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Welcome

The PCPhone User Guide (NN48111-121) provides you with the instructions necessary to get up and running with this product.

Your PC Phone

This guide describes the capabilities of PC Phone, a feature-rich user interface that transforms your PC into a powerful telephony and multimedia communications tool.
PC Phone user interfaces

PC Phone offers two user interfaces, also known as themes, that you can choose from your desktop.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>This theme is the new look and feel of PC Phone. When you launch PC Phone, it defaults to the standard interface.</td>
</tr>
</tbody>
</table>

- The Standard interface provides two styles: Black and Silver. You can select a style from User Interface in the Preferences window.

This guide describes the Standard and PC Phone interfaces.
New in this release

The following sections detail what’s new in the *PC Phone User Guide* for release 8.0 SP1.

This release upgrades both PC Phone (releases 6.0, 7.0 and 8.0) and the Multimedia Office Client (releases 6.0, 7.0, and 8.0) to PC Phone 8.0 SP1.

**If you were a Multimedia Office Client (MOC) user, please note:** In this release, Multimedia Office Client (MOC) ceases to exist. MOC users simply install PC Phone 8.0 SP1 to upgrade to the new client. Your MOC profile is retained by the installation; other profiles can be created after installation.

Features

See the following sections for information about feature-related changes:

- Integration with Microsoft Outlook can be enabled or disabled from the PC Phone MS Office Preference panel. You can enable/disable the Outlook Plug-in on the fly, and change PC Phone’s auto launch setting from the Outlook Plug-in. See “Enabling or disabling the Outlook Plug-in” section. For a complete description of Outlook Plug-in enhancements for this release, see “Using the Outlook Plug-in” section.

- You can now synchronize the Microsoft Outlook and PC Phone address books, so that the Communicator address book becomes a subset of your Outlook contacts. This means that you can choose to deal exclusively with Outlook contacts and hide the PC Phone address book. See “Synchronizing from PC Phone to Outlook” section.

- Conference Bridge information is now included in Outlook meeting invitations, making it easier to create, host and join a conferences. You can include your conference bridge details in an Outlook meeting invitation by pressing a single toolbar button. A meeting participant who receives the invitation can join the conference from Outlook, with minimal button clicks.
When an Outlook reminder window pops up for an upcoming conference event, the user can open the meeting event from the reminder window and join the conference with a single button click. If you have Conference Bridge service, this feature is enabled at installation by default.

- **If you were a Multimedia Office Client (MOC) user with only one profile:** You can now define multiple profiles with separate preferences and configuration data, and manage these profiles in the Profile Manager or from PC Phone. Your existing MOC profile will be retained when you upgrade to PC Phone 8.0 SP1, and you can create additional profiles after installation. See “Configuring multiple profiles” section.

- **If you were a Multimedia Office Client (MOC) user** who created Custom folders which were then added to Outlook by MOC, note that you will no longer need to create these folders. "Friends", "Incoming Calls", and "Outgoing Calls" are available from the default PC Phone. When you click on the My Friends toolbar button, the PC Phone Friend list will be displayed.

- The 64-bit version of Outlook 2010 is now supported. Microsoft Office 2010 is shipped in 32-bit and 64-bit versions. When Outlook is enabled in PC Phone, a correct 32-bit or 64-bit version of the Plug-in is registered.

- The Personal Agent button can now be configured link to a custom web site.

- Automatic Software Updates (ASU) can now be configured to download from a custom web server.

- The Outlook Plug-in Presence feature has been enhanced. See “Viewing Presence information” section.

**PC Phone services and features**

This guide describes all services and features available for PC Phone; the actual set of services and features available to the user is determined by the user’s administrator or service provider.

Access to some of the features listed below depends on the services and service profiles assigned to you for each service wherever applicable. Contact your system administrator for this information.
Bell Aliant PC Phone is an application that provides advanced IP telephony features, many of which are not available on a traditional telephone:

- Internet Protocol (IP) calls
- advanced call logging to keep track of incoming, outgoing, and missed calls
- a Communicator personal address book (PAB), which is stored on the network and synchronized across clients
- global address book, which is stored on the network
- presence to see who is online and let others know that you are online
- control of IP Phones
- call hold/retrieve
- call park/retrieve
- call transfer (direct or consultative)
- file transfer to send and receive files
- sharing tools, such as web push, shared whiteboard, shared clipboard
- do not disturb (DND)
- IM chat to create a chat room or join an existing private, public, or public with password chat room
- call handling to decline, redirect, or ignore incoming calls
- instant messaging
- video calls (on demand, one-way, and two-way video)
- conference calls (requires network conference server)
- Assistant support service
- Assistant console service
- Outlook plug-in support for Microsoft Outlook that allows you to make calls from and import contacts from Microsoft Outlook 2000 and above.
- Plug-ins for the IBM Lotus Notes and Lotus Sametime platforms that augment their respective interfaces with unified communication features provided by the A2 systems available through PC Phone.
PC Phone configurations

PC Phone is available in the following configurations:

- “PC Phone”
- “PC Phone with IP Phone Service”
- “PC Phone with Converged Desktop service”
- “PC Phone without voice”

PC Phone

PC Phone software application runs on your PC and provides access to Session Initiation Protocol (SIP) features and multimedia services.

Most users will choose to use a headset to speak and hear during calls. Optionally, you can use a separate microphone and your computer's speakers for the voice part of the call (not recommended in open office environments).

Tip: Keep PC Phone running in the background whenever you are using your computer so you can easily accept incoming calls.

PC Phone with IP Phone Service

This configuration of PC Phone enables you to use an IP Phone (Unistim or SIP) for voice while using PC Phone for call control and multimedia portion of calls. The ability to have PC Phone control an IP Phone depends on your services and service profiles assigned to you for each service wherever applicable. Also, if the IP Phone (Unistim or SIP) is not enabled, only voice service will be provided by PC Phone (PC Phone’s built-in voice capability is used when it is not paired with an IP phone).
When PC Phone controls an IP Phone, the configuration is called a PC Phone Client Set. The IP Phone provides premium-quality voice, while your computer is dedicated to the data and video components of the multimedia conversation.

To configure PC Phone to control your IP Phone, see “Setting up IP Phones (optional)” section.

**PC Phone with Converged Desktop service**

With Session Initiation Protocol (SIP)-based Converged Desktop service, your desktop telephone provides premium-quality voice, while your computer is dedicated to the data components of the multimedia session. PC Phone with Converged Desktop service configuration is a cost-effective solution that allows you to maintain your existing desktop telephone for voice calls, while using PC Phone for multimedia communication, such as adding video to a call, starting a collaboration session, or beginning an instant messaging session.

There are various versions of the Converged Desktop service. Those versions are:

- **SimRing Converged Desktop**
  
  In this configuration, the C20 Converged Softswitch (C20) is set to SimRing and the user is provisioned as a standard user with a PC Phone that is not using Converged Desktop service (regular PC Phone). This configuration is supported over PRI (DMS 100 switch).

- **Personal Agent-driven Converged Desktop service**
  
  This configuration is used between an A2 Communications Application Server (A2) and systems that do not support SimRing.

- **SIP-based Converged Desktop service**
  
  This configuration is a full-feature version of Converged Desktop and uses basic Advanced Intelligent Network (AIN) call flows to provide Time Division Multiplex (TDM) voice and multimedia convergence to class 5 lines that support AIN call flows.

For information about the Converged Desktop feature and its capabilities, consult your service provider.
PC Phone without voice

When your PC Phone is not enabled for voice, you cannot make voice or video calls. Consequently, Call buttons, Call context menus, Call Logs, and all options requiring voice or video capability are unavailable to you. However, you can use your PC Phone without voice for sending and receiving instant messages and for starting a collaboration session, which enables you to send files, transfer clipboard, send a web page, and share whiteboard with another user.

Text and graphic conventions

This guide uses the following text conventions:

- **bold text** Indicates the command key you need to press
  Example: Press Ok.

- *italic text* Indicates new terms, document titles

PC Phone documentation uses Internet Explorer as the default browser. If you are using another browser (for example, Firefox), your screen may look slightly different.

Screen captures and menus in this guide show the full content of PC Phone functionality. Your screen may look different depending upon your operating system (Microsoft XP, Microsoft Vista, or Microsoft 7).

This guide describes the standard PC Phone Graphical User Interfaces (GUIs). Alternate GUIs may look different but have similar features and operation as the standard PC Phone GUI.

The GUI shown in this document may or may not be fully present, based upon what is enabled by your administrator and the services and service profiles assigned to you wherever applicable.

We recommend that you keep your client open when you follow the steps described in PC Phone documentation.
Online help

There are several ways that you can access PC Phone help.

<table>
<thead>
<tr>
<th>Do this</th>
<th>To receive this</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roll your mouse over a button on the PC Phone main interface.</td>
<td>a small help description of the button</td>
<td>the tool tip help</td>
</tr>
<tr>
<td>Roll your mouse over an icon to see the tool tip help.</td>
<td>the most relevant information in the tip displayed on the PC Phone, such as</td>
<td>the tool tip help from the system tray icon</td>
</tr>
<tr>
<td></td>
<td>• your presence status.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• whether there are new calls.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• whether there are new voice mail messages</td>
<td></td>
</tr>
<tr>
<td>Select Help, Contents from the PC Phone main menu to view a PDF-based user guide.</td>
<td>• information about procedures that help you use the PC Phone.</td>
<td>the online help</td>
</tr>
<tr>
<td></td>
<td>• a table of contents with hypertext links.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• search method within the document.</td>
<td></td>
</tr>
</tbody>
</table>

Language support

The PC Phone User Guide is available in the following languages:

- English
- French
- Japanese
- Simplified Chinese
- German
- Spanish (Spain)
- Korean
How to get help

For services issues, contact your local support or Information Services team
Getting started

Topics in this section include the following:

• “Before you begin”
• “Installing and launching PC Phone”
• “Logging in to PC Phone”
• “Selecting Communicator mode”
• “Starting PC Phone automatically”
• “Navigating PC Phone”
• “Making an emergency call”

Before you begin

You need the following items to start using PC Phone:

• a PC configured with the required minimum software and hardware, as described in the following section
• network access with a connection that meets the minimum transmission speed requirements, as described in the following section

Minimum hardware and operating system requirements

The following configuration allows for voice-only sessions:

• 550-MHz Pentium-III or equivalent processor
• Windows XP, Windows Vista, or Windows 7
• 56-Kbit/s modem
• microphone and full-duplex sound card
• 48-MB free RAM (This requirement is in addition to the memory requirements of the OS and other concurrent applications.)
• 50-MB free hard-disk space
• 640x480 @8bpp (256 colors) VGA graphics card
• mouse
• PC speakers internal or external connected to the sound card

If a separate microphone and speakers are used instead of the recommended headset, then users must select the Echo Reducer option as detailed in “Advanced set-up” on page 189. Otherwise, other parties may experience an annoying echo while on a call.

Recommended hardware and operating system requirements

The following configuration allows for Medium-Bandwidth video and simultaneous voice and sharing sessions:

• 2.0 (or higher) GHz Pentium-4 or equivalent processor
• Windows XP, Windows Vista, or Windows 7
• Broadband internet connection of sufficient speed
• 64-MB free RAM (This requirement is in addition to the memory requirements of the OS and other concurrent applications.)
• 50-MB free hard disk space
• 800x600 @16bpp (65,536 colors) VGA or better video graphics card
• mouse
• full-duplex sound card with speakers (external or built in)
• separate USB headset or analog headset with built-in microphone

With speakers connected to the PC sound card, you will be able to send the ringing (alerting sounds) through the PC's speakers and use a USB headset for voice and audio while on a call. This will enable you to be away from your desk and still be able to hear an incoming call with this combination. Otherwise, the
alerting tones would only get played through the headset if this combination is not used, or if an analog headset (non-USB headset) that connects directly to your PC's sound card is used.

Best performance hardware and operating system requirements

The following configuration allows for high-bandwidth or custom-configured video and simultaneous voice, sharing, and web collaboration (point to multi-point application sharing) sessions:

- 3.0-GHz (or higher) Pentium-4 or equivalent processor
- Windows XP, Windows Vista, or Windows 7
- high-speed network connection (10base-T Ethernet or better)
- 64-MB free RAM (This requirement is in addition to the memory requirements of the OS and other concurrent applications.)
- 50-MB free hard disk space
- 800x600 @16bpp (65,536 colors) VGA or better video graphics card
- mouse
- full-duplex sound card with speakers (external or built in)
- separate USB headset or analog headset with built-in microphone

Optional hardware and software requirements

The following optional hardware and software are required to use some services and features:

- IP Phone is needed to receive services requiring a hard set, including Personal Communicator with IP Phone Service.
- A web browser is required to use Auto Web Push:
  — Internet Explorer 6.0 and above
  — Firefox 2.0 and above
- Microsoft Outlook 2000 and above is required if you want to use the Microsoft Outlook Plug-In or Import Contacts features.
- A USB-based video camera (Web Cam) is required to send video. A 16bpp (65,536) VGA or better video graphics mode is required in order to send video.
- If you wish to use PC Phone with Lotus, Lotus Notes and Lotus Sametime are required. Two plug-ins enable access to PC Phone functionality from within Lotus Notes and Lotus Sametime.

Some PCs (not all) may not have sufficient USB bandwidth to support a USB camera and USB headset. This is not an issue if you are using a IP Phone for voice instead of PC, or using an analog headset that connects to the sound card instead of USB port. For more information, go to Help, Contents, Troubleshooting, Audio problems, Choppy audio when using USB headset. Additionally, some USB cameras could cause a blue screen error. For more information on this issue, go to Help, Contents, Troubleshooting, Video, Blue screen error.

Installing and launching PC Phone

Topics include

- “Installing PC Phone” 28
- “Launching PC Phone”

Tip: Close all other applications before installing PC Phone

Installing PC Phone

The installer application walks you through the installation process, allowing you to select options, including

- the location where you want to install PC Phone
- whether to install PC Phone for the current user or all users who share this computer. This installer option must be enabled by your administrator. Administrator rights are required to install PC Phone for all users.
- whether to let PC Phone install a desktop icon
• whether to enable the Microsoft Outlook plug-in.
• whether to enable Lotus plug-ins.
• whether PC Phone starts automatically when the PC restarts
• whether you would like to view any important release notes

Tip: Administrator privileges are needed to install PC Phone, and it might be necessary to enter an administrator's password at certain steps

To install PC Phone,

1 Double-click the PC Phone install file you downloaded or received on CD.

   A standard Security Warning dialog may appear listing the publisher of the PC Phone program. Click Run if the program is provided by an acceptable publisher.

2 Select the language to be used by the installation process.

Click 'OK' to select the default English (United States).
Click the radio button to Accept the License Agreement and click ‘Next’.

Click ‘Next’ on the Information screen.
Click ‘Next’ to accept the default installation folder.

On the Installation options, select the radio button ‘Anyone who uses this computer’ and click ‘Next’.
On the Select Additional Tasks screen, click to check all three check boxes and click ‘Next’.
**Note:** The checkbox is selected by default. Clear the checkbox if you do not wish to enable the Outlook plug-in at this time. If you do not enable the plug-in at this time, you can do so in the Preferences menu later.

Next is the confirmation screen, simply click ‘**Next**’.

The install will run...

Launching the PC Phone
The installation process is complete. Click ‘Finish’.

PC Phone must be configured for first-time use. Click ‘Next’ to continue.
For PCM users, your username is ‘pcm’ + 10-digit phone number e.g. pcm7095701979

For SIP users, your username is 10-digit phone number + ‘a’ e.g. 7095701979a

**Note:** If you have an Avaya 1120 or 1140 set today, you are most likely a PCM account user!

Proxy address and domain name are specific to region.

For NL
Proxy Address: sip709.aliant.net
Domain Name: aliant709.ca

For NS/PE
Proxy Address: sip902.aliant.net
Domain Name: aliant902.ca

For NB
Proxy Address: sip506.aliant.net
Domain Name: aliant506.ca
The IP address should appear automatically. Just click ‘Next’.

The wizard prompts you to test your Audio. Click ‘Start’ to run the audio test.

Once the test is complete, click ‘Next’ to continue.
Click ‘Finish’.

The first time you run, you will be prompted for your password. Select to Remember Password and Automatically Sign In.

If you cannot remember your password, please contact Official Services at 1-866-830-8801 or email ITGVoice@bellaliant.ca.

**Hint:** Your password may be your 10-digit number, your 7-digit number, or the last 4-digits of your number.
The first time running, you will get an ‘Emergency Service Warning’. Select the ‘Don’t show this message again’ so this does not prompt every time PC Phone is loaded.

If you receive a Security Alert which prompts to accept a new Server Certificate. Click ‘Yes’ to proceed.

You may also receive a Security Alert regarding certificate revocation. Click ‘Yes’ to proceed.
Next, you will be prompted to select your Mode. Your choices are ‘Standard’ or ‘Converged Desktop’.

In the office, use ‘Converged’ if you have a physical VoIP telephone set.

At home or away from the office, use ‘Standard’.

If you don’t have a physical telephone set, always use your PC as your phone, use Standard.

Select your region for location and click ‘OK’.
Congratulations, you have completed the configuration and your PC Phone is ready to use!

Training is available from the Desktop Evolution site under the tab ‘Training Links’.

Logging in to PC Phone

You will be prompted to log in to PC Phone when you launch it. At other times (for example, if you disconnect or lose connection with the server), you may need to manually log in.

Tip: If you chose the option to have PC Phone start automatically, and you set your Network preferences to automatically connect to your proxy server, be sure to select the Remember password option so that you won’t have to type your password during login.

Tip: When you access PC Phone, some Security Alert dialog boxes may appear (depending on your configuration). These alerts should be reviewed and, if necessary, investigated

1 Start your PC Phone application.
2 Select a profile and click the **Launch** button.

If you are a PC Phone user with more than one profile, you are prompted to select a profile. If you have more than one profile and you do not choose a profile within 15 seconds, PC Phone will select the last used profile. A countdown timer at the bottom of the Profile Manager indicates how much time is left.

- If you have just upgraded to PC Phone 8.0 SP1 from Multimedia Office Client (MOC), you will see your MOC profile (Outlook-Outlook). The Profile Manager will not appear.
- If you are a PC Phone user with only one profile, the existing profile is used. The Profile Manager will not appear.
3 Enter your password in the Login window.

![Login Window](image)

- Select the **Remember Password** check box if you do not want to enter your password every time you sign in (optional step).
- Select the **Automatically Sign In** check box if you want the Personal Communicator to automatically sign in (optional step).

**Tip:** If you select both options (**Remember password** and **Sign me in automatically**), then you will not be prompted with the Login window again.

4 Click the **Login** button

Your service provider or system administrator restricts the number of concurrent logons that you can have using PC Phone, the IP Phone, or PC Phone with IP Phone Service. If you are logged on to other devices, you can log off from the other device and try logging on again. Otherwise, contact your system administrator if you receive an error message stating that you have exceeded your logon limit.

5 Select your **Location**.

**Tip:** The physical location you choose becomes your default location whenever you log on to PC Phone until you decide to change it again.
**Caution:** You must provide the correct location information on your PC Phone; otherwise, some services, such as emergency and conferencing services, may not work properly. For example, the location you choose determines where you are during an emergency. If you choose Other as your default location, and you have to make an emergency call, the emergency call may route to the incorrect Public Safety Answering Point (PSAP).

If you are logging in from a different location, ensure that you change your location from the Login window or access the **Tools, Preferences, Users** tab from the main menu.

6 Click **OK**.

If you choose Other as your default location, the following warning box appears.

7 Select **Don’t show me this message again** if you do not want this window to appear again when you login to PC Phone.
Selecting Communicator mode

Once you are successfully logged in, PC Phone retrieves your service profile and displays a Select Communicator Mode dialog box. The Select Communicator Mode dialog box allows you to select an appropriate mode based upon your service profile. Place a check in the “Automatically pick this next time” checkbox if you want PC Phone to remember your mode selection.

You can also select your mode using the User Preferences/Communicator Mode window

Starting PC Phone automatically

When you install, PC Phone gives you the option of having the client start automatically whenever you log on to your computer. If you do not choose this option and you would still like to start the client automatically, perform the following steps:

On Windows XP or Vista:

1. Right-click on the Start button and then click Properties.
2. On the Start Menu tab, click Start menu and then click Customize.
   This changes the style of the Start menu.
3. Click Advanced.
4 In the Start Menu folder, find the shortcut to the program you want to start each time you start Windows, and drag it to the Startup folder located in the Programs folder.

On Windows 7:

1 Click the **Start** button and select **All Programs, Startup**.
2 Right-click on **Startup** and select **Open**.
3 Copy the PC Phone shortcut to the Startup folder.
4 Restart your PC.

**Navigating PC Phone**

The main window interface appears when you start PC Phone. The following figure shows the Standard PC Phone interface.
Main menu actions

PC Phone has a flexible interface that allows you to perform commands using the menus, the GUI, or hot keys. The following tables list the actions you can perform from the PC Phone main menu and their corresponding menu location. The options available from the main menu are slightly different on the Standard PC Phone GUIs.

Tip: Access to some of the menu action items depends on the services and service profiles assigned to you. If a menu item is not available to you, it does not appear on your PC Phone.

The following table shows the menu options available from the Standard Personal Communicator interface.

<table>
<thead>
<tr>
<th>Menu name</th>
<th>Menu action</th>
<th>Key command</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Login</strong></td>
<td>• Login</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Logout</td>
<td>Ctrl+F</td>
</tr>
<tr>
<td></td>
<td>• Change My Status</td>
<td>Ctrl+D</td>
</tr>
<tr>
<td></td>
<td>• Exit</td>
<td>Ctrl+L</td>
</tr>
<tr>
<td><strong>View</strong></td>
<td>• Personal Contacts</td>
<td>Ctrl+B</td>
</tr>
<tr>
<td></td>
<td>• Directory</td>
<td>Ctrl+W</td>
</tr>
<tr>
<td></td>
<td>• Call Logs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Assistant Console</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Presence Watchers</td>
<td></td>
</tr>
<tr>
<td><strong>Tools</strong></td>
<td>• Voicemail</td>
<td>Ctrl+Shift+V</td>
</tr>
<tr>
<td></td>
<td>• Personal Agent</td>
<td>Ctrl+Shift+A</td>
</tr>
<tr>
<td></td>
<td>• Retrieve Parked Call</td>
<td>Ctrl+Shift+P</td>
</tr>
<tr>
<td></td>
<td>• Preferences</td>
<td>Ctrl+P</td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td>• Contents</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Software Update (Downloading)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Show Tip of the Day</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Capture Logs for Support</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• About</td>
<td></td>
</tr>
</tbody>
</table>
Main buttons

The following table shows the buttons available from the Standard Personal Communicator interface.

<table>
<thead>
<tr>
<th>Standard interface button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="call.png" alt="Call button" /></td>
<td>Allows you to make a call.</td>
</tr>
<tr>
<td><img src="cancel.png" alt="Cancel button" /></td>
<td>Clears the name or number textbox of unprocessed characters.</td>
</tr>
<tr>
<td><img src="dialpad.png" alt="Dialpad button" /></td>
<td>Displays the <strong>Dialpad</strong> that allows you to dial the number for the call you wish to make.</td>
</tr>
<tr>
<td><img src="im.png" alt="IM button" /></td>
<td>Begins an IM conversation with another party. This can be done from the main window, without an active session running.</td>
</tr>
</tbody>
</table>
| ![Video call button](video.png) | Allows you to  
  - make a video call  
  - start your camera in a call  
  - preview your camera in a call |
| ![File button](file.png)  | Allows you to send a file to a user with whom you are on an active call. This can be done from the main window, without an active session running. |
The More commands button allows you to do the following, depending upon the services and service profiles assigned to you for each service wherever applicable:

- Send a broadcast by selecting **Broadcast IM**, which opens your personal directory, allowing you to select multiple users for sending them an instant message simultaneously.
- Launch the **Chat Session** window that allows you to create a new chat room or join an existing chat room.
- Launch a Conference call by selecting the **Host Conference** entry, using the bridge settings stored on the provisioning server and the chair pin specified in preferences.
- Display the **Retrieve Parked Call** window to enable you to retrieve a call from a general lot when you enter the call park token information.
- During a call, you can transfer clipboard, send a web page, and share whiteboard with the other user. These options can also be accessed when a name or number has been entered in the Call text field.
## Main tabs on the Standard PC Phone interface

The Standard PC Phone interface provides three tabs to access the following features.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Contacts</strong></td>
<td><img src="image" alt="Personal Contacts" /></td>
<td>The <strong>Personal Contacts</strong> tab shows the contacts that you set as friends and shows their presence status.</td>
</tr>
<tr>
<td><strong>Directory</strong></td>
<td><img src="image" alt="Directory" /></td>
<td>The <strong>Directory</strong> tab shows your personal address book and the global address book. It also allows you to search for a contact from both books.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Add a contact" /></td>
<td>The <strong>Add a contact</strong> button from the <strong>Directory</strong> tab enables you to add a new contact to your directory.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Email" /></td>
<td>The <strong>Email</strong> button from the <strong>Directory</strong> tab allows you to send an email to a contact in your personal address book or the global address book.</td>
</tr>
</tbody>
</table>
|                | ![More commands](image)                                                | The **More commands** button from the **Directory** tab  
- enables you to delete the contact from your personal address book.  
- opens the Groups window to add new groups or edit existing groups.  
- opens the Import Contacts window allows you to import contacts from your Microsoft Outlook email application main contact list to your personal address book. |
| **Call Logs**   | ![Call Logs](image)                                                   | The **Call Logs** tab contains the  
- **Inbox** button that shows you a list of all your incoming calls  
- **Outbox** button that shows you a list of all your outgoing calls  |
System tray icon

When you start PC Phone, an icon appears in the system tray.

Double-click on the system tray icon to restore PC Phone and bring it to the front of your desktop. Right-click on the system tray icon to access PC Phone.

When PC Phone is offline, the icon in the system tray appears as follows.

Tip: When you are not using PC Phone, you can click the X in the upper-right-hand corner to minimize the window. It will continue to run in the system tray and prompt you when you receive a call or instant message.

Making an emergency call

E911 is supported in North America only.

PC Phone

When you use PC Phone to make an E911 call, you cannot disconnect or initiate any features while on an active call.

The system disables the following features during a 911 call:
While PC Phone is in an emergency call, you cannot access the PC Phone main window (or any other) until the client releases the active call dialog box.

During an E911 call, the following PC Phone features behave as described in the following table:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do-not-disturb (DND)</td>
<td>The DND feature blocks new calls, instant messages, and collaborations. During the E911 call, this feature transitions the PC Phone into a mandatory Do-Not-Disturb (DND) mode. This results in rejecting all new inbound requests. Requests subject to rejection include such things as new calls, instant messages, collaborations. After the operator disconnects the call, PC Phone disables this DND behavior.</td>
</tr>
<tr>
<td>Client Collaboration</td>
<td>Active collaboration sessions (those created before an emergency call) will be cancelled if PC Phone establishes a call to the emergency operator. Remote participants of the collaboration observe the cancelled collaboration as if the user had clicked Stop on the collaboration session window.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Feature</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do-not-disturb (DND)</td>
<td>The DND feature is used to block new calls, instant messages, and collaborations. During the emergency call this feature temporarily enables DND on the device involved in the call. This results in rejecting all new inbound requests. Requests subject to being rejected include: new calls, instant messages and collaborations. After the operator disconnects the call, the device disables this DND behavior.</td>
</tr>
<tr>
<td>Soft Keys</td>
<td>During the emergency call this feature removes all soft-labels from the LCD display and disables all softkeys. This new behavior prevents the originator from initiating new mid-call features.</td>
</tr>
</tbody>
</table>
New Keys

During an emergency call this feature consumes key press events that would normally allow the call to be disconnected. For instance, pressing the "Release" key or the "onhook" button (on which the handset usually rests) would typically disconnect the call. The system disables the following keys during an E911 call: Hold, Line keys, Mute, Inbox, Service, Release, Soft Keys, Address Book, Outbox, Transfer.

Device Mode

During the emergency call, new behavior is assigned to the Release button and hook-switch button as described in the table below. Bidirectional transitions between handset mode and speakerphone (or headset) mode are allowed. After the emergency session has completed, the IP Phone returns to the state it was in before the emergency call.

PC Phone with IP Phone Service

This section is applicable when PC Phone is in control of a UNISTIM IP phone. For a SIP phone, E911 service is handled by the hardware phone.

When you use a IP Phone to make an E911 call, the behavior of the set changes during that call to prevent the caller from disconnecting the call or initiating any features while on an active call.

When the system establishes an emergency call, that system modifies the IP Phone in the areas shown in the following table.

<table>
<thead>
<tr>
<th>IP Phone Emergency terminal call control behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency call is made using:</td>
</tr>
<tr>
<td>Handset Mode</td>
</tr>
<tr>
<td>Speakerphone Mode</td>
</tr>
<tr>
<td>Headset Mode</td>
</tr>
</tbody>
</table>
Multimedia communication

Topics in this section include the following:

- “Making a call”
- “Receiving a call”
- “Receiving a new call during a call”
- “Ending a call”
- “Declining a call”
- “Holding a call”
- “Retrieving a held call”
- “Parking a call”
- “Retrieving a parked call from a general lot”
- “Transferring a call”
- “Conference calling”
- “Sending instant messages”
- “Sending IM broadcasts”
- “Using voicemail”
- “Activating and deactivating the Assistant Services Route”
- “Assistant Console consultative transfer”

Making a call

There are multiple ways to initiate a call using PC Phone.

Tip: To make voice or video calls, PC Phone must have voice enabled.
The following table shows the most common ways to make a call.

<table>
<thead>
<tr>
<th>To call from this interface</th>
<th>You can</th>
</tr>
</thead>
</table>
| Standard Personal Communicator interface | • Double click on any **Directory**, **Call Logs**, or **Personal Contacts** tab. Double clicking to make a call is dependent upon your configuration in the Preferences window.  
• Right-click on any **Directory**, **Call Logs**, or **Personal Contacts** entry, and then select **Call** from the shortcut menu. Right-clicking is a quick way to access extended actions that you can perform on a selected entry.  
• Manually type a number or an address in the Call area and click the **Dial** button. |

Depending on your service provider, voice calls may have to be digit dialed, instead of using the user@domain format to invoke a voice call.

If you use Lotus Notes, you can also make a call from the Lotus Notes and Lotus Sametime toolbars, as well as the Lotus Notes multimedia menu.

### Sending and receiving video

PC Phone enables you to make both voice and video calls. For video calls you must have a web camera for your PC so you can transmit video to the other party. A high-bandwidth network connection and fast PC processor are recommended for optimal video performance. If the other party has a camera and subscribes to video service, then you can receive their video transmission as well.

**Tip:** During a Video Conference call, if there are multiple participants sending video feeds, only the participant that is speaking will be displayed.
There are pre-defined video configurations for

- Very low bandwidth (Dialup modem)
- Low bandwidth (ISDN, Cable modem, DSL)
- Medium bandwidth (High speed LAN)
- High bandwidth (High speed LAN)
- Very high bandwidth (Very high speed LAN)
- Receive-only video

In addition, PC Phone allows you to specify a custom video configuration.

The default setting for video is receive-only video. Before you can send video, you must configure the video settings.

Making a voice or video call

You can make voice and video calls from PC Phone. Making video calls depends on whether this service is assigned to you. If you do not have video support, you cannot make video calls.

**Tip:** To make video calls successfully, ensure that you enable the video option from **Tools, Preferences, Video** tab, which you access from the main menu.

Use the following procedures to make a voice or video call:

- “Initiating a voice or video call using the Standard interface”
Initiating a voice or video call using the Standard interface

To initiate a voice or video call using the Standard PC Phone interface,

1. Enter an address (username, SIP address, or public telephone number) in the Enter a name or a number field just above the Call button. When you enter an address, the five most recent calls incoming and the five most recent outgoing calls or your personal contacts closest to the address you typed show up in the new Call Edit box.

   **Tip:** For outside calls from an office system or for long-distance calls, be sure to include any necessary access codes, for example, dial 619725556245. You can also use the Personal Contacts, Directory, and Call Logs tabs to quickly call your contacts.

2. Click Call or click Video, Make Video Call.

   **Tip:** If you have video, then a popup video window slides out to the right side of PC Phone main window by default. If the main window is to the far right side of the screen, the video window slides out to the left side. There are three video modes available in standard skin:

   - Attached - the video window is attached to the PC Phone main window or embedded into the PC Phone main window.
   - Resizable - the video window is detached from the PC Phone main window and you are able to resize, move or close it.
   - Full screen - the video feed displayed switches to a full-screen mode on the computer’s primary monitor.

   Select the values from the drop-down menu located at the right of the interaction controls, below the remote video screen. This control is not visible when video is not active. Additionally, you can preview the video feed sent while performing a video call by clicking Preview My Camera in the video sub menu of the main window. A window appears and the user can choose to minimize and close the preview.
Making a call with a dialing prefix

You can set up dialing prefixes from the Tools, Preferences, Calls window to make calls.

When you set up dialing prefixes and make a call to what appears to be a PSTN number, the Choose A Dialing Prefix window appears.

1. Select the number from the Dialing Prefix drop-down list. Note that the default dialing prefix is initially selected in the drop-down list.
2. Click OK.
3. Click None or Cancel to use no prefixes for making a call.

Receiving a call

When PC Phone receives an incoming call, the call appears either in a separate window or in an expanded area within your client depending upon your interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>The incoming call appears in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone</td>
<td>the expanded Call List area of the client</td>
</tr>
</tbody>
</table>
Tip: In the Standard interface, the Call List area expands only when you receive or make a call, showing the called or calling party. If no call is in progress, the Call List area is hidden.

When a new call is received while an existing call is in full-screen mode, the user receives incoming call notification in the form of a notification popup which allows them to **Accept**, **Decline**, **Ignore** or **Send IM** (reply with Instant Message).

An existing system tray notification mechanism is used for this notification. If the system tray notification is in a disabled state (set in Preferences), it is temporarily activated for this specific case. If the new incoming call is answered, the present video call is placed on hold which causes the video window to close. Once the call is un-held, full-screen video resumes. If the new incoming call is answered with an IM, the full-screen video session continues uninterrupted and an IM window pops up on top of it to send a response to the calling party. Ignore and Decline operations reject the new incoming call without interrupting the ongoing video session.
You also receive a notification of an incoming call from the PC Phone system tray. When the window pops up in the system tray area, you can either answer or ignore the call.

The following table shows the button and status information that you see in the Receiving Call Conversation window.

<table>
<thead>
<tr>
<th>Receiving Call Conversation window</th>
<th>Description</th>
</tr>
</thead>
</table>
| Name on the title bar             | The name of the calling party appears in the title bar. Select the name that will appear in the window by using the following order of precedence:  
  • If the calling party is defined in your personal address book, then the user’s nickname appears.  
  • If the user has provided a display name and the user is not in your personal address book, then their display name appears.  
  • If the calling party is not in your personal address book, and no display name is provided, then the user’s username appears. |
<p>| Stop                              | Closes the Conversation window and ends the call. |
| Subject                           | If the calling party provides a subject for the call, the call subject appears in the Subject area. |
| Call                              | Until the call is answered, the Call button has no action. Once a call is answered, the Call button closes or reopens the call control pane. It also initiates a call to the other party. |
| Picture                           | If the caller provides a network calling picture ID, a photo of the caller appears. |
| Answer                            | The call is answered and voice is started. |
| Answer Video                      | The call is answered and voice (and, if negotiated, video) is started. This button is enabled if you have a camera and the other party has a camera installed on its PC Phone. |
| Decline                           | When selected, this button informs the caller that the call has been declined and the Conversation window closes. You have the option of declining with or without a reason. |</p>
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignore</td>
<td>The conversation window closes. You can configure whether the caller is informed that the call has been ignored using <strong>Tools, Preferences, Miscellaneous</strong>.</td>
</tr>
<tr>
<td>Redirect</td>
<td>A Redirect Call window appears and you can select or enter an address where the call will be redirected. After selecting or manually entering a redirect address, the Conversation window closes.</td>
</tr>
<tr>
<td>Instant Message</td>
<td>In the Standard interface, a separate window opens where you can enter a message to the caller.</td>
</tr>
<tr>
<td>Send File</td>
<td>In the Standard interface, you can select the Send File button under the Call List area.</td>
</tr>
</tbody>
</table>
### Receiving Call Conversation window

<table>
<thead>
<tr>
<th>More</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click this button to access PC Phone sharing functions:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Broadcast IM</strong> to enable you to send an instant message to multiple users simultaneously.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Chat Session</strong> to enable you to create a new chat room or join an existing chat room.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Retrieve with ID</strong> to enable you to retrieve a call from a general lot when you enter the call park token information.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Transfer Clipboard</strong> to send the contents of your system clipboard to the other user.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Send Web Page</strong> to send web pages for viewing on the other user’s system.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Share Whiteboard</strong> to share a common whiteboard with the other user.</td>
</tr>
</tbody>
</table>

### Receiving a new call during a call

When you are on a call, and you receive another call, right click the mouse button on the incoming call in the Call List area to:

- answer the call
- decline the call (with or without reason)
- redirect the call
- ignore the call
Answering a voice or video call

When you receive a call, you can answer it either as a voice call or a video call. To answer an incoming call, click **Answer** in the Call area. The window changes to include active call controls.

**Tip:** In the Standard interface, the Call List area expands only when you receive or make a call, showing the called or calling party. If no call is in progress, the Call List area is hidden.

The following table shows the buttons and status information available in an active call window.
<table>
<thead>
<tr>
<th>Conversation window</th>
<th>Description</th>
</tr>
</thead>
</table>
| Transfer            | Displays the following buttons:  
|                     | • Announce button calls the user in the edit box to announce the transfer  
|                     | • Transfer button directly transfers to the user in the edit box.  
|                     | • Voice Mail button transfers the call to voice mail.  
|                     | • Cancel button returns to the active call view  
|                     | Transfers the conversation to another user. The transfer can be unattended (direct transfer) or attended (consultative transfer). |
| Hold Retrieve       | Places the conversation on hold or retrieves the held conversation.  
|                     | In the Standard interface, the Hold button caption changes to Unhold and is used to release the held call. |
| Mute                | Mutes the microphone and stops video for the conversation or un-mutes the muted microphone and restores video for the conversation.  
|                     | In the Standard interface, the Mute button caption changes to Unmute and is used to restore audio to the call. |
| Conference          | Places the conversation on hold (if it is not already held) and opens a Make A Call window that allows you to originate another call. Once that new call is answered, the Conference button becomes a Join button that allows you to join the new call and the held call into a single conference call. |
| New Call            | Places the conversation on hold (if it is not already held) and opens a new Make A Call window that allows you to originate another call. |
| Start Camera        | Attempts to add video to the existing voice conversation. |
More commands
• Audio Quality
• Park Call

<table>
<thead>
<tr>
<th>Provides the following buttons:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Audio Quality: displays what type of voice CODEC is actively being used for the call (low speed or high speed). When selected, PC Phone attempts to switch CODECs for the call (high speed to low speed, or low speed to high speed). Also allows you to increase or decrease the call volume (applies to active calls only)</td>
</tr>
<tr>
<td>• Park Call: Parks or holds a call in a general lot so another user can retrieve it with a call park token or parks a call for a specific user for retrieval.</td>
</tr>
</tbody>
</table>

End Call
Closes the Conversation window and ends the call.

Hang up

Disabling call waiting

If you do not wish to receive any incoming calls while you are on an active call, you can have your system administrator activate the call-waiting disable feature. When this feature is enabled, you do not receive any incoming call pop-up windows, allowing you to focus on your current call. The system logs the rejected incoming calls into your incoming call logs as missed calls. Call Waiting Disable applies to all endpoints, not just the PC Phone.

Activating the call-waiting disable feature does not affect instant messaging, collaboration capabilities, or making outgoing calls.

When the system administrator activates the call waiting disable feature, the caller receives one of the following:

• a busy tone
• your voicemail with the “user busy” greeting

The ability to use the call-waiting disable feature depends on whether this service is assigned to you. If you do not have support this feature, then you cannot use the call-waiting disable feature.
Ending a call

To end a call, select the following option depending on your Personal Communicator interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>End Call</td>
</tr>
</tbody>
</table>

Ending a voice conversation does not necessarily close the Conversation window. If there are other active conversations with the user, the window stays open (for example, if the instant messaging control pane is open, the Conversation window remains open, even after the voice conversation has ended).

Declining a call

You can decline a call using the Decline option. When a call is declined, with or without reason, the calling party hears a tone indicating that the call has been declined. When a decline reason is given, depending on the capabilities of the service provider and the calling party’s phone, the reason is presented to the calling party.

To decline a call,

1. Click Decline in the incoming call window.
2. Select Decline/Decline with reason.
   The called party window is closed, but the calling party’s window remains open.

Holding a call

To put an active voice conversation call on hold,

1. Make a voice call or answer an incoming voice call.
2  Click **Hold**.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>The Hold button changes to <strong>Unhold</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td></td>
</tr>
</tbody>
</table>

The call is now on hold, and the caller can hear music or a tone if you have the Music on hold service. As there is a receive-only voice path playing the music or tone, the call will be shown as Active for the holder’s PC Phone.

The ability to play music or a tone for calls that are placed on hold in the network depends on whether this service is assigned to you. If the Music on Hold service is not assigned to you, then the calls you place on hold cannot hear music.

**Tip:** While the call is on hold, you can make and answer other calls.

---

### Retrieving a held call

To retrieve a call on hold, select one of the following options.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone</td>
<td>the <strong>Unhold</strong> button to retrieve a call. The button caption changes back to <strong>Hold</strong>.</td>
</tr>
</tbody>
</table>

Occasionally, you may not be able to retrieve a call. For example, the caller you put on hold can place you on hold as well.

**Tip:** If you retrieve a held call while on another call, the client automatically places the active call on hold.

---

### Parking a call
The **Park Call** button allows you to place a call on hold so that someone else can retrieve it. You can have the call returned to you if it is not picked up after a specified amount of time. This service must be assigned to you.

You can park a call in a general lot for general retrieval, or park a call for a specific user.

To park a call

1. Make a call or answer an incoming call.
2. Select the option to park the call.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>More, Park Call.</td>
</tr>
</tbody>
</table>

3. From the Park Call window, select **Park in general lot** if you wish to hold the call for any user in the domain to retrieve it.
4. Click **OK**.
   
The Call Parked window appears providing you with a call park token.
5. From the Park Call window, select **Park against a user** if you wish to hold the call for a specific user.
6. Click **OK**.
   
The user you designate to retrieve the parked call receives a Parked Call window on PC Phone, indicating that the user has a parked call. The window identifies the name and picture (if available) of the caller.

---

**Retrieving a parked call from a general lot**

When you park a call in a general lot, you receive a call park token. Forward the call park token to the users who may retrieve this call from the general lot.

To retrieve a call from a general lot,
1 Select the option to retrieve the call.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>More, Retrieve with ID</td>
</tr>
</tbody>
</table>

2 In the Parked call ID window, enter the call park token of the parked call.

3 Click OK.

You get connected with the call.

Automatically retrieving a parked call

If you set the auto-retrieve function in the Personal Agent, you can automatically retrieve your parked call from PC Phone. With this setting, if a parked call is not retrieved from the general lot or by a specific user within a specified time period, then the call automatically routes back to you since you initially parked this call. Enable the auto-retrieve function in the Personal Agent through Preferences, Services, Call Park.

Tip: If you enable the auto-retrieve function in the Personal Agent, you do not need the call park token information to retrieve a call.

The ability to automatically retrieve a parked call that was not answered within a specified amount of time depends on whether this service is assigned to you.

Call Pick-up

Call Pick-up has three general derivatives:
• **Group Call Pick-up** allows PC Phone user (A) to become aware of and pick-up an incoming call that was presented to another user (B), provided that both users (A and B) are members of the same Call Pick Up group, and user A has an active subscription for call pickup on this particular group.

• **Directed Call Pick-up** allows a PC Phone user to view the calls ringing for all members of group, using the group ID, the feature also gives the opportunity to the user to pickup one these calls.

• **Targeted Call Pick-up** allows a PC Phone user, enabled with targeted call pick-up service, to view a list of calls ringing on another user’s PC Phone. It also gives the opportunity to pickup one of those calls.

**Retrieving a call from a group notification**

In order to be notified of incoming calls on a group, the PC Phone users must have the Call Pickup service assigned to them. They must also be members of that group and have an active call pickup subscription for that group.

When an incoming group call is received, the PC Phone displays it in the Call Pickup List. The PC Phone user can see all the group calls waiting to be picked up, and they can select one of the calls and pick it up. All the user’s personal calls will take higher priority over the call pickup calls. The personal calls will be sorted with the oldest first and afterwards the call pickup calls sorted with the oldest first.

To retrieve a call from a group notification,

1. Select the **Pick Up Call** button.
2 If the list of calls contains more than one call, you can answer a lower priority call by double-clicking on the entry, or right-clicking on the entry and selecting **Pick up call**.

When a group member answers the call, the PC Phones of the other group members are notified that the call has been terminated, and the call is removed from their lists. The user who answered the group call has full call control over this connected call.

**Retrieving a call from a directed notification**
Directed Call Pick-up allows a PC Phone user to pick up a call ringing on a specified group. The PC Phone user must be a member of that group, and must have the directed call pickup service variant enabled on the server.

To retrieve a call from a directed notification,

1. Enter the group name or ID.

   ![Directed Call Pick-up Screen]

2. Select the **Pickup** button.

   PC Phone will display the list of calls ringing on the group. The list will be displayed until the user picks a call up or closes the list. If the list of calls was found by sending an ad-hoc subscription, the displayed list is not updated when new calls are received or existing calls are terminated.

**Retrieving a call from a targeted user**

Targeted Call Pick-up allows a PC Phone user, who has enabled targeted call pick-up service, to view a list of calls ringing on another user’s PC Phone (provided the two users are members of the same group). It also gives the opportunity to pickup one of those calls.

To retrieve a call from a targeted user,
1 Enter the user name or DN of the targeted user. PC Phone displays a list of calls ringing for that user.

2 Click the Pick Up Call button. The PC Phone targeted user whose call has been picked up will be able to see the call picked up by someone else in the Missed calls and the Call Log.

Transferring a call

You can transfer an active call without talking to the person you are transferring the call to (direct transfer), or you can consult with the person who will receive your transferred call (consultative transfer).

Direct transfer

To perform a direct transfer of an active call,

1 Click the Transfer button for the conversation you wish to transfer. The Transfer window appears.
2 Enter a transfer address, such as a telephone number or SIP address.
3 Click **Transfer**.

PC Phone transfers the call to the named destination, closes the window, and disconnects the call.

**Consultative transfer**

The consultative transfer feature must be enabled by your administrator.

To transfer an active call and speak with the party you are transferring to,

1 Click the **Transfer** button for the conversation you wish to transfer.

The **Transfer** window appears.

2 Enter a transfer address, such as a telephone number or SIP address.

3 Click **Announce**.

PC Phone initiates a new call to the transfer destination client and places the call between you and the transferee on hold.

<table>
<thead>
<tr>
<th>If you use this interface</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Complete Transfer button appears in the Call area.</td>
</tr>
</tbody>
</table>

4 After talking to the transfer destination, select the option to complete the transfer.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Press the</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Complete transfer button</td>
</tr>
</tbody>
</table>

The transferee and the transfer destination are connected in a call and the transfer is complete. You are dropped from the calls with both transferee and transfer destination.
Conference calling

Conferences are calls that can involve more than two callers. You can use PC Phone to create a conference or to dial into a conference. The ability to create conferences depends on whether conferencing service is assigned to you.

There are two types of conferences, ad hoc conferences, and MeetMe conferences.

- Ad hoc conferences are created on the fly by joining multiple calls together into one conference call.
- Conference Bridge service allows you to have a personal conference bridge, available 24 hours a day. Use of the bridge is enforced through PIN access. Participants dialing into the bridge are greeted and prompted to enter an Access Code that uniquely identifies a personal bridge. Only you, as the chairperson (the person who owns the bridge), can open the bridge and allow participants to join.

Tip: To make conference calls, your PC Phone must have voice enabled.

Creating a conference

The maximum number of conference ports available for your call is defined by your services. As conference host, you use one port, so the maximum number of people who can join an audio conference is the conference port limit minus one.

Creating an ad hoc conference using the Standard interface

To set up an ad hoc conference call using the Standard PC Phone,

1. Make a call or answer an incoming call.
2. Press the Conference button.
3. Select the parties you want to add to the conference.
4. Repeat this process up to the conference port limit defined by your services.
5. Press Join to Conference to add all parties into the conference.
Hosting a conference call as Chairperson using the Standard interface

Prerequisites:

- You have Conference Bridge service assigned to you as part of your service profile.
- You have a conference bridge and a Chairperson PIN.
- Your Chairperson PIN is setup in PC Phone.

To host a conference call using the Standard interface,

1. In the PC Phone main window, click on the More Commands button.
2. Click the Host Conference option. This starts a new call session with the bridge number, the access code and the chair pin dialed in automatically.

If you do not have Conference Bridge service assigned to you as part of your service profile, or if you do not have your own conference bridge, the Conference Bridge option is hidden in the PC Phone main window.

If you have not set up your Chairperson PIN, you will be prompted to enter the PIN when connected to the conference bridge.

Joining a conference as a Participant using the Standard interface

Prerequisites:

- You must have the conference bridge number and the access code

To join a conference as a Participant,

1. Enter the conference bridge number in the PC Phone main window.
2. Click the Call button. You are connected to the conference and prompted to enter the conference access code.
3 Enter the conference access code. You are placed into the conference. The conference will not begin until the Chairperson has joined the conference and started it.

Leaving a conference

A user can depart from a conference call at any time.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td><strong>End Call</strong> button</td>
</tr>
</tbody>
</table>

The network conference server continues hosting the conference call until only one party remains, at which point it ends the call.

Conference Bridge Chairperson and participant audio controls

Audio Conferencing service users have their own private conferencing resource available for meetings at any time. The following conference controls are available during the conference for the chairperson and participants:

**Table 1**
Chairperson Audio Controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*1</td>
<td>Enable/disable audio emoticons</td>
</tr>
<tr>
<td>*2</td>
<td>Launch/end chat session</td>
</tr>
<tr>
<td>*3</td>
<td>Enable/disable entry/exit tones</td>
</tr>
<tr>
<td>*4</td>
<td>Lock conference</td>
</tr>
<tr>
<td>*5</td>
<td>Unlock conference</td>
</tr>
<tr>
<td>*6</td>
<td>Mute</td>
</tr>
</tbody>
</table>

**Table 1**
Chairperson Audio Controls
<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*7</td>
<td>Un-mute</td>
</tr>
<tr>
<td>*8</td>
<td>Conference continuation</td>
</tr>
<tr>
<td>*#</td>
<td>Count participants</td>
</tr>
<tr>
<td>###</td>
<td>Mute all participants. Participants cannot un-mute themselves</td>
</tr>
<tr>
<td>8 8</td>
<td>Mutes all participants but allows participants to un-mute themselves</td>
</tr>
<tr>
<td>9 1</td>
<td>Start Web Collaboration session</td>
</tr>
<tr>
<td>9 2</td>
<td>End Web Collaboration session</td>
</tr>
<tr>
<td>9 9</td>
<td>Un-mute all participants</td>
</tr>
<tr>
<td>2 0-9</td>
<td>Play audio emoticon</td>
</tr>
<tr>
<td>0 0</td>
<td>Ask for an operator</td>
</tr>
<tr>
<td>* *</td>
<td>List available commands</td>
</tr>
</tbody>
</table>

Audio Emoticons are available to both the conference chairperson and participants but controlled by the chairperson. The Chairperson has the option to enable/ disable audio emoticons via the Personal Agent. After the conference starts, the chairperson can override the option setting, and enable or disable audio emoticons by pressing *1 as needed.
For an audio emoticon, press 2, then press one of the following:

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Clapping</td>
</tr>
<tr>
<td>1</td>
<td>Booing</td>
</tr>
<tr>
<td>2</td>
<td>Laughing</td>
</tr>
<tr>
<td>3</td>
<td>Punch</td>
</tr>
<tr>
<td>4</td>
<td>Crying</td>
</tr>
<tr>
<td>5</td>
<td>Boing</td>
</tr>
<tr>
<td>6</td>
<td>Slap</td>
</tr>
<tr>
<td>7</td>
<td>Snoring</td>
</tr>
<tr>
<td>8</td>
<td>Surrounded</td>
</tr>
<tr>
<td>9</td>
<td>Jungle yell</td>
</tr>
</tbody>
</table>

**Chair Status Option**

The Chair Status Option feature allows any user to assume the role of the chairperson if no chairperson is present or if a chairperson was present on the call and subsequently left the conference. If the conference has started and the chairperson has not arrived or has left, a user will have the option to press *0 and then enter the conference PIN. The user will be recognized as the conference chairperson and will have the ability to use all available conference chairperson commands. This is allowed any time a chairperson is not present. If a previous chairperson had started a command such as a chatroom and left the conference, a new chairperson would have the ability to stop the chatroom. Only one chairperson is allowed at a time for each conference.

**Conference Kill**

The Conference Kill option allows the chairperson to kill the conference immediately by pressing 11. A confirmation prompt is played to prevent the chairperson from unintentionally killing the conference. Upon confirmation by the
chairperson, the conference and all participants are informed that the conference has been killed and will end.

**Chairperson Call for Operator without Transfer**

When the chairperson presses 00 to transfer to an operator, the operator joins the conference as a participant and the chairperson remains in the conference. The operator is then connected to all parties in the conference. If any of the participants press 00, they are transferred to an operator and leave the conference to prevent participants from disturbing conferences with operator questions.

**Silent Bridge Audit**

To prevent users from leaving a conference in an open state, the system will automatically detect any conference that has been silent for a predetermined period of time and drop the conference.

**Conference Fast Start**

Conference Fast Start allows you to configure the conference to start on the arrival of the first person in the conference (chairperson or participant). Use the Personal Agent to configure Conference Fast Start for each conference. Each conference is configured to be either fast start or traditional. After the first person arrives and enters the access code, an announcement plays to indicate the conference has started (if fast start is enabled).

**MeetMe audio conferencing recording**

The chairperson may record all or part of a conference by pressing *9 (toggles on/off). Conference audio recordings are sent to the chairperson using e-mail when the user presses *9 to stop audio recording or when the conference ends. The chairperson’s e-mail address is specified using the Personal Agent. The audio files are segmented into manageable chunks of 30 minutes and sent out accordingly for longer conferences. Conference participants, including
participants that join the conference after the recording is started, will hear an announcement indicating the conference is being recorded.

**Web Collaboration**

Web Collaboration is a powerful, yet simple-to-use tool that allows secure display of real-time presentations on the Internet. Presentations can be planned or Ad Hoc (unplanned) and may consist of anything you want to share from a computer. You can publish and review documents or leverage online content during presentations; you can also share desktop applications for software demonstrations and application training.

Web Collaboration sessions use MeetMe conferencing. You cannot use Web Collaboration without MeetMe Conferencing service. From PC Phone, dial in to the MeetMe conference. Web Collaboration conferences are started by the chairperson of a MeetMe conference. The chairperson starts the Web Collaboration conference by pressing the '91' keys. The collaboration session is then pushed to the participants automatically. Pressing '92' ends the Web Collaboration session. The MeetMe conference continues. Pressing the 91 again starts a new Web Collaboration conference.

**Sending instant messages**

Instant messaging allows you to send and receive text notes among one or more recipients, even while you are engaged in an active call. The ability to send an IM depends on whether this service is assigned to you.

The instant messaging functionality also includes spell-checking, which detects incorrectly spelled words as soon as the user finishes typing them. Misspelled words are underlined in red.

If the “Is-Typing” feature is enabled in the service profile, you can enable/disable the transmission of “is-typing” notifications from the local client and specify the idle timeout period (that is, the time period in which not typing causes the transmission of an "idle" notification).

From PC Phone, you can send instant messages and check the presence of users on external communities, such as Yahoo, Google, AOL, MSN, and Jabber.
However, you must have valid user names for each community you wish to communicate with. For example, in order to exchange instant messages with a Yahoo user, you must have a valid Yahoo identification. Ensure that you create an ID as required for each community.

Encryption of instant messaging is system dependent and is subject to the export control regulations of your country.

The following table shows how you can send an instant message (IM) in any of the following ways.

<table>
<thead>
<tr>
<th>When you send an IM</th>
<th>By selecting the</th>
<th>Then this window appears</th>
</tr>
</thead>
<tbody>
<tr>
<td>from the Conversation window of an active call</td>
<td><strong>Instant Message</strong> button</td>
<td>an IM Conversation window appears in the Standard interface for text messaging to the other user on the call.</td>
</tr>
<tr>
<td>from the Conversation window of an incoming call</td>
<td><strong>Instant Message</strong> button</td>
<td>an IM Conversation window appears in the Standard interface for text messaging to the originator.</td>
</tr>
<tr>
<td>by right-clicking any Personal Contacts, Directory, or Call Logs entry</td>
<td><strong>Send Instant Message</strong> button</td>
<td>an IM Conversation window appears for you to send a text message to the address of the selected entry.</td>
</tr>
</tbody>
</table>

Sending an instant message from the Standard interface
To initiate an instant message conversation from the Standard Personal Communicator interface,

1. Enter an address (username, or SIP address) in the **Enter a name or a number** field just above the **Dial** button field.
2. Click the **Instant Message** button. The Instant Message window appears.

**Tip:** You can also select a contact from the **Personal Contact**, **Directory**, or **Call Logs** button. When initiating an instant message directly from one of these buttons, you do not have to enter the instant message recipient address, just right click and select **Send Instant Message**.

3. Type your message in the instant message control pane.
4. Press **Enter** on your keyboard, or click **SEND** in the instant messaging control pane.

If you use Lotus Notes, you can also send an instant message from the Lotus Notes and Lotus Sametime toolbars, as well as the Lotus Notes multimedia menu.

**Replying to an instant message**
When you receive an instant message, it appears in an IM conversation window from the sender. To reply to the instant message,

1. Type your message in the instant message control pane. If you want, format the text by using the font button.
2. Press Enter on your keyboard, or click **SEND** in the instant messaging control pane.

Your message appears in an IM Conversation window of the person who sent the instant message.

---

**Tip:** You cannot chat with multiple contacts simultaneously from an external IM community. For example, if you are exchanging instant messages with your Yahoo contact, then you cannot exchange instant messages with your AOL contact.

---

### Sending an instant message during a call

To send an instant message during an active conversation,

1. Select the **Instant Message** button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>When you click</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td><strong>Instant Message</strong> button under the Call List area.</td>
<td>a separate instant messaging window appears.</td>
</tr>
</tbody>
</table>

2. Type your message in the instant message control pane. If you want, format the text by using the font button.
3. Press Enter on your keyboard, or click **SEND** in the instant messaging control pane.

### Querying the presence of a user in an instant message conversation window

In an IM conversation window, you can see the Presence status of another user if the other user is in your personal address book, and that user is tagged as a
Friend. If the user is not in your personal address book, and the user is not tagged as a Friend, the Presence of the other user is not automatically shown. In this case, you may query the user's Presence.

**Tip:** You can query Ad hoc presence only if you have Presence Watch Authorization. You can see another user’s presence only if your request is accepted by that user.

To find the address of a user from the Global Address Book and query the user's Presence status from the IM conversation window,

1. Click **Directory** from your PC Phone main window.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the <strong>Directory</strong> tab</td>
</tr>
</tbody>
</table>

Note that the Directory display pane defaults to the PC Phone Address Book.

2. Select the Global Address Book from the drop-down list.

3. Enter the name of the user with whom you wish to start an IM conversation. The name appears in the Directory display pane.

4. Right click on the name and click **Send Instant Message**. An IM window appears, showing the name of the user ‘s current Presence status.
Clearing your instant messages history

When you exchange instant messages with another user, all your conversations are saved and appear in the IM display window during your subsequent conversations. You can save, print, or clear these conversations from the window. Additionally, you can view the time and date of your conversations with a user.

To clear your instant message history in the Standard interface,

1. Select a user from the Personal Contacts tab and right click to select Send Instant Message. The instant message conversation window of the user you selected opens.

2. Click the More commands button. It is the arrow button at the bottom right of your IM window. Options appear, including Clear.


4. Click OK. Your instant message history with the current user is cleared.
Sending IM broadcasts

Sending an IM broadcast enables you to send an instant message to multiple users simultaneously. The ability to send an IM broadcast depends on whether this service is assigned to you.

To send an IM broadcast,

1. Select one of the buttons to open the Instant Message window.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone</td>
<td>More, Broadcast IM under the Call List area.</td>
</tr>
</tbody>
</table>

2. In the Instant Message window, select an address (username, or SIP address).

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select an address from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the Personal Contacts, History, and/or Directory tabs</td>
</tr>
</tbody>
</table>

3. Click Add to place the address into the Participants field.

   The Start IM Broadcast Session button is disabled until you add at least two addresses in the Participants field.

4. Click Start IM Broadcast Session.

   The IM Broadcast window appears.

5. Type your message in the instant message control pane. If you want, format the text by using the font button.

6. Press Enter on your keyboard.

   The IM broadcast you sent appears on your IM Broadcast window.

Tip: The IM Broadcast window sends messages to multiple users simultaneously. It does not receive any messages.
If one of your contacts is offline, a window appears letting you know that your IM broadcast failed to reach this person.

**Using voicemail**

PC Phone gives you point-and-select access to your voicemail service from your organization or network provider. You can access the integrated voicemail commands from your PC Phone only if this service is assigned to you. Contact your service provider for details on obtaining network-based voicemail and ensuring that your unanswered calls go to your network voicemail box.

**Tip:** Before accessing your voicemail through PC Phone for the first time, configure PC Phone to contact your voicemail system.

The ability to use Unified Communications services depends on whether this service is assigned to you.

**Tip:** To use the voicemail service, your PC Phone must have voice enabled.

**Message Waiting Indicator (MWI)**

You can have access to your network-based voicemail server only if this service is assigned to you. If you have support for this service, then, when a user leaves you a voicemail message, PC Phone alerts you that you have voicemail. The voicemail alert you receive depends on your PC Phone user interface.

<table>
<thead>
<tr>
<th>If you use this interface</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the <strong>voicemail</strong> button appears in the Call area, with the message, “You have voice mail.”</td>
</tr>
</tbody>
</table>
With PC Phone with Converged Desktop service, you can use your existing voicemail system to get your voice messages. However, you will not be able to take advantage of the *voicemail* status button on the main GUI. If you host your voicemail off of the network-based voicemail system, the *voicemail* status button flashes and alerts you about your new voicemail messages. Accessing the network-based voicemail server depends on whether this service is assigned to you.

**Accessing your voicemail box**

Before using the *voicemail* button to access your voicemail server, configure PC Phone, providing the command digits for the various voicemail commands.

To access your voicemail box, click the *voicemail* status button on PC Phone main window. PC Phone makes a call to your voicemail server. A Conversation window and extended call control pane appears that enables you to interact easily with the voicemail system.

**Using voicemail functions**

To use the voicemail control pane functions, click the command buttons on the voicemail control pane for the function you wish to perform on the voicemail system. You can also access the integrated dial pad to manually enter commands for the voicemail system.

To access the integrated dial pad,

1. Click **keypad** in the call control pane.
   
   PC Phone displays a dial pad so you can enter digits to send to the voicemail server.

2. Click the digit(s) you want to send to the voicemail server. You can also use your keyboard to type in the digits to send.
Using Assistant Services Routes

Assistant support enables you to designate other users (assistants) to act as primary or alternate assistants. Assistants can monitor, transfer, or route incoming and outgoing calls for you, the assisted user. As an assisted user, you can add assistants to monitor, transfer, or route your incoming and outgoing calls. You can also select a default route to be used for Assistant Service. You can select whether to redirect calls to your own voicemail service or an assistant voice mail service, and set the number of times a phone can ring before the unanswered call is forwarded to an alternate assistant, who makes the routing decision.

Activating and deactivating the Assistant Services Route

Assisted and Assistant users can activate the Assistant Services Route from PC Phone.

The Assistant Support service must be assigned to you, and the Assisted Services Route must already be selected from the Personal Agent.

Assisted user

To enable the Assisted Services Route as an Assisted user, select Tools, Enable Assistant Services Route or the button on the main GUI. The tooltip for the button displays the text “Enable Default Assistant Services Route” if the button is colored and “Disable Default Assistant Services Route” if the button is dimmed.

If default route is not selected, activating the Assistant Services Route returns an error indicating that default route is not selected for Assistant Service.
Assistant user

To enable the Assisted Services Route as an Assistant user,

1. Select the **Assistant Console** button from the main GUI.

   The assistant console shows a list of assisted users.

2. Right-click on an assisted user to display a pop-up menu.

3. Select **Enable Default Assistant Services Route** to activate the Assistant Services Route.

   The menu option displays **Disable Default Assistant Services Route** if the route is already enabled.
Assistant Console consultative transfer

If you are subscribed to Assistant Console service, you have the option of completing or joining a call that you transfer. You can also transfer a caller to an Assisted user’s voicemail. The transfer destination must be logged into PC Phone or a IP Phone.

Consultative transfer and complete or join call

To transfer an active call, announce the caller, and either join or complete the call,

1. Click **Transfer** in the pane for the conversation you wish to transfer.
   
   The **Transfer Call** window appears.

2. Enter a transfer address, such as a telephone number or SIP address, select a **Recent** or **Directory** entry, or select an Assisted user from the drop-down list.

3. Click **Announce Caller** in the **Transfer Call** window.

   The call is put on hold and PC Phone initiates a new call to the transfer destination.

4. To join the call after talking to the Assisted user, click **Join** in the Conversation window to initiate the transfer.
A 3-way conference starts between the Assisted user, Assistant, and the caller being transferred.

5 To complete the call without joining after talking to the Assisted user, click **Complete Transfer** in the Conversation window to initiate the transfer.

A call is established only between the Assisted user and the caller being transferred.

**Transferring a call to Assisted user voicemail**

This procedure requires that Assisted user has voicemail and Unified Communications services assigned.

To announce an active call and transfer the call to an Assisted user’s voicemail,

1 Click **Transfer** in the Conversation window.

   The **Transfer Call** window appears.

2 Enter a transfer address, such as a telephone number or SIP address, select a **Recent** or **Directory** entry, or select an Assisted user from the drop-down list.

3 Click **To Voicemail**.

   The call on hold is transferred to the selected Assisted user’s voicemail. If the Assisted user has a static voicemail redirection, the call is redirected to the selected assistant user’s voicemail.
Presence

Topics in this section:

- "Understanding presence"
- "Managing your presence"

Understanding presence

Presence enables you to see the online status of other users on the network, lets others know your status, and also allows you to be immediately notified when a new watcher is requesting authorization to view your presence. Each presence icon represents a presence state as shown in the following table.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Presence state(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Unknown" /></td>
<td>Unknown</td>
<td>No presence information is available.</td>
</tr>
<tr>
<td><img src="image" alt="Connected" /></td>
<td>Connected</td>
<td>User is registered in network.</td>
</tr>
<tr>
<td><img src="image" alt="Connected Away" /></td>
<td>Connected Away, Out to Lunch, Connected Be Right Back Connected</td>
<td>User is registered in network and has manually set this state to indicate that the user is currently unavailable.</td>
</tr>
<tr>
<td><img src="image" alt="Connected Inactive" /></td>
<td>Connected Inactive</td>
<td>User is registered in network, has automatic presence, and has not accessed the computer, where PC Phone is currently registered, for a period of time.</td>
</tr>
<tr>
<td><img src="image" alt="Unavailable" /></td>
<td>Unavailable</td>
<td>User is registered in network and has manually set this state to indicate that the user may not be reachable, or user is not registered in network.</td>
</tr>
<tr>
<td>Presence State</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Waiting for authorization</td>
<td>A pending state for presence watch authorization (the watch request has not been approved or declined).</td>
<td></td>
</tr>
<tr>
<td>Active Available</td>
<td>User is registered in network, has automatic presence enabled, and is actively using the computer where PC Phone is currently registered.</td>
<td></td>
</tr>
<tr>
<td>Active On the Phone</td>
<td>User is registered in network, has automatic presence, and is actively on a call. You see the yellow icon if you use the standard PC Phone GUI,</td>
<td></td>
</tr>
</tbody>
</table>

You cannot manually set all of the presence states shown in the above table. For example, the **Connected Inactive** state is set by PC Phone automatically when it detects you have been away from your computer for a specified amount of time.

Just as your contacts can see your presence status, you can also see whether they are online, offline, available, or unavailable. If you have a valid user identity of other communities, such as Yahoo, Google, AOL, MSN, and Jabber, and have contacts from these communities in your Communicator personal address book, then you can view the presence status of these contacts from PC Phone.

If you use Lotus Notes, the PC Phone functionality toolbar extension shows the user name and presence status of the PC Phone that is running on the current system. Click the item to display the list of presence states available. When a presence item is selected, the plug-in sets this presence on PC Phone.

**Automatic presence**

You can configure PC Phone to automatically alert others whether you are away from your PC and/or on the telephone.

The ability to configure automatic presence notifications on PC Phone depends on whether this service is assigned to you. If you do not have support for
automatic presence, then you will not be able to use the automatic presence feature.

If automatic presence service is assigned to you, then you can configure your automatic presence settings. To access automatic presence settings, select **Tools, Preferences, Presence**.

Tip: Automatic presence overrides most manual settings, such as **Connected**. The only manually selected presence states that are unaffected by Automatic Presence are “Unavailable” states, for example, **Unavailable Busy**.

---

### Presence watch authorization

You can configure PC Phone to notify you when a new watcher is requesting authorization to view your presence status. You can approve, decline, or ban your contacts from watching your presence information in the “Presence Watchers” window, launched from the View menu within PC Phone. This dialog box appears automatically when a watcher requests authorization. You can also invoke it manually using the **View/Presence Watchers...** option on the PC Phone menu bar. If multiple watchers are requesting presence information, all of them are displayed in the same dialog box.

If you approve the watch request, this particular user will be able to see your presence information when you are offline or online. To approve a watch request, select the “Approve” button in the “Presence Watchers” window. In addition, you can also add the watcher to your Friend list using the “Add to friends” checkbox.

If you decline or ban the watch request, this particular user will not be able to see your presence information when you are offline or online. To decline a watch request, select the “Decline” button in the “Presence Watchers” window. In addition, you can also select the “Show Offline” option, which results in the user’s status appearing as “Offline” to the requestor.

Whenever a user attempts to retrieve the presence of the remote party, the remote party is notified so they can grant the permission or not. The following presence display states are possible:
• “Waiting for authorization” – clock icon - while the user waits for the authorization response from the remote party
• “Unavailable” – gray icon - the user was banned from watching the remote contact presence
• “Offline” – red icon – the remote party possibly chose to appear offline, or the permission was granted and their current presence status is offline
• “Connected” – green/yellow icon – the presence display permission is granted, current state is displayed

Presence Watcher Authorization is an optional feature. The feature is enabled by system administrators only, and it may not be enabled for all subscribers. End users have the ability to opt in or opt out of the feature. If the feature is not available or not enabled for a subscriber, all users can see the subscriber's presence unless explicitly banned by the subscriber using the Personal Agent.

If you approve a watcher's request, your presence information becomes available to them. In addition, you can also add the watcher to your Friend list using the Add to friends checkbox. If you decline a watcher's request, the watcher is not able to see your presence information. Watchers will always see your status as Offline, if you select the Show Offline checkbox.

PC Phone maintains three lists of watchers for each user: Allowed watchers, Banned watchers and Show-Offline watchers. Approving a watch request moves the user to the Allowed list (this list specifies users who can see the subscriber's presence). Declining a watch request moves the watch to the Banned list (this list specifies users who can never see the subscriber's presence). When declining a watch request, the user has the option of selecting the “Show Offline” option, which results in the user's status appearing as “Offline” to the requestor.

A watcher's presence request continues to remain in a pending state as long as you have not approved or declined the request. For a pending watch request, your presence status remains unavailable to the watcher.

Global address book ad-hoc presence

Ad-hoc presence subscription allows users to check presence status of people who are not in their Friends list. In the case of contacts that are defined as
Friends, no ad-hoc presence subscriptions are required since the user is already subscribed to their friends’ presence. For Global Address Book (GAB) and non-friend Communicator personal address book (PAB) contacts, an ad-hoc subscription is created for the lifetime of the Contact Details window. As long as the window is open, the user receives presence updates for that contact. The ad-hoc subscription is terminated when the window is closed.

Managing your presence

Once you are registered with the network, PC Phone allows you to change your presence information at any time. There are several procedures you can use to change your presence in the network:

- “Changing presence state from the main menu”
- “Changing presence state from the presence shortcut menu”
- “Creating custom presence state notes”

Changing presence state from the main menu

To change your presence state using the PC Phone main menu,

1. Select Login, Change My Status.
2. Select the desired presence state from the Change My Status submenu.
   If you selected one of the Unavailable states, the Unavailable Setting window appears.

   ![Unavailable Setting Window]

   You will remain 'Unavailable' until you manually change your presence status to 'Connected'. Do you want to continue?

   OK Cancel

3. Click OK to change your presence to the selected Unavailable state, or click Cancel to stop the presence change operation, leaving your current presence state unchanged.
   PC Phone presence state status display indicates your new presence state.

   ![Unavailable Busy]
Changing presence state from the presence shortcut menu

The procedure to change your presence state using the presence state shortcut menu is identical to changing it from the PC Phone main menu. The only difference is in accessing the presence state menu.

To initiate a presence change using the presence state status display shortcut menu, left-click or right-click on the presence state status display and select the desired presence state from the shortcut menu.

Creating custom presence state notes

PC Phone allows you to add a presence note associated with either the **Connected** or **Unavailable** presence states. Other users will see your note next to your presence state.

To create a custom presence state note,

1. Select **Login, Change My Status**. Select the **New Note** menu item to bring up the **New Presence State** window. You can also select **New Note** from the presence state shortcut menu.
Type your note in the text area provided. Your note can be up to 32 characters long.

Select one of the State option buttons to choose the presence state for your note.

Click OK to save your note and change your current presence state to the new one you have just defined, or click Cancel to exit without saving the new note and leaving your current present state unchanged.

The PC Phone presence state display indicates your new presence state.

Managing custom presence state notes

To view and manage a list of the presence state notes that you create:

1. Select Login, Change My Status. Select the Manage Notes menu item to bring up the window. You can also select Manage Notes from the presence state shortcut menu.

2. To create a new custom presence state note, click Insert to bring up the New Presence State window.

3. Type your note in the text area provided. Your note can be up to 32 characters long.

4. Select the presence state for your note by clicking one of the State option buttons.

5. Click OK to save your note or click Cancel to exit the New Presence State window without saving the new note.

6. To modify an existing note, click the Modify button to bring up the Modify
Presence State window.

7 To delete an existing note from the list, select the note and click Remove.

8 To change the order of the list of notes, select a note and click the Up or Down buttons.

9 Click OK to save all changes and close the Manage Notes window, or click Cancel to exit without saving any changes.

Routing your calls based on your presence state

If you have Presence-based routing service assigned, you are able to route your incoming calls in a specific way if your presence state is one of the following:

- Unavailable Busy
- Active on the Phone
- Unavailable on Vacation
- Unavailable Offline

Incoming calls will not ring on your clients. To create routes for your incoming calls, use the Route Wizard in the Personal Agent.

Managing your contacts and calls

Topics in this section:

- “Managing your call logs”
- “Managing your Communicator personal address book”
- “Using the Communicator global address book”
- “Managing your Friends”
- “Synchronizing address books”
Managing your call logs

PC Phone keeps a record of all incoming and outgoing calls. All call log entries are stored into an inbox (for incoming calls) and an outbox (for outgoing calls).

**Tip:** To access your call logs, PC Phone must have voice enabled.

Checking your inbox

To check your inbox for your incoming calls,

1. Click **Call Logs** from the PC Phone main GUI, or select **View, Call Logs** from the main menu. The main GUI window expands to show the Call Logs display pane of PC Phone.

2. Select **Inbox** in the Call Logs display pane to view your inbox entries.

**Tip:** Sort the entries in your inbox by any of the displayed columns by clicking the column name. To sort in reverse, click on the column name again.

Your missed calls are highlighted in bold and blue color. Note that when a Converged Desktop user makes a call that no one answers, the client does not populate the outbox.

**Tip:** The ability to separate the Call Logs display pane from the PC Phone main GUI is not available in the Standard PC Phone interface.

To separate the Call Logs display pane from the main GUI,

1. Click and drag the Call Logs display pane title bar away from the Personal Communicator main GUI.
2 Release the mouse button and the Call Logs display pane becomes its own Call Logs window.

Tip: You can re-attach the Call Logs window to the PC Phone main GUI by dragging the Call Logs window back to the bottom display area of the PC Phone main GUI and releasing the mouse button.

Viewing your missed calls

If you miss a call on your PC Phone, the main window shows an icon indicating missed calls and also identifying the number of missed calls. In the PC Phone Standard interface, this icon appears only when you have missed calls.
Returning a missed call

In the inbox, your missed calls are colored blue and bold highlighted. To return a missed call, double-click on a missed inbox entry.

PC Phone initiates a call to the address of the selected call log entry.

Tip: An alternate method for returning a call in the Call Logs is to right-click on a call log entry and select Call from the shortcut menu.

Acknowledging missed call log entries

To acknowledge a missed call log entry, click on a missed call log entry.

PC Phone removes the blue and bold highlighting of the missed call log entry.

Checking your outbox

To check your outbox for a list of your outgoing calls,

1 Click Call Logs from the PC Phone main GUI, or select View, Call Logs from the main menu.

The window expands to include the Call Logs display pane.

2 Select Outbox in the Call Logs display pane to view your outbox entries in PC Phone.

Tip: Sort the entries in your outbox by any of the displayed columns by clicking the column name. To reverse the sort, click on the column name again.

Deleting call log entries

To permanently delete a call log entry,

1 Select the call log entry you wish to delete.
2 Delete the entry as shown in the following table.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select one of the options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>• Right click the call log entry and click Delete.</td>
</tr>
<tr>
<td></td>
<td>• Right click the call log entry and press Delete on your keyboard.</td>
</tr>
<tr>
<td></td>
<td>• From the bottom of the call logs panel, click More &gt; Delete Entry.</td>
</tr>
</tbody>
</table>

A Delete Call Log Entries dialog box appears.

3 Click Yes to delete the call log entry.

Tip: You can remove multiple call log entries from the inbox (or outbox) at the same time. Select a range of multiple entries (using either shift-click or ctrl-click) and then click Delete Entry.

Saving call log entries

You can save your call log entries from your inbox or outbox onto your PC.

To save your call log entries on your PC,

1 Select Inbox or Outbox.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>More commands, Save Call Logs</td>
</tr>
</tbody>
</table>

2 Select the folder where you wish to save the call log entries.

For example, you can save the file on your desktop.

3 Click Save. The file is automatically saved as a .txt file.
Managing your Communicator personal address book

Your personal address book helps you manage, track, and access information about all of your key contacts. You can choose how PC Phone displays your contacts. When you sign in, your personal address book is downloaded and synchronized from the network.

Viewing your Communicator personal address book using the Standard interface

To display your Communicator address book, click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu. The window expands to show the Directory display pane.

**Tip:** Sort the entries in your personal address book by any of the displayed columns by clicking the column name. To sort in reverse, click on the column name again.
Communicator personal address book entry commands

From a selected Directory entry, the PC Phone allows you to access many commands. To see what commands are available for a selected personal address book entry,

1. Select the Directory entry.
2. Right-click on the Directory entry to display a shortcut menu of available actions.
3. Select the action you wish to perform on the entry.

<table>
<thead>
<tr>
<th>Select</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>Call the user using their primary contact address.</td>
</tr>
<tr>
<td>Call at</td>
<td>Call the user at a specified PSTN number.</td>
</tr>
<tr>
<td>Send Instant Message</td>
<td>Send an instant message to the user.</td>
</tr>
<tr>
<td>View Details</td>
<td>Display detailed information about the user.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the contact information for the user or remove the user from your personal address book.</td>
</tr>
<tr>
<td>Delete</td>
<td>Remove the user from your personal address book.</td>
</tr>
<tr>
<td>Friend</td>
<td>Add or remove the user to your Friends Online list.</td>
</tr>
<tr>
<td>Show availability</td>
<td>Add or remove the user to your Personal Contacts list.</td>
</tr>
<tr>
<td>Trusted user</td>
<td>Accept files or use the sharing capability with your contact without receiving the Accept option.</td>
</tr>
<tr>
<td>Email</td>
<td>Send an email to the user.</td>
</tr>
<tr>
<td>Send File</td>
<td>Send a file to the user.</td>
</tr>
<tr>
<td>Sharing (if enabled)</td>
<td>Start a sharing conversation with the user.</td>
</tr>
</tbody>
</table>
The list of available shortcut actions depends on how much information is available for the address book entry. For example, if the selected address book entry has a home phone number, then an option to call the user at that home phone number also appears on the action menu.

Adding a personal address book entry

PC Phone allows you to add entries to your personal address book. The maximum number of personal address book entries you can add depends on your services.

You can communicate with users from other communities, such as Yahoo, Google, AOL, MSN, and Jabber by adding their contact information in your personal address book. To successfully communicate with external communities, you must do the following:

- Get access to the XMPP Gateway service from your voice service provider (an Enterprise or Carrier).
- Use the Personal Agent to configure the XMPP Gateway service with your external gateways' credentials.
- Strictly follow the naming conventions as shown in the following table:

<table>
<thead>
<tr>
<th>For this user</th>
<th>Use this naming convention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yahoo user</td>
<td>user@yahoo</td>
</tr>
<tr>
<td>AOL user</td>
<td>user@aol</td>
</tr>
</tbody>
</table>
| Google user  | • user@gtalk (if the user's domain is gmail.com)  
               • user@gtalk.domain (if the user's domain is not gmail.com) |
| MSN user     | • user@msn (if the user's domain is hotmail.com)  
               • user@msn.domain (if the user's domain is not hotmail.com) |
| Jabber user | • user@xmpp (if the contact is hosted on the same XMPP gateway server as the subscriber)  
               • user@xmpp.domain (if the contact is hosted on another XMPP gateway server) |
If you are offline and try to add a new contact, but you have exceeded the maximum number of offline contacts, the following message appears: “No more entries can be added while logged out. Please log in first.”

To add a new personal address book entry,

1. Click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2. Click **Add Contact** in the Directory display pane.

   PC Phone displays a new **Contact Details, Add** window.

3. Enter the data for the new address book entry in the appropriate text field.

   It is recommended that you provide as much information as possible for your contacts. However, all fields are optional except **Nickname**, **SIP**, and **Preferred Contact**. Provide values for **Nickname**, add a primary contact (SIP address or phone number) for **SIP**, and specify a **Preferred Contact** from the drop-down list.

   **Preferred Contact** specifies the preferred method of calling the contact. When you call a contact in Directory or Friends Online windows (by double-clicking on the entry or by right-clicking on the entry and selecting “Call <contact>” from the shortcut menu), the preferred contact field is dialed.

   The information you add as your contact’s nickname is displayed where applicable, in all modes of PC Phone.

   By default, the preferred method of contact is the contact’s SIP address. Other possible values are Home Phone, Business Phone, Mobile, Pager, and Fax.

---

**Tip:** If you do not specify a SIP address, PC Phone generates one using the preferred contact field that you specify. For example, if the preferred contact is “Home Phone” with number 555-5555, a SIP address like “5555555@domain.com” is generated. It is not guaranteed that the SIP address generated will be valid and usable (for example, for making calls or marking as friend). If you create a contact without specifying a SIP address, all that can be guaranteed is that an attempt to call that contact at the preferred number will be made.
If you want to place this entry in a directory group, select the group as shown in the following table:

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Preferred Contact Group</td>
</tr>
<tr>
<td></td>
<td>drop-down list</td>
</tr>
</tbody>
</table>

If you want to select a particular ring tone for your contact, see below “Selecting ring tones for contacts”

If you want to receive presence information about this user, select the check box as shown the following table.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the Show availability check box</td>
</tr>
<tr>
<td></td>
<td>If the presence service is not assigned to you, then you cannot access this check box.</td>
</tr>
</tbody>
</table>

If you wish to accept files and other sharing actions with this contact without getting the Accept option, select the Trusted user check box. This check box is visible only if Client Collaboration service is enabled for this contact.

Click Save to save your changes or Cancel to exit without saving.

Selecting ring tones for contacts

You can select a ring tone for a contact in your personal address book so that you can identify the incoming calls from this contact without looking at the incoming call window.

Ring tones are stored as .wav files in PC Phone installation directory. Ask your system administrator if other ring tones are available.

To select a ring tone for a new or existing personal address book entry,

1. Click Add Contact in the Directory display pane.

   A new Contact Details, Edit window appears, or right-click on an existing address book contact name and select Edit.
2 Enter the data for the new address book entry in the appropriate text field.

3 Locate your .wav ring tone file as shown in the following table.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “...” button under the Custom Ring field</td>
</tr>
</tbody>
</table>

A navigation window opens.

4 Navigate to the directory location of your .wav ring tone files and select a file.

5 Click Open.

The file path to the ring tone appears in the field. Incoming calls from this contact will sound this ring tone.

6 Click the “>” button to hear the ring tone you have selected.

7 Click Save.

**Viewing a personal address book entry**

To view the details of a personal address book entry,

1 Select the Directory entry.

2 Right-click on the Directory entry and select View Details from the shortcut menu of available actions.

PC Phone displays a Contact Details window for the selected entry.

---

**Tip:** You can initiate a call to a specific number (or address) shown in the Contact Details window by clicking on the highlighted field.

---

**Editing a personal address book entry**

To edit the details of a personal address book entry,

1 Select the Directory entry.
2  Right-click on the **Directory** entry and select **Edit** from the shortcut menu of available actions.

   PC Phone displays a **Contact Details, Edit** window for the selected entry.

3  Enter any data you wish to change in the appropriate text field.

4  If you want to place this entry in a different directory group, use the **Group** drop-down list to select the group for the entry.

5  If you want to receive presence information about this user, select the check box as shown the following table.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the <strong>Contact is a friend</strong> check box.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the presence service is not assigned to you, then you cannot access this check box.</td>
<td></td>
</tr>
</tbody>
</table>

6  Click **Save** to save your changes or **Cancel** to exit without saving.

**Deleting a personal address book entry**

PC Phone allows you to remove personal address book entries. Your personal address book is stored on the network and shared by all clients where you are logged on. When you delete an address book entry, it no longer appears on any of your clients (including the Personal Agent). If you remove an address book entry using the Personal Agent, that entry is also removed from the Communicator address book.

To delete a personal address book entry,

1  Click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2  Use the following table to select the **Delete Contact** button.
In this interface

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “&gt;” button and select Delete Contact</td>
</tr>
</tbody>
</table>

A delete confirmation dialog box appears.

3 Select Yes to delete the address book entry.

**Tip:** You can remove multiple address book entries from your personal address book at the same time. Select a range of multiple entries (using either shift-click or ctrl-click) and then click Delete Contact.

Adding a new group to your personal address book

PC Phone allows you to organize your personal address book entries into address book groups. For example, you can group contacts for a major project into one category, personal contacts in another, and administrative contacts in another.

To add a new directory group,

1 Click Directory on the PC Phone main GUI, or select View, Directory from the main menu to bring up the Directory display pane.

2 Select the Edit Groups button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “&gt;” button and select Edit Groups</td>
</tr>
</tbody>
</table>

PC Phone displays the Groups window.

3 Select the <Add New Group> label and type in the name of the new group.

4 Press Enter. The group name is added to the list of groups.

**Tip:** You can create additional groups without closing the Groups window. Repeat Step 3 and Step 4 for each new group name you wish to create.

5 Click Close when you are done adding new group names.
Renaming a group in your personal address book

PC Phone allows you to rename groups in your personal address book.

If a group that contains address book entries is renamed, then all the entries are automatically moved to the renamed group.

To rename a personal address book group,

1 Click Directory on the PC Phone main GUI, or select View, Directory from the main menu to bring up the Directory display pane.

2 Select the Edit Groups button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “&gt;” button and select Edit Groups</td>
</tr>
</tbody>
</table>

PC Phone displays the Groups window.

3 Double-click on the group you wish to rename to activate edit mode on the group.

4 Type in the new name of the group and press Enter.

The group has now been renamed.

Tip: Additional groups can be renamed without closing the Groups window. Repeat Step 3 and Step 4 for each group you wish to rename.

5 Click Close when you are done renaming groups.
Removing a group in your personal address book

PC Phone allows you to remove groups in your personal address book.

If a group that contains address book entries is removed, the entries are not removed. Those address book entries remain in your personal address book but are not associated with a group.

To remove a personal address book group,

1. Click Directory on the PC Phone main GUI, or select View, Directory from the main menu to bring up the Directory display pane.
2. Use the following table to select the Edit Groups button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “&gt;” button and select Edit Groups</td>
</tr>
</tbody>
</table>

3. Select the group you wish to remove.
4. Click Remove to remove the group.

---

Tip: Additional groups can be removed without closing the Groups window. Repeat Step 3 and Step 4 for each group you wish to remove.

Searching for an entry in your personal address book

PC Phone allows you to quickly search for a contact in your personal address book.

To search for a name in your personal address book,
1 Click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Type the name of your contact.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Type the name of your contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal</td>
<td>in the field under the Personal Contacts tab</td>
</tr>
<tr>
<td>Communicator</td>
<td></td>
</tr>
</tbody>
</table>

3 Search the person’s nickname, first name, last name, phone number, or SIP address from the drop down list.

The window displays the name of the person.

Using the Communicator global address book

The Communicator global address book is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

You have access to the global address book if it has been enabled by your system administrator. You will receive the following message if the address book is not enabled: “The global address book has been disabled by the network system administrator.”
Viewing the global address book using the Standard interface

To display your Communicator global address book,

1  Click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu. The window expands to show the Directory display pane.

   **Tip:** The drop-down list defaults to the personal address book entry.

2  To view entries, select the Global Address Book from the drop-down list under the Call Logs tab.

Viewing the global address book – List View

To display the global address book in list view,

1  Click **Directory** on the PC Phone main toolbar or select **View, Directory** from the main menu.

   The main GUI window expands to show the Directory display pane.

2  Select **Global Address Book** from the **Look in** field.

3  Select the **List View** tab in the Directory display pane to view the global address book entries in a list view.
Viewing the global address book – Card View

Viewing a global address book entry

To view the details of a global address book entry,

1. Select the **Directory** entry.
2. Right-click on the **Directory** entry and select **View Details** from the shortcut menu of available actions.

PC Phone displays a **Contact Details** window for the selected entry.

**Tip:** You can initiate a call to a specific number (or address) shown in the Contact Details window by clicking on the highlighted field.

Global address book entry commands
From a selected **Directory** entry, PC Phone allows you to access many commands.

To see what commands are available for a selected global address book entry,

1. Select the **Directory** entry.
2. Right-click on the Directory entry to display a shortcut menu of available actions.

![Shortcut Menu Example](image-url)
4 Select the action you wish to perform on the entry.

<table>
<thead>
<tr>
<th>Select</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>call the user using their primary contact address.</td>
</tr>
<tr>
<td>Call at</td>
<td>call the user at a specified PSTN number.</td>
</tr>
<tr>
<td>Send Instant Message</td>
<td>send an instant message to the user.</td>
</tr>
<tr>
<td>View Details</td>
<td>display detailed information about the user.</td>
</tr>
<tr>
<td>Add Contact</td>
<td>add the contact information to the Personal Address Book.</td>
</tr>
<tr>
<td>Email</td>
<td>send an email</td>
</tr>
<tr>
<td>Send File</td>
<td>send a file to the user.</td>
</tr>
<tr>
<td>Sharing (if this service is</td>
<td>start a sharing conversation with the user.</td>
</tr>
<tr>
<td>assigned to you)</td>
<td></td>
</tr>
</tbody>
</table>

Searching for an entry in the global address book

PC Phone allows you to quickly search for a contact in the global address book. (You can also perform this search from Outlook, if the Outlook Plug-in is enabled.)

To search for a name in your global address book,

1. Click **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2. Select **Global Address Book**.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td><strong>Global Address Book</strong> from the drop-down list under the <strong>Call Logs</strong> tab</td>
</tr>
</tbody>
</table>
3 Type the name of your contact.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Type the name of your contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>in the field under the <strong>Personal Contacts</strong> tab</td>
</tr>
</tbody>
</table>

From the PC Phone interfaces, you have the option of searching by the person’s name, first name, last name, phone number, or SIP address. If the search string you enter is too broad, you may receive the following message “User search will return too many entries. Please refine your search criteria.” In this case, modify the criteria in the text box to narrow down your search so that your search results will appear.

If a global address book search matches more than 100 entries, the following error message appears and no results appear: “User search will return too many entries. Please refine your criteria.”

**Importing contacts from Microsoft Outlook**

**Note:** When the Outlook Plug-in is enabled, you can import contacts only in CSV form.

PC Phone allows you to import contacts from your Microsoft Outlook email application main contact list to your Communicator address book.

To start the Import Contacts command,

1 **Click** **Directory** on the PC Phone main GUI, or select **View, Directory** from the main menu to bring up the Directory display pane.

2 Use the following table to select the **Import Contacts** button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the “&gt;” button and select <strong>Import Contacts</strong></td>
</tr>
</tbody>
</table>
3 From the **Import Contacts** window, click on **Import**.

Microsoft Outlook displays a security window when PC Phone attempts to access the contacts list in Outlook.

![Security Window Image]

4 Select the **Allow access for** check box and select **1 minute** from the drop-down list.

There may be a short delay while PC Phone retrieves the information from Outlook.

Depending on your security settings, the Microsoft Outlook security window may not appear on your computer.

After PC Phone retrieves the information, the main GUI expands to show the Outlook Contacts Import display pane.

---

**Tip:** Sort the entries by any of the displayed columns by clicking the column name. To reverse the sort, click on the column name again.

---

**Importing the results of the Import Contacts command**

Once PC Phone has obtained the contact information from Outlook, the Import Outlook Contacts pane displays a list of all the contacts that you can now add to your personal address book.

To import Outlook contacts into your personal address book,

1 Select an entry in the Import Outlook Contacts display pane list.

2 Select a group from the **Group** drop-down list. Select **<none>** if you do not want to add the contact to a group.

3 Click **Add Contacts** and the contact is added to your personal address book.
If the entry you select is missing a required field, an error message appears and allows you to enter the missing field data.

4 Repeat Step 1 through Step 3 for each Outlook contact you wish to add to your personal address book.

**Tip:** You can import multiple contacts at the same time. Select a range of multiple entries (using either shift-click or ctrl-click), select the directory group, and then click *Add Contacts*. These contacts are added to your personal address book in the group you selected.

---

**Importing contacts from Microsoft Outlook Express**

PC Phone allows you to import contacts from your Microsoft Outlook Express email application main contact list to your personal address book.

From the Import Contacts window,

1 Under **Select the source of new contacts:** select the option, *Outlook Express.*
2 Click the Import button to display the contents of the Outlook Express address book.

3 Import the contacts by either individually selecting a contact and clicking Add Contacts or by multi-selecting contacts (using the Shift or Ctrl keys) and then clicking Add Contacts.

Importing contacts from CSV files

PC Phone allows you to import contacts from Comma Separated Values (CSV) files to your personal address book.

From the Import Contacts window,

1 Under Select the source of new contacts, select the option, CSV File.
2 Click the Browse button that appears to the right and navigate to the CSV file to import. The name of the selected CSV file appears next to List of Found Contacts:

3 Click the Import button to display the contents of the CSV file.

4 To assign different names for the column headings, double-click on a column heading in the grid and select a name from the list (First Name, Last Name, SIP Address, Email, Home Phone, Business Phone, Mobile Phone, Pager, Facsimile).

Tip: Duplicate column names are not allowed.

Tip: The Nick Name heading cannot be changed during the import process, however, it can be changed after the contact is imported into the address book.
5 Import the contacts by either individually selecting a contact and clicking Add Contacts or by multi-selecting contacts (using the Shift or Ctrl keys) and then clicking Add Contacts.

6 If the CSV file is not formatted correctly, the following error message is displayed.

Managing your Friends

PC Phone allows you to mark personal address book entries as Friends and displays the presence information for these Friends.

Friends can prevent you from seeing their presence information. See the A2 Communications Application Server Personal Agent User Guide (NN48111-119) for more information about how to ban users from seeing your presence information.

Your services determine the maximum size of your personal address book and the maximum number of entries that you can have as Friends.

Viewing your Friends online

To see the presence information for your Friends, select View, Friends from the main menu or select one of the following options.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the Personal Contacts tab</td>
</tr>
</tbody>
</table>
Entry commands for your contacts

From a selected contact that is designated as your friend, the Personal Communicator allows you to access many commands.

To see what commands are available for a selected personal address book entry,

1 Select one of the following the options, depending upon your Personal Communicator interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the <strong>Personal Contacts</strong> tab</td>
</tr>
</tbody>
</table>

2 Right-click on the entry to display a shortcut menu of available actions.

3 Select the action you wish to perform on the entry.

<table>
<thead>
<tr>
<th>Select</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>Call the user using their primary contact address.</td>
</tr>
<tr>
<td>Call at</td>
<td>Call the user at a specified PSTN number.</td>
</tr>
<tr>
<td>Send Instant Message</td>
<td>Send an instant message to the user.</td>
</tr>
<tr>
<td>View Details</td>
<td>Display detailed information about the user.</td>
</tr>
<tr>
<td>Show availability</td>
<td>Add or remove the user to your Personal Contacts list.</td>
</tr>
<tr>
<td>Trusted user</td>
<td>Accept files or use the sharing capability with your contact without receiving the <strong>Accept</strong> option.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the contact information for the user or remove the user from your personal address book.</td>
</tr>
</tbody>
</table>
The list of available actions also depends on the information available in the address book entry as your friend. For example, if the selected Friend has a home phone number in its address book entry, then an option to call the Friend at the home phone number also appears on the action menu.1

Adding an entry as Friend

To make a Communicator address book contact a Friend,

1  Click Directory on the PC Phone main GUI, or select View, Directory from the main menu to bring up the Directory display pane.

2  Right-click on the Directory entry and select Friend to mark this entry as a Friend.

   The selected entry is now marked as a Friend and appears under a different menu.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Friend entry appears in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Personal Contacts entries</td>
</tr>
</tbody>
</table>
3 Select **View, Friends** from the main menu or select one of the following options.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>the <strong>Personal Contacts</strong> tab</td>
</tr>
</tbody>
</table>

The window expands to show all your Friends entries. The newly added Friend now appears in the display pane.

**Deleting a Friend**

There are two way to delete a friend from the Communicator address book. To delete a Friend using the context menu,

1 Right click on the Friend contact.

2 Select **Delete** from the context menu. The contact is removed from the view, tab, and Communicator address book.
Or,

1. Select the entry you marked as a **Friend**.
2. Right-click on the entry and select **Friend** to mark this entry as not a Friend. The checkmark against the Friend icon disappears.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>The deleted friend does not appear in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal</td>
<td>the <strong>Personal Contacts</strong> list</td>
</tr>
<tr>
<td>Communicator</td>
<td></td>
</tr>
</tbody>
</table>

**Tip:** To remove a Friend from the Directory display pane, right-click on an address book entry, and select **Friend** to unmark the entry as a Friend.

**Synchronizing address books**

When you first open PC Phone with the Outlook plug-in enabled, custom fields from your Communicator address book are added to the contact details window in your Outlook contacts list, shown below in Outlook 2007 (left) and Outlook 2010 (right).
When you add a contact to Outlook, enter information the new fields so that you can also use the contacts in PC Phone.

How synchronization works

During synchronization, the Outlook contacts list and the Communicator address book attempt to match entries by their email addresses, SIP addresses, and Nicknames.

When a new or changed Communicator address book entry is being synchronized to Outlook, an attempt is made to locate a matching Outlook contact by email address, then by SIP address.

- If either one is found, then the Communicator address book entry fields are used in the Outlook Contact form.
• If more than one matching Outlook contact is found, then only the first one in the list is used.
• If no matching Outlook contacts are found, then the Communicator address book entry is added to Outlook contacts.

During the synchronization, Outlook contact fields take precedence over those in the Communicator address book. Outlook contact form entries are retained, unless the fields are empty. If they are empty, then Communicator address book fields are used in the Outlook fields.

After synchronization the matching or added contact will automatically have the **Keep a copy of this contact in Communicator Address Book** checkbox selected in the Outlook contact form.

**Synchronizing from PC Phone to Outlook**

If you add a contact to the Communicator address book, the contact is added to your Outlook contact list with the **Keep a copy of this contact in the Communicator Address Book** checkbox selected in the Outlook contact form.

If you add a contact to the Communicator address book as a **Friend**, the contact is added to your Outlook contact list with the **Keep a copy of this contact in the Communicator Address Book** and **This contact is a friend** checkboxes selected in the Outlook contact form.

If you add a contact to the Communicator address book as **Trusted**, the contact is added to your Outlook contact list with the **Keep a copy of this contact in the Communicator Address Book** and **Trusted user** checkboxes selected in the Outlook contact form.

If you delete a contact from your Communicator address book, the **Keep a copy of this contact in the Communicator Address Book**, **Friend** and **Trusted User** checkboxes are automatically deselected, but the contact remains on you Outlook contact list.
Sharing

Topics in this section:

- “Understanding sharing”
- “Starting a sharing conversation”
- “Ending a sharing conversation”
- “Sending web pages”
- “Transferring files”
- “Sharing a whiteboard”
- “Transferring the clipboard”

You must have the sharing services assigned to you to be able to send files, share a whiteboard, transfer the contents of your clipboard, and send web pages to a remote user.

If some or all of the client collaboration services described in this section are not assigned to you, then you will not be able to use the various sharing features. As a result, the following icons may not be present in the GUI:

- Share
- Send File
- Share Whiteboard
- Transfer Clipboard
- Send Web Page

Understanding sharing

PC Phone enables two users to team together in a multimedia sharing conversation and enables one PC to support multiple peer-to-peer sharing conversations simultaneously. The table shows the sharing tools that the PC Phone offers.

<table>
<thead>
<tr>
<th>This tool</th>
<th>Enables you to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send File</td>
<td>send files to the remote user.</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Share Whiteboard</th>
<th>collaborate with the remote user by entering text and graphic objects in a shared workspace. Both you and the remote user can manipulate and view the shared whiteboard equally.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer Clipboard</td>
<td>send the contents of your Windows system clipboard.</td>
</tr>
<tr>
<td>Send Web Push</td>
<td>send web pages to the remote user.</td>
</tr>
</tbody>
</table>

**Tip:** With the exception of the **Send Web Push** command, the **Sharing** actions are only available when the other user is also using PC Phone.

When you start a sharing session with a user, you receive an Accept request to begin the sharing action, such as sending a web page, transferring a clipboard, sharing a whiteboard, or sending or receiving a file. If you wish to eliminate the Accept request in a sharing session with your contact, configure this contact as a Trusted User in the contact's details window. Sharing sessions from Trusted Users are accepted without having to submit or receive an Accept request.

**Starting a sharing conversation**

PC Phone allows you to access the sharing commands at any time. For example, you can access them during an already established voice conversation or start a sharing conversation without establishing a voice conversation with the remote party.

**Tip:** To use sharing capabilities during a call, PC Phone must have voice enabled.

There are multiple ways to start a sharing conversation with or without being on a call on PC Phone. The following table shows the most common ways to start the sharing conversation.

<table>
<thead>
<tr>
<th>To share from this interface</th>
<th>You can</th>
</tr>
</thead>
</table>
**Starting a sharing conversation during a call using the Standard interface**

To access the sharing tools during a voice conversation using the Standard PC Phone interface,

1. Make or answer a call.
2. Select the sharing option you wish to use under the Call List area.

<table>
<thead>
<tr>
<th>To</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send a file</td>
<td>Send file.</td>
</tr>
<tr>
<td>Transfer clipboard</td>
<td>More Commands, Transfer Clipboard.</td>
</tr>
<tr>
<td>Send a web page</td>
<td>More Commands, Send Web Page.</td>
</tr>
<tr>
<td>Share Whiteboard</td>
<td>More Commands, Share Whiteboard.</td>
</tr>
</tbody>
</table>

A separate window opens, showing that the sharing action you selected is pending.
Starting a Whiteboard, Clipboard, and Web Page sharing conversation without a call

To start a sharing conversation to access the Share Whiteboard, Transfer Clipboard, or Send Web Page sharing tools,

1 Select one of the following **Sharing** options.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Use one of these options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone interface</td>
<td>• Right-click on any <strong>Personal Contacts</strong>, <strong>Directory</strong>, or <strong>Call Logs</strong> entry, and then select <strong>Sharing</strong> from the shortcut menu.</td>
</tr>
<tr>
<td></td>
<td>• Type a number or an address in the Call area and click the <strong>More Commands</strong> from the shortcut menu to select <strong>Transfer Clipboard</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Send Web Page Share</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Whiteboard</strong>.</td>
</tr>
</tbody>
</table>
Ending a sharing conversation

To end a sharing conversation, select one of the following options.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Use this option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Shut down the Sharing window.</td>
</tr>
</tbody>
</table>

Sending web pages

PC Phone lets you push (send) web pages for display on another user’s screen. It also enables you to view web pages pushed from another user.

Pushing a web page to another party on an active call

To push the active web page on your browser to another party on an active call,

1. Make or answer a call.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone interface</td>
<td>More Commands, Send Web Page under the Call List area.</td>
</tr>
</tbody>
</table>

PC Phone displays a window to enter or confirms a web page selection to be pushed to the remote computer.
2 Enter a URL and click OK to push the web page to the other computer.

Pushing a web page to another party not on an active call

To push the active web page on your browser to another party not on an active call,

1 Select the contact you wish to send the web page to.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Do this</th>
</tr>
</thead>
</table>
| Standard Personal Communicator          | • Type the name or SIP address of the party in the Call area.  
|                                         | • Select the name or SIP address from the Personal Contacts tab, Directory tab, or Call Logs tab. |

2 Click the Send Web Page option.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>More Commands, Send Web Page</td>
</tr>
</tbody>
</table>
3 If PC Phone was able to communicate with a compatible running web browser application, a Confirm Web Push window appears, with the current web page URL already entered for you. Click Yes to push the web page to the other computer.

4 If PC Phone was unable to communicate with a compatible running web browser application, an empty Web Push window opens. Enter a URL and click OK to push the page to the other computer.

Receiving web pages

When you receive a web page, the following window appears depending upon your interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>You see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>a sharing window, showing the URL of the web page you received</td>
</tr>
</tbody>
</table>

1 Click Open to view a received web page.

PC Phone opens your default web browser application and displays the received page. PC Phone also displays a dialog box where you can choose whether PC Phone automatically displays future received web pushes from the far end.
2 Click **OK** to have PC Phone automatically display future received web pushes from this remote party.

---

**Tip:** GENBAND recommends that you allow PC Phone to automatically view received web pages, especially if the remote party is using PC Phone’s co-browsing feature. This way you won’t have to click **Open** for every web page you receive.

---

**Co-browsing web pages**

During a web push, if PC Phone is able to communicate with a compatible running web browser application, you have the option to set PC Phone to automatically push any subsequent web pages you view to the remote computer.

---

**Tip:** Co-browsing is not available when using PC Phone with Converged Desktop service or when pushing a web page to a user not on an active call.

---

To use Co-browsing, you must have a compatible browser application running. Internet Explorer version 6.0 and above or Firefox version 2.0 and above is recommended.

To activate co-browsing when pushing a web page,

1 Select the **Enable auto web** push check box from the Confirm Web Push window.
PC Phone automatically sends all subsequent pages you view to the other computer.

While co-browsing (auto web push) is active, the Send Web Page button flashes in the sharing control pane for the Conversation window.

While co-browsing, keep in mind that when you click on a new web site (another URL), the user on the remote PC is also able to see this web site (the new URL). However, if you select a link and go to another page on the same URL, the user on the remote PC does not see the updated page.

If PC Phone receives a web page while auto web push is active, it deactivates auto web pushing. This prevents two PC Phone systems from getting into a web-pushing loop with each other.

Transferring files

PC Phone lets you send (and receive) files to (and from) another user’s PC Phone. Once a conversation has been successfully started, two users can exchange files using the Send File sharing tool.

Sending files

To send a file,

1 Select the Send File option.
PC Phone displays a file selection dialog window where you can select a file to send to the remote computer.

2 Using the file dialog, select a file and click **Open** to initiate the file transfer.

**Tip:** You can also send a file through the drag-and-drop method. Click the file you wish to transfer on your desktop. Drag the file and drop it in the Conversation window or an Instant message window. This automatically initiates a file transfer.

PC Phone contacts the remote party and waits for the file send request to be accepted or rejected. While waiting for remote party acceptance, the file transfer appears in the pending state.

**Tip:** Before the far end has accepted or rejected your file send request, you can cancel the file send action. Click **Stop** to cancel the file send.

If the remote party accepts the file transfer, the file is sent, and the sharing window indicates that the file has been sent successfully.
If the remote party rejects the file transfer, the file is not sent, and the sharing window indicates that the file transfer has failed.

Receiving files

When the remote party requests a file transfer to you, PC Phone displays the file transfer request in the pending state.

To accept the file, click Accept in the sharing window. The file transfers to your computer. The sharing window displays the Accepted message when the file transfer is complete.

Tip: You do not receive the Accept option in the sharing window, if you have configured the user sending the file as a Trusted User.

To reject the file, click Reject in the sharing window. The sharing window displays the Failed message, indicating the file transfer has not been transferred.

Accessing received files

After a file has been successfully received, you can open an Internet Explorer window to access the transferred file. PC Phone provides quick access to the received file.

To locate the file, click Open in the sharing control pane.
PC Phone opens an Internet Explorer window directory to its incoming file directory.

Sharing a whiteboard

PC Phone lets you and another user share a common drawing window. The **Share Whiteboard** tool lets both users draw to the window and see the results of the shared whiteboard.

Sending a share whiteboard request

To start sharing a whiteboard,

1. Select the sharing option.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td><strong>More commands, Share whiteboard</strong> under the Call List area.</td>
</tr>
</tbody>
</table>

2. Select **Share Whiteboard**.
PC Phone contacts the remote party and waits for the share whiteboard request to be accepted or rejected. While waiting for remote party acceptance, the share whiteboard request is in the pending state.

**Tip:** Before the far end has accepted or rejected your share whiteboard request, you can cancel the share whiteboard request. Click **Stop** to cancel the share whiteboard request.

If the remote party accepts the share whiteboard request, the whiteboard application is started, and the sharing window indicates that the whiteboard has been opened.

If the remote party rejects the share whiteboard request, the whiteboard application is not started, and the sharing window indicates that the file transfer has failed.

**Receiving a share whiteboard request**

If the remote party initiates a **Share Whiteboard** command, the following window appears depending upon your interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>You see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>a sharing window</td>
</tr>
</tbody>
</table>
The window displays the share whiteboard request in a pending state.

To accept the share whiteboard request, click **Accept** in the sharing control pane.

The share whiteboard application is started. The Sharing control pane display indicates that the shared whiteboard request was accepted.

To reject the share whiteboard request, click **Reject** from the sharing window. The whiteboard request is rejected, and the window indicates that the shared whiteboard request was rejected.
Using the whiteboard

After the remote party has accepted your share whiteboard request, Personal Communicator displays the **Whiteboard** window.

Keep the following in mind when using the whiteboard workspace:

- Use the object drawing tools—circle, square, polygon—to create shapes and lines.
- The drawings are vector drawings, not bitmaps. This means you can move, edit, or delete the objects you create with these tools, rather than manipulate them pixel by pixel (as you do with paint-type programs).
- Use the color selectors to choose colors for drawing objects and text.
- Use the line weight selectors to choose the thickness of drawing lines.
- Both you and the other user can edit the whiteboard drawing space. Both of you can view the results immediately.
Saving whiteboard drawings

To save whiteboard drawings,

1. Select File, Save from the menu on the Whiteboard window.
2. Select a location and enter a filename in the Save Whiteboard window.
3. Click Save.

   PC Phone saves the file to the location and filename you specified.

Restoring whiteboard drawings

To restore whiteboard drawings,

1. Select File, Restore from the menu on the Whiteboard window.
2. Browse to select the previously saved whiteboard drawing.
3. Click Open.

   The Whiteboard window updates to display the saved whiteboard drawing.

Transferring the clipboard

PC Phone lets you send (and receive) Windows clipboard data to (and from) another user’s PC Phone. You can share clips of text, photos, drawings, Web bookmarks, email address books, and other clipboard contents. Once a conversation has been successfully started, two users can send Windows clipboard data using the Transfer Clipboard sharing tool.

Certain items copied to your clipboard file, such as file icons, cannot be copied and sent using the Transfer Clipboard sharing tool. Use the Send File sharing tool to send these items.
Placing the content in the Windows clipboard

Before you are able to transfer clipboard data to the remote user, you must place some data into the system clipboard.

To put content in the clipboard,

1. Open the application and file containing the desired content you want to transfer.
2. Select and highlight the portion of the file you wish to exchange through the clipboard.
3. Use that application’s **Copy** function to copy the content to the system clipboard.

**Tip:** For most applications, the keyboard shortcut command is `<CTRL-C>` and the menu command is **Edit, Copy**. The selected contents are automatically placed in your Windows system clipboard.

Sending clipboard data

Once the system clipboard contains data, you can transfer it to the remote user. To send clipboard data,

1. Select the sharing option.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Click</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone interface</td>
<td><strong>More commands</strong> under the <strong>Call List</strong> area.</td>
</tr>
</tbody>
</table>

2. Select **Transfer Clipboard**.
PC Phone contacts the remote party and waits for the transfer clipboard request to be accepted or rejected. While waiting for remote party acceptance, the transfer clipboard request is in the pending state.

Tip: Before the far end has accepted or rejected your transfer clipboard request, you have the ability to cancel the transfer clipboard request. Click Stop to cancel the transfer clipboard request.

If the remote party accepts the transfer clipboard request, the clipboard data is sent, and the sharing window indicates that the data transfer has been completed successfully.

If the remote party rejects the transfer clipboard request, the clipboard data is not sent, and the sharing window indicates that the data transfer request was rejected.

Receiving a transfer clipboard request

If the remote party initiates a Transfer Clipboard command, the following window appears depending upon your interface.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>You see</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>a sharing window</td>
</tr>
</tbody>
</table>

The window displays the clipboard transfer request in a pending state.

To reject the clipboard data, click Reject in the sharing control pane.

The sharing window indicates that the data transfer has not been transferred to your system clipboard.

To use clipboard data received from the other client, click Accept in the sharing window.
The data is transferred into your PC Phone application. The sharing window displays when the data transfer is complete. It also indicates what type of data was transferred.

To put the transferred data into the system clipboard, click **Copy**.

**Using or saving the received clipboard data**

To use or save the transferred clipboard data,

1. Open the Windows application(s) in which you want to use the clipboard data.
2. Use the **Paste** function of that application to paste the data from the system clipboard into the application.

**Tip:** For most applications, the keyboard shortcut command for pasting clipboard data is `<CTRL-V>` and the menu command is **Edit**, **Paste**.
3 Edit and save your data in the Windows application.

Tip: The data format selected for the clipboard transfer determines how the clipboard data appears when it is finally pasted into an application. For example, clipboard data transferred in Rich Text Format (RTF) and pasted into an application that understands this format (Microsoft Word or Windows WordPad) retains formatting even when shared through the clipboard tool.

Using the IM chat room

Topics in this section:

• “Understanding IM chat room”
• “Types of chat room”
• “Creating a chat room”
• “Joining a chat room”
• “Chatting in a room”
• “Leaving a chat room”

Understanding IM chat room

From your PC Phone, you can create or join a chat room to send instant messages to multiple users simultaneously. You can create a new chat room inviting others to join it, or you can join an existing chat room. You can also browse online for chat rooms and join multiple chat rooms simultaneously with a separate window for each chat room.

The ability to create and join chat rooms from PC Phone depends on whether the IM chat room service is assigned to you. If you do not have support for creating and joining chat rooms, then you will not be able to use the IM chat room feature.
Types of chat room

PC Phone provides three types of chat rooms for the user.

<table>
<thead>
<tr>
<th>Chat room</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public chat room</td>
<td>A public chat room is open to all users. Anyone can join this type of chat room from PC Phone. You can view a list of public chat rooms from your Select Chat Room window.</td>
</tr>
<tr>
<td>Public with password</td>
<td>A public chat room with password is open to those users who have the password to join that particular chat room. Public chat rooms with passwords are also visible from your Select Chat Room window.</td>
</tr>
<tr>
<td>Private chat room</td>
<td>A private chat room is only open to selected users. You cannot view a list of private chat rooms from your Select Chat Room window. You need an invitation to be able to join a private chat room.</td>
</tr>
</tbody>
</table>

Creating a chat room

To create a chat room,

1. Open the Select Chat Room window.

   In this interface | Select                                                                                             |
   -----------------|---------------------------------------------------------------------------------------------------|
   Standard Personal Communicator | More, Chat Session from the Call area |

2. Click Create chat room.

   The Create Chat Room window appears.

3. Type the information required for a new chat room.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Name</td>
<td>Type a name of the chat room.</td>
</tr>
<tr>
<td>Topic</td>
<td>Specify the topic of the chat room.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Room Type</td>
<td>Specify whether the chat room is private, public, or with password.</td>
</tr>
<tr>
<td>Password</td>
<td>If the Room Type is password protected, then type the password. If you selected private or public in the Room Type field, then this field is grayed out.</td>
</tr>
<tr>
<td>Confirm</td>
<td>Confirm the password you typed in the Password field.</td>
</tr>
</tbody>
</table>

4. Select the names to invite in the chat room.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select the names from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone</td>
<td><strong>Personal Contacts, Recent, or Directory tabs</strong></td>
</tr>
</tbody>
</table>

5. Click **Add**.

The names you selected appear in the **Participants** field.

Tip: Click **Remove** to delete names from the **Participants** list.

6. Type the SIP address of other names not in your contact list.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Type the SIP address in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PC Phone</td>
<td>the field beside the <strong>Add</strong> button</td>
</tr>
</tbody>
</table>

7. Click **Add**.

The name you typed appears in the **Participants** list.

8. Click **Create**.
You will be placed into the chat room, and each user in the **Invite Participants** list will receive a chat invitation.

## Joining a chat room

To join a chat room,

1. **Open the Select Chat Room window.**

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>More, Chat Session from the Call area</td>
</tr>
</tbody>
</table>

2. **From the Select Chat Room window, select the chat room you wish to join.**

   The **Select Chat Room** window only lists public or public chat rooms with password in the **Room List** pane.

   **Tip:** The chat rooms that are password protected have a lock icon next to their names.

3. **Click Join chat room.**

4. **If the chat room is password protected, enter your password in the Please input password window.**
5 Enter the password and click **OK**.

**Chatting in a room**

Once you join a chat room, the chat room window appears.

The table shows the status and button information that you see in the chat room window.

<table>
<thead>
<tr>
<th>Chat room window</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat room name</td>
<td>Displays the name of the chat room in the Welcome statement.</td>
</tr>
<tr>
<td>Topic</td>
<td>Displays the topic of the chat room.</td>
</tr>
<tr>
<td>Send to:</td>
<td>Shows the list of participants in the chat room. Your name within this window is dimmed. The default setting in this window is <strong>All participants</strong>, which means all participants in the chat room can see your instant messages.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves your chat.</td>
</tr>
<tr>
<td>Timestamp</td>
<td>Shows the date and time of your chat.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints your chat.</td>
</tr>
<tr>
<td>Font</td>
<td>Changes your font type and font size.</td>
</tr>
<tr>
<td>Chat room window</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears your chat in the Conversation window.</td>
</tr>
<tr>
<td>Emoticons</td>
<td>Allows you to add emoticons to your chat.</td>
</tr>
<tr>
<td>Invite</td>
<td>Allows you to invite your contacts into the chat room.</td>
</tr>
<tr>
<td>Topic</td>
<td>Allows you to set or change the chat room topic.</td>
</tr>
</tbody>
</table>

Once you join a chat room, you can send messages to all participants or to just one participant. You can also invite others to join the chat room.

### Sending a message to all participants

To send an instant message to all participants in the chat room,

1. Select **All Participants** in the **Send to** window.
2. Type your message and click **Send**.

   This sends your message to all participants in the chat room.

### Sending a private message

To send a private message to a specific participant in the chat room,

1. Select the name of the participant from the Send to window.
2. Type your message and click **Send**.

### Changing the topic

To change the topic in the chat room,

1. Select **Topic**. The Set Topic window appears.
2 Type the topic you wish to discuss and click OK.

Inviting a friend into a chat room

To invite a friend into a chat room,

1 Select the invitation button.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal</td>
<td>Invite user button from the chat room</td>
</tr>
<tr>
<td>Communicator</td>
<td>window</td>
</tr>
</tbody>
</table>

The Invite Participants window appears.

2 Select the name you wish to invite into a chatroom and click Add.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Select names from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal</td>
<td>Personal Contacts, Recent, or Directory</td>
</tr>
<tr>
<td>Communicator</td>
<td>tabs</td>
</tr>
</tbody>
</table>

The name you selected appears in the Participants field.

3 Click Invite.
Receiving an invitation to join a chat room

If you are invited to join a chat room, you have the choice to accept, decline, or ignore the invitation from the Chat Invitation window.

1 Select one of the following options.

<table>
<thead>
<tr>
<th>Click</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept</td>
<td>join the chat room</td>
</tr>
<tr>
<td></td>
<td>Accepting an invitation notifies all participants in the chat room that you have joined the chat room.</td>
</tr>
<tr>
<td>Decline or Decline with reason</td>
<td>reject the invitation</td>
</tr>
<tr>
<td></td>
<td>Declining the invitation notifies your friend that you declined the invitation.</td>
</tr>
<tr>
<td>Ignore</td>
<td>ignore the invitation.</td>
</tr>
<tr>
<td></td>
<td>When you select this option, the request for invitation times out after a certain time. When the request times out, the person who sent you the invitation receives the following message: “User did not respond to your invitation.”</td>
</tr>
</tbody>
</table>

**Tip:** An invitation to a friend may fail if the chat room reaches its capacity limit. An invitation may also fail if the user name of your friend is invalid.
Leaving a chat room

To leave a chat room, select one of the options.

<table>
<thead>
<tr>
<th>If you use this interface</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal Communicator</td>
<td>Close the chat room window.</td>
</tr>
</tbody>
</table>

All other participants are notified that you have left the chat room.

Advanced set-up

Topics in this section:

- “Configuring your preferences”
- “Using the audio wizard to configure audio volume”
- “Configuring multiple profiles”
- “Automatic software upgrades”
- “Removal procedures”

Configuring your preferences
You may not be able to change some settings. They may not be assigned to you, or pre-configured by your service provider, or available for your configuration. Users of PC Phone without voice capability do not have audio connection, video, voicemail, or IP Phones settings available to them.

The **Tools, Preferences** menu allows you to configure the following settings:

- user profile
- communicator mode
- connection speed
- active network proxy server
- audio devices
- audio
- sounds
- video
- voicemail
- IP Phone connectivity
- file exchange
- presence
- instant messaging (This option is available only if the instant messaging service is assigned to you.)
- display
- calls
- system
- miscellaneous
- user interface
- MS office
- MeetMe conference
Setting up your user profile

To set up your user profile,

1. Select **Tools, Preferences, User** to display a window where you can identify yourself.

   ![User Profile Settings Window](image)

   - **Username**: 5066943000a
   - **IP Address**: 10.216.176.121
   - **Location**: sthnb

2. Enter your **Username**.
   
   This is the same name you use when accessing the Personal Agent. Usernames are unique; your username cannot be the same as any other username in your network domain.
Your service provider or system administrator assigns your username.

**Tip:** You can define multiple profiles for PC Phone. Each user profile you define has a completely separate set of preferences and configuration data. For more information, see “Configuring multiple profiles” on page 263.

3 Click **Change** if you wish to change your current location information.

![Select Location](image)

4 Select your location.

**Caution:** You must provide the correct location information on PC Phone; otherwise, some services, such as emergency and conferencing services, may not work properly. For example, the location you choose determines where you are during an emergency. If you choose **Other** as your default location, and you have to make an emergency call, the emergency call may route to the incorrect Public Safety Answering Point (PSAP).

5 Click **OK**.
If you choose **Other** for location, the following warning box appears indicating that, in case of an emergency, your physical location information will be unavailable.

![Warning Box Image]

6  Check **Don’t show me this message again** to prevent this warning box from appearing when you log on to PC Phone.

7  Click **OK**.

If you use Lotus Notes, PC Phone plug-ins will automatically use the “Default” profile (if the plug-ins detect a current running version of PC Phone). If you wish to use a different profile, you must launch PC Phone from the startup menu item provided by the installer prior to starting Lotus Notes or Sametime.

**Selecting Communicator mode**

Communicator Mode allows you to select an appropriate mode for your PC Phone. The following modes may be available for selection depending on your service profile:

- Standard
- Converged Desktop
- Mobile Converged Desktop
- PBX Communicator
- VoIP with Fixed and/or Mobile identity

The following services affect the availability of these modes:

- Converged Desktop
- PBX Communicator
- Mobile Extension
To set your Communicator Mode,

1. Select **Tools, Preferences** from the PC Phone main menu to view the User Preferences window.

2. Select **Communicator Mode** to bring up the Communicator Mode window.

3. Select a mode from the **Automatic Communicator Mode** drop down menu.
4 Place a check mark in the checkbox to automatically choose the mode selected in Step 2 every time you log on.

5 Click **Ok** to save your settings.

The Communicator Mode window is not displayed when only one mode is available or when the user is logged off. The “Automatic Communicator Mode” drop down is populated with the last known available modes (usually from a previous login); if none of the modes are known then only Standard mode is shown. The “Current Communicator Mode” drop down list is populated with the current available modes (depending upon your service profile).

---

### Setting your connection speed

The Connection preferences allow you to select the connection speed to the Internet.

---

**Tip:** This option is only available if your PC Phone is enabled for voice.

---

To set your connection speed,

1 Select **Tools, Preferences, Connection** to display the connection speed window.
2 Select the **Connection Speed** of your computer’s connection to the network:

- low speed (Dialup, ISDN, VPN, or Cable/DSL with less than 128 kbit/s uplink)
- medium speed (Cable, DSL with greater than 128 kbit/s uplink)
- high speed (LAN or Cable/DSL with at least 384 kbit/s uplink)

PC Phone selects the appropriate voice and video settings based on this connection speed. If you enter a connection speed higher than your actual connection, the application may overload your PC with incoming voice packets. Check with your system administrator if you are not sure what type of connection you have.

3 Click **OK** to save your changes or **Cancel** to exit without saving.
Defining network settings

Network preferences allow you to customize your active proxy and to select whether to automatically connect to the active proxy when PC Phone launches.

Specify the active proxy

1. Select Tools, Preferences, Network to display the Network configuration window. Your active proxy server IP address appears.

2. Select your proxy server in the Active Proxy list.

3. Click Edit.
The Network Configuration window displays your proxy address, port, domain name, and automatic firewall/NAT detection status along with the Timer Value.

4 Click **OK** to save if you made any active proxy changes or **Cancel** to exit without saving.

**Specifying automatic sign in to the active proxy**

1 Select **Automatically sign me in at Startup** if you want PC Phone to automatically connect to the proxy server when you start the program.

2 Click **OK** to save your changes or **Cancel** to exit without saving.

**Specifying Server Authentication**

When PC Phone tries to communicate with SESM over a TLS (Transport Layer Security) connection, it authenticates the server by validating the received server TLS certificate. PC Phone verifies:

- that the certificate can be validated against a trustable root CA
- that the Subject Alternative Name is valid
- that the Subject Distinguish Name is valid if there is no Subject Alternative Name filed in the received certificate
- the certificate revoke status by checking CRL
• the whole certificate chain
• the certificate chain depth

You can use the Server Authentication checkbox to enable/disable Certificate Revoke Status checking when the server certificate is validated. Note that this does not disable other server certificate warnings such as “Root CA not recognized” or “Certificate expired.”

To disable Certificate Revoke Status checking:

1. Select the Server Authentication checkbox.
2. Click OK to save your changes or Cancel to exit without saving.

Selecting audio devices

If your PC has more than one audio device installed, you can select the audio device for alerting sounds and voice. For example, you can select your PC speakers to alert you to incoming calls and IMs and select your USB Audio Adapter for voice and audio.

Tip: To set up your microphone or speaker/headset for voice and your USB Audio Adapter for voice and audio, your PC Phone must have voice enabled.

The following are the supported USB adapters (with or without a headset) which provide one-touch access to answer and release calls as well as to control audio:

• GN Netcom 2100 USB
• GN Netcom 9330 USB
• Sony Ericsson VoIP kit HBV-100

Other products may not retain the settings as described.
1 Select Tools, Preferences, Audio Devices.

2 Select an audio device from the drop-down lists Device to use for alerting sounds, Microphone for voice, and Speaker/Headset for voice. (These settings are optional.)

**Note:** If you are using a USB Headset Adaptor (see step 3), the device you select under Device to use for alerting sounds will work independently from the USB adapter. However, the USB Headset Adapter setting overrides the selections you make under Microphone for voice and Speaker/Headset. This means that your voice in/out device becomes the USB Adapter even if you made other selections above.
3  In the **USB Headset Adapter** area, choose an adapter from the drop-down list. If a non-supported adapter is chosen, a warning message appears to let you know that the selected adapter is not supported but it might work.

---

**Tip:** The backlight option turns on lamps in the recommended USB keypad adapter. You can disable the backlight option if you desire.

4  Click **OK**.

### Setting up audio preferences

Audio preferences allow you to customize PC Phone audio settings. These settings are not available to users who have PC Phone with Converged Desktop service or who have PC Phone with no voice capability.

#### Specifying call-related sound effects

1  Select **Tools, Preferences, Audio** to display the Audio settings window.
2 Select whether PC Phone generates call-related sound effects (for example, local incoming ringing or end of call notification).

3 Click OK to save your changes or Cancel to exit without saving.

**Accessing the Audio Wizard**

1 Select Tools, Preferences, Audio to display the Audio settings window.

2 Click Launch to start the Audio Wizard.

**Specifying advanced audio options**

1 To specify advanced options for Automatic Gain Control, Echo Reducer, and Mic Boost, click Advanced Options to display the Advanced Audio Options dialog box.
2 Enable **Automatic Gain Control** if other parties on a call complain that your speech is too loud or soft. To enable Automatic Gain Control if you are already on a call, place the call on Hold, select the Automatic Gain Control check box, and then take the call off hold. You can select the Automatic Gain Control check box any time while not in a call for all subsequent calls to receive this treatment.

Enabling Automatic Gain Control will use more of your system resources (memory and CPU processing). Do not select this option unless necessary.

3 Select whether PC Phone activates its **Echo Reducer** capabilities to remove echo while on a call.

If you are using a microphone and separate speakers (internal to your PC or externally connected), then select the **Enable Echo Reducer** check box.

If you are using a USB headset (best) or analog headset that plugs into your PC’s sound card, and other parties on a call complain about echo, then see “Echo” within “Troubleshooting” section of document before selecting the Enable Echo Reducer check box. Troubleshooting echo problems include
— checking whether Mic Boost is enabled
— adjusting the volume controls for both input (the microphone of the headset) and output (the headset's speakers)
— adjusting the Mixed Input options

To enable the Echo Reducer if you are already on a call, place the call on Hold, select the Enable Echo Reducer check box, and then take the call off hold. You can select the Enable Echo Reducer check box any time while not in a call for all subsequent calls to receive this treatment.

Enabling the Echo Reducer will use more of your system resources (memory and CPU processing). Do not select this option unless necessary.

4 Mic Boost is a Windows OS setting. The PC Phone audio engine works best with Mic Boost disabled (otherwise, calls may have echo). When PC Phone option Disable Mic Boost is checked (the default) when you launch PC Phone, it disables Mic Boost in the OS. After that, Mic Boost remains disabled until you manually re-enable it from the Windows Control pane.

If PC Phone disables Mic Boost, then the Mic Boost is also disabled for all other applications. If you prefer to keep Mic Boost enabled, un-check Disable Mic Boost so that PC Phone does not disable the OS setting.

5 Click OK to save your changes or Cancel to exit without saving.

Selecting alerting sounds

You can change Alerting Sounds Settings by selecting different .wav files. Standard alerting sounds are stored as .wav files in the PC Phone installation directory. Ask your system administrator if other alerting sounds are available.

Tip: To access all sound settings, your PC Phone must have voice enabled.
1 Select **Tools, Preferences, Sounds** to display the **Sounds** window.

![Sounds window](image)

2 Select .wav files for Alerting Sounds Settings. Click the “...” button and navigate to the location of the .wav files in your PC Phone directory. Click the “>” button to listen to the .wav file after you have selected it.
3 Click OK.

**Tip:** If your PC Phone is not enabled for voice, then you do not have access to these Sounds settings: Play this sound when a call is received, Play this sound when ringing remotely, Play this sound when a call has finished, and Play this sound for call waiting.

Setting up video preferences (optional)

You can choose various video settings to suit your particular needs. The pre-configured values in the Video settings window apply to most users. An expert user may choose to configure custom settings.

Access to the video settings depends on whether this service is assigned to you. If you do not have video support, then you cannot alter the video settings. You must register before trying to alter these settings.
Setting up video

To set up video,

1. Select **Tools, Preferences, Video** to display the Video settings window.
2 Select the video configuration that most closely meets your needs.

The following table lists the video configuration settings.

<table>
<thead>
<tr>
<th>Video setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very low bandwidth</td>
<td>Enables video telephony over dialup. This configuration uses a small video window and produces a video bit rate around 10 kbit/s for H.263.</td>
</tr>
<tr>
<td>Low bandwidth</td>
<td>Enables video telephony over ISDN/DSL/Cable modem. This configuration uses a small video window and produces a video bit rate around 64 kbit/s for H.263.</td>
</tr>
<tr>
<td>Medium bandwidth</td>
<td>Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a medium-sized video window and produces a video bit rate around 150 kbit/s to 300 kbit/s.</td>
</tr>
<tr>
<td>High bandwidth</td>
<td>Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a large video window and produces a video bit rate around 400 to 800 kbit/s. This video is suitable for overhead projection.</td>
</tr>
<tr>
<td>Very high bandwidth</td>
<td>Enables video telephony in an office using a 10/100 Mbit/s LAN. This configuration uses a 640 x 480 video window and produces a video bit rate of 800 kbit/s.</td>
</tr>
<tr>
<td>Custom setting</td>
<td>Fine-tunes video performance.</td>
</tr>
</tbody>
</table>

The video bit rates listed for the pre-defined video configuration settings are approximate and may vary in actual use.

The first time you configure the video, the video camera is examined and verified for compatibility with PC Phone. If the camera is compatible, a small window displaying video from the camera appears.

If the video camera is incompatible with PC Phone, follow the on-screen directions to configure the camera.
If no video camera is attached to the PC when you configure video, a “No camera available” message appears the first time that you select a pre-defined video configuration setting. This message indicates that, although you cannot send video, you can still receive video.

3 Click **OK** to close the **Configure Video** window.

4 Click **OK** to save your changes or **Cancel** to exit without saving.

After the video camera has passed compatibility testing with PC Phone, video can be sent and received on all calls to other video-enabled clients.

**Disabling video transmission**

To disable video transmission from your camera-equipped PC,

1 Select **Tools, Preferences, Video** to display the Video settings window.

2 Select the **Do not send or receive video on my calls** option to completely disable all video (incoming and outgoing).

   OR

   Select the **Restrict video to receive-only operation check box to allow other video-enabled clients to send you video while your PC Phone does not.**

3 Click **OK** to save your changes or **Cancel** to exit without saving.

---

**Tip:** Re-enable video by selecting one of the pre-defined video configuration settings or the custom video configuration setting.

---

If video has been enabled for all calls (either bi-directional or receive-only), video can be wholly disabled by selecting the **Do not send or receive video on my calls** setting.
Custom video configuration

Use custom video configuration with care. The combination of a large video image size, high-quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. GENBAND encourages you to use one of the pre-defined video configurations for everyday use.

To customize your video configuration,

1. Select **Tools, Preferences, Video** to display the Video settings window.
2. Click **Configure** (or select **Custom setting** for the first time).

The **Video Configuration** window appears. Advanced users can fine-tune their video settings from the **Video Configuration** window.

3. Adjust the custom video configuration. This custom Video configuration window has the following controls:

This custom Video configuration window has the following controls:
• **Video Driver** drop-down list identifies the driver that controls the camera. This is usually Microsoft WDM Image Capture, but some cameras provide a different one. Other items on this menu allow you to
  — Disable video for all subsequent calls.
  — Set video to receive-only operation on all subsequent calls.
  — Reset the video configuration to its never-been-set-up default values.

• **Preferred Video Codec** drop-down list identifies which video CODEC is used. The available selections are
  — H.263 Codec
  — H.263+ Codec
  — H.264 Codec
  — MPEG4 Codec

Select one of the available CODECs. The list of available CODECs depends on whether you have support for these CODECs and the raw image format that your video camera supports.

• **Codec Quality Settings** allow you to specify the image size and amount of detail in the transmitted video. Quality settings are
  — Very low bandwidth
  — Low bandwidth
  — Medium bandwidth
  — High bandwidth
  — Very high bandwidth
  — Custom

High and very high quality transmits the most detailed images but at the expense of CPU and network bandwidth. GENBAND strongly discourages the use of Custom quality settings unless you are highly knowledgeable.

In a video call, the two clients negotiate to a common video quality that is acceptable to both, so delivered image quality may vary from call to call.

• **Config button** launches an advanced CODEC configuration dialog box. Defaults are used based on the Codec Quality Setting selected. To set up one of these CODECs as your preferred video selection, see “sections on selecting CODEC and video Codec.”
The **Format** button produces another window that allows you to specify the size and internal organization of the video image. The layout of the **Video Format** window varies from camera to camera.

You can modify the following controls:

- **Resolution** (or **Image Size**) specifies the preferred size of the images that are transmitted during a video phone call. The following sizes are supported by the client: 160x120, 176x144, 320x240, 352x288, and 640x480.

In a video call, the two clients negotiate a video size acceptable to both, so video size may vary from call to call.

- **Pixel Depth and Compression** (or **Image Color Format**) specifies the organization of the video data captured by the camera. PC Phone supports two, **RGB 24** and **I420**, although others may work. If **Video Codec** is unavailable under the **Preferred Video Codec** drop-down list, try to adjust this setting.

The **Source** button allows you to specify how the camera captures video. Note that the layout of the **Video Source** window varies from camera to camera.

You can modify the following controls:
— Select which camera to use if more than one “Microsoft WDM” camera is attached to the PC.

— Adjust the camera’s color balance, brightness, contrast, and color saturation, among other settings.
— Adjust zoom, focus, and exposure.

- The **FPS** field allows you to specify the number of Frames Per Second that the PC Phone Client transmits. Higher numbers increase the fluidity of motion but at a cost of greater CPU and network bandwidth. A value of 15 produces quite an effective sense of motion.

- **Display Remote Video at** options allow you to specify the scaling factor on received video (2x means image dimensions multiplied by 2, 4x means image dimensions multiplied by 4). Smaller screens disable these scaling factors as appropriate.

  Select **Emb** if you want video to be integrated into the **Conversation** window; otherwise, video appears in a separate **Video** window.

- Select **Full** to see full screen video.

4 Click **OK** to save the changes or **Cancel** to exit without saving.

The **Video Configuration** window closes.

5 In the **Preferences** window, click **OK** to save your changes or **Cancel** to exit without saving.
Selecting H.263 video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your Personal Agent, Preferences, Services, Service package.

To choose H.263 as the preferred video CODEC,

1. Click Preferences, Video, Configure.

   The Video Configuration window appears.

2. Select H.263 Codec from the Preferred Video Codec drop-down list.

   If your video camera does not support a video capture format that is usable by the H.263 CODEC, then the H.263 CODEC does not appear as a choice.
3 Select one of the **Codec Quality Settings** or click **Config**.

Use custom video configuration with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. GENBAND encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

<table>
<thead>
<tr>
<th>H.263 custom video configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output video bitstream (rate)</td>
<td>This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.</td>
</tr>
<tr>
<td>Key frame interval</td>
<td>This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.</td>
</tr>
<tr>
<td>Video fluidity</td>
<td>This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion with a higher image quality for each frame of video. The default value is 100 (all quality settings).</td>
</tr>
<tr>
<td>Advanced Prediction Mode</td>
<td>This option tightens video compression, but the decoded video is more susceptible to artifacts due to packet loss.</td>
</tr>
</tbody>
</table>

5 Click **OK**.
Both clients in a call must support H.263 video CODEC in order to send and receive.

The following table lists the H.263 Codec Quality Settings default values.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Very low</th>
<th>Low</th>
<th>Med</th>
<th>High</th>
<th>Very high</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bitstream</td>
<td>8</td>
<td>64</td>
<td>192</td>
<td>512</td>
<td>768</td>
</tr>
<tr>
<td>Key Frame Interval</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Video Fluidity</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Advanced Prediction Mode</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

Selecting H.263+ video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences, Services, Service package**.

To choose H.263+ as the preferred video CODEC,

1. Click **Preferences, Video, Configure**. The Video Configuration window appears.
2. Select **H.263+ Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the H.263+ CODEC, then the H.263+ CODEC does not appear as a choice.

3. Select one of the **Codec Quality Settings** or click **Config**.

![H.263+ Codec Configuration](image)

Use custom video configuration with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. It is recommended that you to use one of the pre-defined video configurations for everyday use.

4. Use the guidelines in the table to adjust the custom video configuration.

<table>
<thead>
<tr>
<th>H.263+ custom video configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output video bitstream (rate)</td>
<td>This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.</td>
</tr>
<tr>
<td>Key frame interval</td>
<td>This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.</td>
</tr>
</tbody>
</table>
Video fluidity

This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).

Advanced Prediction Mode

This option tightens video compression, but the decoded video is more susceptible to artifacts due to packet loss.

Modified Quantization and Advanced Intra Coding

This option improves video quality by improving compression and compression quality. Enabling this setting uses extra CPU processing time.

Enable Deblocking Filter

This setting, when enabled, filters out JPEG/MPEG-style blockiness to improve image quality, by filtering macroblock edges. Enabling this setting uses extra CPU processing time, though not very significantly on modern computer systems.

Improve Resistance to Packet Loss

This setting allows good decoding quality despite packet loss. This setting allows greatly improved resistance to packet loss, allowing up to 10-15% packet loss without noticeable video degradation.

Independent Segment Decoding Mode

This setting improves error resistance further by confining errors to slices and prevents them from corrupting an entire frame. This option is useful during packet loss conditions.

5 Click OK.

Both clients in a call must support H.263+ video CODEC in order to send and receive.

The following table lists the H.263+ Codec Quality Settings default values.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Very Low</th>
<th>Low</th>
<th>Med</th>
<th>High</th>
<th>Very High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bitstream</td>
<td>8</td>
<td>64</td>
<td>192</td>
<td>512</td>
<td>768</td>
</tr>
<tr>
<td>Key Frame Interval</td>
<td>10</td>
<td>10</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Video Fluidity</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Advanced Prediction Mode</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Modified Quantization and Advanced Intra Coding</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Enable Deblocking Filter</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Improve Resistance to Packet Loss</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Independent Segment Decoding Mode</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>
Selecting H.264 video CODEC

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your Personal Agent, Preferences, Services, Service package.

To choose H.264 as the preferred video CODEC,

1. Click Preferences, Video, Configure. The Video Configuration window appears.

2. Select H.264 Codec from the Preferred Video Codec drop-down list.

If your video camera does not support a video capture format that is usable by the H.264 CODEC, then the H.264 CODEC does not appear as a choice.
3 Select one of the **Codec Quality Settings** or click **Config**.

Using a custom video configuration must be done with care. The combination of a large video image size, high quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. GENBAND encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

<table>
<thead>
<tr>
<th>H.264 custom video configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output video bitstream (rate)</td>
<td>This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.</td>
</tr>
<tr>
<td>Key frame interval</td>
<td>This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.</td>
</tr>
<tr>
<td>Video fluidity</td>
<td>This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).</td>
</tr>
<tr>
<td>High Quality Coding</td>
<td>This setting improves higher quality encoding of video, at the cost of more CPU. Almost twice the CPU usage is required when this setting is enabled, for a picture quality improvement of almost 1db in SNR at the same bitrate.</td>
</tr>
</tbody>
</table>
5 Click **OK**.

Both clients in a call must support H.264 video CODEC in order to send and receive.

The following table lists the H.264 Codec Quality Settings default values.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Very Low</th>
<th>Low</th>
<th>Med</th>
<th>High</th>
<th>Very High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bitstream</td>
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<tr>
<td>Key Frame Interval</td>
<td>10</td>
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<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Video Fluidity</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>High Quality Coding</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

**Selecting MPEG4 video CODEC**

The different formats that you can use to send and receive video depend on the support you have for different CODECs. Contact your system administrator for this information or check your **Personal Agent, Preferences, Services, Service package**.

To choose MPEG4 as the preferred video CODEC,

1 Click **Preferences, Video, Configure**. The Video Configuration window appears.
2 Select **MPEG4 Codec** from the **Preferred Video Codec** drop-down list.

If your video camera does not support a video capture format that is usable by the MPEG4 CODEC, then the MPEG4 CODEC does not appear as a choice.

3 Select one of the **Codec Quality Settings** or click **Config**.

![MPEG4 Codec Configuration](image)

Using a custom video configuration must be done with care. The combination of a large video image size, high-quality CODEC setting, and high Frames Per Second (FPS) produces video transmission rates over 1 Mbit/s and erodes network and PC performance. GENBAND encourages you to use one of the pre-defined video configurations for everyday use.

4 Use the guidelines in the table to adjust the custom video configuration.

<table>
<thead>
<tr>
<th>MPEG4 custom video configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output video bitstream (rate)</td>
<td>This specifies the maximum bitrate that the encoder transmits, not including header information. Drag the slider or enter a value in the text box above it.</td>
</tr>
<tr>
<td>Key frame interval</td>
<td>This value allows you to change the interval of sending keyframes, which could reduce the bandwidth requirement at the cost of quality. The default value is 8 (medium, high, and very high quality settings), and you can specify values between 1 and 300.</td>
</tr>
<tr>
<td>Video fluidity</td>
<td>This value allows you to improve the frame rate of the video at the cost of quality. A lower value for Video Fluidity will produce more choppy video motion, with a higher image quality for each frame of video. The default value is 100 (all quality settings).</td>
</tr>
</tbody>
</table>
Enable four motion vectors per macroblock. Instead of having one motion vector for each 16x16 macroblock, four separate motion vectors can be specified (for four 8x8 blocks). This provides better motion quality in video that contains compound motion. This may require slightly more bitstream for the extra information.

Improve Resistance to Packet Loss
Packet loss resistance is improved by enabling resynchronization markers in the video, which accelerates recovery from transmission issues. Header Extension Code is also used in the video packet header to improve error resiliency. This setting can be used to improve video quality on connections with high packet loss.

Dynamic Resolution Conversion
This is a technique that adapts temporal resolution depending on video content and circumstances in real time. This also helps error conditions, since error-related artifacts become less noticeable because the errors are more spread over the bitstream. (This setting requires back-channel information sent to the encoder).

5 Click OK.
Both clients in a call must support MPEG4 video CODEC in order to send and receive.

The following table lists the MPEG4 Codec Quality Settings default values.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Very Low</th>
<th>Low</th>
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</tr>
<tr>
<td>Key Frame Interval</td>
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<td>10</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Video Fluidity</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Enable four motion vectors for each macroblock</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Improve Resistance to Packet Loss</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Dynamic Resolution Conversion</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

Setting up network-based voicemail access (optional)

Voicemail preferences allow you to customize how the PC Phone behaves when contacting your voicemail server.

Access to the voicemail settings depends on whether this service is assigned to you. If you do not have voicemail support, you cannot alter the voicemail settings.
To set up your network-based voicemail access,

1  Select **Tools, Preferences, Voice Mail**.

![Voicemail settings](image)

2  Enter the **Voicemail Phone Number** of your voicemail system, without punctuation. Enter any extra digits required by your organization’s phone network.

3  Enter the **Mailbox ID** and the pound (#) symbol, if required.
4 Enter your **Password** and the pound (#) symbol, if required.

**Tip:** After auto-dialing your voicemail system number, by default, PC Phone waits three seconds before dialing your mailbox ID, then waits another two seconds before dialing your password. If you need to increase the delay to match the timing of your voicemail systems prompts, add one or more commas (,) before the mailbox ID and/or password value. Each comma represents an additional one-second delay.

5 Enter the **numeric function commands** your voicemail uses to perform standard functions, such as playing and deleting messages and sending replies.

PC Phone uses this information to support at-a-select voicemail functions.

6 Optionally define up to two **custom voicemail functions** and the keystrokes that activate them.

7 Click **OK** to save your changes or **Cancel** to exit without saving.

---

**Setting up IP Phones (optional)**

PC Phone with IP Phone service enables you to use an IP Phone (Unistim or SIP) for voice while using PC Phone for call control and multimedia operations. You must first configure your IP Phone settings before your PC Phone can take control of the Unistim or SIP terminal.

**Tip:** These settings are not available to the following types of PC Phone configurations: PC Phone with Converged Desktop service, and PC Phone with no voice capability.

**Tip:** The option of configuring your IP phone for UNISTIM or SIP is dependent on the services assigned to you by your service provider. For example, you will not be able to activate Unistim or SIP terminals if you are not an active subscriber for Unistim or SIP service.
Setting your IP Phone for UNISTIM

To set up your IP Phone for UNISTIM,

1. Select **Tools, Preferences, IP Phone**.

2. Check **Use the IP telephone for voice instead of PC** to indicate that you want the IP Phone to provide voice while the PC provides advanced IP and multimedia services.

3. From the Phone Type drop-down list, select **UNISTIM**.

4. Enter the port number (and optionally the MAC address) for the IP Phone.
Tip: PC Phone can automatically detect and fill in the MAC address field with information it obtains from the first IP Phone that attempts to contact it on the port specified in Step 4.

5 Check whether you wish the network to take over control of the IP Phone when PC Phone exits.

The default is that this feature is activated. This step is optional.

6 Check whether PC Phone routes voice to/from the IP Phone for private IP addresses.

This option may be required if you are using a private LAN in a home office. This is not usually required for work office use. The default for this feature is not active.

7 Click OK.

When the IP Phone mode is activated, the IP Phone connectivity icon (telephone icon) changes to a “Connecting” state (a yellow telephone icon). When the IP Phone connection is successfully established, the icon changes to the “Connected” state (a blue telephone icon). Clicking the icon (in either state) brings up the IP Phone preferences window.

The same yellow telephone icon displays when PC Phone attempts to regain the control of the Unistim phone that was previously successfully connected, but then disappeared from the network.

Tip: If the IP Phone is disconnected, PC Phone automatically attempts to reconnect every 1.5 minutes until a connection is regained (or until the user decides to disable the use of the IP Phone in the Preferences portlet). If the Phone is disconnected, the following error message appears - “Unable to gain control of the IP Phone. The control will be automatically regained once the phone becomes available. You can discontinue use of the phone using IP Phone preferences.” The error message will close automatically once the connection is successfully regained.
Setting your IP Phone for SIP

To set up your IP Phone for SIP,

1. Select **Tools, Preferences, IP Phone**.

2. Check **Use the IP telephone for voice instead of PC** to indicate that you want the IP Phone to provide voice while the PC provides advanced IP and multimedia services.

3. From the **Phone Type** drop-down list, select **SIP Phone**.

4. From the **Phone Contact** drop-down list, select either "All my SIP Phones" or select a specific phone from the list of available SIP terminals.
5 Click **Ring Phone** to ring the selected IP phone. This option is enabled only when you are configuring a specific phone.

**Tip:** The Ring Phone button rings the phone selected in step 5 to help the user identify which phone is associated with which terminal. This button only enabled while the PCC is not currently controlling a phone. It is disabled when the Phone Contact is “All My SIP Phones” or if the PCC is already controlling a phone.

6 Click **OK**.

**Setting up file exchange settings (optional)**

To set up file exchange settings,
1. Select **Tools, Preferences, FileExchange**.

2. Specify the default folder location for received files.

3. Select how you want to be notified when you receive a share request:
   - Select the check box **Display a notification near the System Tray** to display a system tray popup window when you receive a share request.
   - Select the **Play a sound** check box to have PC Phone generate an audible alert when a share request is received.

4. Click **OK** to save your changes or **Cancel** to exit without saving.
Setting automatic presence preferences

Presence preferences allow you to customize automatic presence indicator support. PC Phone can update your presence status to show when your PC is idle or when your telephone is occupied.

Access to the automatic presence settings depends on whether this service is assigned to you. If you do not have automatic presence support, then you cannot alter these presence settings.

**Specifying automatic presence idle detection**

To set up your automatic presence idle detection,

1. Select **Tools, Preferences, Presence**.
2  Select the **Report when inactive** check box.

3  Enter the number of minutes that must elapse before your presence status is reported as idle.

---

**Tip:** The minimum value of the Inactivity Timer (in minutes) depends on your settings. Your system administrator sets the minimum value.

---

4  Click **OK** to save your changes or **Cancel** to exit without saving.

   Your automatic presence settings are automatically uploaded to the network and the Personal Agent is updated to match your presence settings.

**Enabling presence authorization**

To enable Presence Authorization,

1  Select **Tools, Preferences, Presence**.

2  Select the checkbox for **Enable presence watch authorization**.

3  Click **OK**.

**Specifying automatic presence phone usage detection**

To set up your automatic presence phone usage detection,

1  Select **Tools, Preferences, Presence**.

2  Select the **Report when on the phone** check box.

3  Click **OK** to save your changes or **Cancel** to exit without saving.

---

**Setting instant messaging preferences**

Instant messaging preferences allow you to customize how Personal Communicator behaves during instant messaging.
Specifying an audible alert

To control whether PC Phone generates an audible alert when an instant message is received,

1  Select **Tools, Preferences, Instant Messaging**.

   ![User Preferences window with Audible Alert settings]

   Select the **Play a sound when a message is received** check box to have the PC Phone generate an audible alert when you receive an instant message. Clear the check box if you do not want PC Phone to generate an audible alert when you receive an instant message.

2  Click **OK** to save your changes or **Cancel** to exit without saving.

Specifying instant message timestamps
By default, PC Phone displays a time and date stamp for every instant message. To change the date display format or to remove the datestamp from being displayed,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select the desired timestamp format from the **Timestamp format settings** drop-down list.
3. Click **OK** to save your changes or **Cancel** to exit without saving.

**Specifying instant message pop-up behavior**

By default, when PC Phone receives an instant message, a **Conversation** window appears and assumes window focus. To configure how PC Phone behaves when an instant message is received,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select
   - **Minimize new IM window to taskbar** to have PC Phone only flash the taskbar and not have the new instant message pop up on your desktop.

   When you select this option, you can also select the check box **Display a notification near the System Tray**. This displays a system tray pop-up window when you receive an instant message.

   - **Bring IM window to front** to have PC Phone bring the **Conversation** window to the front of your desktop.

3. Click **OK** to save your changes or **Cancel** to exit without saving.

**Enabling “Is-Typing” notifications**

The instant messaging functionality also includes the option of “Is-Typing” notifications. If your service package enables this option, an indicator is added to the Instant Message window indicating that the user is typing a message. The “Is-typing” notification displays in an existing Instant Message session window before the actual Instant Message content arrives.

You can also specify the idle timeout period (the time period in which not typing causes the transmission of an "idle" notification). The default value for this interval is 15 seconds.
To enable the “Is Typing” notifications, and to change the default value of the idle timeout period,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select **Enable** under the **Typing notifications** section.
3. If desired, enter a new idle timeout period (in seconds).
4. Click **OK**
Enabling instant messaging spell check

The instant messaging functionality also includes spell-checking functionality, which detects incorrectly spelled words within instant messages and chat sessions as soon as the user finishes typing them (misspelled words are underlined in red). To enable the spell check functionality,

1. Select **Tools, Preferences, Instant Messaging**.
2. Select **Enable IM Spell Check**.
3. Click **OK**

Setting up or changing instant messaging dictionaries

Dictionaries are collections of valid words used by the spell checker to identify misspelled words and to provide correction suggestions. By default, the English dictionary is used for spell check functionality. To change the current dictionary,

1. Select **Tools, Preferences, Instant Messaging**.
2. Click **Change** beside the listing of the current dictionary.
3 Select a dictionary from the available or installed list, and click **Set as current**.

4 Click **OK**.

**Adding a custom dictionary**

The user can add custom dictionaries, and then use them for spell checking. Custom dictionaries can either be downloaded from the Internet or manually created using dictionary creating tools. The dictionary must be defined as a DIC file and a corresponding AFF file that share the same name.

To add a custom dictionary,

1 Select **Tools, Preferences, Instant Messaging**.

2 Click **Add...**

3 In the dialog that displays, locate the DIC file that contains the custom dictionary. If a corresponding AFF file is missing, the addition operation fails and an error message displays.

4 Click **OK**. The dictionary then appears in the list of installed dictionaries and is set as a current one automatically.

**Setting display preferences**

Display preferences allow you to customize the PC Phone interface.

**Setting PC Phone to startup as an icon**

This option allows you to set PC Phone to start up without opening on your desktop (silent startup). PC Phone icon will appear in the system tray.

To set PC Phone to start up automatically,

1 Select **Tools, Preferences, Display**.
2  In the **Startup** section, select the **Start in system tray** check box if you want PC Phone to start up as an icon in the system tray.

3  Click **OK** to save your changes or **Cancel** to exit without saving.

**Specifying how the main interface appears on the desktop**

To specify whether the PC Phone main interface appears on top of other applications’ windows,

1  Select **Tools, Preferences, Display**.
2 In the **Always On Top** section, select the **Always On Top** check box if you want the PC Phone main GUI to appear on top (in front) of other applications on your desktop.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

**Specifying a tool tips delay**

To specify the delay before the tool tip shows up,

1 Select **Tools, Preferences, Display**.

2 In the **Tool Tips** section, select how long PC Phone waits before displaying a Tool Tip.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

**Setting calls preferences**

Calls preferences allow you to enable or disable dialing prefixes when making a call. Call preferences also enable you to specify call session window pop-up behavior.

**Setting up a dialing prefix**

To set up a dialing prefix,

1 Select **Tools, Preferences, Calls**.

2 Select the **Use dialing prefix** check box.

3 Click the `<Click to Add New Prefix>` and enter the new prefix you wish to define.

4 Press **Enter**.

   The prefix appears in bold, indicating it is your default dialing prefix. Continue to add more dialing prefixes as needed.
Additional prefixes are not highlighted, indicating they are not your default dialing prefixes.

5 Select a prefix from the list you entered and click **Make Default** to change your default dialing prefix.

The dialing prefix you choose appears in bold.

6 Select a prefix from the list you entered and click **Remove** to remove a dialing prefix.
Specifying call pop-up behavior

By default, when PC Phone receives a call, a system tray notification appears. From here, you can choose to answer or ignore the call.

To turn the notification on or off,

1. Select **Tools, User Preferences, Calls**.
2. Standard interface: Under **System Tray Notification**, check or uncheck the box labeled **Display a notification near the System Tray**.
3. Click **OK** to save your changes or **Cancel** to exit without saving.
Setting system preferences

System preferences allow you to customize how PC Phone behaves when the PC enters low power mode. It also allows you to select the language of the PC Phone interface.

Tip: If you are running PC Phone on Windows Vista or Windows 7, the System Standby option is not available. If your system goes into standby or sleep mode, PC Phone on Windows Vista or Windows 7 tries to log out within two seconds; however, it may not, in all instances, log out completely.

Setting the standby option

To set up the standby option,

1. Select Tools, Preferences, System.
2 Select the **Exit on system standby** check box if you want to exit Personal Communicator when the system enters low power mode.

Low power mode is one of the following:

- **Standby** - Power to most PC components is off, but RAM remains powered in order to preserve system state.
- **Hibernate** - The system state is saved to the hard drive, and power to all PC components is turned off.
- **Eject** - Similar to Standby, but it causes a hardware re-configuration to occur in the PC.

3 Click **OK** to save your changes or **Cancel** to exit without saving.

**Choosing the language of the PC Phone**

System preferences let you select the language of the PC Phone. You can choose the same language as your Windows operating system or select English. System setting (English) is the default selection.

1 Select **Tools, Preferences, System**.

2 Select a language for PC Phone.

3 Select **OK**. The system prompts you to restart your PC Phone.

   The languages that PC Phone supports are Latin American Spanish, Parisian French, Traditional Chinese, Simplified Chinese, Japanese, English, Korean, and German.

4 Select **Login, Exit**.

5 Start PC Phone. The display appears in the language you chose.

**Specifying miscellaneous settings**

Miscellaneous preferences allow you to customize how PC Phone behaves when you click **Ignore** and when you double-click an entry.

**Specifying Ignore button action**

To specify the action that PC Phone performs when you click **Ignore** for an incoming call,
1 Select **Tools, Preferences, Miscellaneous**.

2 Select how PC Phone behaves when you click **Ignore** on a receiving call **Conversation** window:

   — **Ignore Action affects PC Client Only** silences ringing only on Personal Communicator; your other network devices continue to ring.
   
   — **Ignore Action affects all User Network Contacts** silences ringing on PC Phone plus all your network devices; the incoming call route advances to your next route list.

3 Click **OK** to save your changes or **Cancel** to exit without saving.
Specifying double-click action

Double-click action settings are visible in miscellaneous Preferences only if you have the Instant Messaging service assigned to you. If Instant Messaging is not assigned, double-clicking an entry will initiate a call.

To specify the action PC Phone performs when you double-click an entry,

1 Select Tools, Preferences, Miscellaneous.

2 Select what action PC Phone performs when you double-click an entry:
   — Call User initiates a call to the selected entry.
   — Send an Instant Message to User sends an instant message to the selected entry.

3 Click OK to save your changes or Cancel to exit without saving.

Specifying user interface preferences

In the Standard PC Phone interfaces, the User Interface settings enable you to specify settings related to power failure warnings and themes.
Tip: The risk of power failure warning is only available if your Personal Communicator has voice enabled.

Receiving a warning window in case of power failure

As there is a risk associated with power failures, your PC Phone warns you about it each time you login. You can turn this warning off from the user interface settings.

To turn off warning of power failure,

1. Select Tools, Preferences, User Interface.
2 Select the Don’t warn me about the risks of power failures check box if you do not wish your PC Phone to warn you each time you login that your service may cease to function if there is a power outage or failure.

3 Click OK to save your changes or Cancel to exit without saving.

Selecting a new theme

To select a new theme,

1 Select Tools, Preferences, User Interface.
2 Select the theme from the drop-down list.
3 Select the theme style from the drop-down list.
4 Click Apply.

The PC Phone window updates and appears with the new theme. You may be prompted to confirm your IP address and telephone number.

5 Click OK.

Closing a window.

Ending a voice conversation does not necessarily close the Conversation window. If there are other active conversations with the user, the window stays open. For example, if the instant messaging control pane is open, the Conversation window remains open even after the voice conversation has ended.

You have two settings for closing a window. The first allows you to disable a warning that appears when you close an active call, and the second enables the window to close automatically when the call has ended.

To change the settings for closing a window,

1 Select Tools, Preferences, User Interface.
2 Check Don’t warn me before closing an active call window, if you do not want to be warned when you try to close an active call window.
3 Check Close the user-initiated call window when the call is finished to automatically close the window when a call is finished.
4 Click OK to save your changes or Cancel to exit without saving.
Resetting warnings to default

When a PC Phone dialog asks for confirmation of an operation, you have the option of also selecting the "Don't show me this message again" checkbox (example below).

Your selection is saved and used for the next occurrence of that operation.

If you would like to reset all warnings to the original, default value, click the Reset warnings to default button in the User Interface Preferences window.

Specifying MS Office preferences

MS Office Preferences let you enable or disable Smart Tags, and enable or disable the Outlook Plug-in.

Enabling or disabling Smart Tags

Smart Tags are a technology offered by Microsoft that allows you to use PC Phone functions such as making a call or sending an instant message from within a Microsoft Office Application such as Word, Excel, PowerPoint and Outlook.
Smart Tags work by recognizing and highlighting certain types of data, such as a person's name or telephone number, in a Microsoft application. When you select the Smart Tag-enabled data, a menu of PC Phone actions appears.

To enable the Smart Tag feature in PC Phone,

1 **Select Tools, Preferences, MS Office.**

![PC Phone Preferences](image)

2 **Select the Enable PC Phone Smart Tags** if you want to use Smart Tags with PC Phone.

3 **Click OK** to save your changes or **Cancel** to exit without saving.

   If the PC Phone Smart Tags option changes while an MS Office application is running, the change will not take effect in that application until the application restarts.

You can also enable or disable PC Phone Smart tags in most MS Office applications from the AutoCorrect options located on the standard Tools menu. To disable PC Phone smart tags, uncheck all PC Phone Contacts entries from the smart tags list.
For more information about using smart tags, refer to the Microsoft Smart tags documentation.

**Setting up or changing the Conference Bridge chairperson PIN**

When a conference is initiated, the bridge number and access code are retrieved using the provisioning server. The chairperson PIN is entered through the Conference Bridge preferences window.
If you do not have Conference Bridge service assigned to you on the provisioning server, or if you do not have your own conference bridge, the Conference Bridge Preferences window is hidden.

To setup or change the chairperson PIN,

1. Select **Tools**, **Preferences**, **Conference Bridge**.
2. Enter the Chairperson PIN. The field will not display the entered symbols.
3. Click **OK**.
Using the audio wizard to configure audio volume

Use the audio wizard tool to configure your microphone and speakers audio levels.

These settings are not available for the Converged Desktop users.

To test and adjust audio settings for optimal voice transmission and reception quality,

1. Select **Tools, Preferences, Audio**.
2. Click **Launch** to start the audio test wizard. The **Audio Wizard** window appears.
3. Shut down any other audio applications that are running and click **Next** to continue.
4. Click **Start** and begin talking into your microphone. You should hear your voice coming through the speakers or headset.
5. Click **Stop** to stop the audio recording and playback.
6. Click **Next** to end the audio test call.
7. If you did not hear yourself during the audio test call, click **Settings** to display your sound card **Audio Properties** window.
8 Click **Volume** from the Sound playback device to display your Volume Control window.

9 Adjust all volume settings to approximately 80% and close the window.

10 Click **Advanced** from the Sound playback device in the **Audio Properties** window.

   ![Advanced Audio Properties](image)

The Advanced **Audio Properties** window appears, showing your speakers setting.
11 Select the appropriate option from the Speaker Setup drop-down list. For example, if you use a laptop without a headset for applications other than PC Phone, select the Laptop Stereo Speakers option.

12 Click OK to save the setting.
13 Select the Performance tab from the Advanced Audio Properties window.

14 Set the Hardware acceleration to **Full** and Sample rate conversion quality to **Best**.

15 Click **OK** to save the settings.

16 Click **Volume** from the Sound recording device in the Audio Properties window.
The Recording Control window appears.

17 Adjust the microphone setting to approximately 15%.

18 Click **Advanced** to display your Advanced Controls for Microphone window.

19 Ensure that the **Microphone Boost** check box is unchecked.

20 Click **Close**.

21 Click **OK** to close the **Audio Properties** window.

22 Click **Finish** to close the **Audio Wizard** window.
Configuring multiple profiles

If you are a laptop user, you may have different configuration needs, depending on where you are located (for example, at work or at home). Often the configuration of PC Phone in one location is not correct when you connect your laptop in a different location.

For example, as a laptop user you may have two IP Phones, one at the office and one at home. Depending on where the laptop is located, PC Phone needs to establish communication with a specific IP Phone.

You can define multiple PC Phone profiles. Each user profile you define has a completely separate set of preferences and configuration data. If you have more than one profile, PC Phone prompts you at start up to select the profile suitable for the current network environment.

Adding a new profile

To add a new user profile,

1. Select the Start, Programs, GENBAND PC Phone, Profile Manager program icon in the PC Phone program group on your PC. The Profile Manager window appears.

2. Click New.

   A window prompts you to enter a profile name.
3. Enter the name of the new profile.

4. Click OK to save your changes or Cancel to exit without saving.

**Tip:** Double-click on a profile to automatically launch Personal Communicator using that profile.

---

**Removing a profile**

To remove a user profile,

1. Select the **Start, Programs, PC Phone, Profile Manager** program icon in the PC Phone program group on your PC.

   The **Profile Manager** window appears.

2. Select a profile and click **Delete**.

   A confirmation window appears to confirm your deletion.

3. Click **Yes** to delete the user profile or click **No** to exit without deleting the user profile.

---

**Renaming a profile**

To rename a user profile,

1. Select the **Start, Programs, PC Phone, Profile Manager** program icon in the PC Phone program group on your PC.

   The **Profile Manager** window appears.

2. Select a profile and click **Rename**. A window prompts you to enter the profile’s new name.
3 Enter the new name for the user profile.

4 Click OK to save your changes or Cancel to exit without renaming the user profile.

Automatic software upgrades

For automatic software upgrades, you need to download the Automatic Software Upgrade (ASU) packages. The downloaded ASU packages is saved under the user profile directory:

\<user profile directory>\<install directory name>\

For example, the ASU packages get saved under

\users\winuser\PC Phone\

When you launch PC Phone, it automatically checks to see if there is a need to upgrade the software. This occurs five minutes after you log on and every hour thereafter. By default, automatic software updates are downloaded from the provisioning server, but this is configurable. For more information about configuring ASUs to download from a custom web server, contact your next level of support.

The following icons explain the colors of the Automatic Software Upgrade ASU) status button you will see in the status bar.

- yellow = in progress
- red = failed
- green = upgrade available
- gray = client is up to date
ASU is performed only for packages that have been modified. When PC Phone checks for available updates, its decision to download a JAR file is based on its version. If the version is newer, the JAR file is downloaded and later extracted to replace outdated files. The JAR version increments only when a modification to one or more packaged files is detected (only modified packages are downloaded and installed by the client).

If you have a low-speed connection to the Internet, you will be prompted to confirm before the updated files are downloaded to a temporary folder on your PC. If you selected a medium- or high-speed connection on this window, the files are automatically downloaded.

When you are prompted to update the software, a window appears.

- Click **Yes** to install the latest software updates for PC Phone.
- Click **No** if you do not wish to install the latest software updates.

**Removal procedures**

The following sections cover how to remove PC Phone from your PC.

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**Warning:** You must shut down PC Phone before attempting to remove the program. Failure to do so may leave extraneous PC Phone files remaining on your PC, even after the uninstall program completes its execution.

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**Removing the Microsoft Outlook Plug-in**

When you remove PC Phone, no special steps are required to remove the Microsoft Outlook plug-in other than that you must completely exit from Microsoft Outlook before running the PC Phone uninstall program.
If Microsoft Outlook is running while PC Phone uninstall program is running, the button that the Outlook plug-in uses will remain on the toolbar in Outlook. Since the Outlook plug-in is no longer present on your PC after you remove PC Phone, the Call button will no longer function.

Remove the stranded button by right-clicking on the toolbar and selecting customize. Right-click Call and then Delete.

Removing PC Phone

During installation of PC Phone, the installer program creates both an uninstall icon for the PC Phone and an entry in the Add/Remove Programs control pane applet.

Tip: If you remove PC Phone running on Windows Vista, you will receive a prompt stating that the publisher is unidentified. This is currently a known InstallShield 2008 issue. Click Allow and continue the process of removing PC Phone.

To remove PC Phone using the uninstall program icon,

1. Select the Start, Programs, GENBAND PC Phone, Uninstall program icon in the PC Phone program group on your PC.

   The PC Phone uninstall program launches and the uninstall confirmation dialog window appears.

2. Click Yes to remove PC Phone from your computer; click No to cancel the uninstall procedure, leaving PC Phone on your computer.

To remove PC Phone using the Control Panel,

1. Select the Start, Settings, Control Panel to display the system Control Panel window.

2. Click the Add/Remove Programs icon to launch the Add/Remove Programs window.
3 Select PC Phone from the list of programs and click **Change/Remove**.

The PC Phone uninstall program launches and the uninstall confirmation dialog window appears.

4 Click **Yes** to remove PC Phone from your computer; click **No** to cancel the uninstall procedure, leaving PC Phone on your computer.

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**Tip:** When you uninstall PC Phone, your profile(s) are not deleted. You will have access to your profiles when you reinstall PC Phone.

You can remove personal profiles by deleting the PC Phone profiles directory. By default, this is located in the PC Phone directory on your PC, although you or your administrator can specify the location at the time of installation.

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**Troubleshooting**

PC Phone activities are automatically captured in a log file. If you experience any of the problems in this section, make sure to send these logs to your next level of support.

Topics in this chapter can help you troubleshoot if you have problems such as starting up PC Phone, setting up your audio, enabling your video, or using the sharing features.

Topics for PC Phone users:

- “For PC Phone users”
- “Calling and messaging problems”
- “Sharing problems”
- “Video problems”
- “IP Phone configuration problems”
For PC Phone users

The following sections help you find solutions to some problems that you may come across with PC Phone.

Security Alerts when Accessing PC Phone

When you access PC Phone, the following Security Alert dialog boxes can appear, depending on your configuration.

When the dialog box appears, you must perform the following steps:

1. Click Yes. Another Security Alert dialog box appears.

2. Click Yes.
   
   You now have access to the client.
PC Phone will not connect

If your PC Phone will not connect, try the following general troubleshooting steps:

- If you are using a VPN client, make sure that it is up and running.
- Make sure that you have the right IP address.
- Make sure that your network connection is up and running.
- Verify that you have entered the correct username, domain name, and password.
- If you have changed your Internet security or advanced settings in Windows, reset to your default values. To restore default values, see “Resetting Internet Options and “Checking Security settings” sections.

If you continue to experience problems, contact your system administrator.

Reinstallation

For a number of reasons, the PC Phone may occasionally get corrupted. If this occurs, you will need to uninstall and reinstall PC Phone. See “Removal procedures” section.

Your preferences, call log entries, profiles, and IM history logs will survive the reinstallation.

Abnormal exit

There may be times when you have an abnormal exit from PC Phone. Upon your next logon, a dialog window will appear with the message “PC Phone did not exit properly from a previous run, and exiting properly is important to your network services.”

When you see this message, you will need to continue to log on, then log off, and log on again.
Audio problems

Audio settings may need to be fine-tuned depending on the type of equipment you have.

Echo

If you use a desktop microphone and speakers as your sound input/output devices, your microphone often hears the sound from the speaker and the person on the far end will hear an echo. This is why GENBAND recommends that you use a headset or handset with your PC. The use of headphones (without a microphone) along with your desktop microphone will also work.

Sometimes echo occurs even when using a headset. Usually, a quick adjustment of the volume can fix this. Try lowering the speaker volume and microphone gain.

If you are using a sound card with a headset connected (not the USB headset) and the sound quality is not good, ensure that you have the latest sound card driver version. If the latest version does not improve the sound quality, then contact the PC vendor and/or sound card manufacturer for support.

Some sound cards have input mixing capabilities. To see if your card supports this,

1. Launch the Windows volume control application through Start, Programs, Accessories, Entertainment, Volume Control.
   Your version of Windows may have a different path to the volume control. Check the Start, Help menu to find it.
2. Select Options, Properties.
3. Select Adjust Volume for Recording and click OK.
   If you have checked Mixed Input, you can experience echo even when using a headset.
4. Uncheck the Mixed Input check box and see if the echo has disappeared.
(Not all sound cards have this feature.) Muting Wave on the recording settings may also help with this problem.

**Tip:** To reduce echo of your headset (USB or analog), use the audio wizard to configure your audio volume

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**Disabling the Microphone Boost check box**

If you are using an analog or a USB headset and echo occurs despite lowering your volume setting, use the audio wizard from Tools, Preferences, Audio window and ensure that the Microphone Boost check box is unchecked to eliminate echo. For information on how to uncheck the Microphone Boost check box, see “Using the audio wizard to configure audio volume” section.

---

**PC requirements for sound quality**

The minimum requirement for good sound quality is to have a microphone and full-duplex sound card on your PC. If you use separate speakers on your PC, you must use the echo reducer option, which you can access from Tools, Preferences, Audio, Echo Reducer.

Enabling the Echo Reducer option will use more of your PC’s system resources (CPU and Memory) and could cause performance issues if insufficient available Memory and/or slow CPUs are used. Only enable the Echo Reducer when necessary. If you are on a call and are generating the echo heard by others, and the Echo Reducer is not already selected, place the call on Hold, then select the Echo Reducer, and then take the call off hold. You can select the Enable Echo Reducer check box any time while you are not in a call for all subsequent calls to receive this treatment.

The recommended requirement for good sound quality is to have a full-duplex sound card with a headset with a microphone and headphone combination. With this type of headset, you will have better sound quality, and you may rarely have to use the echo reducer.
No voice during calls

Make sure no other audio applications are running. If another application is using your sound card, PC Phone might not be able to access it.

Check to make sure your volume settings are correct.

Distorted voice

Your sound card drivers may not be completely compatible with PC Phone. This can be typical of older laptop computers and can usually be fixed by installing a different version of the sound card drivers. Check your computer manufacturer’s website for details on obtaining sound card drivers for your computer.

The following table lists the recommended driver versions for the NeoMagic card for the various Microsoft operating systems.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Recommended driver versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows XP</td>
<td>NM6WDM.SYS - 5.1.2461.0</td>
</tr>
<tr>
<td></td>
<td>WDMAUD.DRV - 5.1.2481.0</td>
</tr>
<tr>
<td>Windows Vista</td>
<td></td>
</tr>
<tr>
<td>Windows 7</td>
<td></td>
</tr>
</tbody>
</table>

For laptops, it is recommended that you perform the driver upgrade while the computer is undocked, as it is usually the laptop’s internal sound card that encounters problems and not the docking station’s sound card (if the docking station has one).

Cannot speak when the other party is speaking

You may not have a full-duplex sound card (some laptops default to half-duplex mode). A full-duplex sound card is a minimum system requirement for the A2 Communications Application Server product. You can try a USB headset instead of replacing the sound card.
Cannot hear with headphones

Try plugging your headphones directly into your laptop instead of into the docking station.

Choppy audio when using USB headset

Choppy USB audio can occur when multiple USB devices are sharing the serial bus. Disconnect all other USB devices from your computer and see if the problem goes away. If you cannot disconnect the other devices, for example, if you are using a USB camera, disconnect the USB headset and switch to an internal sound card, using an analog headset for audio, or if you are a Standalone user, use a IP Phone for voice instead of PC.

Calling and messaging problems

Some of the enhanced features of PC Phone may not be supported on your network.

Cannot complete call

If your call does not complete, verify that you have dialed the correct number. If the number is correct, connection to this number may not be supported by your network. Contact your next level of support for more information.

Voicemail button is disabled

You must set up your voicemail access before PC Phone can access your voicemail system. Access to voicemail preferences depends whether you have voicemail service support.

Sharing problems

The sharing tools are designed for specific tasks and may not provide all native windowing functionalities.
Cannot send a copied file using Send Clipboard

Use the File Transfer function to send files.

Cannot paste from my clipboard into my whiteboard

PC Phone does not support copying from or pasting to the whiteboard.

Web Co-browsing does not work

Internet Explorer version 6.0 and above or Firefox version 2.0 and above is recommended.

Video problems

Video cameras and video settings may require fine tuning to optimize the quality of the transmission.

Blurry video

Most video cameras have a focus ring to adjust the image. In a call where you are transmitting video, click the video preview check box (or select the 1x button) to see your transmitted image. Turn the focus ring (it usually encircles the lens) until the image is sharper.

Poor color/contrast/brightness

Most video cameras allow the user to tune these settings. Terminate any active video call, then do the following:

1. Go to Tools, Preferences, Video and click Configure.

2. If video does not appear in the Video Configuration window, select your video camera from the Video Driver drop-down list. (It is probably “Microsoft WDM.”)

3. Click Source after video appears. This usually produces a multi-tab window that has controls to tune video color and brightness. Operate the controls until you are satisfied with the image.
4  Click **OK** to close the camera controls.
5  Click **OK** to close the **Video Configuration** window.
6  Click **OK** to close **Preferences**.

**Adding a new video camera**

First, make sure that PC Phone has permission to perform video telephony. Go to **Tools, Preferences, Video**. If all of the controls are dimmed and non-operational, you may not have logged into the network (use the Login menu). If you have logged on to the network (that is, if there is a green light on your Login menu), your service profile does not include video. Contact your service provider or administrator.

If the video controls are enabled, make sure that PC Phone has been configured to send/receive video by verifying that the **Video Disabled** selection is not selected. If video was disabled, click on another setting to set up video.

**No CODECs video message**

The camera may need to be manually configured, as follows:

1  Go to **Tools, Preferences, Video**, and click **Configure**.
2  If video does not appear in the **Video Configuration** window, select your video camera from the **Video Driver** drop-down list. (It is probably “Microsoft WDM.”)
3  Click **Format** after video appears. The window that comes up varies from camera to camera but look for a control for “Pixel Depth / Compression” or “Format”. Choose either RGB 24 or I420 in this control and click **OK**.
4  If “RGB 24” or “I420” is not listed as a selection, the camera may not be usable by PC Phone. However, try examining other programs that came with the camera in order to enable **Video For Windows** with this camera. Also, check with the camera vendor’s web site to obtain the most recent drivers.
5  Press **OK** to close the **Video Configuration** window
6  Press **OK** again to close **Preferences**.
**Camera switches to receive-only**

PC Phone switches to receive-only video if it starts up and cannot locate a previously found camera. To transmit video again, go to **Tools, Preferences, Video**, disable video, then select your video configuration again.

**Blue screen error**

This is caused either by multiple cameras/video capture devices corrupting each other’s installations or by buggy device drivers. Try to uninstall unneeded video devices, go to the vendor’s web site, and ensure that you are running the latest drivers for the video device. If you are unsure of how to troubleshoot device installation conflicts, seek knowledgeable assistance.

**PC Phone services retrieval or download problems**

When you log on to your PC Phone, you may sometimes fail to retrieve the services. Follow the procedures in this section for services retrieval or download problems. For more information, go to Microsoft Help and Support web site, [http://support.microsoft.com/kb/887678](http://support.microsoft.com/kb/887678).

**Unable to retrieve services**

If you are unable to retrieve your services, you may get the following error:

“Unable to retrieve services”

To resolve this problem, do the following:

1. Log out of PC Phone.
2. Login to PC Phone. PC Phone should automatically retrieve your services.
When you log back into PC Phone, ensure that your Presence status is “Connected.” If your login button is green, but your Presence status is “Unknown,” it means you need to reset your Internet Options to their default settings.

Resetting Internet Options

If you modified your Internet Options, reset the values and verify that it is configured to use SSL2.0 and SSL 3.0:

From your PC,

1. Go to Start, Control Panel and click Internet Options.
2. Click the Advanced tab from the Internet Properties window.
3. Scroll down to Security and check Use SSL 2.0 and Use SSL 3.0 check boxes.
4. Click Apply.
5. Click Restore Defaults.
6. Log out of PC Phone. The services should download successfully.

Checking Security settings

If you are unable to retrieve or download services even after resetting the Restore Defaults option, check your Security settings by performing the following procedures:

- “Configuring the security settings for the Trusted sites zone”
- “Setting the Security Zones to default settings”
- “Clearing SSL state and AutoComplete history”
- “Turning off the pop-up blocker”
- “Looking for third-party firewall or antivirus programs”
Configuring the security settings for the Trusted sites zone

**Tip:** Only add those sites that you trust as a trusted site. If you are not sure about a web site, do not add the web site to the Trusted sites list.

To configure the security settings for the Trusted sites zone

1. Go to **Start, Control Panel** and click **Internet Options**.
2. Click the **Security** tab.
3. Click **Trusted sites**.
4. Click **Default Level**.
5. Click **Sites**. The **Trusted sites** window opens.
6. Type the URL of the any SSL-secured (128-Bit) web site in the **Add this web site to the zone** field.
7. Click **OK**.
8. Click **Apply**.

Setting the Security Zones to default settings

1. From the **Security** tab on the Internet Properties window, Click **Internet**.
2. Click **Default Level**.
3. Click **Local Intranet**.
4. Click **Default Level**.
5. Click **Trusted sites**.
6. Click **Default Level**.
7. Click **Restricted sites**.
8. Click **Default Level**.
9. Click **Apply**.
10. From the **Privacy** tab, ensure that the Settings for the Internet zone are set to **Medium**. If it is not set to Medium, move the slider up or down and click **Default**.
Clearing SSL state and AutoComplete history

1. Click the **Content** tab on the Internet Properties window.
2. In the **Certificates** section, click **Clear SSL State**.
3. Click **OK**.
4. In the Personal information area, click **AutoComplete**. The **AutoComplete Settings** window appears.
5. In the Clear AutoComplete history area, click **Clear Forms** and click **OK**.
6. Click **Clear Passwords** and click **OK**.
7. Click **OK** on the Content tab on the Internet Properties window.

Turning off the pop-up blocker

1. Click the **Privacy** tab on the Internet Properties window.
2. In the Pop-Up Blocker area, uncheck the **Block pop-ups** check box.
3. Click **Apply**.
4. Click **OK**.

Looking for third-party firewall or antivirus programs

Make sure that any third-party firewall or antivirus programs that are installed on your computer are configured correctly and are not preventing you from connecting to web sites. For more information, see the product documentation or contact the program vendor.

If you are unable to retrieve or download services after performing the procedures listed in this section, contact your next level of support.

Start-up or configuration problems

If you have start-up or configuration problems, you can do the following:

- Exit your browser (**File, Exit**) and restart.
• If you are using Internet Explorer (IE), verify it is correctly configured. For more information, see “Optional hardware and software requirements” section.

• Check that you have the minimum hardware and operating system requirements. For more information, see “Minimum hardware and operating system requirements” section.

If you continue to have any start-up or configuration problems, contact your system administrator or service provider.
Appendix A

Terms you should know

This section defines the terms and acronyms used in this guide.

Terms

PC Phone uses some terms that may be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms described further below:

- “Call logs”
- “Conference”
- “Conversation”
- “Services”
- “Friends”
- “Communicator address book”
- “Global address book”
- “Presence”
- “Proxy server”
- “SIP address”
- “Trusted user”

Call logs

PC Phone keeps a record of all incoming and outgoing calls. It stores these call log entries into an inbox (for incoming calls) and an outbox (for outgoing calls).
Your system administrator determines the maximum number of incoming and outgoing call logs that can be stored on PC Phone.

Call log entries will not be lost during a reinstallation of PC Phone.

Conference

Conferences are calls that may involve more than two callers. You can use the PC Phone to create a conference or to dial into a conference. The ability to create conferences depends on whether conferencing service is assigned to you.

Conversation

PC Phone allows you to converse with another user in a multitude of ways. Conversations can involve one or more multimedia functionalities. For example, a conversation may involve just voice, instant messaging, or both. The concept of conversations is key to understanding and using the multimedia capabilities of PC Phone.

Services

Your service provider or system administrator assigns you a collection of services and the service profile for each of these services wherever applicable. Some services are only available to you if the service profile is assigned to you. If your administrator assigned a service, not the profile for the service, then you will have only the default or minimal functionality for this service.

Tip: The concept of service profiles is similar to the service package concept, where the service package is a collection of services and the service data for each of these services.

The GUI as documented in this guide may or may not be fully present, based upon the services and service profiles assigned for you. For example, your company may not support PC video cameras and therefore these settings would not be available for you to change. In addition to video, the service and service profile
defines how many Friends you can have, how many callers you can join in an audio conference, and whether you have voice mail enabled.

If you have access to the Personal Agent, you can view the features and options available to you through Preferences, Services, Service package.

Friends

Within your Communicator address book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry. Just click the Friends Online button to see your Friends and their online presence status.

The ability to see another user’s presence information depends on whether this service is assigned to you. If you do not have presence support, then you cannot mark any address book entries as Friends. Consequently, you will not see any presence information available in PC Phone.

<table>
<thead>
<tr>
<th>In this interface</th>
<th>Presence is available from</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Personal</td>
<td>Personal Contacts tab</td>
</tr>
<tr>
<td>Communicator</td>
<td></td>
</tr>
</tbody>
</table>

Communicator address book

Your Communicator personal address book is a list of personally selected user contacts with a finite length. Opening the address book will show all your contacts that you can search or filter by entering search parameters. You can save your addresses for quick call access as well as organize address book entries into groups.

The Communicator address book is synchronized across all your network access devices. If you make a change to the Communicator personal address book, the change automatically appears on your other network access devices (for example, your IP Phone).
Global address book

The global address book is a list of all existing users in the domain. This list, in your domain, is maintained by your service provider or system administrator. Using PC Phone, you can search on a user’s Username/UserID, Name, First name, Last name, or Phone number. (No information is displayed until a search parameter is entered.) You can initiate a call by double clicking or selecting an entry and clicking the Make Call button in the global address book.

Ad-hoc presence subscription allows users to check presence status of people who are not in their Friends list. In the case of contacts that are defined as Friends, no ad-hoc presence subscriptions are required since the user is already subscribed to their friends’ presence. For GAB and non-friend PAB contacts, an ad-hoc subscription is created for the lifetime of the Contact Details window. As long as the window is open, the user receives presence updates for that contact. The ad-hoc subscription is terminated when the window is closed.

Presence

The ability to configure automatic presence notifications on PC Phone depends on whether this service is assigned to you. If you do not have automatic presence support, then you will not be able to use the automatic presence feature.

Presence is how you let other users know your status in the network. Use Login, Change My Status to change your presence state. This lets other users know whether you are online or unavailable. You can also set the system to automatically alert others whether you are away from your PC or on the telephone.

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Tip: Exiting properly from PC Phone is important since it updates your presence status in the network. You may experience incorrect presence status until you log back in again or after a time-out period.
Proxy server

A proxy server is an application that relays data between PC Phone and the network. It is responsible for making sure your calls get to your registered access clients. When you connect to the proxy server you need to provide a valid username and password.

The IP address of the proxy server may already be defined in PC Phone. If it is not, contact your administrator to obtain the proxy server configuration information.

SIP address

When a procedure instructs you to enter an address, it means that you must enter either a telephone number or a SIP address. A SIP address is a unique identifier of users on the IP network. It can either be a username or a phone number in a domain. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any PC Phone or IP Phone. In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in the Communicator address book.

Using SIP addresses allows you to take advantage of the more powerful features of PC Phone, such as presence.

Trusted user

A Trusted User is a user or a contact that you trust. Sharing sessions (like File Transfers and Whiteboard sharing) from Trusted users are accepted without doing the Accept action. Trusted users are configured on per-Contact basis. In the Communicator Address Book each contact has the Trusted user checkbox on the Contact Details page. The feature is available when at least one of the Client Collaboration services is enabled for a user. When collaboration service is disabled the Trusted user checkbox is not displayed on the Contact Details page.
Trusted users settings are stored locally in PC Phone in the Communicator Address Book.

Acronyms

This guide uses the following acronyms:

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>A2</td>
<td>A2 Communications Application Server bpp</td>
</tr>
<tr>
<td>bpp</td>
<td>Bits per pixel</td>
</tr>
<tr>
<td>CODEC</td>
<td>coder/decoder</td>
</tr>
<tr>
<td>COM</td>
<td>Component Object Model</td>
</tr>
<tr>
<td>C20</td>
<td>C20 Converged Softswitch</td>
</tr>
<tr>
<td>DND</td>
<td>Do Not Disturb</td>
</tr>
<tr>
<td>DSL</td>
<td>Digital Subscriber Line</td>
</tr>
<tr>
<td>FPS</td>
<td>Frames Per Second</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>IM</td>
<td>Instant Message</td>
</tr>
<tr>
<td>IP</td>
<td>Internet Protocol</td>
</tr>
<tr>
<td>IPCM</td>
<td>Internet Protocol Client Manager ISDN</td>
</tr>
<tr>
<td>ISDN</td>
<td>Integrated Services Digital Network</td>
</tr>
<tr>
<td>MWI</td>
<td>Message Waiting Indicator</td>
</tr>
<tr>
<td>LAN</td>
<td>Local Area Network</td>
</tr>
<tr>
<td>NAT</td>
<td>Network Address Translation</td>
</tr>
<tr>
<td>PSAP</td>
<td>Public Safety Answering Point</td>
</tr>
<tr>
<td>PSTN</td>
<td>Public Switched Telephone Network</td>
</tr>
<tr>
<td>SIP</td>
<td>Session Initiation Protocol</td>
</tr>
<tr>
<td>SSL</td>
<td>Secure Socket Layer</td>
</tr>
<tr>
<td>URL</td>
<td>Universal Resource Locator (internet address)</td>
</tr>
<tr>
<td>USB</td>
<td>Universal Serial Bus</td>
</tr>
</tbody>
</table>
Appendix B Hardware notes

Topics in this section include:

- “Compatible video cameras and headsets”
- “Compatibility with the client application”

Compatible video cameras and headsets

PC Phone requires video cameras that capture video in RGB-24, I420, or UYU2 video format; the majority of USB 1.x web cameras meet these requirements.

Bell Aliant makes no recommendation or statement of compatibility about which cameras and/or headsets work with PC Phone on an individual user's PC.

Issues that may influence the operation of a camera are

- hardware revision of the CPU, CPU chipset, and motherboard
- software revision of CPU chipset and motherboard device drivers
- release and revision of the Windows operating system
- hardware revision of the camera
- software revision of the camera drivers
- the presence of other user-installed devices, USB or otherwise, which were previously installed on the user's PC. Other devices may cause issues whether they are still present or not.
- the installation of other software packages on the user's PC
Compatibility with the client application

Ensuring compatibility of the camera with PC Phone application is critical. Compatibility is usually indicated by successfully installing the camera, seeing the camera recognized by the client application, and proper behavior of the PC Phone application during and after several video telephony phone calls.

The following guidelines are recommended:

- Evaluate the camera in person before purchasing.
- If multiple computers with different versions of the Windows operating system are going to be used with the camera, evaluate the camera on all operating systems before purchasing.
- If multiple computers with different hardware configurations are going to be used with the camera, evaluate the camera on all hardware configurations before purchasing.
- Before installing a camera on a computer, always visit the camera vendor's web site for updated camera drivers, and use the updated drivers if available.
Appendix C

Using the Outlook Plug-in

At installation, PC Phone checks for the presence of Microsoft Outlook on the system. If Outlook is installed, PC Phone installs a Communicator plug-in for use with Outlook. The Outlook plug-in modifies the interface of your installation of Outlook so that you can carry out PC Phone tasks like making calls and importing and editing contacts.

Note: The Outlook Plug-in is supported in Outlook 2003, 2007, and as of 8.0 SP1, Outlook 2010, in both 32-bit and 64-bit versions.

After installation, the Plug-in can be enabled or disabled at any time from the PC Phone MS Office Preferences panel. Outlook must then be restarted for this change to take effect.

This appendix contains the following sections:

- “Enabling or disabling the Outlook Plug-in”
- “Outlook Plug-in enhancements for Release 8.0 SP1”
- “GUI changes for Outlook 2003 and 2007”
- “GUI Additions in Outlook 2010”
- “Synchronizing PC Phone Contacts in Outlook”
- “Adding, Editing, or Removing Outlook Contacts”
- “Conference Bridge Host/Join capability in Outlook Calendar”
- “Web collaboration access in Outlook Calendar”
- “Viewing Presence information”
Enabling or disabling the Outlook Plug-in

In PC Phone 8.0 SP1, the Outlook Plug-in is installed and enabled by default. You can disable and enable it from the Preferences panel. If PC Phone does not detect the presence of Outlook, these options are greyed out.

To enable or disable the Outlook plug-in,

1. Select **Tools, Preferences, MS Office**.
2. Select or deselect the **Enable Outlook Plugin** checkbox.

   - If you select **Enable Outlook Plugin**, the **Hide Directory panel when using Outlook Plugin** checkbox is also selected, by default.
• If you select the **Enable Outlook Plugin** checkbox, PC Phone will import contacts in CSV form only. (Two other options are hidden: Import Outlook Contacts and Import Outlook Express Contacts.)

![Import Contacts](image)

• If you deselect the **Enable Outlook Plugin** checkbox while Outlook is running, then Plug-in will still be available. Outlook must be restarted to disable the Plug-in.

• When the Outlook Plug-in is disabled, you can import Outlook Contacts, Outlook Express Contacts, and in CSV form.

• Click **OK** to save your changes or **Cancel** to exit without saving.

### Enabling or disabling Contacts Management for Personal Communicator

If you prefer to manage your connections solely through Outlook, go to **Tools, Preferences, MS Office**, and select the **Hide Directory panel when using Outlook Plug-In** check box. This will remove the Directory tab from the Contacts view of PC Phone so that it cannot be used to manage Contacts. Click **OK** to save your changes or **Cancel** to exit without saving.
Starting PC Phone automatically with Outlook

To automatically start PC Phone when you launch Outlook, go to Tools, Preferences, MS Office, and select the Automatically start Outlook ... check box. Click OK to save your changes or Cancel to exit without saving.

Outlook Plug-in enhancements for Release 8.0 SP1

The Outlook Plug-in has been extensively enhanced in 8.0 SP1 to augment PC Phone's functions in Outlook and to provide continuity for users of GENBAND’s Multimedia Office Client, which is no longer available in release 8.0 SP1.

Microsoft Outlook 2010 and its Ribbon-based Fluent User Interface are also supported in release 8.0 SP1.

GUI changes for Outlook 2003 and 2007

Note: For Outlook 2010, see the section “GUI Additions in Outlook 2010” on page 302.

When the Outlook Plug-in is enabled, it displays PC Phone menus in toolbars:

- Main Toolbar - buttons are shown for your Presence, Session Initiation (via a pop-up window), Contact Information, Call, IM, IP Phone Control Contacts Management (called My friends), Personal Agent, and Help.

- Notification Toolbar - buttons are shown for Do Not Disturb, Missed Calls Indicator, Voice mail Indicator, and Software Update status.
- Contact Toolbar - buttons are shown for Contact Address, Call, IM, and a Sharing drop-down list.

Menus have also been updated for release 8.0 SP1. The Communicator Menu has been expanded for access to more Communicator functions. See “PC Phone Functions in the Communicator tab” section for details on each function.
The context (right-click) menu has also been expanded to give access to Contact-sensitive actions.
GUI Additions in Outlook 2010

Outlook 2010 is now supported and the PC Phone plug-in is a recognized Add-In COM to Outlook's ribbon interface. PC Phone has GUI additions in the following areas.

**Mail view**

The Outlook Home tab has a Communicator Group, displaying the most frequently used Communicator functions: Call, IM, Mute (if on a call), Presence status (and change), and Session.

![Image of Outlook Home tab with Communicator Group]

The Communicator tab is new, and contains all the Communicator functions available in Outlook.

![Image of Communicator tab]

**Note:** Button visibility and availability depends on your service-package and client state. For example, Mute is greyed out when the client is not in a call.

**PC Phone Functions in the Communicator tab**

The following functions are available in the Communicator tab:

**Logout** – Logs you out of PC Phone. Presence status is updated in Outlook as well.
**IP Phone** – Initiates a control to your IP Phone if your PC Phone is configured to control your IP Phone. See “PC Phone with IP Phone Service” on page 54 for more information on controlling IP Phones with PC Phone.

**Preferences** – brings up the User Preferences window of PC Phone.

**Agent** – brings up (in the default web browser) the Personal Agent web portal. Note that the Plug-in passes your SIP credentials to the Personal Agent, enabling the Personal Agent to auto-login and present the main screen.

**Presence Status** (dynamic field) – displays your current Presence status as seen on the PC Phone and by all others who watch your Presence. Click to select another Presence status; this will auto-update the Presence on the PC Phone.

**My Friends** – brings up the Personal Contacts window of Personal Communicator.

**Mute** – if enabled, mutes the currently active call in progress, if the call is through PC Phone.

**Session** – brings up a separate window that allows you to connect to someone in a selectable way, for example, direct-dial calling or web page sharing.

**Contact information (dynamic field)** – displays the most readily available contact information of the sender of the email currently selected.

- If the user is in your Personal Address Book, their SIP address is displayed.
- If the user is only in the Global Address Book, their primary telephone number is displayed.
• If the user is in neither address book, the field prompts for information so as to then contact them via the Call or IM button etc.

**Call** – brings the PC Phone to the forefront and places a call to the email sender

**IM** – brings up an IM window to begin an IM session with the email sender

**Send a File (multi-list)** – brings up an IM window that initiates a file transfer prompt to the email sender, or click on the arrow to choose how to share information with the email sender, be it a file, web page, whiteboard, or clipboard entry.

**Voice Mail** – brings PC Phone to the forefront and places a call to your voice mail, provided the voice mail information has been filled out in the Preferences panel.

**Host Conference** – brings PC Phone to the forefront and places a call to your conference bridge, provided your conference bridge information has been filled out in the Personal Agent. You will be auto-logged in as the chairperson if your PIN has been entered in the Preferences panel under Conference Bridge.

**Incoming Calls** – brings PC Phone to the forefront with Call Logs, Inbox selected.

**Outgoing Calls** – brings PC Phone to the forefront with Call Logs, Outbox selected.

**Import Contacts** – brings up a window that allows you to add users from the Global Address Book into your Outlook Contacts.
Manage Groups – brings up a window that allows you to add, delete, or edit the groups you have used to organize your Personal Contacts.
**About** – brings PC Phone to the forefront with the About window displayed.

**Help** – brings up a PDF of the PC Phone User Guide (in the default web browser), in the language set on Windows, or in English if no match exists.

**Software Update status (dynamic field)** – displays the upgrade information of the plug-in and PC Phone, for example, Up to Date or Upgrade available.

**Contacts view**

The Outlook Home tab has a Communicator group, with the most frequently used Communicator functions: Call, IM, Mute (if on a call), Presence status (and change) and Session.

Note the call dropdown is populated using info in SIP, Business, Home and Mobile fields of the Contact. If the Contact is a conference bridge, the applicable Conference button (Host or Join) is displayed instead of the Call button.

Each Contact window also contains a Communicator Group with Call and IM buttons as well as the primary contact information for that contact (SIP address or telephone number).
Synchronizing PC Phone Contacts in Outlook

The first time that Outlook is launched after the Plug-in is installed, the Plug-in automatically synchronizes the entries in your Personal Address Book with Outlook to create corresponding Outlook Contacts, and sets new flags for each Outlook Contact, as appropriate, in a section of the Contact window called "Online Communication."

Your Outlook Contacts can be a super-set of your Personal Address Book. Previously existing Outlook Contacts are not affected by this synchronization, nor are external Contacts imported by you afterwards. A synchronized Outlook Contact is shown below.
Online Communication fields

SIP Address – the SIP address of the contact

Nickname – the nick name of the contact. It must be unique in the Personal Address Book. If it is not unique in Outlook contacts or is blank in the Personal Address Book, a unique nick name is auto-generated. The default nickname is the SIP address.

Group with – click to change the group this contact is associated with. The Personal Address Book and Personal Contacts will be auto-updated with the change.
**Groups...** – brings up the Manage Groups window, which allows you to add, edit, or delete Groups.

![Manage Groups Window](image)

**Keep a Copy of this contact...** – automatically selected if the contact was imported from the Personal Address Book, this flag indicates that you want this Outlook Contact to also exist in the Personal Address Book. Deselecting it will remove the entry from the Personal Address Book.

**This contact is a friend** – auto-checked if the contact was imported from the Personal Address Book and in your Personal Contacts list, this flag indicates that you want this Outlook Contact in your Personal Contacts list, so that you can see their Presence and easily contact them. Deselecting it will remove the contact from your Personal Contacts list but leave it in the Personal Address Book.

**Trusted User** – auto-checked if this contact was imported from the Personal Address Book with Trusted User set, this flag indicates that you allow this user to send you files through PC Phone or the Outlook Plug-in without your real-time approval prior to the file transfer. Deselecting it will update the setting in the Personal Address Book for the contact and will disallow un-approved file transfers to you.
**Presence Status (dynamic field)** – shows the current Presence status of the Outlook Contact, if the contact is in your Personal Contacts list, that is, if the contact is a "friend" in Outlook.

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**Adding, Editing, or Removing Outlook Contacts**

Now that the PC Phone automatically synchronizes your Personal Address Book with Outlook into the Contacts folder, it’s easy to modify your contacts in either application and have the change reflected in both PC Phone and Outlook.

**Adding a Contact** – If you add a contact in Outlook and want it also added to your Personal Address book, check the **Keep a Copy of this contact**... field. Otherwise the contact exists in Outlook alone. If you add the contact to your Personal Address Book, it will automatically appear in Outlook Contacts with the Keep a copy... field set.

**Editing a Contact** – Editing a contact in Outlook will change the entry in your Personal Address Book as well, so long as the Keep a copy ...field is set. Editing it in your Personal Address Book will automatically change it in Outlook as well.

**Removing a Contact** – Deleting a contact in Outlook will delete it from your Personal Address Book as well, if the Keep a copy... field is set. If that field is not set, it means the contact exists solely in Outlook and will be removed only from Outlook. Removing an entry from your Personal Address Book will also delete it from your Outlook Contacts folder.
All Personal Address Book entries are also now Outlook Contacts, and any change to them from PC Phone will make the same change in Outlook. An Outlook contact does not have to be in your Personal Address Book unless you want it to be there, and it can be changed without affecting your Personal Address Book, as it does not exist there. You can change who are Personal Contacts (that is, Friends in Outlook) and who are Trusted Users in either application.

Conference Bridge Host/Join capability in Outlook

Calendar

Outlook users can now easily advertise and use their conference bridge information in the Outlook Calendar to host or join conferences with only a few mouse clicks.

Enhancements to the Outlook Calendar are described in the following sections in greater detail:

- “Adding conference bridge information to a meeting invitation”
- “Joining a conference from a meeting invitation”
- “Hosting or Joining a Conference from the Calendar Window”

Adding conference bridge information to a meeting invitation

Provided your conference bridge information is populated in the Personal Agent, this information is easily added for inclusion to meetings, or accessed to host or join meetings you arrange or to which you are invited. Opening a new window to create a meeting invitation gives you access to the Communicator group in the window's ribbon.
Clicking the Add Conference Bridge button will insert the conference bridge details stored in the Personal Agent, including (if applicable):

- All available dial-in numbers to the conference bridge
- The access code for your bridge
- The Web Collaboration URL link
- An Outlook vcard with this information, which users can choose to save or pin to their desktop for later/frequent use.

**Joining a conference from a meeting invitation**

Opening up a meeting invitation (from either the reminder pop-up or from the Calendar window) will display the Communicator group in the window's ribbon.
If the meeting organizer has used the Host Conference button to supply the meeting's conference bridge information, your window will have the Join Conference button in the Communicator group. Clicking this button will bring up a window allowing you to choose which number to use to join the conference bridge. By default the SIP address (if datafilled in the Personal Agent) will be selected, but a pull-down menu will allow you to choose any of the dial in numbers available.

![Choose A Conference Number]

Click OK to bring the PC Phone to the forefront and call the conference bridge and input the access code. You will have joined the conference bridge in as little as two mouse clicks.

Hosting or Joining a Conference from the Calendar Window

The main calendar window's ribbon offers a variety of ways to host or join a meeting, depending on the information available in the meeting invitation that is selected by left clicking or right clicking the mouse. The information can be summarized into three categories:
• A meeting you have created (using the Host Conference functionality is assumed)
• A meeting invitation you have received that the organizer has created using the Host Conference functionality
• A meeting invitation you have received that the organizer has created without using the Host Conference functionality (typically "ad-hoc"- that is, manually typed)

For meetings you create, left-clicking the meeting will update the ribbon to show the Host Conference button. Right-clicking it will show this option in the resulting context menu.
For a meeting invitation you have received that the organizer has created using the Host Conference functionality, left-clicking it will display the Join Conference button in the main window ribbon while right-clicking it will display Join Conference in the resulting context menu.

For meeting invitations you have received that the organizer has created without using the Host Conference functionality, right-clicking it will present no options in the context menu, and left-clicking it will display in the main window's ribbon the standard Communicator group functions.

Note that the Call and IM buttons are only highlighted if the meeting organizer is in your Personal Address Book.

Web collaboration access in Outlook Calendar

Provided this functionality is provisioned in your Personal Agent (and presumably for the rest of your user group), right-clicking on a meeting notice that the organizer has created using the Host Conference button will display the Web Collaboration option in the resulting context menu.
Clicking on Web Collaboration will open a web page in your system's default browser, and load the collaboration session identified by the URL in the meeting invitation.

Viewing Presence information

**Note:** Presence information is shown in the MS Office 2010 ribbon interface only, not in earlier versions of Outlook.

To display presence information, new GUI elements have been added to the Outlook 2010 ribbon.

The online presence of an email sender can be seen in multiple views in the Outlook Plugin, including the Home and Communicator tabs and the Message window.

**Note:** Presence information is not shown on MS Outlook Meeting forms.

The presence status of an email sender is displayed automatically when you select an email, if the sender is a contact in your Personal Contacts/Personal Address Book, or a contact accessible through the Global Address Book.

In the Communicator Home tab for Mail, shown below, presence is displayed for a selected email.
Done, thank you for the quick solution.

John
In the Communicator Group Home tab for Contacts, presence is displayed for a selected contact.

In the Session group Communicator tab for Contacts, presence is displayed for a selected email.
Incoming messages display presence.

The Communicator Address Book displays a contact’s presence status.
Appendix D

Using the Lotus Plug-ins

Two plug-ins enable access to PC Phone functionality from within Lotus Notes and Lotus Sametime.

Topics in this section include:

- “Installing Lotus plug-ins”
- “Using Lotus Notes to Make a call or send an Instant Message”
- “Setting PC Phone Presence in Lotus Notes”
- “Making a call using Lotus Notes Calendar entries”
- “Associating a SIP address in Lotus Sametime”
- “Making a call in Lotus Sametime”
- “Troubleshooting”

Installing Lotus plug-ins

The Release 8.0 SP1 PC Phone Installer contains the necessary files for Lotus Notes and Lotus Sametime. The files are added to the following PC Phone folder: `<pcc_install_dir>\Lotus Update Site`.

The default installation folder on 32 bit systems is `C:\Program Files\GENBAND PC Phone`. On 64 bit systems it is `C:\Program Files (x86)\GENBAND PC Phone`.

At any time, a user can point their Lotus Notes or Lotus Sametime feature installer mechanism to this PC Phone sub-directory and choose from a listing of available plug-ins.

To install the Lotus Notes plug-ins,
1 If you have default settings, start with Step 2; if you have custom settings, start with Step 6.

2 Browse to <Notes installed directory>/Framework/rcp folder.

3 Open plugin_customization.ini file.

4 After the last line, type com.ibm.notes.branding/enable.update.ui=true.

5 Select File, Save.

6 From Lotus Notes, select File, Select Application, then Install Plug-ins.

7 In the Install/Update dialog box, select Search for new features to install.

8 Click Next.

9 In the Install dialog box, click Add Folder Location.

10 In the Browse For Folder dialog box, select the local update site

11 Click OK.

12 In the Edit Local Site dialog box, verify the information is correct and click OK.

13 In the Install dialog box, click Next.

14 In the Install dialog box, review the software license agreement information and select I accept the terms in the license agreements.

15 Click Next.

16 When the installation is complete, click Finish.

17 Once the installation is complete, the system will prompt you to restart your system. Click Yes to restart.

To install the Lotus Sametime plug-ins,

1 From Lotus Sametime, select Tools, then Plug-ins, then Install Plug-ins.

2 In the Install/Update dialog box, select Search for new features to install.

3 Click Next.

4 In the Install dialog box, click Add Folder Location.

5 In the Browse For Folder dialog box, select the local update site

6 Click OK.
7 In the Edit Local Site dialog box, verify the information is correct and click OK.

8 In the Install dialog box, click **Next**.

9 In the Install dialog box, review the software license agreement information and select **I accept the terms in the license agreements**.

10 Click **Next**.

11 When the installation is complete, click **Finish**.

12 Once the installation is complete, the system will prompt you to restart your system. Click **Yes** to restart.

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**Using the Lotus Notes Plug-in**

The Lotus Notes plug-in adds a set of user interface extensions to the main Lotus Notes interface. These extensions perform GENBAND PC Phone API operations, indirectly using A2 functions as shown in the following pages. Note that the use of the Lotus/Sametime plug-ins does not preclude any user from also accessing and directly using the native PC Phone GUI.

Lotus Notes Plug-in user interface extensions appear as toolbar and menu items, described below.

**Toolbar items**

Lotus Notes Plug-in toolbar items include:

- Display of the current user name with presence control
- A button to display a dialog to make sessions
- An input field which can start a call directly to the specified number
- The ability to start a call to the selected item's number or associated contact
- An input field which can start a call directly to the specified number
- The ability to start an IM session with the selected item's associated contact
In the figure above:

- The first item to the left shows the user name and presence status of the PC Phone that is running on the current system. Clicking the item brings the list of presence states available from on the PC Phone. When a presence item is selected, the plug-in sets this presence on PC Phone.
- The second item, Session, invokes the Make Session Dialog box described in the section see “Using Lotus Notes to Make a call or send an Instant Message” section.
- The third item is a free text input and drop-down field where the user can enter a number or SIP address which is used by the business logic when the Call or IM buttons (fourth and fifth items) are pressed. Also, the drop-down portion of the item shows the last ten numbers which were used to make a call or IM from the Notes plug-in. Moreover, the field is automatically filled with the preferred number of the contact selected in the Lotus Notes Address Book or email.

**Multimedia menu items**

A new top-level menu item, labeled Multimedia, shown below, is used to:

- Control presence
The Lotus Notes plug-in uses contact matching to provide a dialable number or SIP address to the plug-in functionalities described above. Lotus Notes contacts are matched to PC Phone address book entries by email address. This enables the user to initiate a number of C20-A2 functions by selecting the Call, IM, or Session buttons, described in the following sections.

Using Lotus Notes to Make a call or send an Instant Message

To make a call or send an Instant Message (IM) using Lotus Notes,

1. Select **Multimedia**, then **New Session** from the Lotus Notes menu bar. The Start Session dialog box opens.
2 In the Start Session dialog box, enter a number (using the dial pad) or type a SIP address in the 'To' field.

![Start Session dialog box]

**Tip:** The drop-down portion of the To field shows the last ten dialed numbers or SIP addresses. You can select a number from this drop-down list.

3 In the Make Session dialog box, select **Call** from the Action drop-down menu to make a call, or **Instant Message** to send an IM.

**Tip:** The Action field is pre-filled with a list of multimedia services that are available to the current user.

4 Click **Connect** to initiate the call or IM.

You can also make a call (or send an IM) by entering a number or a SIP address in the Session field on the Lotus Notes toolbar and then clicking the **Call** button.
You can also initiate a call to a currently selected contact’s preferred number by selecting **Multimedia**, then **Call** from the Lotus Notes menu bar. To send an IM to a currently selected contact’s preferred number, select **Multimedia**, then **IM** from the Lotus Notes menu bar.

### Setting PC Phone Presence in Lotus Notes

The User/Presence field shows the user name and presence status of the PC Phone which is running on the current system. To set the PC Phone Presence state in Lotus Notes,

1. Select the User/Presence drop-down list by clicking the arrow on the right side of the field. The list displays the presence states available from on the PC Phone.

2. Select the presence state from the drop-down menu. The plug-in sets this presence on PC Phone.
Making a call using Lotus Notes Calendar entries

To make a call using the Lotus Notes Calendar entry,

1. Select and display a calendar entry. When a calendar entry is selected, the IM button is disabled in the Lotus Notes toolbar and the Session field displays the extracted information from the entry’s Where field.

2. Click Call.

The call operation will use all the characters up to the first whitespace as the number to dial. For example, if the entry’s Where field contains 9084441991 Joe’s office, then PC Phone calls 9084441991.

Also, all the characters after the first comma character will be dialed as DTMF tones after the call has been established. For example, if the entry’s Where field contains meetme@imsinsight.com,5976142 Dan’s bridge, PC Phone will first call meetme@imsinsight.com and then dial the digits 5976142 once the call is established.
Using the Sametime Plug-in

The Sametime plug-in is similar to the Lotus notes feature and provides a set of UI additions that are added to the main Sametime interface. These include:

- A dialog to associate a C20-A2 SIP address with a Sametime contact. This is required because Sametime contacts do not carry SIP or email addresses, so they cannot be matched in the same way Lotus Notes contacts are matched.
- A toolbar button to show the Make Session dialog. This allows a user to start calls, Instant Messages, and other multimedia activities as described previously
- Context menu items for Sametime contacts
- GENBAND C20-A2 Presence for Sametime contacts, as shown in the following figure.

![Contacts](image)

Note that Presence is only displayed when a contact's associated SIP address matches the PC Phone's Personal Contacts ("friend" with continuous presence). In other words, if the PC Phone's address book does not have a "friend" entry with the SIP address associated to a Sametime contact, presence information is not available for that Sametime contact.
To associate a SIP address in Lotus Sametime,

1. In the main Lotus Sametime interface, right-click on a user entry and select **Associate SIP Address**.

   ![Associating a SIP address](image)

   **Tip:** The Associate SIP Address menu item will appear for non-person items of the Sametime contact list (for example, groups). Attempting to select this function with non-person items results in an error message being displayed to the user.

2. In the Associate SIP Address dialog box, enter the new SIP address.
   When the Associate SIP Address dialog box initially opens, the input field is filled with the contact’s currently associated SIP address. If no SIP address was previously associated, the default association is used.
3 Click **OK**.
Clicking the Default button computes a default which will be used as a SIP address. This is usually the contact’s mutable nickname.

Making a call in Lotus Sametime

To make a call in Lotus Sametime,

1 In the main Lotus Sametime interface, click the GENBAND button to launch the Start Sessions dialog box.

   ![Start Session Dialog Box](image)

If the Start session dialog box is launched while a contact is selected in the Sametime friends list, the associated SIP address is displayed in its To field of the Start session dialog box.

2 In the Start Session dialog box, enter a number (using the dial pad) or type a SIP address in the 'To' field.

   ![Start Session Dialog Box](image)

   **Tip:** The drop-down portion of the To field shows that last ten dialed numbers or SIP addresses. You can select a number from this drop-down list.

3 In the Make Session dialog box, select **Call** from the Action drop-down menu.
**Tip:** The Action field is pre-filled with a list of multimedia services that are available to the current user.

4. Click **Connect** to initiate the call.

**Troubleshooting**

**PC Phone startup**

The Lotus Notes and Lotus Sametime plug-ins are essentially extensions of PC Phone running on a machine. Therefore, they require PC Phone to be running at all times for proper operation. In the case where PC Phone is not logged-in, and attempts to use functionality which requires a logged-in PC Phone are made, the plug-ins display an error message alerting you that a login is required.

If you click **Yes** and PC Phone fails to start, contact your contact administrator or next level of support.

**Uninstalling**

Because un-installing PC Phone deletes only the update site files, it is possible to un-install PC Phone without un-installing the Lotus Notes and Lotus Sametime plug-ins. If PC Phone is no longer installed, the plug-ins will display an error message alerting you that a login is required. To restore plug-in functionality, PC Phone must be re-installed.

**Profiles**

If you are using Lotus Notes, the PC Phone plug-ins will automatically use your default profile (if the plug-ins detect a current running version of PC Phone). If you wish to use
a different profile, you must launch PC Phone from the startup menu item provided by
the installer prior to starting Lotus Notes or Sametime.

ASU updates

It is not possible to apply ASU updates when PC Phone is launched at request of the
Lotus plug-ins (see “PC Phone startup” on
page 335). The current workaround is for the user to launch Personal
Communicator from the startup menu item provided by the installer prior to
starting Lotus Notes or Sametime.

Since the plug-ins cannot be directly installed/upgraded by external entities, the PC
Phone ASU mechanism is not able to automatically upgrade the Notes and Sametime
plug-ins directly. Instead, the ASU mechanism simply updates the files in the update
site folder (<pcc_install_dir>\Lotus Update Site) and a user needs to manually request
the update from the Lotus Notes or Lotus Sametime interfaces.