

FlexIP SoftPhone User Guide

(Version 2.xx)



The flexible way to communicate

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1 About this Manual

1 Document Description

The FlexIP SoftPhone User Guide is designed to be used as an installation and quick start guide for users of the FlexIP SoftPhone. It describes the installation of the necessary software and gives general overview and usage instructions for the SoftPhone. For more detailed information, the user is directed towards the software on-line help.

2 Special Symbols Used in this Manual



NOTE:

Indicates important information demanding special attention.

3 Related Documentation

<i>Subject</i>	<i>Manual</i>
Installation of Voice over IP equipment	Voice Over IP Installation Manual
Detailed explanation of SoftPhone features	FlexIP SoftPhone online help
Keypad (including SoftPhone) feature codes at a glance	Quick Reference Guide to Feature Access Codes
Detailed explanation of keypad features, also applicable to SoftPhone	FlexSet 280, 280D, 280D-Z, 120, 120D & 120L User Guide
Comprehensive overview of entire Coral product range	Coral FlexiCom and IPx Product Description

2 *Installation and Configuration*

1 Minimum Requirements

PC Hardware

- CPU: Pentium III 500Mhz
- Memory: 128MB RAM
- Disk space: 30MB
- Sound card (full duplex)
- Headset, Handset, or speaker/microphone
- Network Interface Card (NIC) or dialup connection
- Internet connection bandwidth: 56Kbps (ADSL or cable connection recommended)
- Free USB port
- Screen resolution of 1024 x 768 recommended

PC Operating System

- Windows NT4 / 2000 (with Service Pack 2) / XP

Coral

- Coral Software Version 14.6x or later

2 Installation Instructions

Pre-Installation Requirements

Before you install the FlexIP SoftPhone, inform your system administrator of the MAC address of your PC. Your system administrator must register this MAC address in the call agent database to enable the SoftPhone to operate.

To determine the MAC address of your PC, enter **ipconfig/all** at the DOS prompt ( > **Run** > **CMD**). The MAC address is in the format xx-xx-xx-xx-xx-xx.



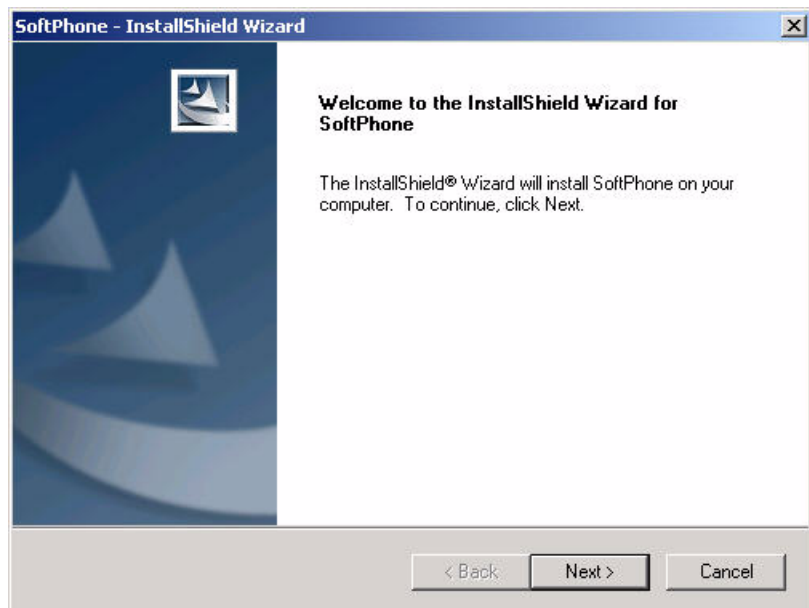
NOTE:

The Coral System Administrator should define the following parameters in the PI:
Sizes (Route: Siz) - KEYSETS_IP
Numbering Plan (Route: NPL) - IP_KEYSET
IP Ports: Keysets (Route: IP, 1, 0) - all parameters
Keyset Definitions (Route: Key) - SOFTSET

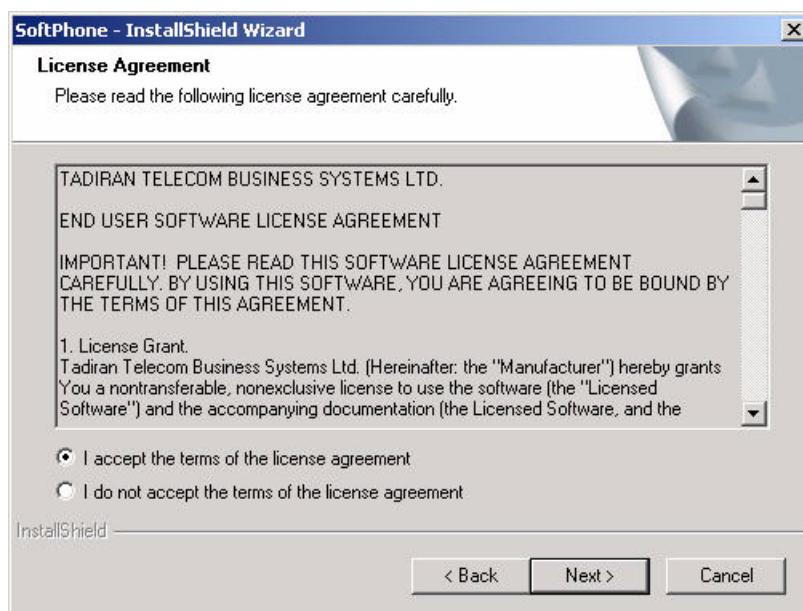
FlexIP Softphone Application

Install the FlexIP SoftPhone in the following way:

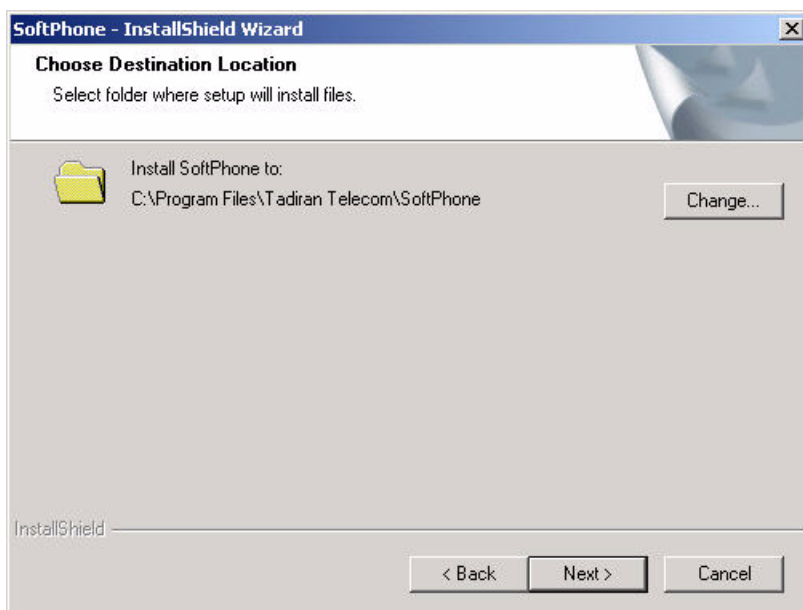
1. Insert the FlexIP SoftPhone Installation CD and locate the SoftPhone installation file (*SoftPhoneSetup_xx.exe*, where xx is the version number).
2. Double-click the installation file. Follow the on-screen instructions to install your FlexIP SoftPhone, as described over the following pages.



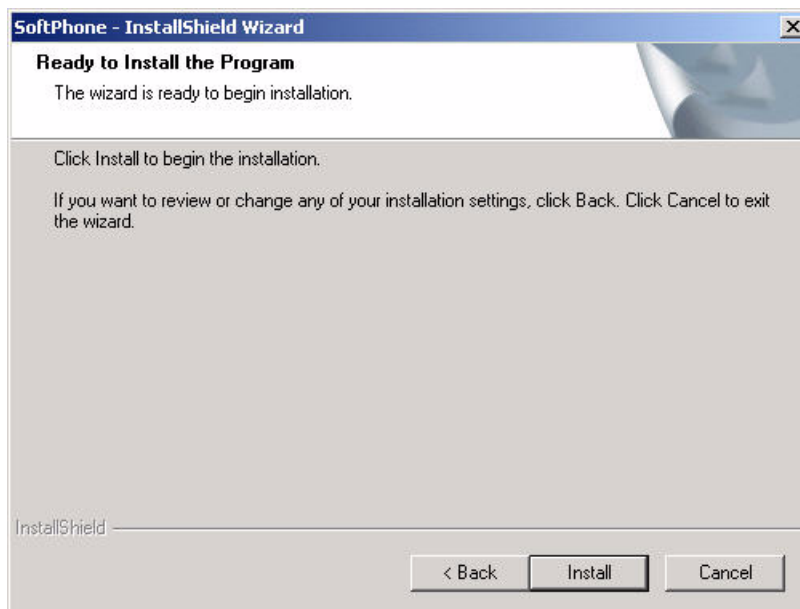
3. Click **Next** to continue installation.



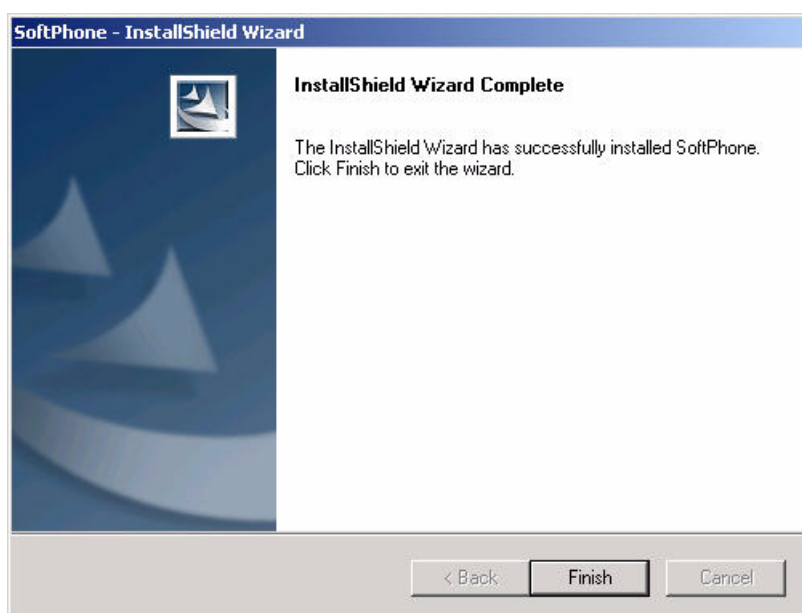
4. After reading the license agreement, select **I accept the terms of the license agreement** and click **Next** to continue.



5. Select an installation location and click **Next** to continue.



6. Click **Install**. The FlexIP SoftPhone is now installed on your computer.

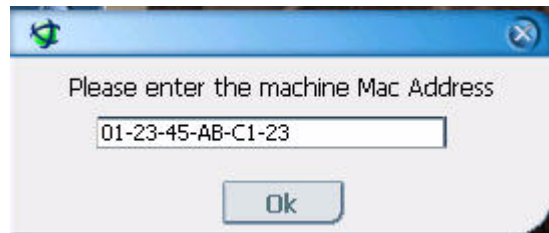


7. At the prompt, click **Finish** to finalize the installation.

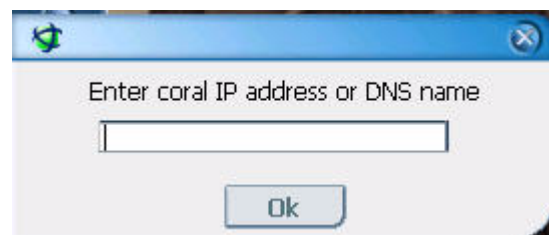
Configuration

1. Launch the FlexIP SoftPhone by selecting **Start** > **Programs** > **SoftPhone** > **SoftPhone**, or by clicking on the desktop icon .

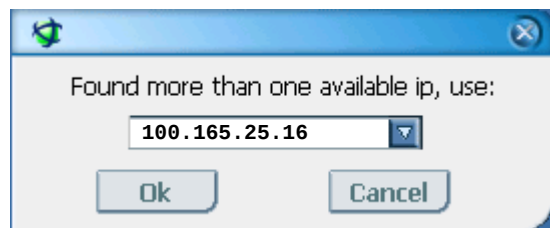
The SoftPhone application initiates and the following screen is presented.



2. The MAC (physical) address of your PC is displayed. Click **OK**.



3. At the prompt, enter the IP address or DNS name of the UGW card in your call agent and click **OK**. Ask your system administrator for the IP address or DNS name. If you are connecting via a Coral Sentinel, enter the IP address of the Sentinel in this field.
4. If your PC has more than one IP address (for example: a laptop used to connect both to the office network and for home internet use interchangeably), the following message will be displayed:

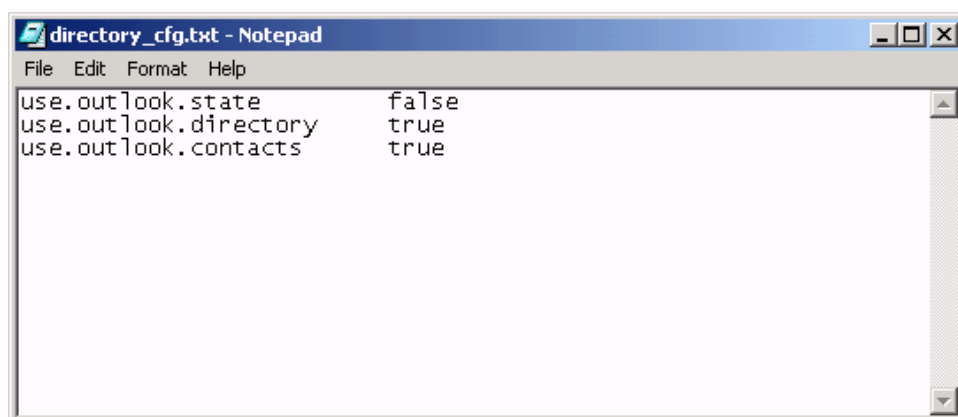


Select the IP address from the drop-down menu and click **OK**. The SoftPhone will now initialize.

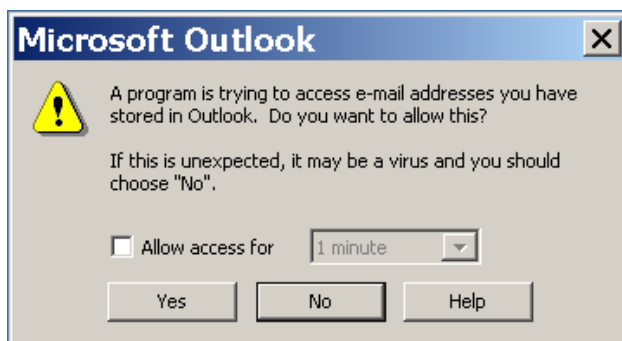
Microsoft Outlook Synchronization

If you wish to work with Microsoft Outlook features (See “Using the Directory” on page 3-8 and online help for further details), take the following steps:

1. Exit the SoftPhone application (See “Exiting the FlexIP SoftPhone” on page 3-4).
2. Open the Directory configuration file (*directory_cfg.txt*). The default location is:
C:\Documents and Settings\your user name\SoftPhone\directory_cfg.txt



3. To synchronize your SoftPhone with the current logged in user in Outlook, manually change one or more of the following parameters in this file as required:
To enable the SoftPhone to use the Outlook Calendar state,
change **user.outlook.state** to **true**
To enable the SoftPhone to recognize names from the Directory when you receive incoming calls, change **user.outlook.directory** to **true**
To enable the SoftPhone to use Outlook Contacts,
change **user.outlook.contacts** to **true**.
4. Select *File > Save* to save the changes.
5. Relaunch the FlexIP SoftPhone by selecting  **Start** > **Programs** > **SoftPhone** > **SoftPhone**, or by clicking on the desktop icon .
6. If you configured the SoftPhone to operate in conjunction with Outlook Contacts, the SoftPhone will attempt to retrieve your Outlook Contact details upon initialization. Depending upon your Office security settings, the following message may be displayed:



To allow the SoftPhone to access your contacts, click **Yes**.



NOTE:

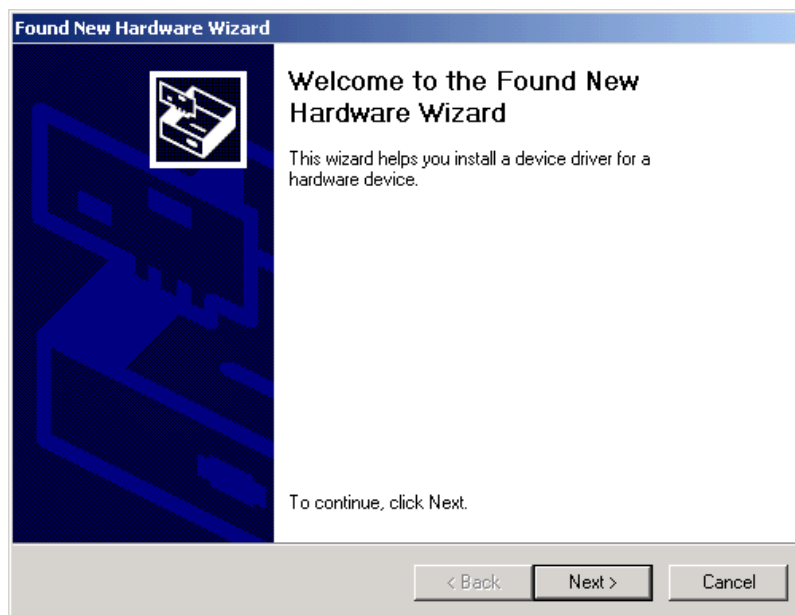
This may occur every time your SoftPhone is initialized or every time you edit Contact details.

Handset Installation

The FlexIP SoftPhone supports generic and brand specific (“Tiger Jet”) handsets. You may communicate using a generic handset in the same manner as you would a normal handset.

The Tiger Jet handset has the additional feature of enabling you to dial direct from the set. To facilitate this, you must install the handset drivers in the following way:

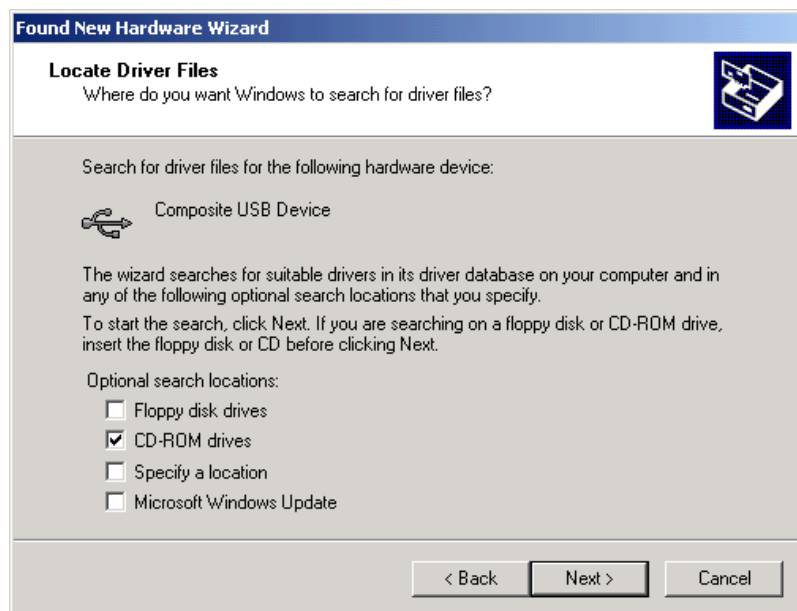
1. Plug the handset into a spare USB port. The Install New Hardware wizard will start automatically.



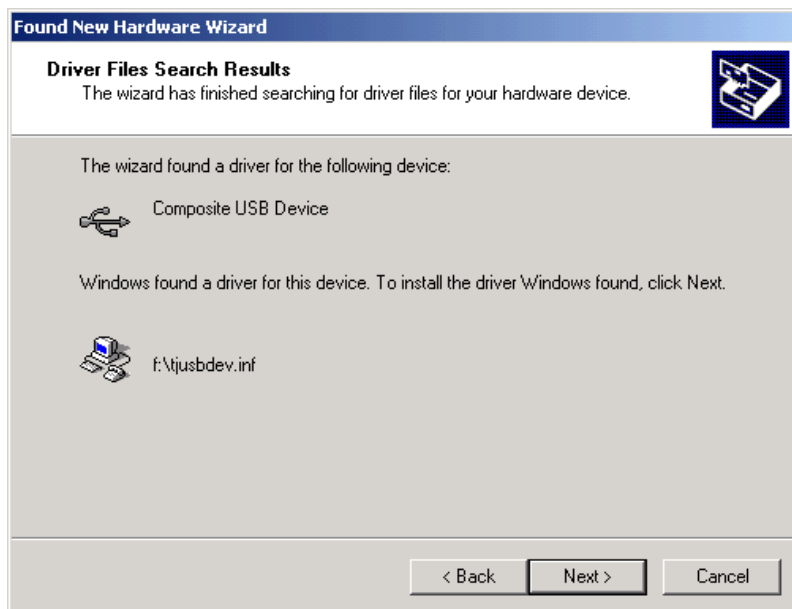
2. Click **Next**.



3. Select **Search for a suitable driver for my device (recommended)** and click **Next**.



4. Select **CD ROM Devices**, insert the SoftPhone CD and click **Next**.



5. Click **Next** to install the driver.

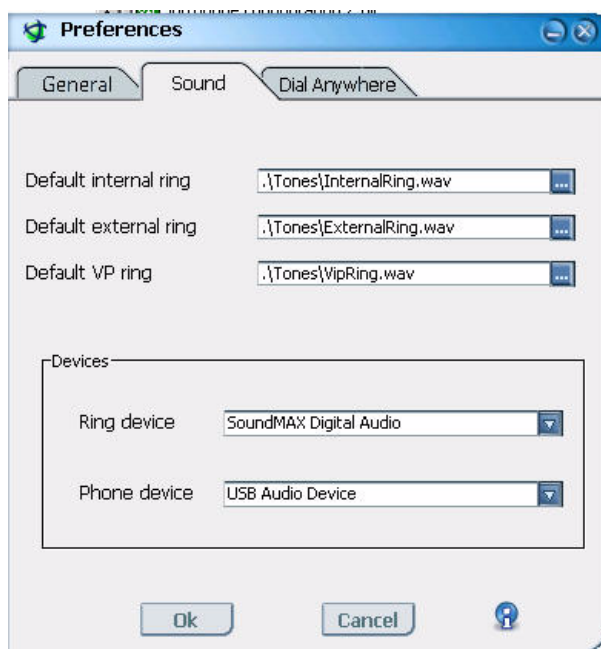


6. Click **Finish** to complete the handset installation.

Sound Configuration

Setting the Sound Preferences:

1. Press  and select **Preferences**.
2. Select the **Audio** tab.



3. In the Devices section, you can designate the ring and phone devices that can be used by the Softphone. Select the device from the drop-down menu:

The **Ring Device** is the device that the Softphone will use whenever there is an alerting call. To configure the SoftPhone to ring via the PC's external speakers, select your sound card in this field.

The **Phone Device** is the device used by the Softphone for voice communication. To communicate via the handset, select **USB Audio Device** in this field.

4. Click **OK** to accept your changes or **Cancel** to close the Preferences page without making any changes to the existing Preferences settings.

Adjusting the system volume:

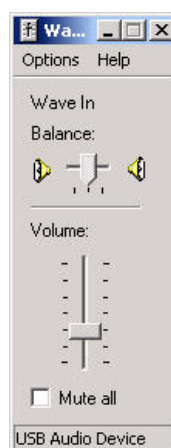
Depending upon your system settings, it may be necessary to adjust the sound of your recording device so that your conversing party can hear you clearly.

To adjust the volume level heard by your conversing party:

1. Select  **Start** > **Settings** > **Control Panel** > **Sound and Multimedia** and select the **Audio** tab.



2. Under **Sound Recording**, click **Volume**.



3. Adjust the sound volume as required. Be careful not to increase the volume too high as this may distort the sound heard by the other party.
4. Click **OK** to accept your changes or **Cancel** to close the Preferences page without making any changes to the existing Preferences settings.

3 Getting Started

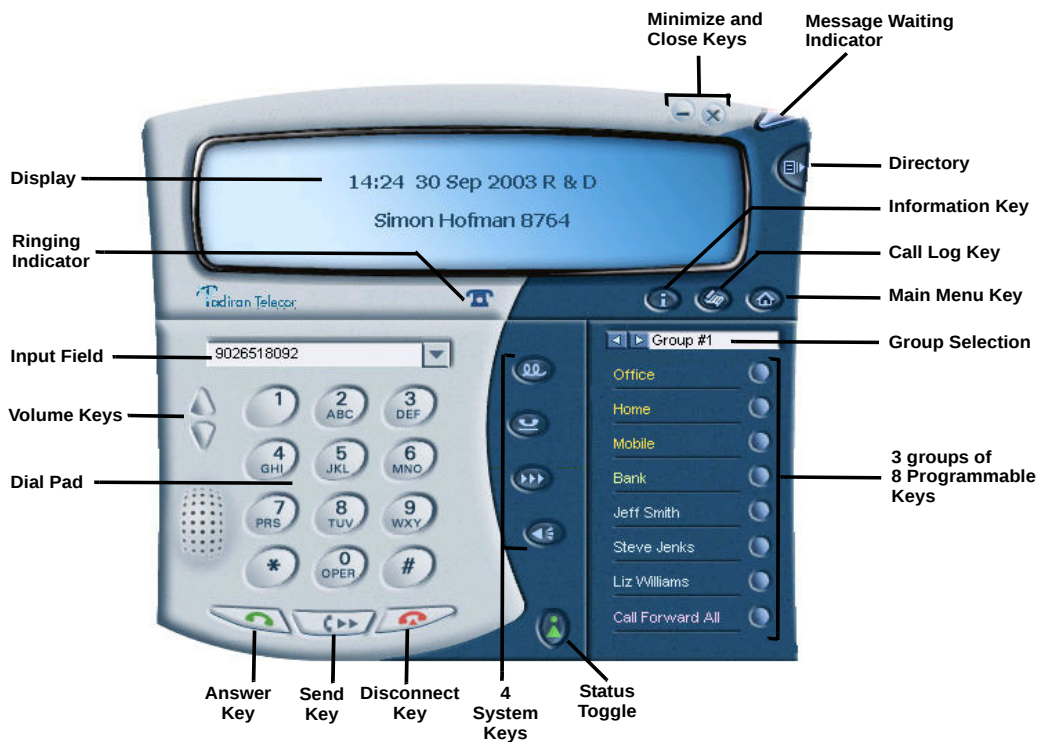
1 Overview

The FlexIP SoftPhone is a comprehensive software-based application, designed to offer a full range of features and capabilities that combines all the benefits of a standard phone with the convenience and flexibility of an interactive software application.

Like any telephone, the SoftPhone can receive and make phone calls, forward incoming calls, automatically answer or play a recorded message and more.

Figure 3-1
SoftPhone

FlexIP



The SoftPhone has the look, feel and functionality of a FlexSet-IP phone, with many additional features that make it ideally suited for the corporate work environment.

The SoftPhone's unique features include the following:

- A standard 12 key interface lets you select numbers and make phone calls. Using your mouse or keyboard, you can enter numbers, select contacts, enter and save important phone numbers, select your preferences, and more.
- Four Function Keys enable you to quickly access your predefined functions (such as Speaker, Hold, Conference, etc.).
- Dial from any application.
- Dial by name.
- Programmable User keys enable you to create up to 24 quick keys to access friends, program actions such as Do Not Disturb, Call Forwarding, Follow Me options or any of the other rich array of keyset features, and more, using easy, intuitive programming.
- A personal directory
- Extensive Contacts list lets you store personal information on hundreds of co-workers, friends and family, and access them with a single click.
- A Rules Wizard enables you to predetermine how your phone reacts in a given situation. When you are out of the office, set the phone to forward calls to someone else. If you are sitting in another office, tell the phone to "Follow Me".

Table 3-1 **SoftPhone**
Button Descriptions

Button	Name	Function
	Minimize	Minimizes the SoftPhone The SoftPhone remains active, and you will still be alerted about any incoming calls. The SoftPhone is accessible via the  taskbar icon.
	Close	Closes the SoftPhone to the system tray
	Directory	Launches the Directory of contacts
	Information	Launches the online help
	Call Log	Launches the Call Log
	Main Menu	Provides access to the Rules Wizard and Preferences. You may also exit the SoftPhone from here.
	Status Toggle	Sets your presence status, determining (in conjunction with Rules) how a call is handled
	Answer	Answers the call
	Send	Dials the number entered
	Disconnect	Hangs up the phone
	Hold	Places the call on hold
	Transfer	Transfers the call
	Line	Enables making and receiving calls. When several line keys are in use the SoftPhone will act as if it is a multiline instrument. (Identical to LOOP button in regular keysets)
	Speaker	Activates a dial tone, or answers an incoming call.

2 Accessing the FlexIP SoftPhone

Starting the FlexIP SoftPhone

To start the SoftPhone:

- From the Windows Taskbar, select  > **Programs** > **SoftPhone** > **SoftPhone**
or
- Click on the desktop icon 

Minimizing the FlexIP SoftPhone

Click  in the upper right corner to minimize the SoftPhone.

The SoftPhone remains active, and you will still be alerted about any incoming calls. The SoftPhone is accessible via the  taskbar icon.

Maximizing the FlexIP SoftPhone

Double-click  in the Windows system tray to maximize the SoftPhone.

Closing the FlexIP SoftPhone

Click  in the upper right corner to close the SoftPhone.

The SoftPhone remains active and you will still be notified of incoming calls. The  icon will remain in the system tray only.

Exiting the FlexIP SoftPhone

To exit the SoftPhone:

- Click the Main Menu icon  and select **Exit**
or
- Right-click on  in the system tray and select **Exit**
or
- Right-click on  in the taskbar and select **Close**
or
- Press Alt+F4 while the SoftPhone window is active

3 Operating the SoftPhone

Making a Call

The SoftPhone lets you make outgoing calls using many of the methods you might currently use on a standard phone and more, as described in full in the on-line help.

Making a call via the keypad

To enter the number using the keypad:

1. Enter the number by clicking on the appropriate numbers on the SoftPhone keypad or the handset keypad, or manually typing the numbers into the input field.
2. If you have enabled **Direct** on the Preferences page (as explained in the online help), your call is dialed in real time as you enter the numbers.

If you have enabled **Via Send**, click  to make the call.

3. When you have finished the call, click  or  to close the phone connection.

Making a call using other methods

Using the easy-to-use interface, you can make a call using any one of the following methods:

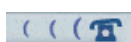
- Select a number from your Directory (“dial by name”, right-click or hot key activation)
- Select a number from the recently dialed calls list
- Select a user-programmable key
- Select a number from the Call Log
- Make a call from any application
- Dial from the handset (Tiger Jet handsets only)

Receiving a Call

When the SoftPhone detects an incoming call, it immediately alerts you to the call in the following ways:

- Audible ring
- Pop-up notification
- Flashing LED on the Softphone's upper right corner (only when SoftPhone interface is active)
- Speaker icon  flashes (only when SoftPhone interface is active)
- The telephone icon on the SoftPhone becomes animated and "wave" lines appear, as indicated below:

Ringing:



Not ringing:

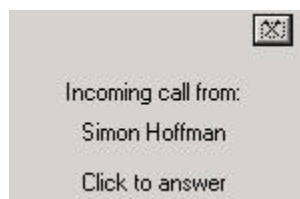


(only when SoftPhone interface is active)

- If the incoming call is from someone in your list of programmed user keys, the associated key will flash (only when SoftPhone interface is active)

To answer the call, select one of the following:

- Click 
- Click the pop up notification that appears when an incoming call is received



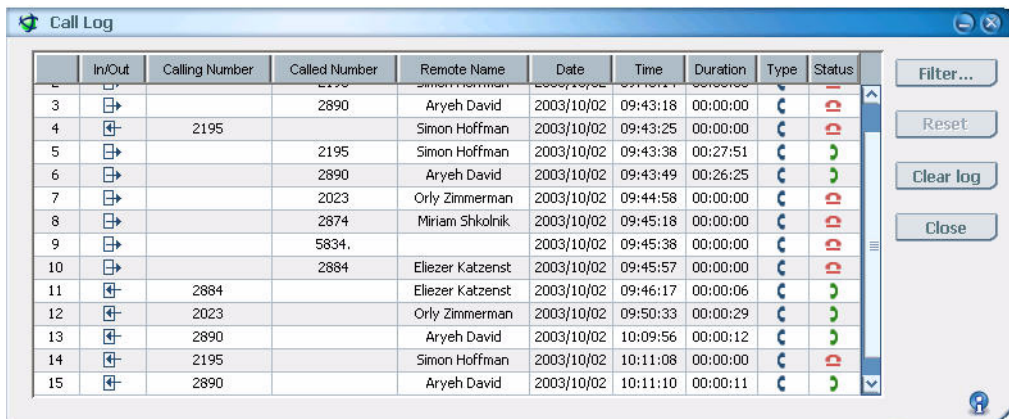
- Click  to answer the call.
- If someone from your programmed list calls you, the LED beside that name will flash, and you can click on the button to answer the call.

If you created an auto-answer rule for a specific number (as explained on page 3-9 and in the online help), the call will be answered automatically, as per the rule definition. However, if you are in the middle of another call, the incoming call will not be answered automatically.

Using the Call Log

The Call Log details all incoming and outgoing calls that have been made using the SoftPhone. Click  to launch the Call Log.

Figure 3-2 **Call Log**



	In/Out	Calling Number	Called Number	Remote Name	Date	Time	Duration	Type	Status
3			2890	Aryeh David	2003/10/02	09:43:18	00:00:00		
4		2195		Simon Hoffman	2003/10/02	09:43:25	00:00:00		
5			2195	Simon Hoffman	2003/10/02	09:43:38	00:27:51		
6			2890	Aryeh David	2003/10/02	09:43:49	00:26:25		
7			2023	Orly Zimmerman	2003/10/02	09:44:58	00:00:00		
8			2874	Miriam Shkolnik	2003/10/02	09:45:18	00:00:00		
9			5834		2003/10/02	09:45:38	00:00:00		
10			2884	Eliezer Katzenst	2003/10/02	09:45:57	00:00:00		
11		2884		Eliezer Katzenst	2003/10/02	09:46:17	00:00:06		
12		2023		Orly Zimmerman	2003/10/02	09:50:33	00:00:29		
13		2890		Aryeh David	2003/10/02	10:09:56	00:00:12		
14		2195		Simon Hoffman	2003/10/02	10:11:08	00:00:00		
15		2890		Aryeh David	2003/10/02	10:11:10	00:00:11		

Sorting the Call Log view

Calls can be sorted according to column by clicking on the column heading, enabling you to see the information you want at a glance, clearly and logically.

Filtering the Call Log view

You can filter both current and future information in the Call Log to find specific information or locate a specific number. If a filter is defined and a call enters the call log (either incoming or outgoing) that matches the filter criteria, the Call Log display is automatically updated. If it does not match the filter, it enters the Call Log, but is not displayed. It will be included in the list when you delete the current filters.

Making a call

You can easily make a call to a number that exists in your Call Log, either to a number that you have called or to a number of someone who called you. To make a call, highlight a call record, right-click and select **Make Call**.

Using the Directory



NOTE:

Full functionality will be available in a future phase.

The SoftPhone features an advanced Directory option that enables you to store contact information for your colleagues, friends and family. You can add, edit and delete contacts freely from the contacts section. You can also search for a contact.

The SoftPhone displays existing Microsoft Outlook contacts. Any changes you make to the contacts in the SoftPhone also affect your contacts list in Outlook.

Additionally, you can call a number directly from the stored contact information in the Directory by dragging the name of the person you wish to call to the input field above the keypad, or by right-clicking the name of the person and selecting **Make Call** from the menu.

Click  to launch the Directory.

Figure 3-3 **Directory**



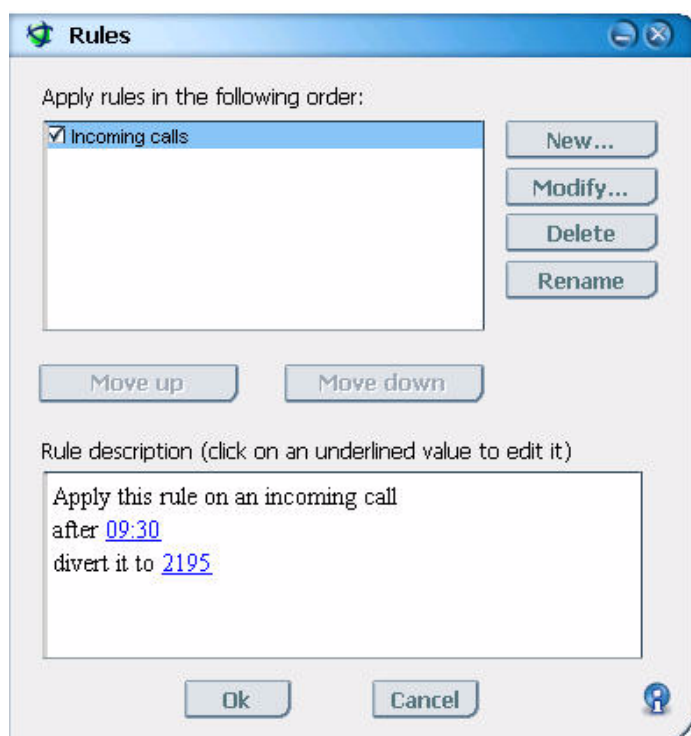
Working with Rules

You can create personal routing rules that are applied to incoming calls automatically. You can also add cumulative rules to create a hierarchical list of rules applied to incoming calls that match one or more criteria.

These rules can be created and modified using the Rules Wizard.

Click  and select **Rules Wizard**. The Rules Wizard window appears.

Figure 3-4 **Rules Wizard**



Creating Rules

You can define various conditions under which to apply a rule, such as calls from/to a specific number, calls arriving when you are in a specific state or calls received before/after specific date/time. You can then determine an action that will apply to the call, such as auto-answering the call or diverting the call to an alternate destination.

Additionally, you may automatically launch a chosen file or application upon receipt of the incoming call.

Modifying, Deleting and Renaming Existing Rules

You can modify, delete or rename an existing rule using the Rules Wizard.



International Headquarters
Tadiran Telecom Business Systems Ltd.
18 Hasivim Street P.O.Box 450
Petach Tikva 49105 Israel
Tel. +972-3-9262000, Fax. +972-3-9262310

USA Headquarters
Tadiran Telecom, Inc.
4 Tri Harbor Court
Port Washington, NY 11050
Tel. +1-516-632-7200, Fax. +1-516-632-7210

Visit us at our website <http://www.tadirantele.com>
Email: coral@tadirantele.com

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