



NetVanta Unified Communications

NetVanta ucCompanion Desktop Presence and Instant Messenger

User Guide

Version 5.0

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Conventions



Notes provide additional useful information.



Cautions signify information that could prevent service interruption or damage to equipment.



Warnings provide information that could prevent injury or endangerment to human life.

Below is a list of naming conventions used in this document. The first example shows the naming convention used for the first occurrence; the second example shows the naming convention used for subsequent occurrences.

Type	Convention Example
Operating System*	Microsoft® Windows Server® 2008 operating system version R2 or later or Windows Server 2008 R2 or later
Server Software	NetVanta Unified Communications Server software or NetVanta UC Server software NetVanta Unified Communications Live Attendant Server or Live Attendant Server
Client Software	NetVanta Unified Communications Client software or NetVanta UC Client software NetVanta ucCompanion Desktop Presence client software or ucCompanion NetVanta ucCompanion Live Attendant or Live Attendant NetVanta ucCompanion Soft Phone or Soft Phone
Hardware	Server computer - the computer on which the server software is installed. Client computer - the computer on which the client software is installed.
NetVanta Unified Communication Products	NetVanta Unified Communications Server or NetVanta UC Server NetVanta Business Communications System or NetVanta BCS NetVanta Enterprise Communications Server or NetVanta ECS NetVanta Business Application Server or NetVanta BAS NetVanta UC Live Attendant Server or Live Attendant Server

* Other operating systems may be mentioned in this document. They will follow a format similar to the one provided.

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Introduction

The NetVanta ucCompanion Desktop Presence is a client application providing a presence-based console designed to work in conjunction with the following NetVanta Unified Communications (UC) Server products:

- NetVanta Business Communications System (BCS)
- NetVanta Enterprise Communications Server (ECS)
- NetVanta Unified Communications Server (UCS)

Both the NetVanta BCS and NetVanta ECS provide the full spectrum of features described in this user guide. The NetVanta UCS has partial feature support, excluding the telephone presence and dialing capability.

NetVanta ucCompanion is installed on a client computer automatically during the NetVanta Unified Communications (UC) Client software installation process. It requires connectivity to a server computer installed and configured as a NetVanta UC Server. Refer to documentation available online from ADTRAN's knowledge base at <http://kb.adtran.com>. This user guide assumes all installation and configurations steps have been completed.

Hardware and Software Requirements and Limitations

NetVanta ucCompanion is only available with installations of the NetVanta UC Server version 5.0 or later.

Minimum system requirements exist for installing NetVanta UC Server software. Refer to the applicable NetVanta Unified Communications Release Notes available online at <http://kb.adtran.com> to determine the system requirements for the version of NetVanta UC Server software you are installing.

A Quick Tour

This section provides an introduction to ucCompanion and the basic sections of the application window. We begin with logging into the application, followed by descriptions of the Main Menu Bar, Search Field, and Contact List. Additional features are accessible from the menu and provided in greater detail later in this guide.

Logging In

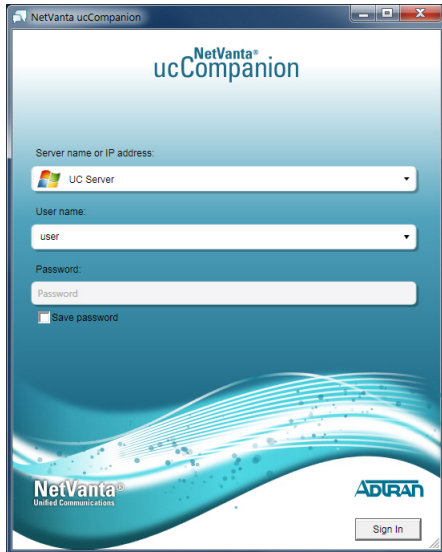
When ucCompanion is launched for the first time, you are prompted to enter the name or IP address of the server computer with NetVanta UC Server software installed. The network administrator can provide this information to you. Once the name or IP address is entered, it will automatically display in the drop-down menu for any future login attempts.



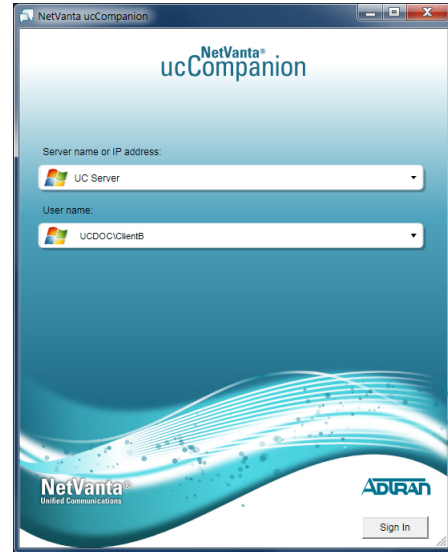
If your installation of the NetVanta UC Server software is integrated with Active Directory, your administrator could have configured a service connection point which includes a list of all the NetVanta UC Servers currently available on the network. If this is the case, just select the appropriate server from the drop-down list.

To log in:

1. Launch the NetVanta ucCompanion Desktop Presence client software by selecting **Start > Programs > ADTRAN > NetVanta ucCompanion**. The login menu displays as one of the options shown below depending on your network configuration.



Typical Sign-on (Local Authentication) requires username and password.



Single Sign-on (Active Directory Authentication) allows automatic login.

Figure 1. Login Menu



*If Active Directory is integrated in your network configuration, you can use your network credentials to automatically log in (single sign-on) by selecting **Sign In**.*

2. Enter the name or IP address of the server computer with the NetVanta UC Server software, or select it from the drop-down list.
3. Enter your user name or select it from the drop-down list. Any user previously logged into the application is retained in the drop-down list.
4. Enter your password. You can select the option to save your password for future access. This is only recommended if you are the only user to log into the application from this computer.
5. Select **Sign In**.

Once logged into the application, the main NetVanta ucCompanion menu appears. Many of the features and settings available on this menu are also accessible from other locations throughout the application. See [Figure 2 on page 9](#) for an explanation of the main areas of this menu.

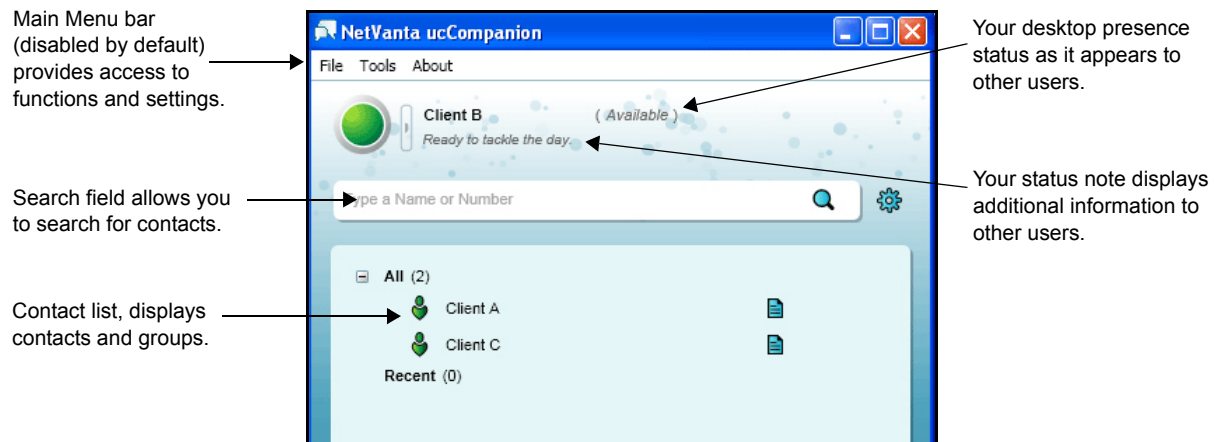


Figure 2. NetVanta ucCompanion Menu

NOTE

*The Main Menu bar is disabled by default and can be enabled by pressing the **Alt** key or selecting **Main Menu Always Visible** from the **Personal options** section of the **Settings** menu. Refer to [Personal Options on page 19](#) for more information.*

Main Menu Bar

The Main Menu bar provides the following three menu selections:

- **File** menu - Provides access to your status settings, contact sorting options, rejoining a conversation, signing out, and closing the application. Refer to the following sections for more information about using these features: [Setting Your Status on page 11](#), [Sorting Contacts on page 14](#), [Using Contact Groups on page 14](#), and [Signing Out on page 24](#).
- **Tools** menu - Provides a method for adding a new group for your contacts. Refer to [Using Contact Groups on page 14](#) for more information about this feature.
- **About** menu - Provides the currently loaded version of ucCompanion software and copyright information.

Search Field

The search field allows you to search for contacts either by name or phone number. To start a new search, begin entering either text or numbers in the search field. Possible matches appear below the search field (see [Figure 3 on page 10](#)). To clear the search, select the **X** on the right side of the search field. A message displays if no matches are found.

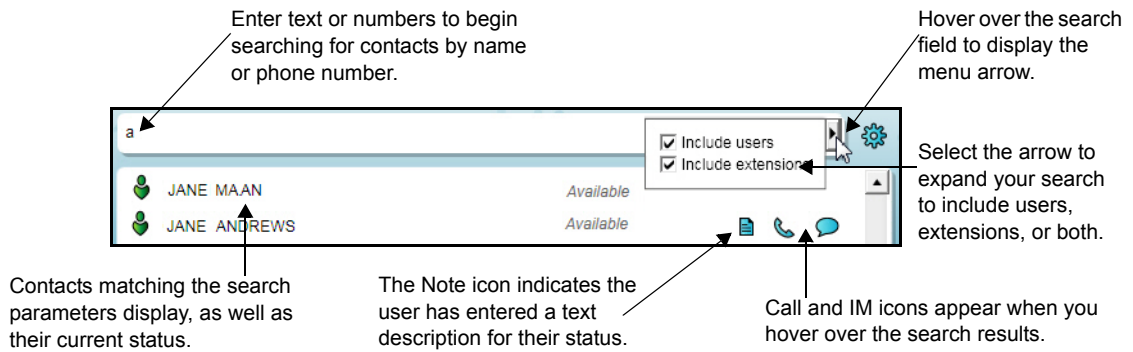


Figure 3. Search for Contacts

Once a contact is found through the search, several actions are presented by hovering over the results or right-clicking the contact name. These actions allow you to add the contact to your groups, remove the contact from a group, send an instant message, or place a call. Refer to the following sections for more details about these functions:

- [Using Contact Groups on page 14](#)
- [Sending and Receiving Instant Messages on page 15](#)
- [Placing Calls on page 16](#)

Contact List

The contact list displays the people you can contact through ucCompanion, as well as their current status. By adding contacts to your list, you can view their status quickly and initiate a call or instant message with a few clicks of the mouse.

By default, the **All** and **Recent** contact groups are already created. Every contact you add to your contact list will appear in the **All** group. Personalized groups can also be added to sort your contacts. Refer to [Using Contact Groups on page 14](#) for more information about creating and using groups.

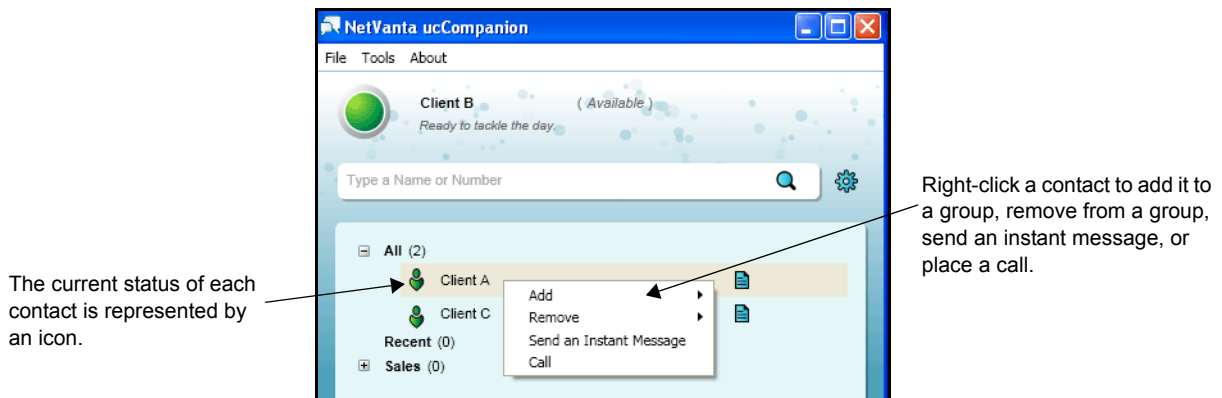


Figure 4. Contact List

Setting Your Status

Your status is a visual representation to other users on ucCompanion of your availability for phone calls or instant messages. Your status is displayed to users who have added you to their contact list, as well as in the search results.

You can set your status manually using the **File > My Status** menu or by selecting the option arrow just to the right of your Current Status icon in ucCompanion. Select the status that best fits your needs. Both of these methods are shown in *Figure 5*.

The status options are **Available**, **Busy**, **Be Right Back**, **Do Not Disturb**, **Away**, and **Reset Status**. The **Reset Status** option resets your status and allows ucCompanion to automatically update your status according to your telephone and desktop activity.

Examples of the Status icons as displayed to users in ucCompanion and their descriptions are shown in *Table 1 on page 12*.

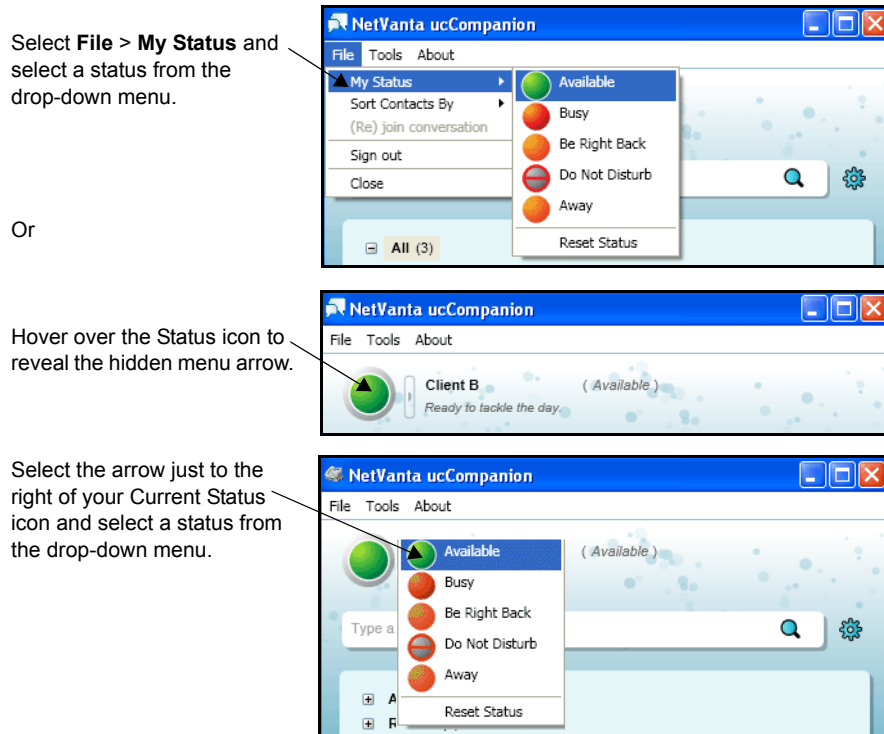










Figure 5. Setting Your Current Status

Table 1. Status Icon Examples




Status	Icon	Description
Available		User is logged in and at least one of their identities* is available.
Busy		User is logged in and at least one of their identities* is busy.
Be Right Back		User is logged in and has manually set their status to Be Right Back.
Do Not Disturb		User is logged in, and has manually set their identity to Do Not Disturb.
Away		User is logged in and has manually set their status to Away, or user desktop has been idle for the time specified in user Settings.
Offline - Available		User is not logged in but at least one of their identities is available, this could mean only their extension is available.
Offline - Busy		User is not logged in and at least one of their identities is busy.
Offline - Out Of Service		User is not logged in and none of their identities are available.

*Users can have more than one identity in ucCompanion. An identity can be a user or their phone extension.

Working with Contacts

There are three types of contacts that can be displayed in your contact list: a user, an identity, and a phone number. Each of these are represented by an icon and explained in [Table 2](#).

Table 2. Contact Types

Type	Icon	Description
User		A user has a display name, first name, and last name. This type of contact can have one or more identities, each with a separate telephone presence. The desktop presence for users can be determined automatically by the system or set manually by the user. The telephone and desktop presence are combined to present a single presence status and description for the user in ucCompanion.
Identity		An identity has a display name and address (extension). This type of contact has only a telephone presence, determined by the communication system.
Phone number		A phone number has the actual phone number and display name. This type of entry does not display presence information in ucCompanion.

The desktop presence displays the status for each of your contacts as **Available**, **Busy**, **Do Not Disturb**, **Away**, **Inactive**, **Offline**, or **Unknown**. Individual users can also display an editable text description of their status which is displayed as a Note icon in your contact list. (See [Figure 6](#).) By hovering over the Note icon, the text status description displays. For example, a user can display a text description **Attending Webinar**.

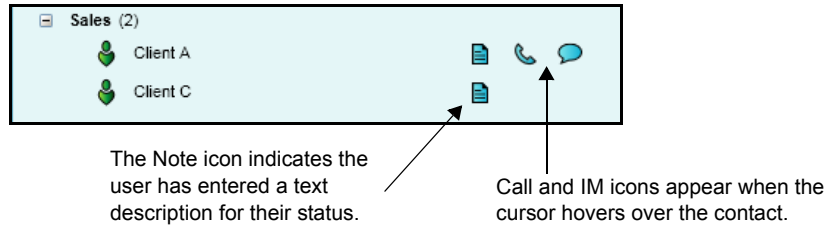


Figure 6. Note, Call, and IM Icons in Contact List

Searching for Contacts

Contacts are found using the search field within ucCompanion. Use this field to search either by contact name or phone number. You can specify whether to include only users, only extensions or both in your search. To do this, display the search options by hovering over the search field and selecting the arrow that appears. Choose the options to include by selecting **Include users** or **Include extensions** using the check boxes shown in [Figure 7](#).

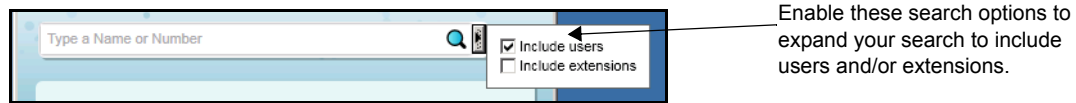


Figure 7. Expand Search Options

Search types can include internal phone numbers (such as, 4-digit extension) and partial information (such as, the first few letters of a name or the first few numbers of a phone number). [Figure 8](#) shows examples of some of the possible searches and their results.

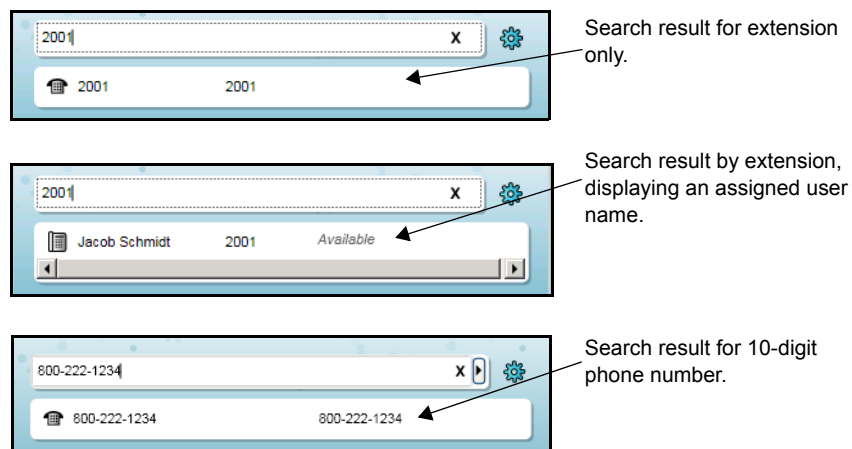


Figure 8. Contact Search Results

After a search is completed, select the **X** in the right end of the search field to clear the results.

Adding a Contact to Your List

Once a contact is found using the search methods described in [Searching for Contacts on page 13](#), they can be added to your contact list. Right-click on the contact name or number and select **Add** from the drop-down menu. You can choose to add them to the default **All** group or any other group configured in your application. A contact can appear in more than one group. For more information on creating groups, refer to [Using Contact Groups on page 14](#).



Figure 9. Add Contact to your Contact List

Sorting Contacts

Contacts can be sorted so they appear in the contact list (within a group) based on certain criteria.

To sort contacts:

Select **File > Sort Contacts By**. Select the method by which to sort the contacts: **Type**, **Presence**, **Display Name**, **Phone Number**, **First Name**, and **Last Name**.

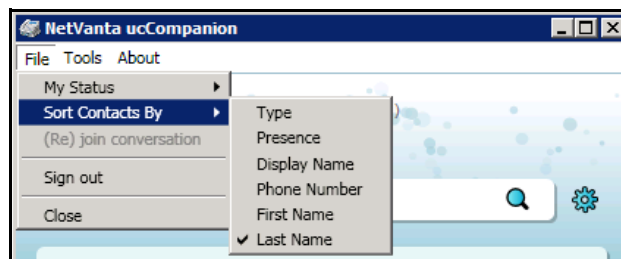


Figure 10. Sort Contact List

Using Contact Groups

Contacts can be arranged in groups. A contact can appear in more than one group. There are two predefined default groups: the **All** group that includes all contacts in your list, and the **Recent** group that displays contacts that you have recently called. You can also create your own Contact group.

To create a group:

1. Select either **Tools > Add New Group** from the menu bar or right-click anywhere in the blank area of the contact list and select **Create Insert** from the menu.
2. Enter a name for the new group in the field provided and press **Enter**. The new group appears in your contact list.

To add a contact to a group:

1. Right-click the contact from the search results field or in the contact list.
2. Select **Add**.
3. Select the group name from the drop-down menu.

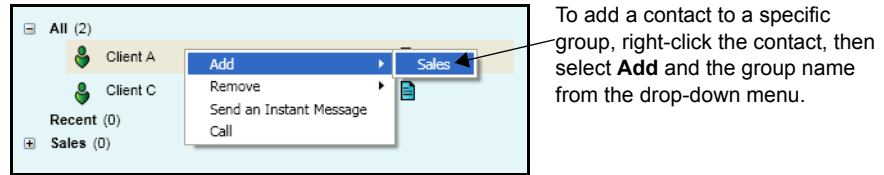


Figure 11. Add Contact to a Group

Sending and Receiving Instant Messages

Conversations through instant messaging are accomplished using a separate dialog menu that displays once you initiate an instant message with another contact or a contact sends a message to you. In either case, the options available are the same and shown in [Figure 12](#).

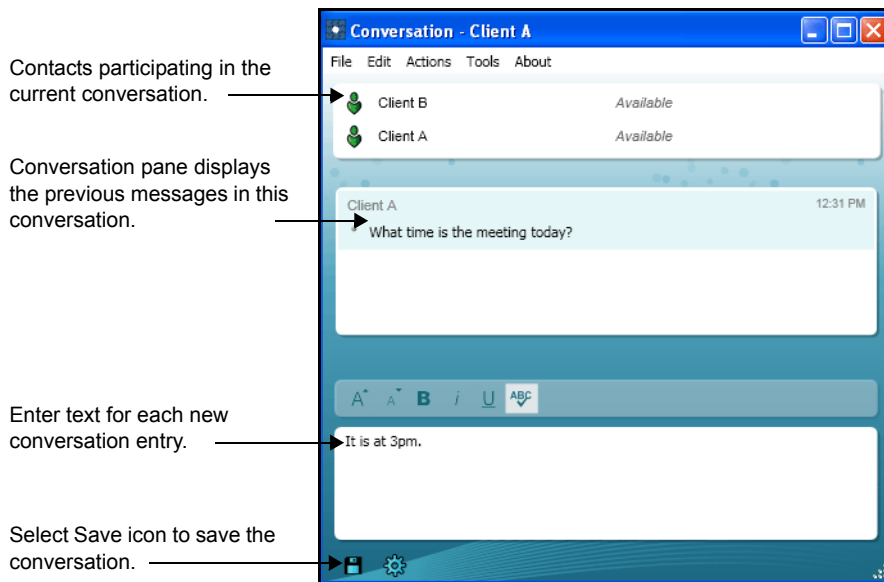


Figure 12. Instant Message Conversation Menu

To initiate a conversation:

1. Right-click a contact from your contact list and select **Send an Instant Message** from the drop-down menu.
2. Alternatively, you can hover over the contact and select the Instant Message icon. The instant message conversation dialog box appears.

Both methods are shown in [Figure 13 on page 16](#).

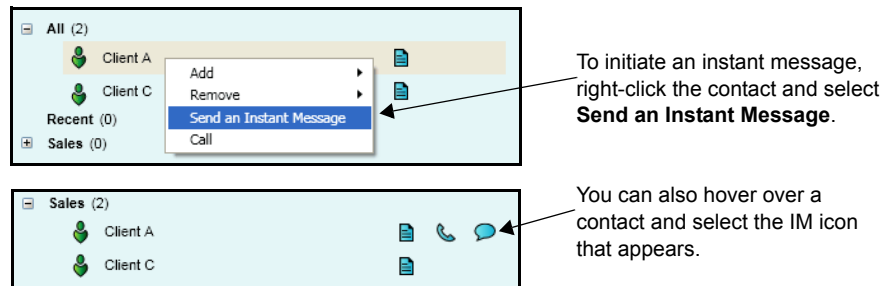


Figure 13. Initiate an Instant Message

To rejoin a conversation:

After a conversation becomes idle or if you close the conversation window, you can rejoin it by selecting **Actions > Rejoin** from the Instant Message Conversation menu, or select **File > (Re)join conversation** from the main menu. You can also rejoin a conversation by selecting the icon that appears next to your own presence in the main menu, shown in [Figure 14](#).

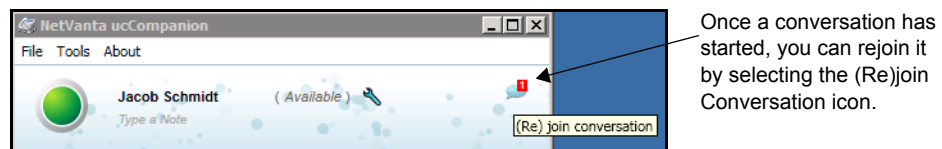


Figure 14. (Re)join Conversation Icon

To save a conversation:

1. Save a conversation by selecting **File > Save as** from the Instant Message Conversation menu, or select the Save icon in the bottom left as shown in [Figure 12 on page 15](#).
2. Enter a name and a location to save the file in the dialog box that appears. Select **Save**. Conversations are saved in rich text or plain text format, depending on the file type selected.

Placing Calls

Calls can be placed to a contact from the Contact list or from the Conversation menu. This is accomplished by either selecting the contact from the list and using the Call icon (shown in [Figure 15 on page 17](#)), or right-clicking the contact and selecting **Call** from the drop-down menu.

To place a call:

1. Right-click a contact in the contact list, then select **Call** from the drop-down menu.
2. Alternatively, you can hover over the contact and select the Call icon.

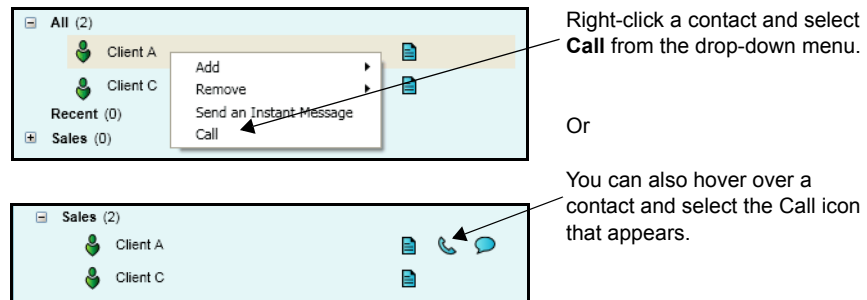


Figure 15. Call Contact from List

Using the Click-to-dial Feature

The click-to-dial feature is a function within the NetVanta UC Client software that allows users to place calls from the desktop. There are two ways a user can click-to-dial a phone number or contact:

1. Use the Microsoft Outlook plug-in installed with the NetVanta UC Client software. This plug-in provides custom buttons in email messages and contact records that allow users to click-to-dial contacts in their personal address book.
2. Highlight and copy a text-based phone number from any application on the desktop.

In the second method, ucCompanion monitors your system clipboard for possible phone numbers to dial automatically. When the application detects a number string in the copied text placed on the clipboard, a notification dialog box appears with the phone number. You are then prompted to initiate a voice call to the phone number. The notification dialog box launches from the Windows task bar. It can appear in two different sizes as shown in [Figure 16](#).

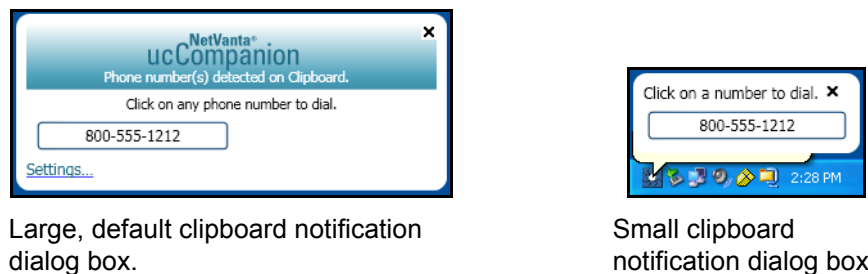


Figure 16. Click-to-Dial Notification

Refer to [Notification Options on page 21](#) to change the notification settings when a number is copied to the clipboard. See [Table 4 on page 22](#) to change the settings for monitoring the clipboard.

Customizing Your Settings

There a number of optional settings that you can set from ucCompanion. The most often used setting is your current status. This is the presence that is presented to other contacts and shows your availability for conversations by phone or instant messaging. Refer to [Setting Your Status on page 11](#) for more information.

You can also set your personal, notification, and advanced options through the Settings menu. This menu is accessed by selecting the Settings icon shown to the right of the search field (see [Figure 17](#)). Refer to the following sections for more information about these options:

- [Personal Options on page 19](#)
- [Notification Options on page 21](#)
- [Advanced Options on page 23](#)

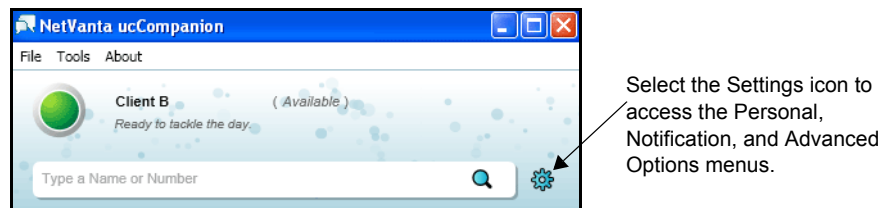


Figure 17. Accessing the Settings Menu

Personal Options

The **Personal options** include settings for starting the application at logon, showing tips, Main Menu visibility, detection of inactivity behavior, search options, dialing behavior, and clipboard monitoring. To set your personal options:

1. Select the Settings icon shown to the right of the search field (see [Figure 17 on page 18](#)).
2. Select **Personal options** from the **NetVanta ucCompanion Settings** menu shown in [Figure 18](#).
3. Make changes to your settings and select **Save** to accept the new settings. A list of the available options and their descriptions are provided in [Table 3 on page 20](#).

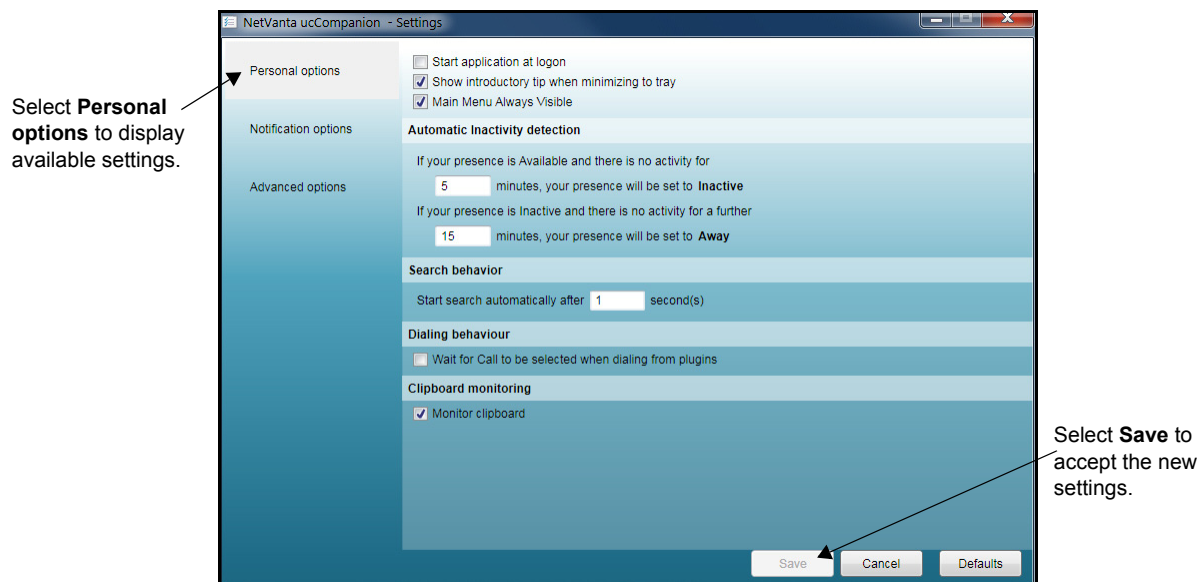


Figure 18. Personal Options

Table 3. Personal Options Menu

Option	Description
Start application at logon	Launches the ucCompanion application immediately after you log on to your computer.
Show introductory tip when minimizing to tray	Displays a series of introductory tips on using ucCompanion when you minimize the application.
Main Menu Always Visible	Enabling this option makes the main menu options (File , Tools , and About) visible. Disabled by default.
Automatic inactivity detection	Automatically set your presence to Inactive or Away after a period of desktop inactivity. Inactive status occurs by default after 5 minutes, and the valid range is 5 to 30 minutes. Away status occurs by default after 15 minutes, and the valid range is 10 to 60 minutes. The Away status is determined for the period of time beginning when the presences is set to Inactive .
Search behavior	Specifies the amount of time to wait after the last keystroke before initiating a search request. Default is 1 second with a valid range of 1 to 30 seconds.
Dialing behavior	Enabling the option Wait for call to be selected when dialing from plugins allows you the option to edit or confirm a phone number prior to dialing using ucCompanion. This behavior is currently used only with the Microsoft Outlook plugin. Disabling this option permits ucCompanion to initiate a call without waiting for confirmation and also allows setting the Dialing notifications (such as; click-to-dial notification) described in Notification Options on page 21 .
Clipboard monitoring	Specifies monitoring the clipboard for number strings to use as phone numbers to dial. If enabled, the contents of a copy action can be used to dial a number through ucCompanion.

Notification Options

The **Notification options** include notification settings for dialing, clipboard monitoring, and instant messages. To set notification options:

1. Select the Settings icon shown to the right of the search field (see [Figure 17 on page 18](#)).
2. Select **Notification options** from the **NetVanta ucCompanion Settings** menu shown in [Figure 19](#).
3. Make changes to your settings and select **Save** to accept the new settings. A list of the available options and their description is provided in [Table 4 on page 22](#).

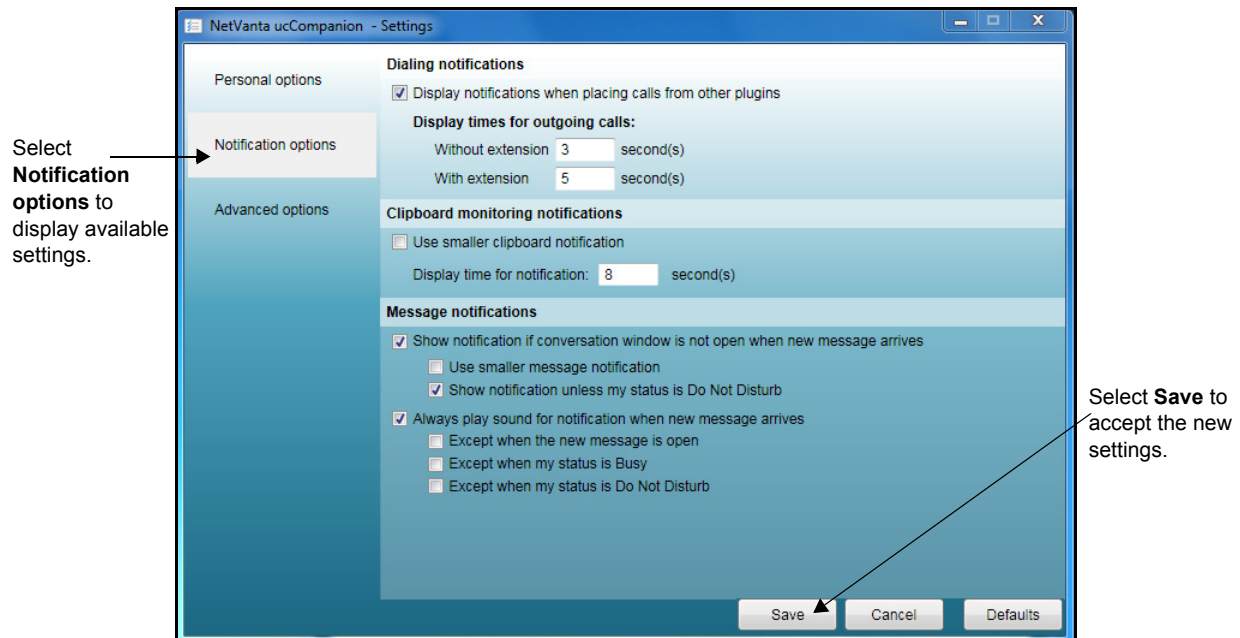


Figure 19. Notification Options

Table 4. Notification Options Menu

Option	Description
Dialing notifications	<p>Only available if the Wait for call to be selected when dialing from plugins option is disabled under Dialing behavior (see Personal Options on page 19).</p> <p>Specifies whether to display notifications when placing calls from plugins (such as Microsoft Outlook). When enabled, the click-to-dial notification displays when a call is initiated from the plugin. The settings for this option also indicates the amount of time to display outgoing calls. The default for calls without an extension is 3 seconds and for calls with an extension is 5 seconds.</p>
Clipboard monitoring notifications	<p>Specifies the size and amount of time to display the notification dialog box for the click-to-dial feature when Monitor clipboard is enabled (see Personal Options on page 19).</p> <p>By selecting the Use smaller clipboard notification check box, a small dialog box is displayed instead of the default larger dialog box (shown in Figure 16 on page 17).</p> <p>By default, the amount of time for the notification to display is 8 seconds. The time period can be set using the Display time for notification field. Valid range for this field is 2 to 20.</p> <p>Refer to Using the Click-to-dial Feature on page 17 for more information about this feature.</p>
Message notifications	<p>Specifies display and sound notifications when a new instant message is received.</p> <p>Select Show notification if conversation window is not open to display a notification when new message arrives.</p> <ul style="list-style-type: none"> • Enable Use smaller message notification to determine the size of the notification message. • Enable Show notification unless my status is Do Not Disturb to prevent a notification from displaying based on a DND status. <p>Select Always play sound for notification when new message arrives to play a default sound.</p> <ul style="list-style-type: none"> • Enable Except when the new message is open to prevent the sound notification. • Enable Except when my status is Busy to prevent the sound notification. • Enable Except when my status is Do Not Disturb to prevent the sound notification. <p>All of these settings apply only when the conversation window is not already open.</p>

Advanced Options

The **Advanced options** include settings controlling the clipboard monitoring for text during a copy and paste action on your desktop. Monitoring the clipboard is a function of the click-to-dial feature which is explained in [Using the Click-to-dial Feature on page 17](#). To set advanced options:

1. Select the Settings icon shown to the right of the search field (see [Figure 17 on page 18](#)).
2. Select **Advanced options** from the **NetVanta ucCompanion Settings** menu shown in [Figure 20](#).
3. Make changes to your settings and select **Save** to accept the new settings. A list of the available options and their description is provided in [Table 5](#).

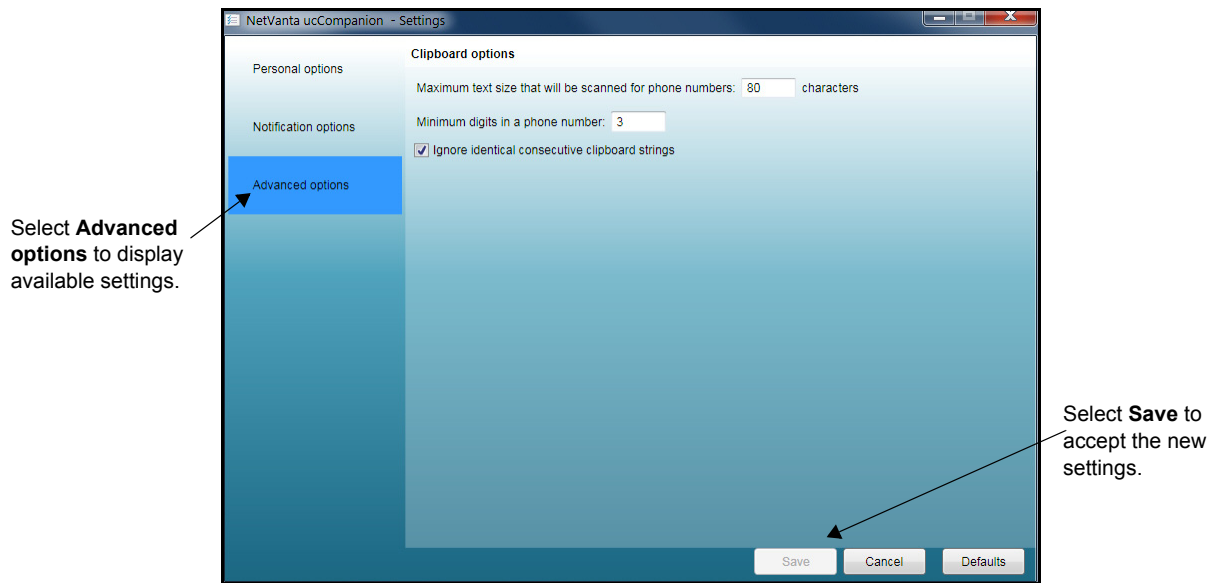


Figure 20. Advanced Options

Table 5. Advanced Options Menu

Option	Description
Maximum text size that will be scanned for phone numbers	Specifies the length of text to review for numbers to dial using the click-to-dial feature. The default is 80 characters. Valid range is 10 to 1000 .
Minimum digits in a phone number	Specifies the minimum number of digits required for a string of numbers to be considered a phone number for the click-to-dial feature. Default is 3 digits. Valid range is 2 to 20 . Refer to Using the Click-to-dial Feature on page 17 for more information about this feature.
Ignore identical consecutive clipboard strings	Specifies whether to ignore copy and paste action if the text copied includes a phone number that has been copied already to the clipboard. If this option is enabled, copying a number to the clipboard will not be repeated.

Signing Out

Since any user can log into ucCompanion from any client connected to NetVanta UC Server, it is important to sign out from the application when you are finished. Only one user can be logged into the application on a computer at a time.

To sign out:

From the Main Menu bar, select **File > Sign out**. Alternatively, you can right-click the ucCompanion icon in the system tray, and select **Exit** from the pop-up menu.

Your account is logged out and returned to the login screen.



*Selecting **Close** is not the same as selecting **Sign out** from the **File** menu. Selecting **Close** only minimizes the application to the system tray. The application continues to run with your login active.*

Additional Resources

Additional documentation and resources for NetVanta UC Server and NetVanta ucCompanion are available online from ADTRAN's knowledge base at <http://kb.adtran.com>.