



MaX UC: Unified Communications

Desktop User Guide



Green Platform

The following guide gives a description of the most commonly used features of MaX UC Mobile. Please refer to the installation instructions for information on downloading and launching the client. Please note that certain features like Meeting and SMS are add-on capabilities.

MaX UC lets you make calls from anywhere using the most convenient device. Therefore, if you place a 911 call from MaX UC Communicator, the 911 operator may not be able to identify where you are calling from, thus this is not suggested for emergency use.

Your account credentials are required to log into the application. The credentials are your **telephone number** and **CommPortal password**. If you do not have this information, please contact your system administrator or Telesystem directly.

This guide will highlight many benefits of the MaX UC client. If you are a Meeting user, please see the **MaX Meeting** guide for an explanation of all Meeting features!

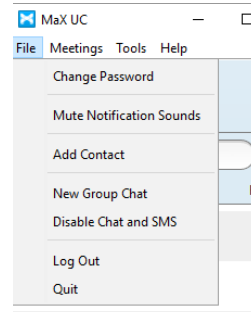
MaX UC Desktop Basics

Logging In and Out

You must be logged into the MaX UC desktop application to use its features.



To launch the installed application, choose the application from the start menu or click on the associated desktop icon then enter your credentials when prompted. While running, the MaX UC program may be minimized.



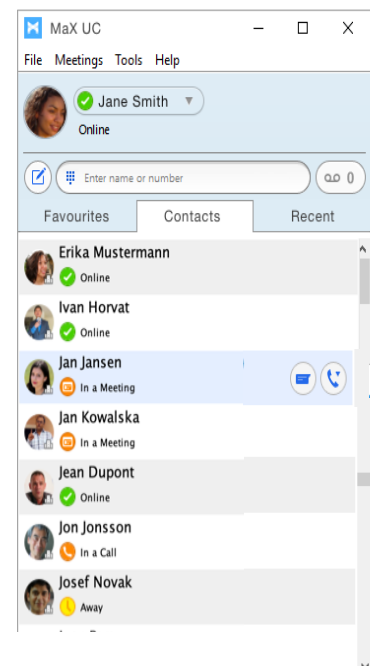
From the *File* menu, you may *Log Out* or *Quit*.

- **Log Out**- Log Out- stops the application from running. When you re-launch it next time, you will have to reinput your credentials.
- **Quit**- stops the application from running. When you re-launch it next time, you will not have to reinput your credentials.

Getting Acquainted with MaX UC Desktop

The MaX UC interface allows you to make and take calls as well as send instant messages and manage collaborative meetings. It also shows the presence of your other colleagues that are using the application.

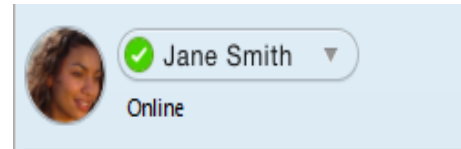
Like other computer applications, simply point and click your cursor through the various sections and menus.



Profile and Settings

Your profile appears on the top left of Max UC Desktop. This section allows you to personalize your account:

- Click on the **avatar** circle to change or remove the current picture.
- Use the **status** drop down to modify your **presence or call manager features** (more information on these in the *Advanced* section below)
- Click the **Online text box** to personalize the message other MaX UC users see.

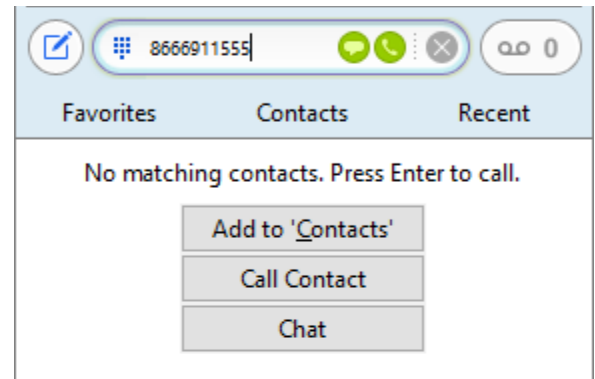


Contacts

Below your profile, you'll notice three tabs for all your contacts and recent phone communication:

- **Favorites** summarizes any contacts which you've marked as a "favorite"
- **Contacts** automatically downloads all of your company extensions. This can also download your outlook contacts (more information on these in the *Advanced* section below).
- **Recent** is a log of all of your most recent phone calls and chats.








The contacts section is used to make calling and chatting with your colleges and customers quick and simple. Alternately, you can use the number text box above the tabs to manually type in a number or extension that is not already a contact.



Presence

MaX UC users monitor the presence of other MaX UC users in their business group when looking at the contact entry.

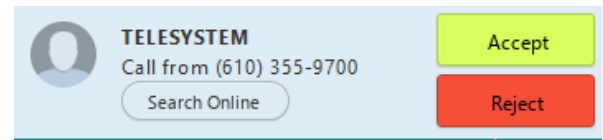
Presence statuses on MaX UC Desktop include:

-  Available: user is available
-  In call: user is on at least one phone call
-  Do Not Disturb: user has enabled Do Not Disturb
-  Busy: user has changed presence status to *busy*
-  Outlook Busy: user outlook calendar reflects an event
-  Inactive: user has not been active recently (default is 15 minutes)
-  Offline: user is not logged into MaX UC or is not an MaX UC user

Making and Taking Calls

Take a Call

When MaX UC receives a call, a notification will show on the screen and a ringtone will play through the connected headset/speakers.

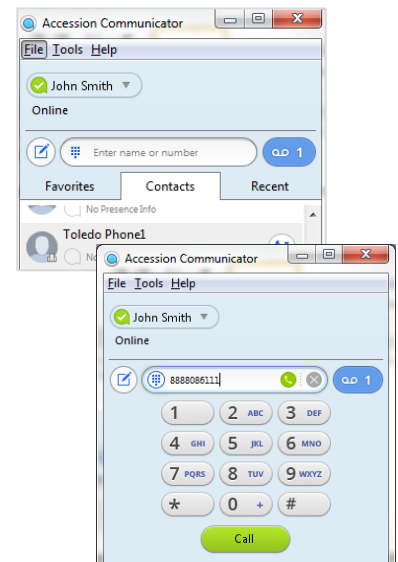


- To **answer** the call, click *Accept*. If you were already on one call and answer a second, the other call will go on hold automatically.
- To **reject** the call, click *Reject*. If voicemail is enabled on your line, the call will go to voicemail.

Make a Call

Call Using MaX UC Contacts:

- Click the Contacts tab.
- Scroll through the contacts or type in a search term to find the appropriate contact.
- Hover over the contact name then click on the Call Contact button.



Call Using MaX UC Dialpad:

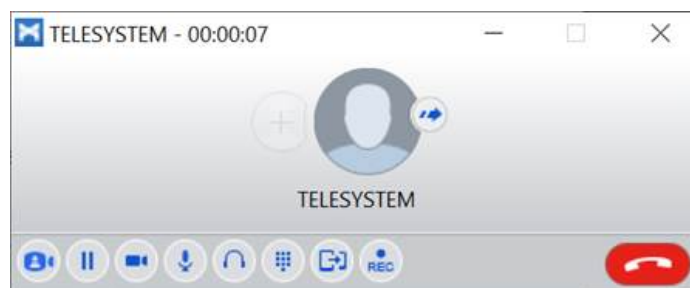
- Type in the phone number in the dialer field or click on the dialer to launch to keypad.
- Press enter or click Call to initiate the call.

Dialing *99 will access your own voicemail box and allow you to record a personalized greeting.

In Call Features

In Call Feature Screen

While on a live phone call, the call screen appears. This screen will show you the caller ID information of the call and over a variety of features to use while on a phone call.





Conference/Add Call: You may add another call to an existing phone call. This allows all parties to speak with each other at the same time. To use, click this button, enter the phone number or extension you wish to join, then click **Add** to add the new caller to the existing call.



Transfer: To send your current call to another destination, click this button, type in the phone number or extension you wish to send it to, then click Transfer to complete the transaction.



Meeting: If the person you are talking to is also using MaX UC on the same network, you can uplift your audio call into a MaX Meeting collaboration session from an audio call with this button.



Hold: click to hold and un-hold your current call.



Video: add in video for 1-on-1 calls between you another MaX UC user within your enterprise (see the “About Video” section that follows)



Mute: click to mute and un-mute your microphone.



Volume: click to adjust your volume.



Dial Pad: click to access the keypad.



Switch: If you have other devices logged in as this phone number (for example, a deskphone or the mobile app), you may switch your currently active call to another device by clicking this button then answer on the other device. When the call is answered on another device, it will automatically end on the desktop.



Record: Click to record your current call. Recordings are saved to your local computer drive by default. Be sure to follow all state, federal, or industry guidelines for recording and file retention.



End a Call: click to hang up the current call.

About Video Calling

Important notes about video calls:

- MaX UC users can uplift voice phone calls into a 1-on-1 video call with other MaX UC users in their own business group.
- Video calling is not available to users that have the iACD feature or automated call recording enabled on their line.
- This option requires that you’ve allowed the application permission to access your device camera(s).
- Please note that the available features during a video call will be curtailed (video call options do not include Add Call or Transfer).


Chat (Instant Messaging and SMS)

Chat (via Instant Message)






MaX UC users may initiate chat with one or more MaX UC users in their business group.

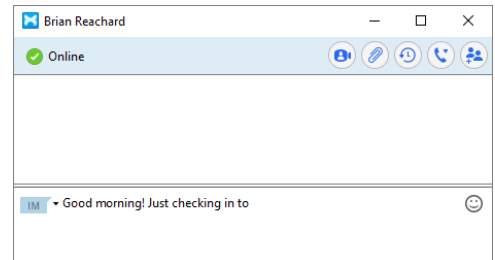
To initiate a chat session:

- Search for the contact
- Hover the cursor over the contact entry

- Click the chat icon  then enter a message to begin a chat

Buttons that line the top of chat window will allow the user to do the following:

-  uplift the chat into a collaborative MaX Meeting
-  Send a file
-  View recent chat history
-  Call the contact
-  Add an additional person to the chat session





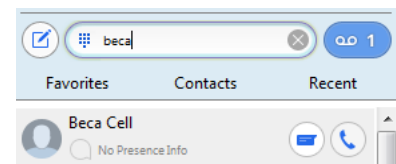
Chat (via SMS)

MaX UC users may send and receive SMS messages if the feature is enabled on the account. Usage charges may apply for SMS messages. Please contact your sales representative for details.



If your MaX UC client has SMS capabilities enabled, you can send an SMS message to other SMS-enabled telephone numbers. For example, you can send an SMS (text) message to one of your clients' cell phones.

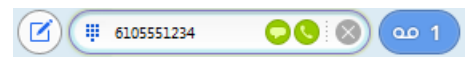
To send an SMS message to an existing contact:

- Find the contact using search or one of the contact tabs.
- Click the  chat icon to open the SMS/Chat box.
- Ensure that  SMS option is selected in the chat text box then send the message normally.



To send an SMS message to an ad-hoc telephone number:


- Input the telephone number of the contact in the dial field.
- Click the  SMS icon to open the SMS/Chat box.
- Ensure that  SMS is selected in the chat text box then send the message normally.



Please note that your direct dial phone number is the telephone number that the SMS recipient will see as the SMS sender (not your company's main number).

Advanced Features

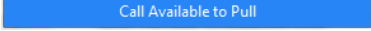
Voicemail

See any/all messages by clicking on the  messages icon. Any messages that are being sent to your CommPortal (phone) may be managed in the *Messages* screen that follows. If new messages are in your box, they are indicated as a number on the messages button.

Call Pull

The Switch feature is what you use when you are already on a phone call on MaX UC and want to resume it on another device. Alternately, if you are on a call on another device (for example, your desk phone), you may **pull** the call to the MaX UC Desktop application in order to continue it there.

To Pull a live phone call to Desktop MaX UC:

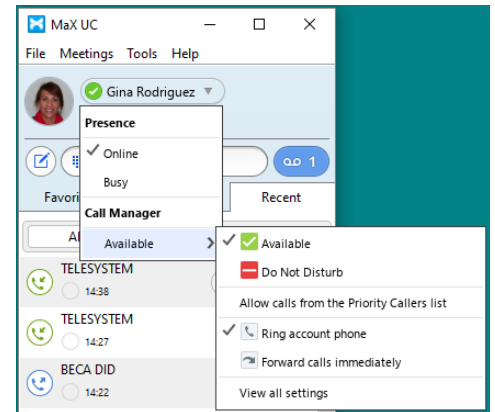
- Click the  button in the MaX UC interface.
- In the screen that appears, click *Pull Call* to continue the call on the Desktop application.

Call Manager

The Call Manager section allows you to modify your availability for calls. Please note that the changes you make to the call manager will apply to all instances of your phone number (for example, you may have a desk phone, desktop softphone, and a mobile softphone application).

To modify the Call Manager settings:

- Click on the arrow by the name of your phone to show the drop down menu
- Hover over the call manager section then choose the menu option you would like to utilize.



Available or Do Not Disturb

- A checkmark by *Available* signals that you are ready to take calls to the phone number and extension assigned to your MaX UC Desktop login.
- A checkmark by *Do Not Disturb* sends all of your calls directly to your voicemail. You may still make outbound calls normally.

Allow Calls from the Priority Callers list

- If you've chosen to put your phone into *Do Not Disturb*, you may choose to keep getting calls from your designated Priority Callers by placing a checkmark here.
- Please note that you must create your desired list of priority callers by going to *View All Settings* and creating a list there.

Ring account phone or Forward calls immediately

- A checkmark by *Ring Account Phone* signals that you want all calls to ring the phone number assigned to your account.
- A checkmark by *Forward calls immediately* allows you send all calls to an alternate phone number or extension.

View all settings


- Use this option to modify the above call manager settings and more.

Call Park

Call Park is a very popular feature of desk phones. To use call park in your Desktop application, you must first enable it. Navigate to *Tools- Options- Calls- Enable call park*. You will only need to do this once.

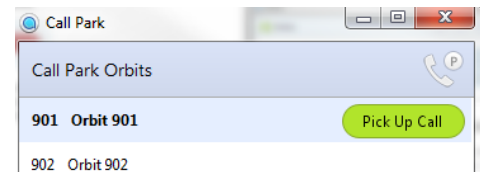
After the call park is enabled, it may be used during a live call as follows:

To park a live call:

- Click on the  Call Park button in the call screen
- Click on an available park to transfer the call to the orbit.

To retrieve a parked call:

- Navigate to *Tools – Call Park*.
- Click on the parked call you wish to retrieve.

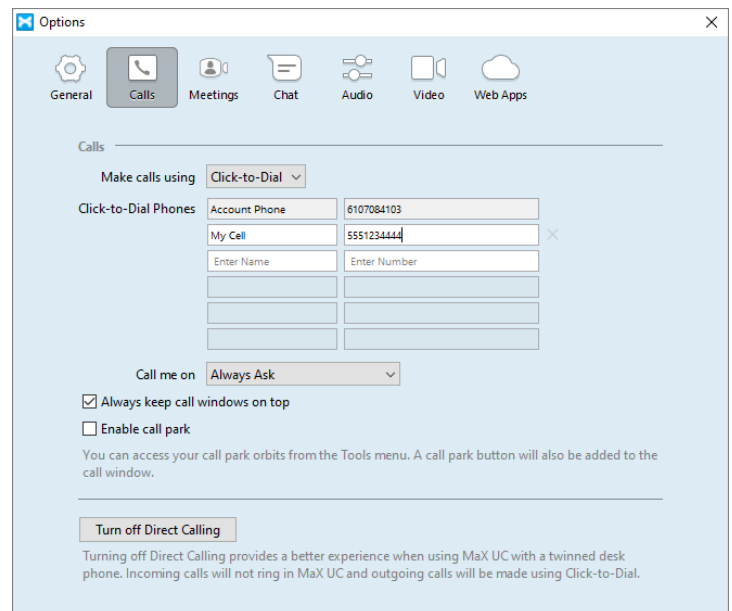


Other Common Changes

There are many options to explore in the MaX UC application.

Other very common changes include:

- **Download your Outlook Contacts.** Integrate your outlook contacts into MaX UC by going to *Tools-Options-General-Contacts-Use Contacts from- Outlook*.
- **Use MaX UC desktop with a different phone.** This is a very helpful option if you don't have a microphone on your computer because it allows you to use MaX UC desktop to initiate calls using a different device such as your desk or even a cell phone. To configure, go to *Tools-Options-Calls-Make Calls Using- Click to Dial-then enter an alternate number to use*.
- **Turn off incoming calls completely.** If you only want to receive chats and manage meetings via your app, you can turn off direct calling completely by going to *Tools-Options-Calls-Turn off Direct Calling*.
- **Advanced Meeting Settings.** You can modify your default MaX Meeting settings by clicking the *Options* tab then *Meetings* section.



Meeting Tab

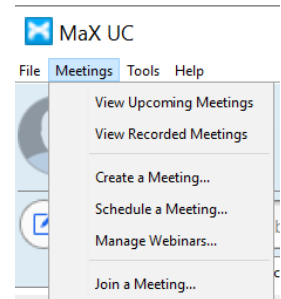
If the Meetings feature is enabled, the Meetings tab will appear at the top of the MaX UC Desktop application. MaX Meeting allows the user to manage scheduled meetings, create new meetings, and join others.

Schedule a Meeting

MaX Meeting users can set up and a meeting that occurs right away or schedule a meeting in advance.

Ways to set up a meeting in MaX UC Desktop:

- using the MaX Meeting Desktop **Meetings** menu (shown to the right)
- from your **Contacts** list or while viewing a contact's details
- while **chatting** to a contact using instant messaging
- when you are in a **call**



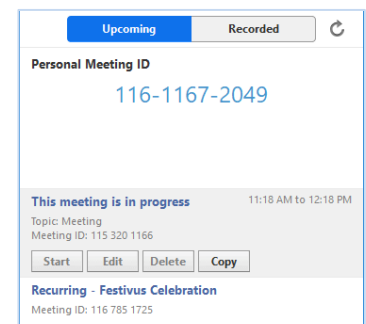
Viewing Meetings

You can view upcoming and recorded meetings via MaX Meeting Desktop. To do so from the application:

- Select the *Meetings* tab
- Choose *Upcoming* or *Recorded Meetings*

From the *Upcoming* screen, you may **start** the selected meeting, **delete** it completely, **edit** the meeting details such as audio and video preferences, or **copy** to save the meeting invite details to your computer clipboard.

The *Recorded* tab will show details and give access to recorded meetings. Recording files are saved locally to the MaX Meeting program file on your computer and thus only the recordings saved on your current machine will be shown in the list.



Live Meeting Options

While a meeting is in progress, you will see the *host* toolbar at the bottom of the Meeting window.

Host toolbar:

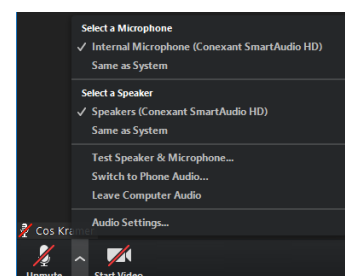


Audio and Video Options

- Use the **Microphone** icon to toggle your microphone on and off.
- Select **Join Audio** to allow MaX Meeting to use either your phone or your computer's microphone and speaker.
- Select **Leave Audio** to prevent MaX Meeting from using your speaker and audio device.
- Use the **Video** icon to toggle your video on and off.

Other Meeting Settings

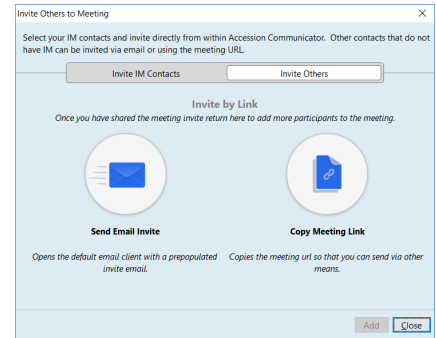
Click the arrow by the audio and video to modify the **Settings** for each. There you can set up and test your microphone, speakers, and video (if available).



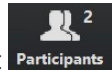
Inviting Contacts During a Meeting



Click **Invite** to select additional contacts you want to invite to join you in the meeting. *Invite IM Contacts* allows you to send an instant invitation to other users that are currently logged into MaX Meeting or *Invite Others* via an email or a URL link.



View Meeting Participants



Participants can select **Participants** to view the list of meeting attendees.

The following options are available:

- Mouse over your name to **mute/unmute** yourself or change your display **name**
- **Mute Me** - put yourself on mute
- **Raise Hand** - let the meeting host know you have something say.









Meeting hosts can select **Manage Participants** to access the **Participants** window. Use the **Mute All or Unmute All** options at the foot of the screen or **Reclaim Host** to take back the role of meeting host.

Additionally, the **More** button gives access to the following:

- **Mute Participants on Entry** - mute all attendees as they join the meeting.
- **Allow Participants to Mute/Unmute themselves**- gives attendees to ability to mute or unmute themselves via the meeting software.
- **Play Enter/Exit Chime** when a participant joins or leaves the meeting.
- **Lock/Unlock Meeting** - no new attendees can join if the meeting is locked.

The following icons provide additional information about each attendee.

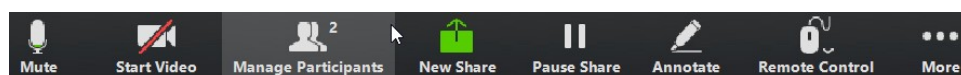
-  The participant is currently speaking.
-  The participant's microphone is on.
-  The participant's microphone is muted.
-  The participant's video camera is on.
-  The participant's video camera is off.
-  The participant has raised their hand.

Screen Sharing




Click **Share Screen** and choose the desktop or individual application window that you want to share or access the Advanced tab of the selection window to share only a portion of your screen or computer sound only.

While sharing your screen with meeting participants, you will see the Screen Share toolbar:



The Screen Share toolbar provides the following options:

- **Mute** - toggle your microphone on and off.
- **Stop/Start Video** - toggle your video sharing on and off.
- **New Share** - select a new window to share.
- **Pause/Resume** screen sharing.
- **Annotate** your shared screen using a variety of shapes and highlight tools, including: a Mouse; Draw options (lines, shapes, and arrows); a Spotlight tool; an Eraser to remove selected annotations; and Undo, Redo and Clear annotation options.
- *Note: The Annotate option may not be visible if the meeting host has selected to Disable Attendee Annotation.*
- **Remote Control** - as meeting host, take control of a participant's screen
- **More** - access settings for chat, audio, video, and participant annotation capabilities.


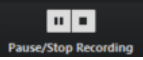
Click  below the toolbar to exit screen sharing.

Send a Message to Meeting Attendees

Click  to open a chat window and send a message to a single attendee or the whole group.

Click *More – Save Chat* in the window to save the conversation to your local computer.

Record your Meeting

Click  to start recording or  to pause or stop the meeting recording.

When the meeting ends, the meeting recording will be converted to mp4 format and saved in a local directory. The file directory containing the saved recording will automatically open to show the recorded file.




Leave the Meeting

Click  to leave the meeting.

If you are a meeting host, click  to end the meeting for all participants.

Additional Meeting Window Options

 extends the meeting display to a full screen display.

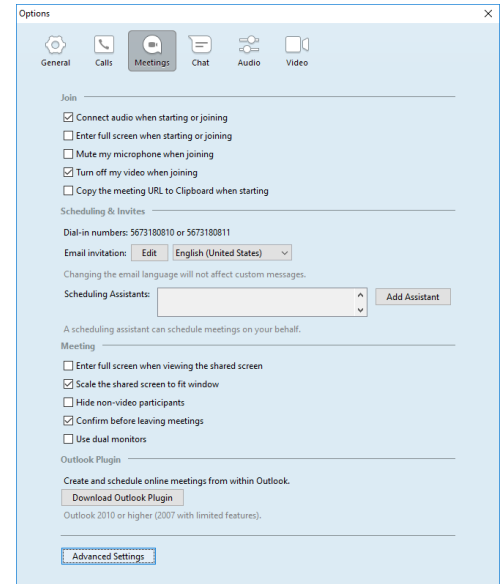
-  **Exit Full Screen** exits the full screen display.
-  **Gallery View** displays the video for all meeting participants.
-  **Speaker View** displays the video for the current speaker.

Download the Outlook Plugin

An Outlook Plugin may be downloaded from within the MaX Meeting Desktop application. This plugin compliments the Meeting functionality by allowing the outlook user to easily schedule online meetings from within Outlook.

To download the Outlook Plugin:

- Click the *Options* menu
- Click the *Meetings* Tab
- Click **Download Outlook Plugin** button at the bottom of the screen



The Outlook Plugin allows you to schedule Meetings directly from your outlook calendar instead of from the MaX application. If there are settings you want to apply to all meetings, note that all Advanced Settings can be set and managed from the application in *Tools > Options > Meetings > Advanced Settings*.