></tr>
</table>

	Turrets	Unigy Soft Clients	Notes
Function buttons.	• Direct Page • Macro • Direct Intercom • Hunt • Do Not Disturb • Privacy • Intercom • Get CLI • Toggle CLI • Suppress CLI • Page Up • Page Down • Handset Vol Up • Handset Vol Down • Left Select • Right Select • Left Signal • Right Signal • Left Hold • Right Hold • Left Release • Right Release • Left Conf • Right Conf • Left Transfer • Right Transfer • Left Recall • Right Recall • Active Recall • Icm Group • Icm GANS • Icm GTBK • Left Redial (IQ/MAX TOUCH only) • Right Redial (IQ/MAX TOUCH only • Voice Monitoring	• Decrease Receiver Volume • Decrease Ringer Volume • Direct Page • Do Not Disturb • Increase Receiver Volume • Increase Ringer Volume • Intercom Features • Page Down • Page Up • Retrieve CLI • Suppress CLI • Toggle CLI • Toggle Privacy	Function buttons that are not supported for Soft Clients are grayed out, including buttons programmed from the UMS, except Direct Page, which can be programmed only from the UMS.
Macro buttons.	Supported.	Not supported.	

	Turrets	Unigy Soft Clients	Notes
Record on Demand (ROD).	Supported.	Not supported.	
Adding a party to a conference from call history.	A party can be added to an active conference call by initiating the call from call history.	A party cannot be added to an active conference call by initiating the call from call history.	
Maximum number of history events displayed per end user.	200	600	
Clearing the display when a call fails.	If the call is not manually cleared from the display, the system automatically clears it when the timeout threshold is reached.	The call must be cleared from the *Activity* display by clicking **Release**.	
Maintaining an active call when a Unigy administrator removes a button from a Button Sheet while the end user is on a call that was placed from that button.	Call continues until it is released.	Call is dropped when the Soft Client receives the database update.	
Maintaining an active call when the CDI home zone is not available.	Call remains active.	Drops the call.	
Seize a dial tone line then without dialing press or click **Transfer**.	Ignores the **Transfer** key press and the line remains seized.	Displays an error message and drops the line.	
Splash tone on any type of group ICM call	Played.	Not played for outgoing call when call is received by the far end. Played for incoming call when auto answer is on.	

	Turrets	Unigy Soft Clients	Notes
Button status when an end user barges in to a conference and later the line that was used to barge goes idle.	Turret end user X creates a conference by bridging line A, line B, and line C. Turret end user Y barges on the conference by seizing line B. User X removes line B from the conference. • Conference call continues. • Both end users remain connected. • Audio on the call continues. • Button status for line B for all end users except user Y is `IDLE`. For end user Y, the status for line button B is `I_BUSY`.	Turret end user X creates a conference by bridging line A, line B, and line C. Soft Client end user Z barges on the conference by seizing line B. User X removes line B from the conference. • Conference call continues. • Both end users remain connected. • Audio on the call continues. • Button status for line B is `IDLE` for all end users.	

	Turrets	Unigy Soft Clients	Notes
Applications.	• **Voice Mail**: Stores and plays voice mail messages. Does not apply to Pulse. • **Presence**: For turrets, displays the current presence information and enables the state to be changed to Do Not Disturb. • **Settings**: For turrets, provides the ability to add, edit, copy, swap, and delete buttons, set preferences, set diversion, view device, network, NTP server, VoIP, and zone information, and access the Admin application. For Pulse devices, provides the ability to change the presence to Do Not Disturb, set preferences for speakers, intercom, peripherals, and the display, log out, and access the Admin application. • **Admin**: Enables a user with administrative privileges to restart the device, configure the network, use the ping tools, force a line clear (turrets only), view and clear network statistics (where supported), and change the transmit volume. • **History**: Displays communication events by category and provides the ability to add speed dial buttons from call events (turrets only), view event information, and make calls from the event entries.	• **Voice Mail**: Stores and plays voice mail messages. • **Presence**: Displays the current presence information and provides the ability to set the state to Do Not Disturb, define a custom message, or reset the value to its actual state. • **Button Sheet (Favorites)** : Displays fixed buttons and the float area, however, the float area is not functional (refer to the *Activity* display). • **Dial Pad**: Provides the ability to dial different types of calls. • **Search**: Provides the ability to search for entries within the current application. • **Home**: Displays the most frequently used contacts and all function buttons. • **Favorites**: Shows all buttons in the Button Sheet except function buttons. • **Directories**: Displays different types of contact directories and provides the ability to make calls, view contact details, and add contacts to the personal directory. • **History**: Displays communication events by call category and provides the ability to view event details, make calls from history events, and add new contacts or add points of contact to an existing contact. • **Speakers**: Provides the ability to control speaker	

	Turrets	Unigy Soft Clients	Notes
	• **Directory**: For turrets, provides the ability to view various types of directories and the most frequently used contacts, and make calls from the directory entries. For Pulse devices, provides the ability to make calls to contacts. • **Favorites**: For turrets, provides access to the Button Sheet buttons, including function buttons, and provides the ability to make calls. For Pulse devices, displays favorite contacts that the end user or an administrator added to the Favorites list. • **Program Manager**: Provides the ability to view settings and perform programming operations for turrets. • **Device applications**: Provides access to custom applications that are displayed on turrets.	volume, enable or disable speakers, mute speakers, and speak on a speaker channel. • **Activity display**: Displays active and pending call activity, similar to the float area on a turret. It includes an additional dial pad. • **Device applications**: Provides access to custom applications that are displayed within the *Main* window.	
Log off during an active call.	System prevents logging off during a call.	The system disconnects the call. There is no warning message.	
Log off Soft Client during an active call and log back in.	Presence continues to show Busy.	Presence shows Available.	
Button programming.	Turrets use the **ResourceID** database field, which is a numeric value that identifies a line.	Soft Clients use the **ResourceAOR** database field, which is an alphanumeric value that identifies a line.	

	Turrets	Unigy Soft Clients	Notes
Message that is displayed when the system rejects an attempt to add an invalid party to a conference. For example, a Soft Client end user connects to line 15101 to a speaker channel to make a speaker call. The line rings and the far end responds on a turret. The Soft Client user barges on line 15101 from a button in the Button Sheet then clicks **Conference** and attempts to add line 15103 to the conference. Because line 15101 is on a speaker call, this action is not allowed.	Message displayed, `Party Addition Rejected`.	Message displayed, `Request Denied` .	
Message that is displayed when an attempt to place a call on hold is rejected when **Auto Select/Hold** is set to **Hold**. For example, a Soft Client end user seizes a dial tone line for a speaker call then seizes another line without releasing the previous line.	A message indicating that the line is not placed on hold is not displayed, but a message for the new seized line is displayed.	The system displays the message `Can't place this call on hold`.	
Button number from an end user's Button Sheet can be displayed on a speaker channel when the line that the button serves is connected to a speaker channel.	Supported.	Not supported.	
Show the speaker symbol on a line button in Favorites when another end user has the line on a speaker.	End users see the speaker symbol in Favorites on all line buttons where the line is on a speaker, regardless of whether it is their speaker or another end user's speaker.	End users can see the speaker symbol only for lines that are on their speakers.	

	Turrets	Unigy Soft Clients	Notes
Preset and Simplex broadcast buttons.	Buttons lamp displaying the line status and presence status.	Preset and simplex broadcast are supported for IQ/MAX Sync. Simplex broadcast is supported for IQ/MAX Omni. Neither broadcast type is supported for Pulse Enterprise. IQ/MAX Sync displays the presence status, but not the line status.	
Message Waiting Indicator (MWI) buttons.	Requires only an MWI button.	Requires two buttons: MWI button with the appropriate data and a line button with a resourceAOR used to access voice mail.	
Dialing intercom extensions that contain fewer digits than the number of digits specified for the enterprise for the number of digits for an intercom call.	Pad the number with leading zeros.	Dial the extension, do not pad the number.	
Pending intercom group calls.	Calls do not pend.	Calls pend.	
Stateful HA failovers.	Active calls remain active.	The system disconnects active calls and logs out end users requiring them to log back in.	

	Turrets	Unigy Soft Clients	Notes

CDI licenses.	• Turret
	Enterprise Trader License: assigned license, required, one per turret end user, enforced at log in.
	• Pulse
	Pulse User License: assigned license, required, one per Pulse end user, enforced at log in.
		• IQ/MAX Omni
		  • Omni User License: anonymous license, one perIQ/MAX Omni end user, enforced at log in.
		  • Enterprise Trader License: assigned license, required if access to a turret is also required, one per end user, enforced at log in.
		  • FastFind license: assigned license, optional, one per end user.
		  • Quick Dial license: assigned license, optional, one per end user.
		• IQ/MAX Sync
		  • Enterprise Trader License: assigned license, required, one per IQ/MAX Sync end user, enforced at log in.
		  • FastFind license: assigned license, optional, one per end user.
		  • Quick Dial license: assigned license, optional, one per end user.
		• Pulse Enterprise and Pulse Mobile
		  • Pulse User License: assigned, required, one per Pulse Enterprise or Pulse Mobile end user, enforced at log in.
		  • One of the following: Pulse Enterprise Intercom only software license or Pulse	

	Turrets	Unigy Soft Clients	Notes
		Enterprise Intercom & Hoot software license: required, one per Pulse Enterprise or Pulse Mobile end user, enforced at log in. • FastFind license: assigned license, optional, one per end user.	
Mobility licenses.	Required when free seating at a different address from the home location.	Not required.	
BCP.	The system automatically redirects the devices to a backup zone during plan activation.	The system logs end users off during plan activation. They must manually redirect the Soft Client to a backup zone then log in.	Redirecting a Soft Client is done within the Unigy Client Configuration Tool.
Changing the resource zone for an Open Connexion line that is assigned to a speaker channel. Change the resource zone to a different zone during an active call then change the zone back to the original resource zone.	Turrets automatically attempt to reseize the line on the speaker channel.	Soft Clients do not attempt to reseize the line. End users must seize the line on the speaker channel to make it active.	
Delete a point of contact that is programmed on a button from the UMS.	The button is removed from Favorites.	The button remains in the Button Sheet, but is disabled.	The end users must reboot their CDI to see the change.

Index

A

activation
- lines 71

Activity display
- overview 33

alerts
- audible 91
- barge in 77

analog hookflash transfer 97

applications
- Directories 42
- Favorites 58
- History 60
- Home 32
- Speakers 101, 102
- third party 69
- using the Button Sheet 52

audible alerts
- record warning tone 92

audio
- setup 21

audio controllers
- microphone, speakers, ringer 89

auto answer 79

automatic line selection 74

availability
- users 25

B

barge in
- notification 77
- overview 77
- to a call 77
- voice services 13

broadcast
- programming buttons 119
- simplex 117
- simplex, button configuration 127
- voice services 13

broadcast calls 82

broadcast groups 82

buttons
- adding a DICM button 125
- adding a line button 121
- adding a point of contact 124
- adding a speed dial 126
- adding point of contact 50
- Button Sheet 52
- changing descriptors for 119
- copying 132
- deleting 133
- diversion 98
- editing 131
- Favorites 52
- Favorites application 52
- fixed 55
- floating 57
- function 123
- functions 52
- functions, programming 122
- Hold 95, 96
- intercom diversion 128
- line CLI preferences 28
- line diversion 129
- line status 37
- line types 36
- moving 132
- pagination 57
- placing a call with 72
- point of contact 52
- Privacy 94, 96
- programming 119
- Release 86
- Retrieve CLI 28
- Signal 73
- simplex broadcast 127
- Suppress Outgoing CLI 29
- swapping 132
- Toggle CLI 29
- Transfer 97
- using the Button Sheet 52
- voice mail 68

C

call forwarding
- lines 99

callers
- getting CLI information 28
- toggling between name and number 29

calls
- Activity display 33
- adjusting volume 89
- answering 78, 79
- answering a group answer intercom call 84
- answering a group talkback intercom call 86
- barging 77
- barging in 77
- conference, overview 113

- configuring history 61
- diverting 98
- forwarding lines 99
- from Button Sheet 72
- high priority ringtones (user preferences) 24
- history 60, 65
- holding 95
- initiating 72
- initiating from the Home application 74
- initiating with automatic line selection 74
- intercom 80, 81
- intercom ringtones (user preferences) 24
- joining 77
- low priority ringtones (user preferences) 24
- making a conference 113
- making a group answer intercom call 84
- making a group talkback intercom call 85
- making an intercom group call 83
- microphone 21
- muting 91
- priority 78, 79
- releasing 86
- ring tones 78, 79
- signaling 73
- speaker 107
- suppressing outgoing caller identity 29
- timer 78, 79
- transferring 97
- unsupervised conferences 114
- viewing history 62

CDI applications 69

CDIs
- differences between desktop devices and Soft Clients 151

CLI
- for line buttons 28
- function buttons 26
- getting caller information 28
- line preferences 121
- Retrieve CLI function 28
- retrieving information 26
- setting user preferences 26
- suppressing 26
- suppressing outgoing information 29
- Toggle CLI function 29
- toggling between name and number 29
- toggling name and number 26
- using Suppress Outgoing CLI function 29
- voice services 13

CLI Preference
- for history displays 61
- line preferences 61
- user preferences 61

communications history
- event details 65

conference
- creating 113
- simplex 117

conferences
- overview 113
- scenarios 115–117
- unsupervised 114
- voice services 13

configuration
- audio 21
- IQ/MAX Omni 13
- Soft Client network connection 147

configure
- preset broadcast 127

contacts
- adding a point of contact button 124
- adding a speed dial button 126
- adding local 50
- adding point of contact to Favorites 50
- adding to personal directory 46
- calling 75
- copying from enterprise directory 48
- deleting personal 49
- editing 49
- making a call from the Home application 74
- navigating directories 45
- personal 41
- personal, editing 49
- programming shortcuts for 119
- viewing 42

context-sensitive help 15

controls
- calls 33

CPI 28

customization
- user preferences 24

D

Date Display Format
- for history displays 61

DDI
- setting diversion 129

default directory 41

desktop devices
- differences from Soft Clients 151

device applications
- overview 69
- using 69

devices
- free seating 19

registration 149
Dial Pad
making an intercom call 81
DICM button
adding 125
directories
enterprise 41
local 41
navigating 45
overview 41
personal 41
personal, displaying 46
Directories application
viewing 42
diversion
intercom 99
intercom, setting 128
line, setting 129
lines 99
one-button 98
status display 99
voice services 13
Do Not Disturb 123

E

enterprise directory
copying a contact 48
definition 41
displaying 45
events
viewing history 62
exclusive hold
overview 96
using 96
exit 30

F

FastFind
overview 39
using 39
Favorites
adding a point of contact 50
application 52
Button Sheet 52
programming buttons for 119
using 58
features
FastFind 39
overview 9, 11–13
privacy 94
QuickDial 75
fixed area 55
fixed buttons 55
float
line preferences 121
float area 57
floating buttons 57
free seating 19
function buttons
programming 119, 122
voice mail 68
functions
buttons 52, 123
Suppress Outgoing CLI 29

G

GANS
answering a call 84
group answer intercom calls 82
initiating a call 84
group answer calls (GANS) 82
group talk back calls (GTBK) 82
groups
answering a group answer intercom call 84
answering a group talkback intercom call 86
making a group answer intercom call 84
making a group talkback intercom call 85
making an intercom group call 83
speakers 106
speakers, talking 109
GTBK
answering a call 86
group talk back intercom calls 82
initiating a call 85

H

handsets
muting 110
hang up 86
hardware requirements 135
help 15
high priority calls
ringtones (user preferences) 24
history
communication events 60, 65
configuration 61
line preferences 121
using the History application 62
viewing 62
History application
using 62
hold

calls 95
exclusive 96
features 95
overview 95
voice services 13
Home application
making a call 74
shortcuts 32
hookflash transfer 97
hoot
overview 38
hot keys 16
hunt
overview 74
using automatic line selection 74
voice services 13

I

ICM
setting diversion 128
incoming calls 65
installation
remote 137, 139, 140
silent 137, 139, 140
Soft Client 135
upgrading 32-bit clients 140
upgrading 64-bit clients 142
intercom
adding a DICM button 125
answering a group answer intercom call 84
answering a group talkback intercom call 86
auto answer 79
diversion 99
group answer calls 82
group calls 82
group talk back calls 82
making a call 81
making a group answer call 84
making a group call 83
making a group talkback call 85
overview 80
ringtones (user preferences) 24
setting diversion 128
voice services 13
Intercom Features 123
IP address
device 149
IP addresses
network connection 147
IQ/MAX Omni
differences from desktop devices 151
IQ/MAX Sync
differences from desktop devices 151

K

keyboard shortcuts 16

L

lines
activation 71
adding a button 121
appearances 121
assigning to speaker channels 105
automatic line selection 74
buttons 36
call status 36
CLI preferences for buttons 28
configuring history 61
diversion 99
hunt 74
preferences 61, 121
presence 36
priority 121
programming 36
setting diversion 129
status 37
user preferences 36
voice services 13
local contacts
adding 50
local directory
definition 41
displaying 45
log in 21
log out 30
login
free seating 19
low priority calls
ringtones (user preferences) 24

M

main window 9
microphone
audio controller and volume 89
microphones
configuring 21
installing 21
overview 21
Push-to-Latch 109
Push-to-Talk 109
missed calls 65

momentary privacy 93, 94
mute
  active calls 91
  speaker channels 108
  speakers 110
  voice services 13

N

navigation
  user interface 31
networks
  configuring connection 147
notification
  barge in 77

O

one-button diversion 98
online help 15
Open Connexion 38
outgoing calls 65
Outlook
  adding local contacts 50

P

Page Down 123
Page Up 123
pagination
  buttons 57
panels
  hiding 35, 36
personal contacts
  adding 46
  deleting 49
personal directory
  copying contact to 48
  definition 41
  displaying 45, 46
  editing a contact 49
point of contact
  adding to Favorites 50
  buttons 52
  calling 75
point of contact button
  adding 124
preferences
  defining 24
presence
  setting 25
priority
  for lines 121
privacy
  exclusive hold 96
  momentary 93, 94
  using 94
  using exclusive hold 96
  voice services 13
private lines
  signaling 73
programming
  function buttons 122
  simplex broadcast button 127
Pulse devices
  differences from Soft Clients 151
Pulse Enterprise
  differences from desktop devices 151
Pulse Mobile
  differences from desktop devices 151
Push-to-Latch
  for a speaker group 109
  on a single speaker channel 109
Push-to-Talk
  on a single speaker channel 109
pushing the Soft Client software 137, 139, 140

Q

QuickDial
  using 75
quiet installation 137, 139, 140
quiet uninstallation 137, 139, 140

R

recording
  Soft Clients 19
  warning tone 92
registration 149
remote installation 137, 139, 140
remote uninstallation 137, 139, 140
requirements
  hardware 135
  software 135
Retrieve CLI 123
Retrieve CLI function
  using 28
ring tones
  overrides 78, 79, 121
  priority 78, 79, 121
ringer
  audio controller and volume 89
ringtones
  preferences 24
routing plans

hunt 74
hunt group 74

S

search
FastFind 39
shortcut buttons 119
shortcuts
viewing 32
shut down 30
sign out 30
Signal button 73
silent installation 137, 139, 140
silent uninstallation 137, 139, 140
simplex
broadcast 117
conference 117
simplex broadcast
button configuration 127
Soft Client
installing 135
requirements 135
rolling back 32-bit clients 143
rolling back 64-bit clients 144
software version 148
system tray controls 23
uninstalling 146
upgrading 32-bit clients 140
upgrading 64-bit clients 142
version 146
voice services 13
Soft Clients
configuring network connection 147
differences from desktop devices 151
recording 19
software requirements 135
software version
Unigy Soft Client 148
speakers
assigning a line 105
audio controller and volume 89
group assignments 106
groups 106
muting 108, 110
overview 101
Push-to-Latch 109
Push-to-Talk 109
setting volume 107
turning on and off 107
using Speakers application 102
speed dial
adding a button 126
configuring buttons 119
line selection 74
splash tone 79
status
audible alerts 91
lines 37
users 25
status messages
communication barrier 69
Suppress Outgoing CLI 123
Suppress Outgoing CLI function
using 29
system tray
controls 23

T

Time Display Format
for history displays 61
Toggle CLI 123
Toggle CLI function
using 29
Toggle Privacy 123
tones
warning 92
transfers
announced 97
unannounced 97
voice services 13
turrets
differences from Soft Client s 151

U

Unigy Client
system tray controls 23
Unigy Soft Client
requirements 135
rolling back 32-bit clients 143
rolling back 64-bit clients 144
software version 148
upgrading 32-bit clients 140
upgrading 64-bit clients 142
version 146
uninstall
Soft Client 146
uninstallation
remote 137, 139, 140
silent 137, 139, 140
unsupervised conferences 114
user interface
navigating 31
user interface help 15

users
  configuring history display preferences 61
  directories 41
  preferences 24
  status 25
  viewing contact information 42

V

version
  Soft Client 146, 148
voice mail
  function button 68
  using 68
voice recording
  Soft Clients 19
voice services 13
volume
  adjusting 89
  setting for speakers 107

W

warning tone
  recording 92
web applications 69
windows
  closing 35, 36
  management 35, 36
  minimizing 35, 36
  moving 35, 36

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