UC-One Users
QUICK HELP GUIDE

Contents

Get to know UC-One

New to the world of Unified Communications? Rest easy, it's much easier than it sounds. We're here to walk you through everything step-by-step.

What is UC-One?

UC-One is a unified communications and collaboration app that lets you call, message, and meet with anyone from any device. It includes full HD video, voice, messaging, screen sharing, and conferencing in a single easy-to-use cloud application that integrates with other cloud business apps.

Who needs UC-One?

UC-One is ideal for any business of any size with employees who depend on communicating and collaborating with colleagues as well as people outside their organization such as customers, partners, agencies, and vendors. UC-One is suited for these types of individuals:

- Knowledge workers who need access to people and information from anywhere
- Mobile employees who work in different locations and use their mobile device for work
- Anyone who works in cross-functional, geographically dispersed teams
- People who frequently host and participate in meetings
- Managers and executives, especially if they travel frequently

Is my data secure?

Yes! Security is always a priority for us. UC-One offers a robust, secure platform based on well-known cryptographic software technology that encrypts all data transmissions from end- to-end, both on the web and on our mobile platforms (iOS and Android).

Downloading UC-One

UC-One is available for your computer, mobile and tablet devices. Install it on multiple devices and switch between them hassle-free because the app automatically knows which device you're using. Your content stays in sync because everything is stored in the cloud.

Apps can be downloaded here.

Navigating UC-One

Navigating UC-One is simple. The left navigation bar contains links to key shortcuts:

Messages/Chat

Find a history of all messages exchanged with your contacts.

Contacts

The Contact menu is where you can add contacts, set favorites, and create groups to keep your list organized.

Calls

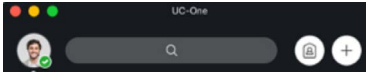Find out what calls were placed, received or missed here.

Preferences
Set your audio, video, calling, and voicemail preferences here.
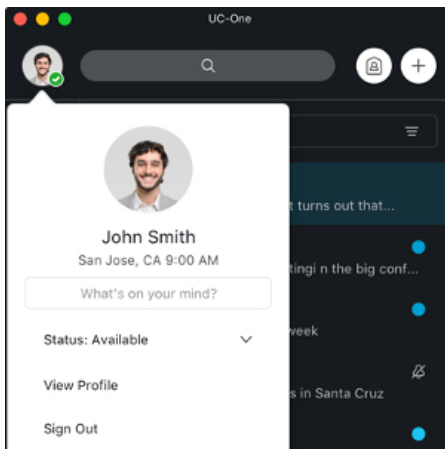

UC-One Header Area
The Header Area displays your profile picture, the search bar, the My Room button and the + button.

Profile picture: With every new account, a little customization can go a long way. Make it easy for people to recognize you by adding a picture to your profile. Until you upload one, your profile picture only shows your initials inside a circle.

To add your photo:
1. Click your Initials to display your Contact card
2. Hover over the profile picture area
3. Click Edit
4. Select an image from your computer
5. Click Open

That's it! After you upload a profile picture, it can only be replaced by another picture. You can also change it at any time. Other settings on the Contact card include:

Name: Your company's IT admin will have loaded your legal name for you.

Location: To set or change your location, click directly on the city/state displayed. Then click 'Set Location'. You can select "Use automatic location" to display the location and time that the system has detected. Alternatively, you can select "Use manual location" and enter in a location and select a time zone. This information is displayed near your name when others save you as a contact.

What's on your mind?: If you would like to display a custom message that will appear when others view your name in their contact list, simply enter it in the text box.

Status: Your presence status is displayed to your colleagues that use UC-One. It indicates if you are available, away, busy, or offline.

View Profile: Your profile includes contact details retrieved from your corporate directory such as first name, last name, work phone, work extension, and email address.

Sign Out: select this option to sign out of UC-One. Other actions in the header area include:

Universal Search: Search on everything, including messages, spaces, contacts, calls, and files and click each icon to narrow the results by type.

Q Search

My Room: One click on your My Room ⬛ button will drop you into your personal conference room. Standard My Room features are available when joining.

+ Button: ⊞ click this button to create:

- New Message
- New Contact
- New Contact Group

System Requirements

System requirements are as follows on native Desktop:

- Mac OS: 10.12 Sierra, 10.13 High Sierra, 10.14 Mojave, 10.15 Catalina.
- Windows: 7 SP1, 8/8.1, or Windows 10 (Classical view only).
- The installation footprint is approximately 125 megabytes (MB) on Mac OS and 215 MB on Windows.
- For voice calls, a sound card, speakers, and a microphone or a headset are required.
- For video calls, a webcam is required.

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

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

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

- HD camera
- HD resolution support in display
- Quad Core x86 or equivalent at a minimum
- 4 GB RAM Virtual Desktop Infrastructure (VDI) environments are not supported.

Managing your Contacts

Contact Quick Access Menu
You can right-click a contact to quickly access menu options. This lets you complete basic actions easily, and reduces the number of mouse clicks required. To access the quick access menu options, right-click a user in your contact list.

Presence
Your presence in UC-One lets users know your availability, which is indicated by a circle icon in your profile picture. You can choose for UC-One to automatically display your presence by selecting **Set Automatically.** When this option is selected, your status will change dynamically based on your state:

- **Available:** When you're logged into the client and active within the last 20 minutes ✅
- **Busy:** On a call or in a meeting (for Windows users, in addition to the above, your status will also display busy if you have accepted a meeting that shows on your calendar) 🚫
- **Away:** idle for more than 20 minutes ⛔
- **Offline:** logged out of all your devices ⚫

If you'd like to know more about a users busy status, roll over their profile picture to learn whether they are on a call, in a meeting, or using their mobile device.

To manually set your presence status, click your profile picture and select **Status** and choose from the options listed. Manual changes will be kept indefinitely. Also, when you select Offline, you will not appear available to others or be able to view anyone else's presence status.

Don't forget that your presence is synced across all your devices (desk phone, desktop app, and mobile app) so if you're busy on your desktop app, your presence will be the same across all devices.

Adding Contacts
You may find keeping a personal contact list handier than using the search feature.

To add users to your contact list:
1. Search for the contact
2. Right-click their name
3. Select **Add to Contacts**

Once the user has been added, they will show up in your contact list.

Adding Favorite Contacts
Favorites are displayed at the top of your contact list. To add a favorite, select a contact from the contacts tab or by searching for a contact in the search bar. Right-click the contact name and select **Set as Favorite**. Note, a user needs to be added to your contact list before they can be made a favorite. To remove contacts as favorites, follow the same steps above but select **Remove from Favorites.**

Contact Groups
You can also create groups to keep your contacts organized.
To add contacts to a group:
1. Click the + button in the header area
2. Select New Contact Group
3. Enter Contact Group Name
4. Click the Add to Contacts button

Once your groups are created, you can add contacts to specific groups by right-clicking on the Contact and then select Add to Group.

Searching for Contacts
UC-One is integrated with your corporate directory. For Windows users that use Microsoft Outlook, your contacts are also searchable. To find a colleague, type in a first or last name in the universal search field and hit enter.

UC-One will search through your corporate directory and display matching results across everything! Click on the contacts icon to see people-specific results.

Calling Basics
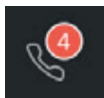
Placing an Audio Call

There are several ways to place an audio call.

From Calls icon in Navigation menu:

1. Click the Calls icon
2. Enter the phone number using the dialpad (or your computer keypad)
3. Click the Audio Call button (or press enter on your keyboard)
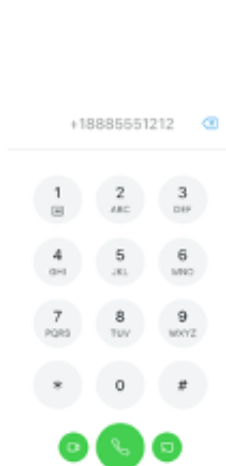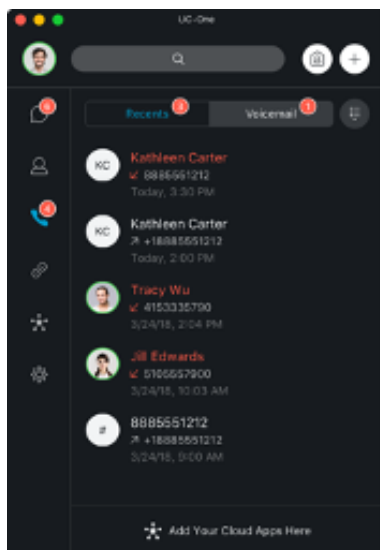
Answering a Call

There are several ways to answer a call:

When you're in UC-One

When someone calls, you will receive a notification in the top right corner of the app.

To answer the call, click the Phone button.

To decline the call, click the end call button.

When UC-One is running in the background

When someone calls, you will receive a pop-up notification displayed in the lower right corner of your screen. You can answer or decline the call directly on the notification pop-up.

To answer the Audio Call, click the Phone button.

To decline the call, click the end call button.

Whether you are in an active or inactive state, if you have UC-One installed on more than one device, you can answer or decline the call from anywhere.

Call From Other Device

If you prefer to use your deskphone rather than the UC-One desktop app to make a call, you can use the Call from Other Device option. This feature rings your desk phone, and when you pick it up, it places your outbound call.

From your Desktop app
1. Select a user from your contact list
2. Right-click and select **Call from Other Device**
3. Select the desk phone number

From a Direct Message
1. Select the Call from Other Device button
2. The app will ring your desk phone. Once you pick it up, it will connect the call to your contact.

Placing a Video Call

When voice isn't enough, add video to bring your call to life. UC-One supports full screen video with High Definition (HD) resolution. You can adjust your video resolution in Preferences. There are several ways to place a video call.

From Contacts Tab
1. Right-click the contact to load the quick access menu
2. Select Video Call and choose the correct work number

From a Direct Message
1. Click the Video button

While you're in a video call, you can still send direct messages to each other. It is also possible to send and receive messages from other Contacts. You can also join a video call during a My Room session by clicking on the Video button.

The following actions are available during a video call:
• Adjust volume
• Mute microphone
• Hold or resume the call
• Switch to voice only
• Hang up the call
• Add participants to the call

Recent Calls

You can view a history of your calls recently placed, received, and missed by simply clicking on the Call icon.

Each call has a separate entry in the list that contains the persons name, phone number, date and time of call along with an arrow that indicates whether it was an inbound, outbound or missed call.

Outbound calls are indicated by an up arrow.
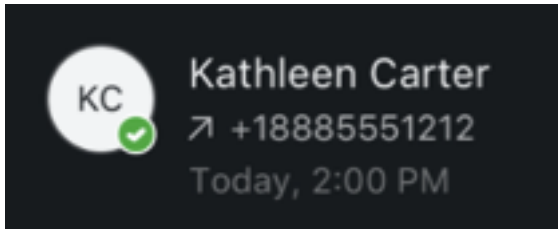
Inbound calls are indicated by a down arrow.
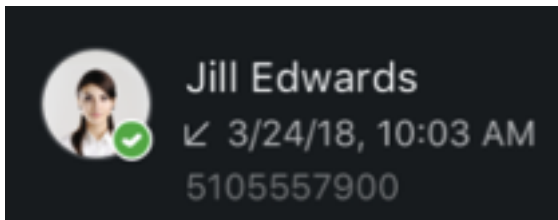
Missed calls are indicated by a down arrow with the caller's name in red
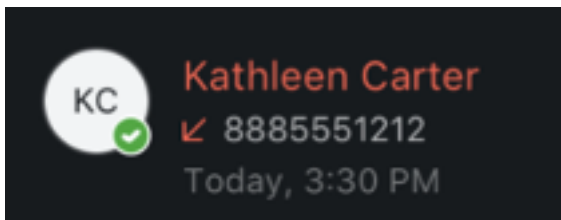
Call History Quick Access Menu
By right-clicking on the call entry, a menu will be presented with the following actions available:
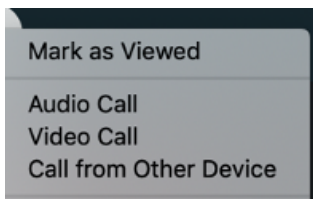
Voicemail
If you have a voicemail message, you will see a badge displayed on the Calls icon indicating the number of pending voicemail messages. The Desktop app offers three methods to retrieve your voicemail messages.

From the Calls icon
1. Select "Calls" in the top menu, then Select "Voicemail". Enter your passcode for access.
2. Select the "Voice Mail" message at the top of the call list to retrieve. Enter your passcode for access.
3. Press and hold the "1" key on the dial pad. Enter your passcode for access.

Note: Press SHIFT+CTRL+D to display the dialpad at any time.

Advanced Call Handling

Audio Device
During an active call, the desktop client supports a user switching between their headset and desktop speakers and vice versa. Device definitions can be set in the Audio/Video menu in Preferences.

Conference
UC-One supports conference calls using voice or video conferencing where participants are called sequentially. This is combined with other communication methods such as chat and desktop sharing.

When you're in an active call:
1. Right click on active call.
2. Select "Conference With" and "New"
3. Type in the phone number you want to conference with, and click "Call"
4. Once connected, press the "Merge" button.

Park Call
If you want to place a call on hold but retrieve it from another location in the office, you must first park the call. (Note: Parked calls will hear hold music while on an active call)

When you're in an active call:
1. Right click on the active call you want to park. Select "Park Call".
2. Enter the extension to park the call to
3. Click the Park button

You will hear a prompt that the call has been parked.

Retrieving A Parked Call
On the Desktop client, the parked call is visible in the Active Communications area so it can be easily retrieved.
Alternatively, you can also dial (*) 88 on your keypad, followed by the extension that the call was parked (currently held) against.

1. Press the (#) sign
2. Click the Phone button to retrieve the call from park

Pull Call
You can seamlessly pull your active calls from your original device and continue the call on another one. To pull an active call, follow these steps:

From your Desktop to Mobile Device
1. On your mobile device, open the menu and tap on Pull Call

The call will move from your desktop application to your mobile app.

From your Mobile Device to Desktop
1. On your desktop, the active call will appear
2. Click the Pull Call icon

The call will move from your mobile app to your desktop app.

Transferring calls

There are two options for transferring a call.

Transfer now is a blind transfer, used to transfer a call to another number without providing an introduction to the destination party.

Attended Audio or Attended Video transfers a call with the option for an audio or video introduction to the destination party.

To initiate a transfer when you're in an active call:
1. Right click on the active call you want to transfer. Select "Transfer To".
2. Enter the contact name you want to transfer the call to.
3. Select the contact and number
4. Select **Transfer Now**, **Attended Audio**, or **Attended Video**

Incoming Call Settings

Simultaneous Ring

Simultaneous Ring rings multiple devices at the same time for incoming calls so you never miss a call.

Enable Simultaneous Ring in Preferences
1. Press the Preferences icon; select "Incoming Calls"
2. Under Simultaneous Ring, click on **Ring number not selected**
2. Toggle **Ring Numbers** to on
3. Enter a Phone Number in the Set Number field

Optionally, to avoid being interrupted when you're on a call, select **Do not ring when on a call**.

Broadworks Anywhere

With Broadworks Anywhere enjoy the freedom to receive calls on an alternate phone number of your choice, such as your personal mobile phone. When an incoming call is received, all "locations" will ring. Location is defined as a unique phone number.

Enable Broadworks Anywhere in the Preferences:
1. Select **Incoming Calls** in the Preferences drop down
2. Expand the Broadworks Anywhere section.
3. Under Broadworks Anywhere, click the following checkboxes
4. Alert all enabled locations for Click-to-Dial
5. Enter an alternate number (i.e "Locations")
6. For each "Location" you add, you can enable specific options, including:
7. Do not forward calls
8. Answer Confirmation: enabling this will have the call recipient press a key before being connected. This allows the recipient to know the call was not to that direct line.
9. Call Control: allows the user to access the system call control features i.e. Call Hold and Call Forward via Feature Access Codes.

Call forwarding

You can forward calls to another number when you're busy or away from your desk by following these steps:

Enable Call Forwarding Simultaneous in Preferences
1. Click "Preferences" icon and Select "Incoming Calls".
2. Expand the **Call Forwarding** section
3. Select one of the call forwarding options and then enter the forwarding number:
4. Always
5. When Busy

6. When No Answer
7. When Not Reachable
8. Select the number of times a call rings before it's forwarded.

Forwarded calls will show the correct identity of the caller as well as the identity of the party to whom the call was forwarded.

Call waiting
Call waiting allows the user to be notified of an incoming call while on an existing call. The existing call can be put on hold to take the second call, since only one call can be active at a time.

When you're in an active call, and another call comes through, select whether to Answer or Decline the call.

Enable Call waiting in the Preferences:
1. Click "Preferences" icon Select "Incoming Calls"
2. Toggle Call Waiting to on

Messaging Basics

Direct Messages
People can get in touch with you in UC-One by sending messages directly to you. When you do, that conversation remains between the two of you. You can't add other people to the conversation later.

There are two ways to send a message:
1. Click the + button and select New Message
2. Enter the name or email address of the contact
Or
1. Enter the name or email address of the contact in the Universal Search bar
2. Click the Messages or Contacts icon to narrow your results and make the appropriate selection

That's it! Once you've found your contact, type your message in the chat bar and hit enter. And, don't forget you can always see your chat history so the next time you message that person, your conversation picks up right where you've left it.

Unread Messages
When you have unread messages, there will be a red badge on the Messages icon in the navigation pane with a number.
Any message that appears in bold indicates that you have new messages waiting. Simply select the message to read it. After you read the message, the bold font is removed from the name, letting you know that you're now up-to-date.

Group Messages
For those times when you need to message with more than one person, send a group message!

To start a group chat:
1. Click the + button and select **New Message**
2. Enter the names of the contacts
3. Type your message in the chat bar and hit enter

Message Features
Now that you have the basics of Messaging down, below is a summary of messaging features:
- **Spell check:** spell checking is supported but can be turned off in the General menu within Preferences.
- **Time stamp:** Time stamps are added only after the contact has sent the message.
- **Pop Out:** Message sessions can be popped out of the app, on a separate window. Note this setting must be adjusted in the General menu within Preferences, under Accessibility.

Sharing your screen

You can instantly share your screen with others.

Whether you're in a direct message, on a video call, or in a [My Room meeting](#), desktop and application sharing is simple. You can enjoy the freedom to share your entire screen or an individual application. Anyone can share their screen, but only one person can share at a time.

To start sharing your screen:
1. Click the Start Sharing icon

2. Select the display or application you want to share. If you don't see the app you want to share, just scroll to see all your open apps.

That's it! Your screen share session will begin immediately and a notification will appear.

Once a screen share session is initiated, the following menu options are available:

- Pause: temporarily pauses screen share
- Switch applications: allows you to switch between applications
- Preview: thumbnail view of what other participants are seeing. Click again to hide the preview
- Stop: stops the screen share session
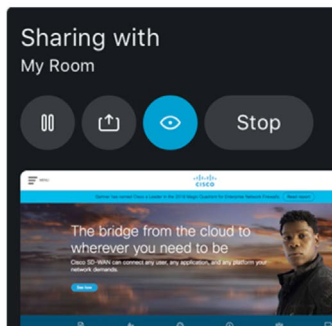
Emojis

Add some personality to your message by including an emoji. Simply click the smiley face emoticon in the chat bar and a menu of emojis will appear for you to make your selection.

Meeting Basics

My Room

With My Room, enjoy a dedicated meeting space and conference bridge number for up to 25 participants to collaborate using HD audio, video, chat and screen sharing, all within a single window. Joining a My Room session is simple and can be done in multiple ways:

From the Header Area

1. Click the My Room button to join the room
2. To join the conference bridge, select between Audio or Video call options and click the appropriate button
3. When the call is completed, click the Leave Room button

To join some else's room from a Direct Message
1. Click the Join Room button in the message window
2. To join the conference bridge, select between Audio or Video call options and click the appropriate button

From the Contact List
1. Right-click the contact or hover over the users profile picture for their contact card to appear and select Join Room
2. To join the conference bridge, select between Audio or Video call options and click the appropriate button

As users join the online meeting, their names will display in the Participant list. A microphone icon will appear next to their name when they join the conference bridge.

My Room users can enjoy these great features:
- **Dedicated meeting room & number:** Enjoy a dedicated audio conference bridge number and ID so you never have to worry about changing #s and IDs.
- **Screen sharing:** During the meeting anyone can share content from their desktop with everyone on the call.
- **Group chat:** Everyone can participate in multi-party chat from their desktop or mobile device. This provides another way for teams to communicate and interact during the call, without interrupting the person who is speaking.
- **Moderator Controls:** Meeting hosts can mute participants if necessary or remove participants from the collaboration session.
- To mute participants, click the microphone next to their name
- To dismiss participants, right-click the contacts name in the Participant list and select Remove.
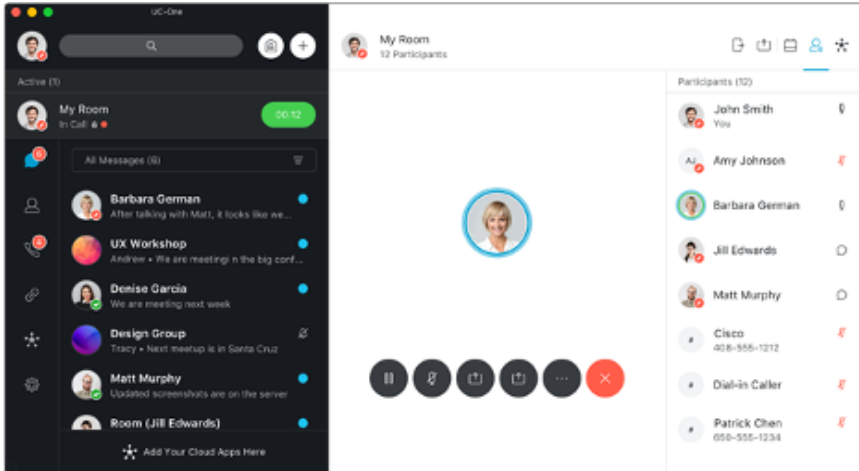
Guest Access

Collaborating with external partners or need a video conferencing solution for prospect calls? No problem. UC-One's guest access feature allows for third-parties to easily join through video and/or a conference bridge number.
Guests will be instructed to click on a link that takes them to a landing page where they can download the UC-One meeting app. All they have to do is enter in their name to join the meeting. They'll have access to the same great features you do such as audio, video, and screen sharing.
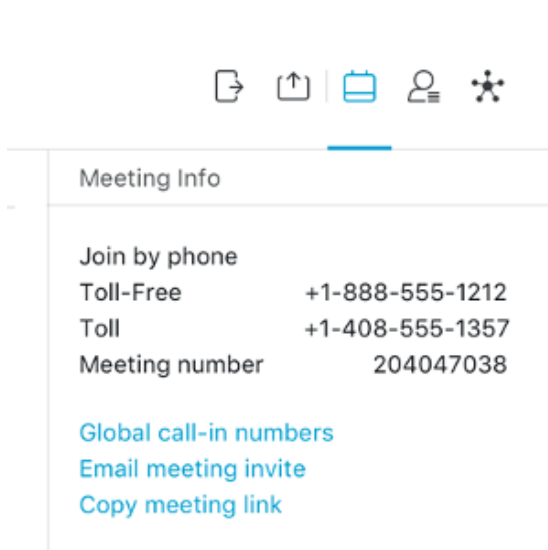
Joining via Audio only

When it's only possible to participate in the audio portion of the meeting, anyone can join from any phone by dialing the dedicated audio conference bridge number and ID.

A dial-in number and Meeting ID can be found in the Meeting Info section of your My Room meeting. Additionally, details will be copy/pasted into a meeting invite upon clicking the Copy Guest Invitation link.
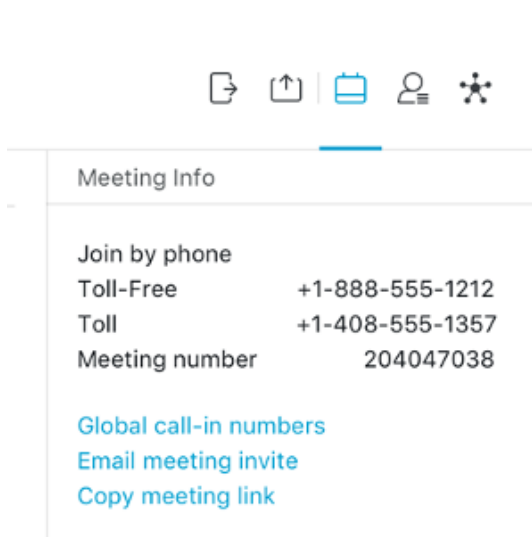

Scheduling meetings

When scheduling meetings, internal colleagues will get familiar with the phrase "See you in My Room" but you may also want to share the meeting details as well. Meeting details can be found in your My Room. Click **Copy Guest Invitation** and paste the details into the calendar invite.

Meeting Info

Join by phone
Toll-Free   +1-888-555-1212
Toll   +1-408-555-1357
Meeting number   204047038

Global call-in numbers
Email meeting invite
Copy meeting link

If a colleague is hosting a meeting in their My Room, it's just as easy to join!
1. Find their name in your list of contacts
2. Right-click the contact or hover over their profile picture for their contact card to appear and select **Join Room**
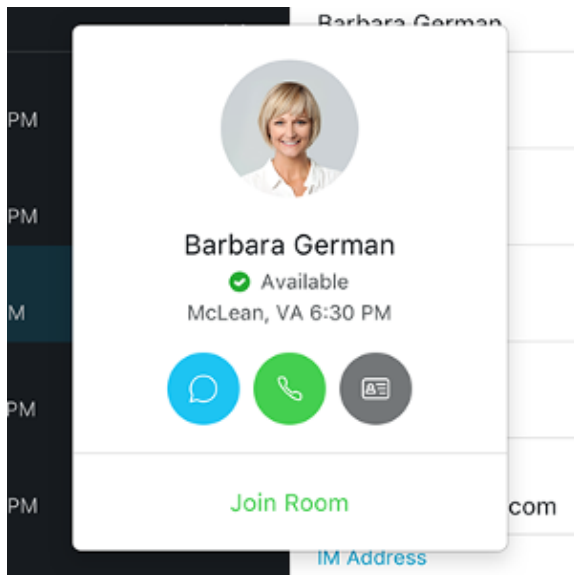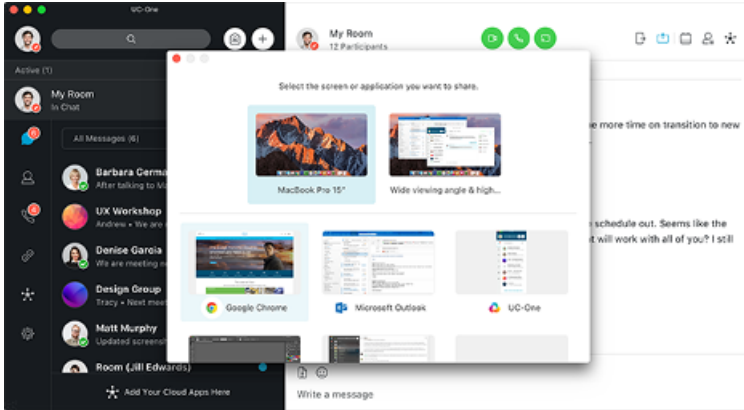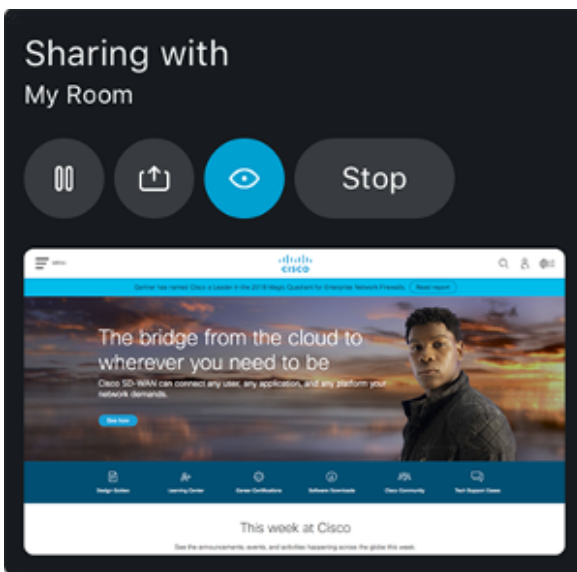

Screen Sharing
Screen sharing in My Room is simple. You can instantly share your entire screen or an individual application with meeting participants.

From My Room
1. Click the **Start Sharing** icon
2. Select the display or application you want to share. If you don't see the app you want to share, just scroll to see all your open apps.

That's it! Your screen share session will begin immediately and a notification will appear.

Once a screen share session is initiated, the following menu options are available:

- Pause: temporarily pauses screen share
- Switch applications: allows you to switch between applications
- Preview: thumbnail view of what other participants are seeing. Click again to hide the preview
- Stop: stops the screen share session

Webex Meetings Cross-launch

This option lets you 'link' an existing Webex Meetings account with UC-One by simply adding your Webex Meetings Personal Meeting Room (PMR) details.

1. In the Preferences menu, select 'Services'
2. In 'Start meeting in:', select Webex Personal Room
3. Enter your Webex Personal Meeting Room link in the Webex Personal Room box

Once added, your meeting icon will be updated with the Webex Meetings icon. When clicked, you will seamlessly be redirected to your Webex Meetings account.