

Helmsman[®]

SIP User Agent

User Guide for
Helmsman SIP User
Agent

Release 3.0

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ABOUT THIS GUIDE

This guide describes how to install, configure and use Helmsman User Agent 3.0. The following chapters comprise this guide:

- “Chapter 1: Introducing Helmsman User Agent”
- “Chapter 2: Installation and Minimal Configuration”
- “Chapter 3: Using Helmsman User Agent”
- “Chapter 4: Additional Configuration”

Introduction to this Guide

This user guide describes Helmsman[®] User Agent (HUA) release 3.0 and how to install, configure, and use HUA.

Purpose of this Guide

The purpose of this guide is to familiarize you with HUA and its functionality and to help you install, configure, and use the application.

Who Should Use this Guide?

You should use this guide if you are installing, configuring, or using HUA.

What is the Scope of this Guide?

This guide covers the following areas:

- HUA and its functionality
- Instructions for installing HUA
- Instructions for configuring HUA
- Instructions for using HUA

This guide is intended for use with the context-sensitive online help that is included as part of HUA.

CHAPTER 1: INTRODUCING HELMSMAN USER AGENT

This chapter provides an overview of the user interface and functionality of HUA.

Overview of Helmsman User Agent

Helmsman User Agent (HUA) 3.0 is the latest SIP user agent developed by Ubiquity. HUA makes it easy for you to send and receive voice calls (sometimes called *VOIP calls* or *Internet calls*) from a desktop computer. In addition to initiating and accepting calls, you can monitor call status and even have several calls in progress at once. You can also register HUA with a registrar or store authentication details against your username for requesting authorization to other users' realms in the future.

An intuitive user interface makes HUA easy to use, and you can access the extensive online help at any time. HUA is also highly configurable; you can change your personal preferences and network settings as you require at any time.

CHAPTER 2: INSTALLATION AND MINIMAL CONFIGURATION

This chapter describes how to install, run and configure HUA with the minimal configuration. The following sections comprise this chapter:

- “Before Installing HUA”
- “Installing HUA”
- “Running HUA”
- “Licensing the Software”
- “Running HUA with the Minimal Configuration”

Before Installing HUA

Prior to installation, you should make sure that your hardware platform, soundcard, and version of Java Runtime Environment (JRE) are supported by HUA. Consult *Helmsman User Agent 3.0.x Release Notes* for these requirements.

Installing HUA

Installing HUA involves extracting the contents of the supplied zip file and running the installation program. You do not have to enter any configuration settings during installation. Simply run the installer using the following procedure. You may enter configuration details after installation is complete.

To Install HUA

1. Extract the contents of the supplied zip file.
2. Go to the directory containing the extracted files.
3. Double-click on the following file:

`jinstall.exe`

The installation program displays a message informing you that it is preparing the installation wizard. Once the wizard is ready, the first screen is displayed listing the software details for HUA.

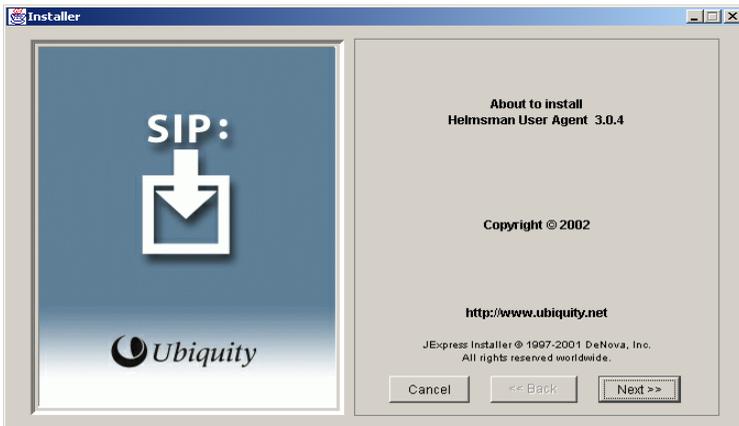


Figure 2-1. Software Details Displayed by the Installation Wizard

4. Click on **Next**, and follow the instructions to complete the installation.

Running HUA

Run HUA by starting the appropriate program from your desktop.

To Run HUA

1. Choose Start > Programs > Helmsman User Agent, or go to the installation directory and run the following file:

`HelmsmanUserAgent.exe`

The Main Window is displayed.



Figure 2-2. The HUA User Interface

NOTE: If this is your first time running HUA, then you need to license it. See “Licensing the Software” on page 9.

Licensing the Software

The first time you run HUA, it displays the *License Details* dialog box. At this time, you must enter a valid license key. If you do not have a valid license key, then you can request a license key by emailing:

uasupport@sipcenter.com



Figure 2-3. License Details Dialog Box

To License HUA

1. Run HUA. See “Running HUA” on page 8.

The *License Details* dialog box is displayed. See “Figure 2-3. License Details Dialog Box”.

2. Enter your license key without spaces or return characters. Alternatively, paste the key into this field.
3. Click on **Apply**.

HUA updates the expiry date to reflect the license.

NOTE: If you enter an invalid license key, then HUA asks for another, valid license key.

HUA updates the expiry date to reflect the license key you entered.

4. Click on **Close**.

HUA displays the *Settings* window.



Figure 2-4. Settings Window with the User Details Tab Pane Displayed

5. Click on **OK** to run HUA with the minimal configuration, or you can specify additional configuration for advanced functionality. See “Chapter 4: Additional Configuration” on page 33.

Running HUA with the Minimal Configuration

If you want to use HUA for peer-to-peer communication, you need only set the minimal configuration. With peer-to-peer communication, calls go directly from one SIP address to another, without going through a proxy server.

When you run HUA with the minimal configuration, HUA does not register a public SIP address with a registrar. Instead HUA automatically creates your contact address from the pre-determined settings on your computer, with the contact address in the following format:

```
sip:user@<host IP address>
```

This contact address is the address that HUA displays in the *Registered User* field of the Main Window, and this is also the address at which other parties can contact you.

CHAPTER 3: USING HELMSMAN USER AGENT

This chapter describes how to use HUA. The following sections comprise this chapter:

- “The Main Window”
- “Figure 3-1 shows the Main Window of HUA.”
- “Call and Registration Status”
- “Making a Call”
- “Ending a Call”
- “Answering an Incoming Call”
- “Rejecting an Incoming Call”
- “Placing a Call on Hold”
- “Being Placed On Hold”
- “Both Parties Holding”
- “Registering with a Registrar”
- “Example: Registering with the SIP Center Registrar”
- “Authorization”

The Main Window

Figure 3-1 shows the Main Window of HUA.

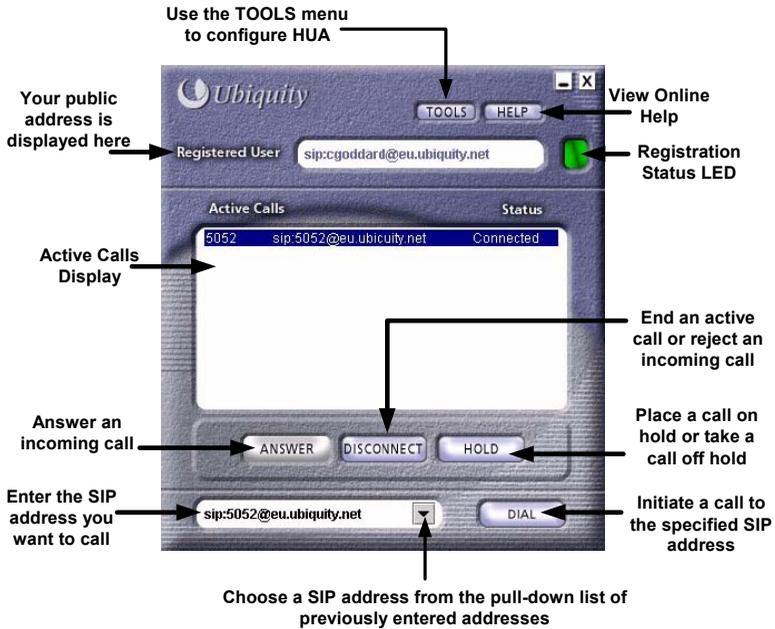


Figure 3-1. Main Window of HUA

Accessing the Online Help

HUA includes comprehensive online help that describes the application and how to use it, including a keyword search facility.

To Access the Online Help

1. From the Main Window of HUA, click on **HELP** to display the *User Agent Help* window.

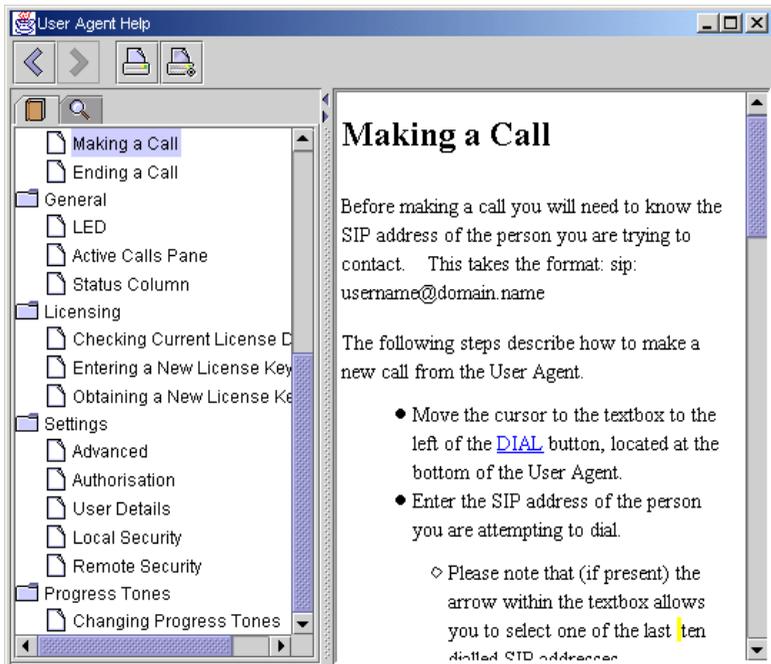


Figure 3-2. HUA Online Help

Select a help topic from the left menu, or click on the search tab pane to perform a keyword search.

Call and Registration Status

HUA displays all active calls in the Active Calls Display of the Main Window.



Figure 3-3. An Outgoing Call with a Status of Alerting

When multiple calls are displayed, HUA flashes the incoming call in green and adds it to the bottom of the list.

NOTE: If a call generates an error, then HUA highlights the call in red.

Call Status

The following table describes each type of status for an active call:

This call status...	Tells you that...
Alerting	you have a new, incoming call. If one or more calls are displayed, then the incoming call flashes green to get your attention.
Dialing	HUA is trying to connect to the party you are calling.
Ringing	HUA is ringing the other party.
Connected	the call is now in progress.
Holding	you have placed the other party on hold.
On Hold	the other party has placed you on hold.
Both Holding	both you and the other party have placed each other on hold.
Disconnected	the call has now ended.
Error	this call has caused HUA to generate an error. The call flashes red.
Busy	the Callee is busy. However, this could mean that your outgoing call has been rejected.
Not Found	HUA cannot find the SIP address that you entered.
Please Wait	HUA is changing from one state to another, for example from <i>Both Holding</i> to <i>Holding</i> .
Authenticate	authorization is required.

Registration Status

The following table explains what the different Registration Status LED colors indicate.

This color...	tells you that...	AND, in the <i>Registered User</i> text field, HUA displays...
red	an error has occurred during the registration process	<i>Not Registered</i> and the error string value.
green	registration is successful	the registered SIP address.

This color...	tells you that...	AND, in the <i>Registered User</i> text field, HUA displays...
orange	HUA is in the process of registering	nothing.
grey	HUA is not registered, because no registrar has been entered	the contact address.

Making a Call

If you want to make a call, then you must have a valid SIP address for the other party you want to call.

To Make a Call

1. In the lower text field next to the **DIAL** button, enter the SIP address of the other party you want to call, or select an address from the pull-down menu.

The pull-down menu shows up to the last ten numbers dialed.

2. Click on **DIAL**.

HUA displays the SIP address you entered in the Active Calls Display, with a status of *Dialing*.



Figure 3-4. An Active Call with a Status of Dialing

NOTE: If a call has a status of Dialing, then you cannot place the call on hold, nor can you make another call.

The status of the call changes depending on the outcome of the call. See the following table for possible outcomes.

IF the status of the call changes to...	THEN...
<i>Ring</i>	<p>HUA has contacted the SIP address you entered and is now alerting the other party of your incoming call.</p> <ul style="list-style-type: none">• If the other party accepts the call, then the status of the call changes to <i>Connected</i>.• If the other party rejects the call, then the status of the call changes to <i>Busy</i>. You do not have to disconnect the call, because HUA disconnects and removes it automatically from the Active Calls Display if the other party is busy.
<i>Authenticate</i>	<p>HUA displays the Authorization pop-up dialog box. You must enter authorization details. See “Authorization” on page 32.</p>
<i>Error</i>	<p>one of the following situations has probably occurred:</p> <ul style="list-style-type: none">• The SIP address that you entered is invalid. Make sure that the SIP address you entered is valid.• An internal/server error has occurred.• The call has timed out, which probably means that the other party has not answered.
<i>Not Found</i>	<p>HUA cannot find the SIP address that you entered. Make sure that the SIP address that you entered is valid.</p>

Ending a Call

You can end a call at any time even if it is on hold. If the other party ends a call, the status of the call changes to *Disconnected*.

To End a Call

1. Highlight the call you want to end.
2. Click on **DISCONNECT**.

The status of the call changes to *Disconnected*. The call remains in the Active Calls Display for a few seconds before HUA removes it.

Answering an Incoming Call

When you receive an incoming call, HUA displays the call in the Active Calls Display with a status of *Alerting*.

- If this is the only active call displayed, then the call is highlighted. See “Figure 3-5. An Incoming Call with a Status of Alerting”.
- If multiple calls are displayed, then the incoming call flashes green to distinguish it from the other calls listed.



Figure 3-5. An Incoming Call with a Status of Alerting

To Answer an Incoming Call

1. Ensure that the incoming call is highlighted in the Active Calls Display.
2. Click on **ANSWER**.

The status of the call changes to *Connected*.

Rejecting an Incoming Call

You can reject an incoming call by making sure it is selected and clicking on **DISCONNECT**. In doing this you automatically place any other connected calls on hold.

To Reject an Incoming Call

IF you receive an incoming call that you want to reject, and the Active Calls Display...	THEN...
is not displaying another active call	click on DISCONNECT to reject the incoming call.
is listing another active call but you do not need to put that call on hold	right-click on the call you want to reject to invoke the pop-up menu. Choose DISCONNECT to reject the incoming call.
is listing another active call that you want to place on hold	highlight the call you want to reject. HUA automatically places the other call on hold and changes the status of the call to <i>On Hold</i> . Click on DISCONNECT to reject the incoming call.

The status of the call changes to *Disconnected*, and HUA removes the call from yours and the other party's Active Calls Display.

NOTE: HUA changes that status of the call for the calling party to *Busy*.

Placing a Call on Hold

While you are in a connected call, you can place the other party on hold at any time. You can only place the other party on hold if the status of the call is *Connected* or if the other party has placed you *On Hold*.

To Place a Call on Hold

While you are on the call, you can place it on hold in either of the following ways:

- Click on **HOLD**, or
- Highlight another call

The status of the call changes from *Connected* to *Holding*. You are now holding the call, and the other party is *On Hold*.



Figure 3-6. A Call with a Status of Holding

To Return to the Held Call

If the call on hold is still highlighted, click on **HOLD** to take it off hold.

If another call is highlighted, highlight the call that you want to take off hold to return to it.

The status of the call changes from *Holding* to *Connected*.

NOTE: When you place a call on hold, the other party may also decide to place you on hold, in which case the status of the call changes from *Holding* to *Both Parties Holding*. See “Both Parties Holding” on page 28.

Being Placed On Hold

While you are in a call, the other party can place you on hold at any time. The other party can only place you on hold if the status of the call is *Connected* or *Holding*.

When the other party places you on hold, the status of the call changes from *Connected* to *On Hold*.



Figure 3-7. A Call with a Status of On Hold

When the other party takes you off hold, the status of the call changes from *On Hold* to *Connected*.

NOTE: When the other party places you on hold, you may also decide to place the other party on hold, in which case the status of the call changes from *On Hold* to *Both Holding*. See “Both Parties Holding” on page 28.

Both Parties Holding

The situation may arise when you and the other party are both *On Hold*, which happens as follows:

1. During a *Connected* call, the initiating party, puts the other party on hold.
 - The status of the call as seen by the initiating party changes to *Holding*.
 - The status of the call as seen by the other party changes to *On Hold*.
2. The other party puts the same call on hold.

The status of the call as seen by both parties changes to *Both Holding*.



Figure 3-8. Call with a Status of Both Holding

Registering with a Registrar

If you want to register HUA with a registrar, then you need to enter a registrar and public SIP address in the *User Details* tab pane of the *Settings* window. For an example of how to register with a specific registrar, see “Example: Registering with the SIP Center Registrar” on page 31.

To Register with a Registrar

1. In the Main Window of HUA, click on **TOOLS** and select *Settings* from the pop-up menu.

HUA displays the *Settings* window.



The screenshot shows the 'Settings' window with the 'User Details' tab selected. The window contains the following fields and controls:

- Outbound Proxy:** An empty text input field.
- Registrar:** An empty text input field.
- Public Address:** An empty text input field.
- Automatically Contact:** A checked checkbox.
- Contact Address:** An empty text input field.
- Contact Username:** A text input field containing the value 'user'.
- Port:** A text input field containing the value '5060'.

At the bottom of the window, there are three buttons: 'OK', 'Reload', and 'Cancel'.

Figure 3-9. User Details Tab Pane of the Settings Window

NOTE: If this window contains no registrar details or public address and *Automatically Contact* is selected, then HUA uses the *Contact Username* and the IP address of the host machine,

to create the *Contact Address*, displaying it in the *Registered User* field.

2. In the *Registrar* field, enter a registrar name or IP address.
3. In the *Public Address* field, enter a public SIP address, for example sip:auser@acompany.net.
4. Click on **OK**.

In the user interface, HUA displays the *Registered User* according to the information configured in *Settings*. The color of the Registration Status LED changes to reflect the status of HUA registration. See “Registration Status” on page 17.

Example: Registering with the SIP Center Registrar

As an example, this procedure shows how to register with the SIP Center Registrar.

To Register with the SIP Center Registrar

1. Go to www.sipcenter.com/devarea/registerproxy.htm.
2. Complete and submit the online form.

In a short while you should receive an email with a username and password for accessing the registrar.

3. Refer to the instructions at the following location for what to do next.

<http://www.sipcenter.com/files/sipcenterconfig1.pdf>

4. In HUA, choose **TOOLS** > *Settings* to display the *User Details* tab pane.
5. For **Registrar**, enter sip.sipcenter.com.
6. Display the *Advanced* tab pane.
7. Verify the accuracy of the DNS Server displayed.
8. Verify that the appropriate Local Domain is displayed.
9. Click on **OK** to send the registration information to the SIP Center.

HUA prompts you for your username and password.

10. Enter the username and password that you received by email.

For more detailed information, go to the SIP Center development area at www.sipcenter.com/devarea.htm.

Authorization

HUA may prompt you for authorization details on either of the two following occasions:

- *When you are calling a user agent in another realm.* In this case you initiate a call and HUA displays the call in the Active Calls Display with a status of *Authorizing*.
- *When you are registering with a proxy in another realm.* In this case, you do not initiate a call. However, the Registration Status LED changes to orange to show that authorization is required.

NOTE: Once the authorization details are entered for a particular realm, you do not have to enter them again for that realm for the duration of the session.

When Authorization is Required

HUA displays a dialog box requesting your user name and password.



Figure 3-10. *Authorization Dialog Box*

1. Enter your username and password.

NOTE: If you select **Remember Password**, then HUA stores the realm, username, and password in the **Remote Security** table.

2. Click on **OK**.

CHAPTER 4: ADDITIONAL CONFIGURATION

This chapter describes how to configure HUA with additional settings. Once you have provided these settings, you do not have to provide them again. Each time you restart HUA, it automatically re-registers using the settings you last provided. The following sections comprise this chapter:

- “SIP Address Format”
- “Configuring User Details”
- “Configuring Local Security and Adding a User”
- “Configuring Remote Security”
- “Performing Advanced Configuration”
- “Setting Progress Tones”
- “Modifying the Settings”
- “Viewing and Updating Licence Details”

SIP Address Format

HUA automatically adds a missing "sip:" or removes an unnecessary "sip:" as required by each configuration field. Therefore, you can enter strings with or without "sip:". However, SIP addresses are case sensitive.

Here is the typical SIP address format:

```
sip:<username>@<domainname>
```

Here is an example of a SIP address:

```
sip:sulewis@ubiquity.net
```

Configuring User Details

After you have licensed HUA, you are presented with the *Settings* window displaying the *User Details* tab pane.



Figure 4-1. User Details Tab Pane

To Configure User Details

1. For **Outbound Proxy**, enter the address of the outbound proxy server if you want HUA to route SIP messages through a proxy server. If you enter an address here, HUA routes all outbound requests via this proxy server. You do not need to include “sip:” in this address, because HUA adds it for you.
2. For **Registrar**, enter the address of the registrar if required. The registrar is the address at which your public SIP address is registered. If you enter a registrar you must also enter the Public Address you want to use that is registered at this registrar. You do not need to include “sip:” in this address, because HUA adds it for you.

3. For **Public Address**, enter the public SIP address via which you want users to contact you, which should be registered with the registrar in the previous step, for example sip:user@domain. To register a public SIP address, ensure that the *Registrar* field contains the correct address.
4. For **Automatically Contact**, leave this box checked if you want HUA to create the contact address from the pre-determined settings on your computer. If you are a novice user, we recommend that you leave this box checked in which case HUA automatically uses the *Contact Username* (the default is “user”, but you can change this in step 6) and the IP address of your computer. For example, HUA creates the following *Contact Address*:

```
sip:<Contact Username>@10.0.0.1.
```

5. HUA activates the **Contact Address** field if you uncheck the *Automatically Contact* box described in the previous step. In this field you can specify your preferred contact address. However, this address must have the following format:

```
sip:<username>@<host IP address>
```

(If you have not provided a public SIP address in the *Public Address* field, then HUA displays the *Contact Address* in the *Registered User* field of the Main Window.)

6. For **Contact Username**, the default is “user”. HUA uses this name to automatically create the contact address. You can change this name to anything you like, for example “johnsmith” or “susanb”.
7. For **Port**, retain the default setting of 5060 unless you have good reason to change it. This is the port number on which HUA listens for incoming SIP messages.

HUA automatically detects whether or not port 5060 is already in use. If HUA finds that this port is already in use, it attempts to use the next available port and displays the alternate port number in the **Port** field. However, HUA only uses the

alternate port for the current session. Upon restart, HUA attempts to use the default port again.

Configuring Local Security and Adding a User

Local security deals with incoming requests for authorization from other users. If you want HUA to restrict contact with other users, then you can select the *Authenticate Requests* option and specify a *Security Realm*. A Security Realm is a string which defines a protected domain.

To Configure Local Security and Add a User

1. From the Main Window of HUA, choose **TOOLS > Settings** to display the *Settings* window.
2. Display the *Local Security* tab pane.



Figure 4-2. Local Security Tab Pane

3. Select **Authenticate Requests** to enable the *Security Realm* text field.
4. For *Security Realm*, enter a security realm. This can be any realm you choose, for example, the hostname of your machine or the name of your company.

5. Click on **Add**.
6. Enter a username. This is a mandatory entry.
7. Optionally, enter password and description for the user.
8. Inform the user of their username, password and appropriate realm.

When the user tries to contact the authorized HUA, they are prompted for their username and password before initiating a communication session.

To remove authorization details, select the appropriate details, and click on **Remove**.

NOTE: If *Authenticate Requests* is enabled and no users are added, then HUA does not accept contact from anyone.

Configuring Remote Security

Configuring remote security involves storing parameters for the realms of other SIP devices. If other users provide you with their authorization details, you can store these details so that you do not have to enter the details manually each time you call that person.

To Configure Remote Security

1. From the Main Window of HUA, choose **TOOLS > Settings** to display the *Settings* window.
2. Display the *Remote Security* tab pane.

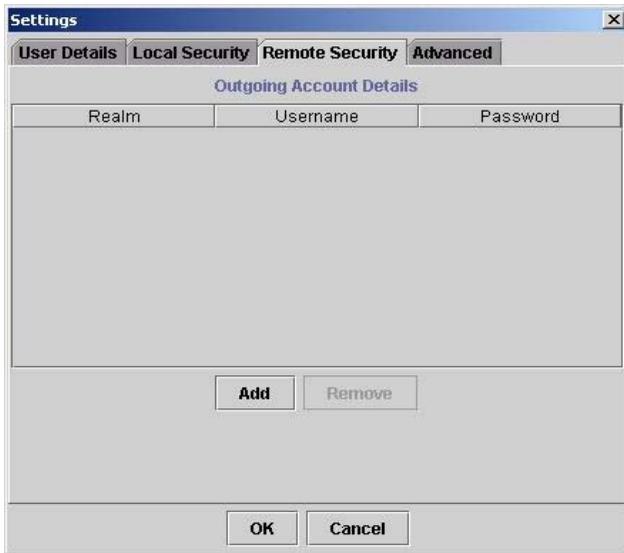


Figure 4-3. Remote Security Tab Pane

3. Click on **Add**.
4. Enter a username. This is a mandatory entry.
5. Optionally, enter password and description for the user.
To remove authorization details, select the appropriate details and click on **Remove**.

If you do not enter the details for a SIP Realm in the *Remote Security* tab pane, then the user must enter them when HUA displays the following *Authorization* dialog box.



Figure 4-4. Authorization Dialog Box

If the user selects *Remember Password*, then HUA saves the realm, user name, and password and displays them in the other user's *Remote Security* tab pane.

Performing Advanced Configuration

You can configure the following advanced settings for HUA:

- DNS Servers
- Local Domain Name
- Use Compact Headers
- Log Incoming Messages
- Log Outgoing Messages
- RTP Packet Adjustment

To Perform Advanced Configuration

1. From the Main Window of HUA, choose **TOOLS > Settings** to display the *Settings* window.
2. Display the *Advanced* tab pane.

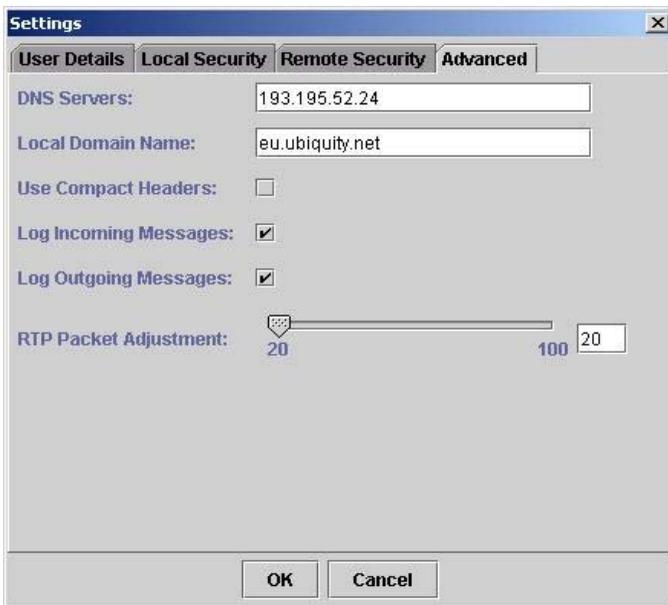


Figure 4-5. Advanced Tab Pane

3. For **DNS Servers**, retain the default setting unless you have good reason to change it. HUA automatically detects this

setting by determining the location of the DNS server; however, if this field is blank, you should contact your administrator, because HUA has failed to detect a DNS server.

4. For **Local Domain Name**, retain the default setting unless you have good reason to change it. HUA automatically detects this setting by determining the local domain name; however if this field is blank, you should contact your administrator, because HUA has failed to detect the local domain name.
5. For **Use Compact Headers**, select this option only if HUA is running on a network with limited bandwidth.
6. For **Log Incoming Messages**, select this option if you want to keep a daily log of all incoming messages. If you enable this option, then HUA writes the details of each incoming message to a log file, for example, `CallLog_<day>.log`. The log file is stored in the Installation Directory.
7. For **Log Outgoing Messages**, select this option if you want to keep a daily log of all outgoing messages. If you enable this option, then HUA writes the details of each outgoing message to a log file, for example, `CallLog_<day>.log`. The log file is stored in the Installation Directory.
8. For **RTP Packet Adjustment**, use this setting to adjust the RTP packet size. (This setting affects the voice quality.) If you adjust this setting, then do so on a trial-and-error basis to determine the optimum packet size for your system. The default of 20 usually produces the best quality. This setting takes effect the next time you start HUA.
9. When you are finished performing advanced configuration, click on **OK**.

Setting Progress Tones

To set progress tones, you must specify a `.wav` file that you have saved in a directory on your network or PC. You can set `.wav` files for the following progress tones in HUA:

- Ringing
- Alerting
- Busy
- Error

To Set Progress Tones

1. From the Main Window of HUA, click on **TOOLS**, and select *Progress Tones*.

HUA displays the *Progress Tones* window.

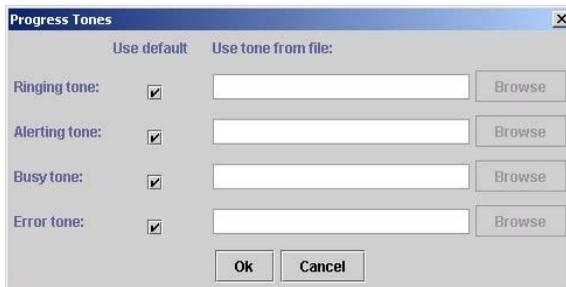


Figure 4-6. Progress Tones Window

The check boxes indicate that the default progress tone is in use.

2. For each progress tone for which you want to set a new `.wav` file, uncheck *Use default*. Then click on **Browse** and navigate to the `.wav` file that you want to set.
3. Click on **OK**.

HUA displays the `.wav` file name and the name of the progress tone in the text field for the tones you have set.

Modifying the Settings

You can modify the current settings for HUA at any time. If you change these settings, then HUA automatically re-registers.

NOTE: For some changes to take effect, you must restart HUA. In this case, HUA displays a message alerting you that you need to restart the application.

To Modify the Settings

1. From the Main Window of HUA, click on **TOOLS** and select *Settings* to display the Settings window.
2. Click on the appropriate tab pane depending on the settings you want to modify to display the appropriate configuration window.

3. Modify the settings required.

NOTE: If you have entered changes, but you decide that you do not want to apply them, click on **Cancel**.

4. Click on **OK** to make your changes take effect.

HUA re-registers, and the color of the Registration Status LED changes to orange. Then the LED changes color again to reflect the current registration state of HUA.

Viewing and Updating Licence Details

You can view the current license details for HUA, or you can enter a new license key to update your current license.

To View and Update License Details

1. From the Main Window of HUA, click on **TOOLS**, and select *License Details* to display the *License Details* window.



Figure 4-7. License Details Window

2. Type or paste a new license key into the text field. Ensure that the entry contains no spaces or return characters.
3. Click on **APPLY** to update the license details.
The expiry date field reflects any changes in the license details.
4. Click on **Close** to close the *License Details* window.

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