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Overview

Fonality HUD Web

Welcome to HUD Web, the ultimate Unified Communications application that brings Chat (Instant Messaging), Calls and Call Recordings, Group Conferencing, Call Center capability, Screen Share, Video Collaboration and a Shared Document portal – all together in one integrated User Interface. This User’s Guide will enable an End User to set up and use Fonality HUD Web.

The HUD Web dashboard is divided into three vertical sections:

- The left-hand section lists the company directory and is where you will place calls, both internally and externally.

![All View](image1.png)  
![Recent View](image2.png)
The right-hand section is called the Docking Area and is where you can dock a user, a group of users, a conference room, park calls and view your call queue.

At the top of the HUD Web Dashboard, you will see eight icons representing the various HUD Web components that you manage in the central section of the HUD Web Dashboard.
We'll explore each of these components in this User Guide, as follows:

- **Me** => Your ‘Main Page’: Establish your availability for incoming calls, place calls, view recent calls, and set up your Account Preferences.
- **Calls & Recordings** => View your complete Call Log, hear Voice Mail and listen to any recorded calls.
- **Conferencing** => Find an available line for conferencing, set up the conference call and invite people to join.
- **Call Center** => View your call queue -- or everyone’s call queues -- and how many calls are waiting.
- **Screen Share** => Share your screen during a conference call or allow others to present.
- **Search** => Type or speak name of contact, team, queue or conference room.
- **Video Collaboration** => Take your conference calls to the next level with instant video collaboration for ‘face-to-face’ interactive discussions.
- **Box** => Access, manage and share critical content with others right from your Control Panel.

However, before we do that, let’s outline out to get HUD Web installed on your computer.

1. **Prerequisites for HUD Web Installation**
   - Obtain the Fonality Server ID from your IT Administrator.
   - Send an email to help@fonality.com to receive your login credentials.

2. **Logging in to Fonality HUD Web**
   - Navigate to http://hudweb.fonality.com/
   - Enter your server and phone extension, separated by an underscore, along with your password in the fields as shown.
   - **NOTE:** Contact your IT Administrator if you have not received an email from Fonality with your login credentials.
3. Installing the HUD Web Plugin

- When you log into HUD Web for the first time you will be prompted by your browser to install a plugin. This plugin is necessary to receive screen pop notifications.
- Follow your browser’s instructions to install the plugin. The example shown below is Google Chrome.
4. Managing Calls
   a. Making a Call

Calls can be made from two places in the left section of the Control Panel:

- The **Upper Call** area of the left section of the Control Panel, if you don’t know the person’s extension or phone number; or,

- The **Bottom Call** area of the left section of the Control Panel.

- SELECT => All to search for the **Contact**
- HOVER over the **Personal Photo or the Avatar** of the contact
- From the Pop-up Menu CLICK => **Call**
- HUD Web will automatically place the call
- Use the SmartPhone in your computer to talk, or pick up the receiver on your phone
b. Transferring an Internal Call

- CLICK => All to use SEARCH to find the Contact Name
- DRAG and DROP the call from the Bottom Call area to the contact of choice in the Upper Call area (In this example, transferring a call with Katerina Roemer to Daryl Reva).

![Image showing the process of transferring an internal call]

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c. Transferring an External Call

- While on a call, CLICK => in the Call Box to bring up the Call Menu in the Control Panel.

![Image showing the call menu]

- From the Call Menu CLICK => Transfer to bring up the Transfer Menu
- ENTER => the **External Number** to transfer the call to => **Destination**
- CLICK => **Transfer**
- The call will be transferred and the existing call will end.
5. Control Panel Features: Configuring a Softphone for HUD Web
   a. Setting up the Softphone Feature
   The softphone feature in HUD Web allows for placing and receiving calls using your computer’s microphone, speakers or a headset.
   - To use the softphone, CHANGE => Location to HUD Web Softphone (see 5c below).

   b. Adjusting Softphone Preferences
   - CLICK => Preferences => Phone
   - ADJUST => Microphone and Speaker levels, echo cancellation, and input, output and ring devices.
   - NOTES:
     - For best call quality, Fonality recommends using a headset with the HUD Web softphone.
     - When switching To or From a headset, make sure to change your input and output settings.
c. **Changing Your Call Location**

HUD Web has the capability to route calls to your mobile phone, softphone or alternate extension when you change your physical location.

- From Your Control Panel (aka ‘Me’)
  
  CLICK => **Location**

- Use the location dropdown to select a different location to route calls. The HUD Web softphone allows you to make calls using the microphone and speakers built into your computer, and you can also add your mobile phone and another office location.

6. **Control Panel Features: Adding a Personal Photo or Avatar to HUD Web**

- Under **Preferences** => SELECT **Account**
- Scroll to **My Personal Information**
- CLICK => **Upload**
- BROWSE to the **Pictures** folder on your computer
- CLICK on the image that you want
- CLICK => **Open**
- The image that you select will be automatically uploaded to your Control Panel.
7. Using the Chat Feature in HUD Web
   a. Starting a 1:1 Chat
      - Locate the person using the Contacts Menu in the left-hand section of the dashboard under Favorites, Recent or Groups.
      - If your contact isn’t under one of these categories, CLICK => All to search by Name, Number or email address.
      - CLICK => Contact Name to chat.
b. Starting a Group Chat

- CLICK => **Groups** in the **Contacts Menu**

- SCROLL => Locate the **Group** you want to chat with.
- SELECT => The **Team/Group** name.

- CLICK => **Call** to chat with all of the members of the team

- To build a New Group, CLICK => **New**
8. Calls & Recordings

CLICK => The Calls & Recordings icon on the Control Panel menu to view your call log, voice mails and recorded calls.

a. Checking Voice Mail

- SELECT => Voicemails
- If your Fonality system has voicemail transcription, you will see text transcriptions of all available voice messages.
- To search for a particular message, type the Contact Name in the SEARCH field.
- To listen to a particular voicemail, CLICK on the Message Transcription or the Contact Name. You will see your message playing in the top right of the screen and can rewind, fast forward, or pause by hovering over it.

- To call the contact back, HOVER over the message
- CLICK => Call
b. Managing Voice Mail

- From the **Actions** drop-down, you can Mark all messages as read or unread, or delete them.

  ![Actions drop-down options](image)

- From the **Sort by** drop-down, you can Sort messages alphabetically, by date received or by status.

  ![Sort by drop-down options](image)
9. Conferencing  
   a. Joining a Conference Call  
      • CLICK => The **Conferencing** icon on the **Control Panel** menu.
      • CLICK => **Sort by Location** to sort conference rooms by location, room number or activity.
      • You can also use **Search** to locate a conference room.
      • CLICK => On the **Room**
      • CLICK => **Join**
   
b. Starting a Conference  
      • CLICK => **Find Free Room & Join**
   
c. Inviting Others to Join a Conference  
      • CLICK => + **Add someone** to invite another person(s) to join the conference.
      • The person(s) you invite to join the conference will receive a call with the **Caller ID** for the conference room.
      • Once they CLICK => **Accept** they will be placed in the conference.
      • OR => **DRAG and DROP** someone from your **Recent** call list into the conference room.
10. Call Center

- CLICK => The **Call Center** icon on the **Control Panel** menu to view all of the queues that you are authorized to view.
- You can view **My Queues** or **All Queues**.
- CLICK => **My Status** to log in and out of particular queues.
- CLICK => **Sort by** to sort queues by one of options shown above.
- CLICK => Either the **List icon** or the **Grid icon**.

**Grid View**

**List View**
11. Screen Share

- CLICK => The Screen icon on the Control Panel menu to initiate a Screen Sharing session.
- ADD => Members by entering their names in the + MEMBERS field.
- CLICK => Start screen share.

12. Search

- CLICK => The Search icon on the Control Panel menu.
- ENTER => Contact Name, Team, Queue or Conference Room
- CLICK => Search
13. **Video Collaboration**

HUD Web provides the capability to instantly take a conference call to the next level of interaction with Video Collaboration.

| **The place to start using Video Collaboration** => hudweb.fonality.com |
| **Topic** => Prepare an Agenda that everyone on the call can see. |
| **Join a Conference** => ENTER => Meeting ID, CLICK => Join Conference |
| **Start a Conference** => ADD => Members, CLICK => Start Conference |

a. **Logging In**

- NAVIGATE => [http://hudweb.fonality.com](http://hudweb.fonality.com)
- ENTER => User Name and Password
- CLICK => The Video Collaboration icon on the HUD Web menu.

**NOTE:**

- If you are not sure about your HUD Web login credentials, check for an email from Fonality or contact your IT Administrator.
- For issues logging in to Fonality HUD Web, please contact your IT Administrator.
b. Starting a Video Conference
- ADD => **Members** by entering their names in the + **MEMBERS** field.
- CLICK => **Start conference**.

c. Joining a Video Conference
- ENTER => **Meeting ID**
- CLICK => **Join conference**.

**NOTE:**
- Wait 15-30 seconds for the video to initiate and connect.
- If your guests click on the Meeting Link prior to the video initiating, they will receive the message below.
- Have them re-click the link once the session has begun.

d. Managing a Video Conference
- Once a video collaboration session is started, you have additional options located at the bottom of the screen for managing the conference (see below):
  - **Audio** => Mute or Unmute yourself
  - **Video** => Allow participants to see you or not
  - **Settings** =>
  - **Invite**
  - CLICK => **Invite**
  - You now have the option to email the session, copy and paste it into a chat window or invite additional participants
  - Depending on bandwidth, you can host up to 25 video collaborators
  - **View Participants** => Mute all or some attendees
  - **Share Screen** => Share your screen without having to leave the video conference
  - **Chat** => Chat with All or individual guests
  - **Record** => Record the session
  - **End Meeting** => End the video session
• **Microphone** – Turn your audio ON or OFF

• **Audio and Video** - Allow the video conference owner to toggle audio and video during the meeting

• **Settings** – Initiate conference recording

• **Invite** - Invite up to 25 collaborators via email or Instant Messaging (IM).
• **Participants** – Mute/Unmute All, Lock Screen Share, Lock Meeting

![Participants screen](image)

• **Share Screen** - Share your screen without leaving video conference

![Share Screen](image)
USER GUIDE: HUD WEB

- **Chat** - Chat with all attendees or individual attendees

- **Record** – CLICK => **Record** to record the session. The recorded file will be automatically converted to mp4 when the meeting ends.
14. **Box**

*Keep Content Organized:* Box makes it easy to upload and organize all your files – documents, spreadsheets, presentations, images, audio and video files in just a few clicks.

*Share Files Quickly and Easily:* With Box, you share content with your team – and external partners and vendors – just by sending a link.

*Manage Content Access:* With Box, you define who can access and edit specific files and folders. You also get the reassurance of password-protecting shared links.

**a. Installing Box Sync on a Computer**

- Once your IT Administrator has set you up as a User for Box
- **LOGIN =>** [https://[Your Company].app.box.com/files](https://[Your Company].app.box.com/files)
- **CLICK =>** The **Settings Icon** next to your User Name
- **CLICK =>** Get Box Sync

  ![Box Sync Interface](image.png)

- **SELECT** the appropriate Operating System for your computer to download (see below).
- **CLICK =>** **Run** to install Box Sync on your computer.

  ![Box Sync Installation](image.png)

- **ACCEPT =>** **License Terms and Conditions**
- **CLICK =>** **Install**
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Box Sync

1. Get Box Sync for Windows
   Download the latest version of Box Sync for Windows now to start syncing content between your desktop and your Box account.

2. Drag and drop folders
   Drag folders on your computer into a folder called “My Box Folders” to sync them with your Box account online.

3. Mark folders to be synced
   Log in to your Box account in any web browser and right click on a folder to sync it with your desktop.
   A blue icon means it’s synced.

Mobile Access

- Box for iPhone and iPad:
  View updates and share files and folders with your contacts. Learn more.
  Download App

- Box for Android:
  View, create, edit and share files. Upload content to Box. Learn more.
  Download App

- Box for Windows 8:
  Edit, share and manage files on your Windows 8 device. Learn more.
  Download App

- Box for Windows Phone:
  Browse, view, and share files easily from your phone. Learn more.
  Download App

- Box for BlackBerry:
  Access and share Box files from your BlackBerry. Learn more.
  Download App

- m.app.box.com:
  It’s Box, optimized for mobile browsers. No software to install.
  View Website

Box Sync Setup

Click Through Agreement

THIS CLICK-THROUGH AGREEMENT (THIS “AGREEMENT”) IS BETWEEN BOX (“BOX”) AND YOU. IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER ENTITY, YOU REPRESENT THAT YOU ARE THE EMPLOYEE OR AGENT OF SUCH COMPANY (OR OTHER ENTITY) AND YOU HAVE THE AUTHORITY TO ENTER INTO THIS AGREEMENT ON BEHALF OF SUCH COMPANY (OR OTHER ENTITY) BY CLICKING ON THE “ACCEPT” BUTTON.

I agree to the license terms and conditions

Install Close
b. Using Box

- Once Box Sync is successfully installed, GO TO => [https://fonality.app.box.com/login](https://fonality.app.box.com/login)
- ENTER => Password in the Log in to your account screen
- CLICK => Log in

From the Box Menu Bar CLICK => the Folders Icon to:

- View and Work With Existing Folders and Files
• **Upload** Files and Folders

```
Upload ▾  New... ▾  More ▾
   - Upload Files
   - Upload Folders
```

• **Create New** Folders and Documents

```
Upload ▾  New... ▾  More ▾
   - Report Update
     - New Folder
     - New Web Document
     - New Bookmark
   - National Update
     - New Google Doc
     - New Google Spreadsheet
   - Channel Update
     - New Word Document
     - New PowerPoint Document
   - Marketing
     - New Excel Spreadsheet
```

• **Perform Other Actions**

```
Upload ▾  New... ▾  More ▾
   - Download
   - Upload Options
   - Share
   - Add / Edit Tags
   - Sync Folder to Computer
   - Properties
   - Remove Folder
   - More Actions
   - Send to Chatter
   - Add Applications...
```
15. **Using the Docking Area**

The **Docking Area** is the perfect place to ‘dock’ **Contacts, Groups, Conference Rooms and Queues** that you use on a daily basis. By default, **My Queues** and **Parked Calls** will always appear in the **Docking Area**.

- To **dock** a **Contact, Group, Conference Room** or **Queue**
  
  CLICK and DRAG => The **Icon** into the **Docking Area**

- To **remove** an item from the **Docking Area**,
  
  HOVER => Over the **Icon**
  
  CLICK => **Undock**

16. **Support for HUD Web**

If you encounter any issues, please send us details (time and date; user ID; SID; etc.) to **betafeedback@fonality.com** or **help.fonality.com**.