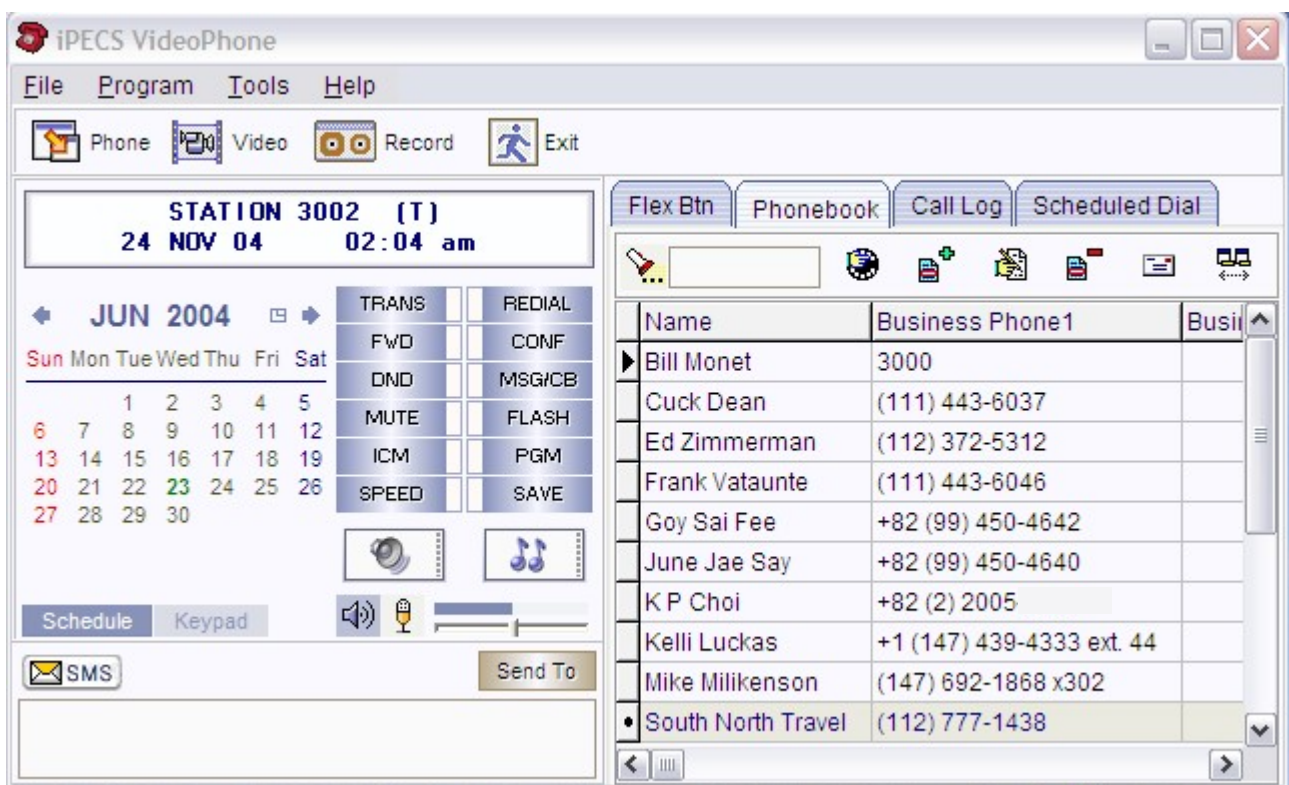


iPECS

Video/SoftPhone

Installer & User Guide



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1 Introduction

The *iPECS Video/SoftPhone* is a multi-media communication terminal using a PC based application to link the operation of an on-screen multi-button telephone with other communications related PC applications. *iPECS Video/SoftPhone* is visualized on the desk-top and interfaced to the user via the mouse and keyboard. All the features of the traditional *iPECS* multi-button phone are available to the user. A Phone Book database with links to the user's PIM (Personal Information Manager) provides pop-ups for incoming caller identification. *iPECS Video/SoftPhone* users can employ the Phone Book to place calls as well as manage contact records. The video interface delivers video for a multiparty conference. The File Sharing feature allows multiple parties in a conference to view and manipulate the file. Other special functions available to *iPECS Video/SoftPhone* users include: appointment scheduling, SMS support, e-mail and call recording.

Features of the *iPECS Video/SoftPhone* include:

- ❖ Automatic database synchronization
- ❖ Display Mode (*Phone/Keypad/Small, Calendar/Keypad*)
- ❖ Phone Book calling
- ❖ Phone Book Management
- ❖ Database import/export (MS Outlook, GoldMine, ACT!, Excel)
- ❖ Scheduled Dial
- ❖ User call log
- ❖ User SMS (Short Message Service)
- ❖ Video Conference
- ❖ File Collaboration
- ❖ Voice Recording
- ❖ Local/ Remote Connection Mode
- ❖ Multi-language support
- ❖ E-mail with MS Outlook
- ❖ Flex button labels
- ❖ Incoming Call with Id pop-up window
- ❖ Help

2 Installation and setup

Set-up of the *iPECS Video/SoftPhone* is a four process;

1. connect the PC to the host *iPECS* system,
2. install the *iPECS Video/SoftPhone* application on the users' PC
3. install system lock key, and
4. complete registration of the *Video/SoftPhone* application to the *iPECS* system.

Completing the registration process may require assistance of the *iPECS* system administrator to adjust settings of the *iPECS*. For remote applications, the *iPECS* will require entry of the MAC address of the PC running the *iPECS Video/SoftPhone*. Also for remote users, the *iPECS Video/SoftPhone* will require entry of the host *iPECS* system IP address.

Prior to installation, the PC and operating system should be verified for compatibility with the *iPECS Video/SoftPhone* application. Assure that the PC and OS (Operating System) comply with the minimum requirements of sections 2.1 and 2.2.

2.1 System requirements

The minimum requirements for the *iPECS Video/SoftPhone* PC are described below.

- ❖ Pentium 4 or compatible CPU
- ❖ 1 GHz clock speed or higher
- ❖ 256 Mbytes RAM
- ❖ 200 Mbytes of free hard-drive space
- ❖ 1024 x 768 resolution monitor
- ❖ CD-ROM drive
- ❖ Video/Web cam, only required for real-time video

2.2 Supported operating systems

The *iPECS Video/SoftPhone* application can run under any one of several Microsoft Operating Systems including:

- ✓ Microsoft Windows XP
- ✓ Microsoft Windows 2000
- ✓ Microsoft Windows 98
- ✓ Microsoft Windows 98 Second Edition

2.3 iPECS Connection

The PC running the *Video/SoftPhone* application may be connected to the *iPECS* system either as a local or remote device. The connection as a local device requires the *Video/SoftPhone* connect to the same LAN as the host *iPECS* system. When connecting as a remote device, the PC's MAC address must be assigned as a Remote device in the *iPECS* for proper registration and operation. Refer to [section 2.6.2](#) for additional information on remote operation. Figure 2.3 provides a pictorial view of the connections to the *iPECS*.

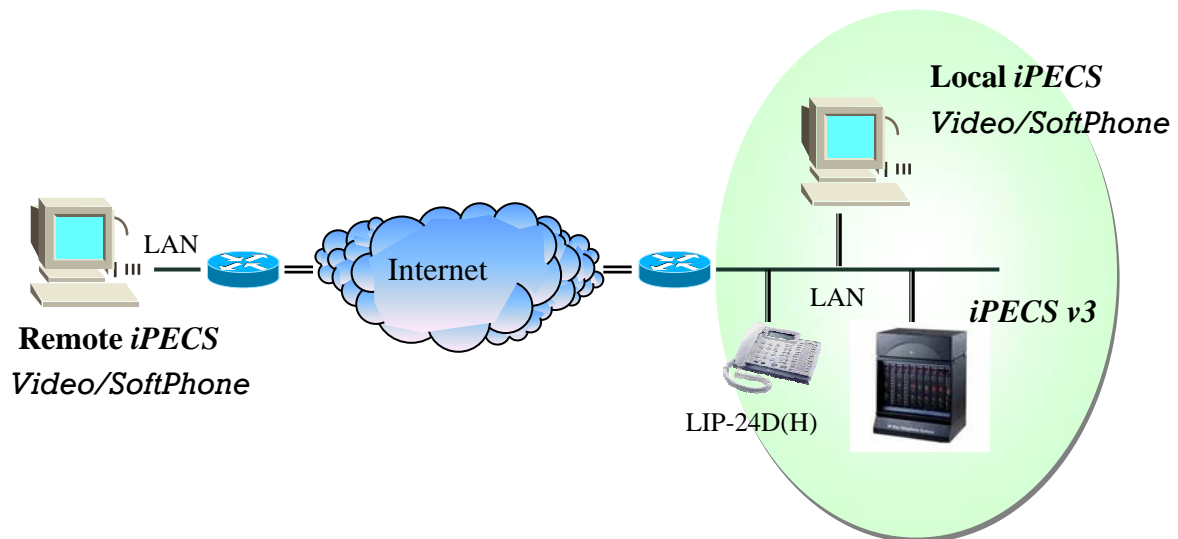


Figure 2.3 *iPECS Video/SoftPhone* Connections

2.4 Video/SoftPhone Application Installation

When the *iPECS Video/SoftPhone* CD-ROM is placed in the PC, an auto-execute install program will start. The install Wizard as shown in Figure 2.4a will appear.

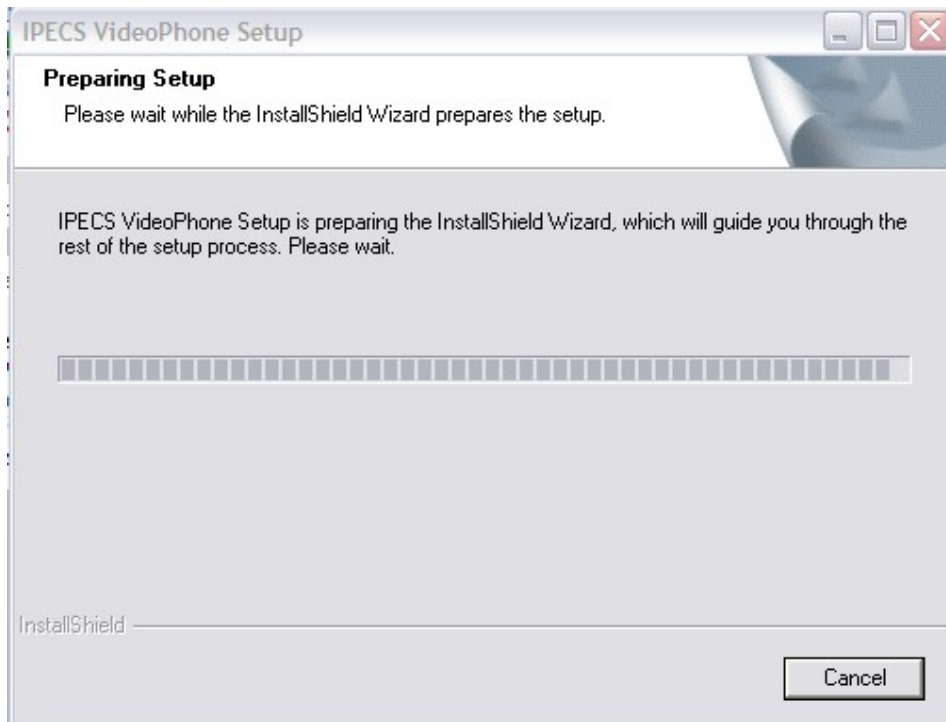


Figure 2.4a *iPECS Video/SoftPhone* Install Wizard

In the next installation step, the default destination folder for the *Video/SoftPhone* application can be modified using the Change button. The default directory for installation is “C:\Program Files\IPECS VideoPhone\”, Figure 2.4b. To continue the installation click the Next> button.



Figure 2.4b Install folder

Once the *iPECS Video/SoftPhone* application has been installed, it is necessary to install WinPcap2_3.exe. You will be asked and must agree to the WinPcap license terms, Figure 2.4c, then follow the instructions in the WinPcap and iPECS Video/SoftPhone wizards to complete the *Video/SoftPhone* installation.

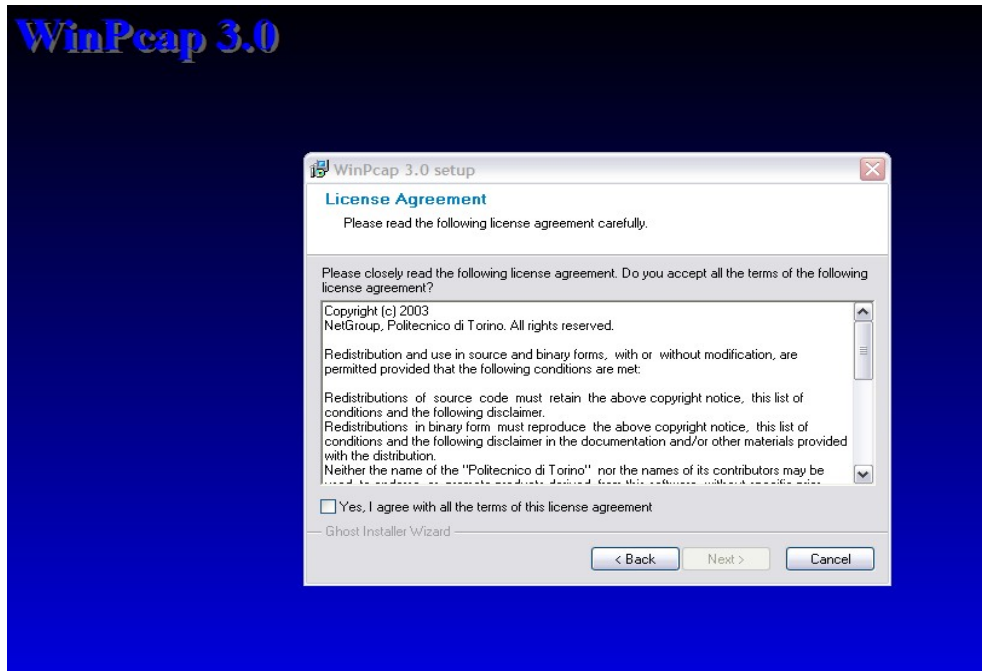


Figure 2.4c WinPcap License Window

2.5 iPECS Lock-key

Prior to registration of the *iPECS Video/SoftPhone* with the host *iPECS* system, the host *iPECS* system will require installation of the *Video/SoftPhone* software lock-key. This is accomplished by the *iPECS* system administrator under the system's Maintenance window. The administrator should reference the *iPECS* Admin and Maintenance Manual for guidance.

2.6 Registration

2.6.1 Registration Process


When *iPECS Video/SoftPhone* is run the first time, it attempts to register with the system. The initial registration, when locally connected, is automatic assuming the *iPECS* system is set to allow registration, refer to the *iPECS* Description & Installation manual for the Registration

Switch settings.

When the *iPECS Video/SoftPhone* is remotely connected the first time, registration will fail unless pre-registered in a local environment. Such failure may also occur due to use of an improper IP address or MAC address, which can be corrected as outlined in [section 2.6.2](#). When this occurs, the host iPECS system IP address must be entered and the connection mode change to remote in the Registration Error dialog box, Figure 2.6.2. Also assure the correct MAC 'In Use', is displayed in the message window.

For a locally connected device, audio is from point to point over the LAN, NAT (Network Address and Port Translation) is not supported and IPsec is not implemented. For a remotely connected device, audio is handled through an *iPECS* system VoIP channel and remote NAT is supported.

To run the *Video/SoftPhone* application;

- select the *iPECS Video/SoftPhone* shortcut icon (), the *iPECS Video/SoftPhone* application will start and attempt to register with the host *iPECS* system.

2.6.2 Remote Registration Error

If a registration error occurs, the user will receive a Registration Error message and dialog box, Figure 2.6.2. In the dialog box, the user may enter the IP Address for the host *iPECS*, and configure the *Video/SoftPhone* Connection mode ([section 5.3.4](#)) and appropriate MAC for the PC. In certain local environments, the Multicast selection may be available. To enter information in the dialog box;

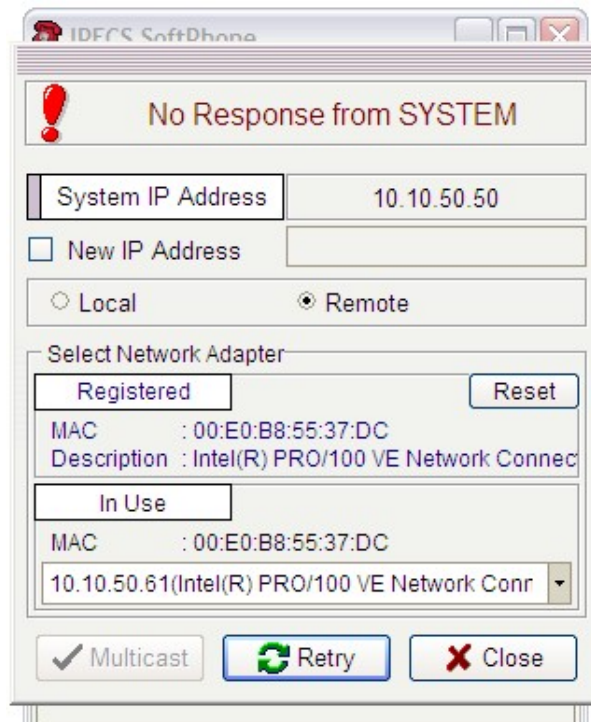


Figure 2.6.2 Registration Error message & dialog box

System IP Address:

- select New IP Address box,
- enter new IP Address.

Connection Mode:

- select Local or Remote radio button.

PC Network Adapter:

- if the PC has multiple NICs, e.g. wired, wireless, VPN network support, etc., select the desired NIC from the drop down menu under In Use MAC.

After changing characteristics in the message box it may be necessary to,

- select Retry to register,
- close the *iPECS Video/SoftPhone* application,
- restart the application.

Registration error messages that may be received include:

No Response from System – there is no connection to the host *iPECS*, the host IP address is incorrect, the *iPECS* is not set for local registration, or the wrong NIC (MAC) is being used.

Current Adapter NOT presently Available – the currently defined NIC is in use by another application, not connected, or has failed to properly connect to the network.

3 iPECS Video/SoftPhone Operation

3.1 Overview

iPECS Video/SoftPhone interfaces with the user through the *iPECS Video/SoftPhone* window, Figure 3.1a. At the top of the *Video/SoftPhone* window is the Menu bar and below the Menu bar is the *Video/SoftPhone* Tool bar.

There are two *Video/SoftPhone* views, *Phone* and *Keyset*. The *Phone* view, Figure 3.1a, emulates the basic *iPECS* phone; an LCD area, keypad and fixed feature buttons are arranged generally as with the traditional *iPECS* phone. The fixed feature buttons give the user access to features and resources of the *iPECS* with the same displays as the LCD of an *iPECS* multi-button phone. The user may dial with the mouse from the *Keypad* window or with numeric keys on the PC keyboard. Below the keypad, are the volume control up/down buttons and window selection buttons, *Schedule* and *Keypad*. The separate Speaker and Microphone icons may also be used to adjust the volume of the microphone or speaker independently with the adjustment slide bar to the right of the icons.

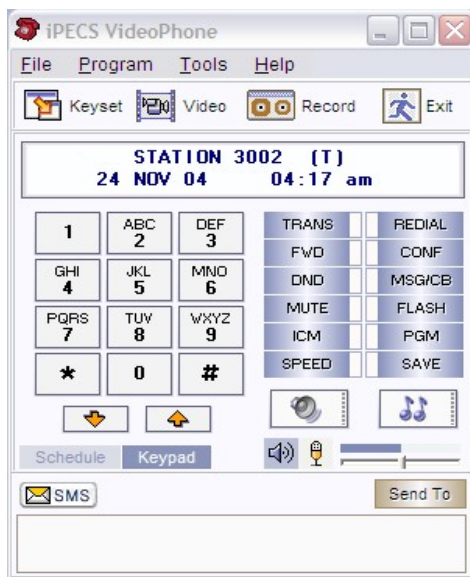


Figure 3.1a *Phone* view w/*Keypad* Window

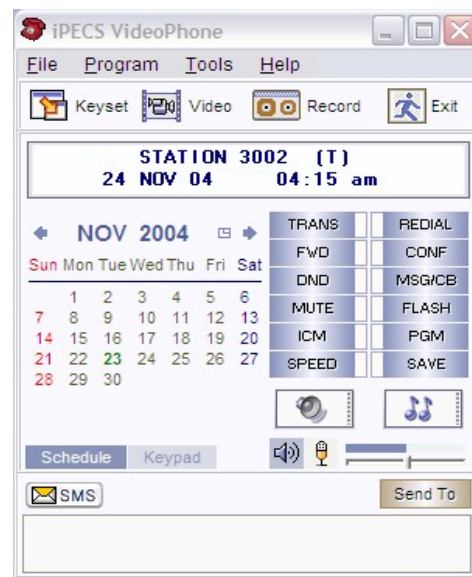


Figure 3.1b *Phone* view w/*Calendar* Window

The *Keypad* window can be toggled to a *Schedule* window, Figure 3.1b, which links to the user's Outlook appointment scheduler. The *Schedule* view includes a scrolling display of daily events below the calendar and allows access to the scheduler for managing appointments. At the bottom of the window, the user may access the SMS (Short Message Service) features of the *iPECS*

Video/SoftPhone to exchange short text messages with other users.

The *Keypad* view, Figure 3.1c, adds the 4 *Keypad* folders to the right of the *Phone* view. The folders include Flex Button, PhoneBook, Call Log and Scheduled Dial folders. The Flex Button folder emulates the multi-button function of the traditional 24 button *iPECS* phone. The Flex Buttons are used in the same manner as the traditional *iPECS* phone and are fully programmable in the *iPECS* system database. The *iPECS Video/SoftPhone* has two Flex button screens for display of 48 Flex buttons. The screen displays 24 Flex buttons at a time, displaying buttons 01 to 24 and 25 to 48 by selection at the bottom of the screen.

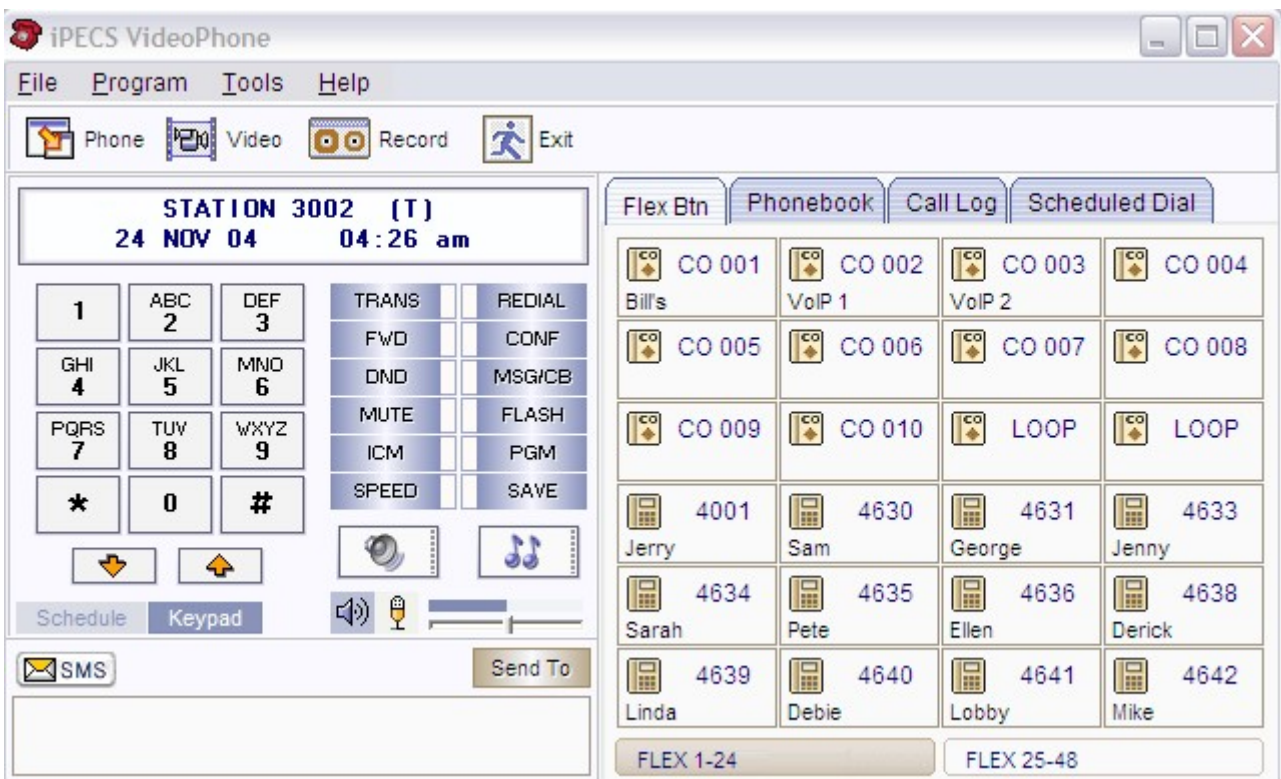


Figure 3.1c *iPECS Video/SoftPhone Keypad* view

The user’s contact manager can be imported for the PhoneBook folder, displaying information on contacts registered in the contact manger database. The PhoneBook is employed to place calls and send e-mails and can be searched, sorted and edited. The PhoneBook database can be synchronized with an external source database each time the *iPECS Video/SoftPhone* application is run. Also, changes made to the PhoneBook database can be automatically exported to the external database to maintain synchronization.

The Call Log folder maintains a database with a record of each call placed or received by the *iPECS Video/SoftPhone*. The Call Log, if enabled, can be viewed, sorted and printed or can be disabled so no log records are generated.

In the Scheduled Dial folder the user can input a phone number and a date & time to call the number; at the scheduled time the system will confirm and place the requested call.

The *iPECS Video/SoftPhone* supports Video communications with an automatic link to a standard PC camera. Activate the video camera interface for a preview and open the channel to send real-time video to the remote party. More importantly to the business user, files may be shared in a collaborative 3 party conference session, each party has access to and can edit the application file, over the *iPECS Video/SoftPhone* link. From the Tools menu select Application Sharing then, select the file. The file is opened and any of the parties may manipulate the contents in real-time.

3.2 Placing & Receiving Calls

3.2.1 Placing a Call

The basic operation of placing a call for the *iPECS Video/SoftPhone* is the same as the traditional *iPECS* multi-button phone. Dialing is accomplished by selecting digits from the *Keypad* window with the mouse or using numeric keys on the PC keyboard.

For internal calls to other *iPECS* system users;

- Dial the station number or press a DSS/BLF Flex button. The digits will display in the LCD area.
- Press the “Space” bar or select the Speaker button with the mouse to terminate the call.

For calls external to the *iPECS* system;

- Select a Line button or dial the CO access code (generally ‘9’),
- Dial the desired number.
- Press the “Space” bar or select the Speaker button with the mouse to terminate the call.

In addition to the basic calling operation, the user can also place calls by selecting records from the Phone Book folder, [section 3.5.2](#), or Call Log folder, [section 3.5.3](#).

The *iPECS Video/SoftPhone* application must be the active application in order to place a call.

3.2.2 Receiving a Call

When a call is received, the phone will ‘ring’ and the Caller Information window will appear below the *Video/SoftPhone* window, Figure 3.2.2. The window shows the caller id delivered from the *iPECS* system and the name associated from the Phone Book database. By selecting More from the window, the complete Phone Book record will be displayed. If a call is received while the *Video/SoftPhone* is minimized, the *Video/SoftPhone* and Caller Information window will pop-up to display the incoming call information.

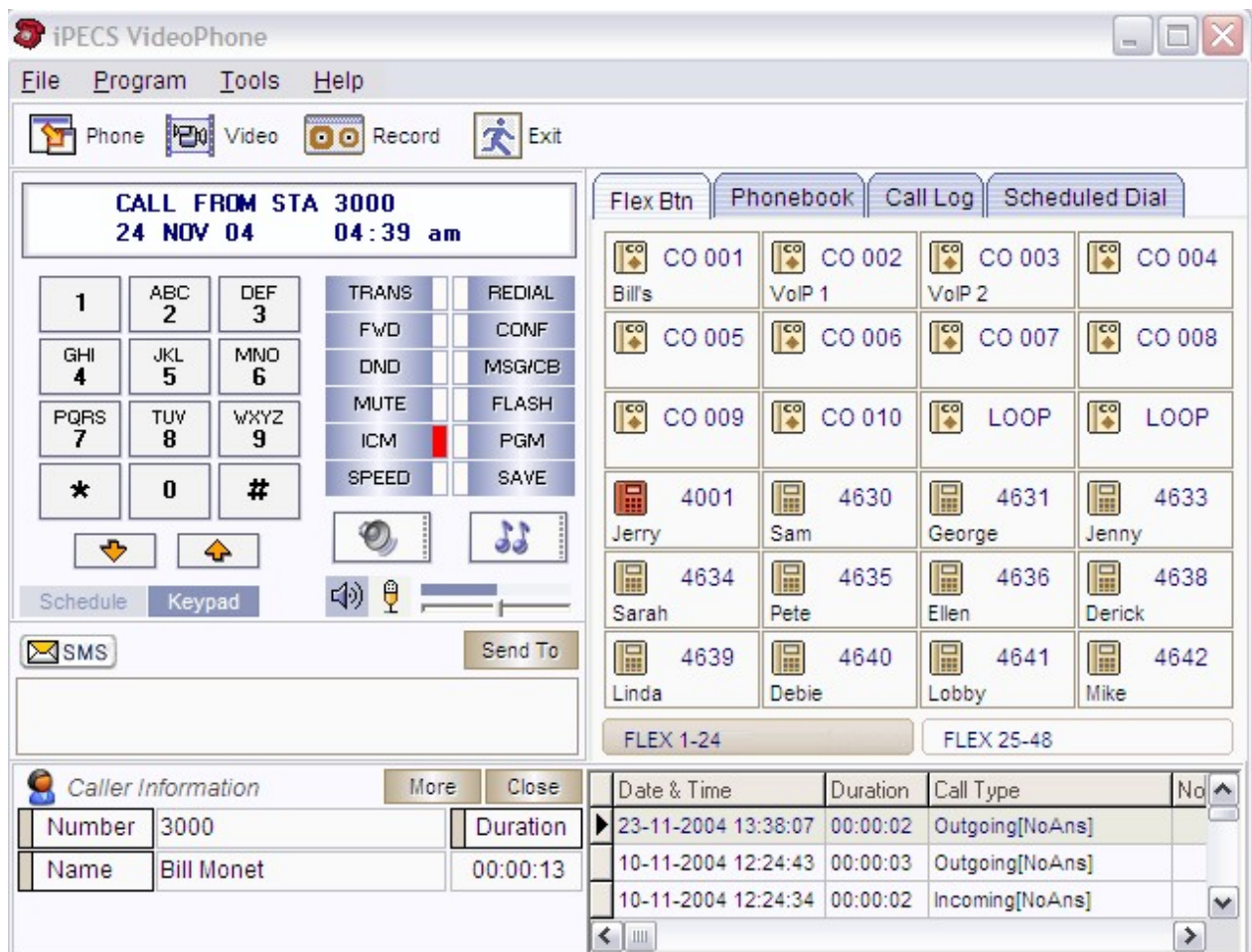


Figure 3.2.2 Caller Information window

To answer the call;

- Press the “Space” bar or select the SPEAKER button with the mouse.
- Press the “Space” bar or select the SPEAKER button with the mouse to terminate the call.

The *iPECS Video/SoftPhone* application must be either the active application or minimized to the tray in order to receive a call.

3.3 Using *iPECS* System Features

The *iPECS Video/SoftPhone* has complete access to all of the system features as well as the features available to the traditional *iPECS* phones, with the few exceptions based on the differences in the user platform, refer to [section 5.5](#). The fixed feature keys operate in the same manner as the *iPECS* phones except the mouse is used to select dial pad and feature buttons. For operation of the features, refer to the *iPECS* Quick Guide or the *iPECS* Phone User Guide.

3.4 Appointment Calendar

iPECS Video/SoftPhone *Schedule* window displays a monthly calendar and a scrolling appointment display below the calendar derived from the user's Outlook scheduler. By right clicking the mouse over a date on the calendar, an Appointment Summary window is displayed over the *Schedule* window, Figure 3.4a.

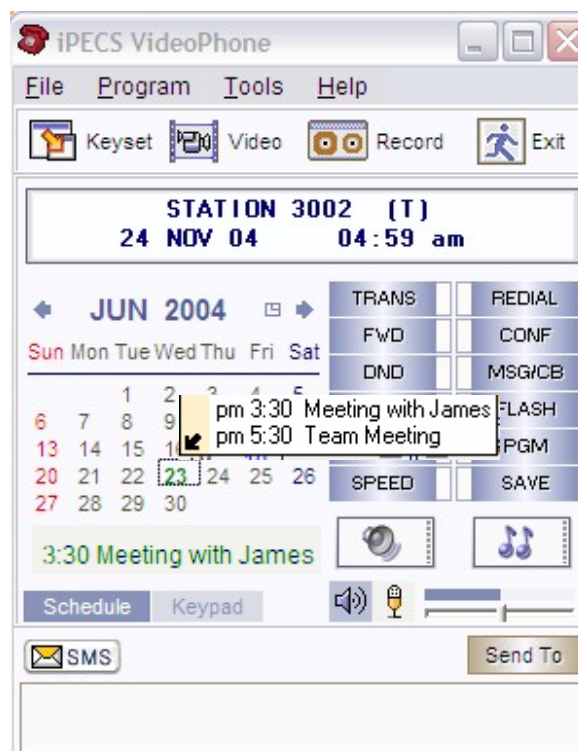


Figure 3.4a Appointment Summary in Schedule window

The *iPECS Video/SoftPhone Schedule* window permits on screen access to Outlook scheduler in two ways;

- double click on a date in the *Schedule*
- or
- right click the mouse over the calendar date
 - double click on an appointment in the Summary window.

iPECS Video/SoftPhone will call the Outlook Scheduler so that the user can add or modify an appointment in the Scheduler edit box, Figure 3.4b.

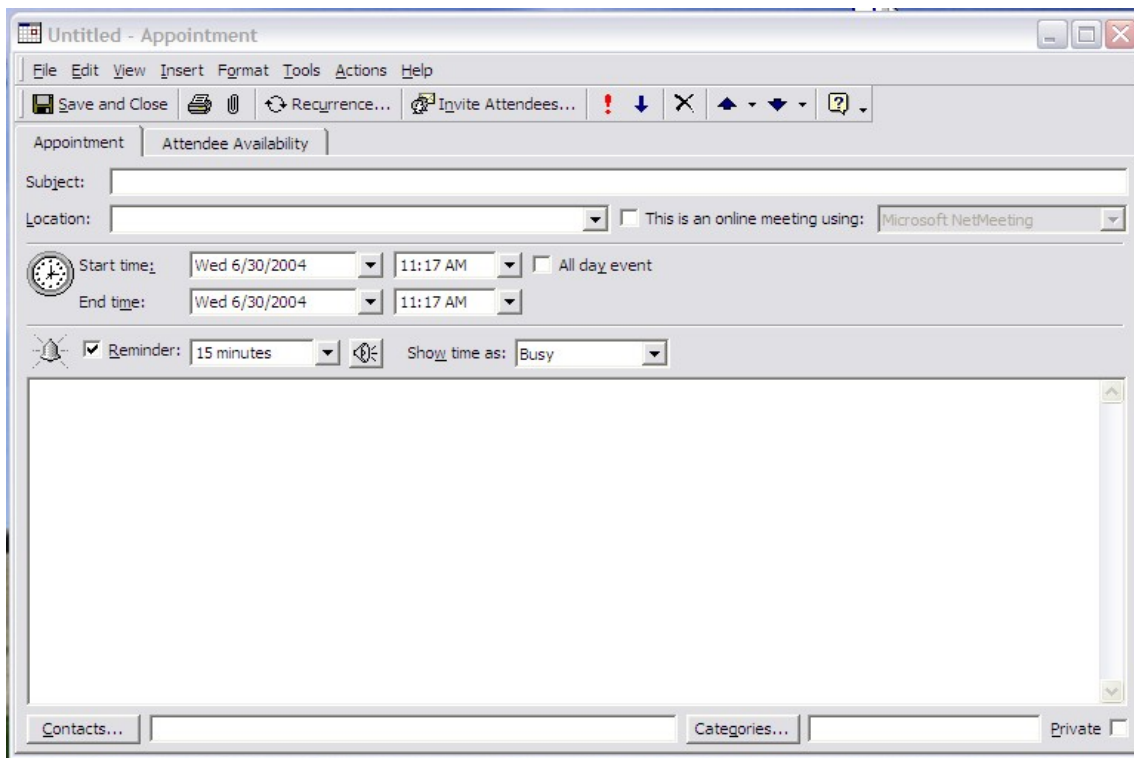


Figure 3.4b Outlook Scheduler edit window

- enter a new or edit an existing appointment following Outlook instructions. When complete save and close the Appointment, this will save the file in the Outlook database and automatically update the *iPECS Video/SoftPhone Schedule* database.

When browsing the Calendar, the user may return to the current date display by clicking the Today button next to the month/year display in the Schedule window, Figure 3.4c.

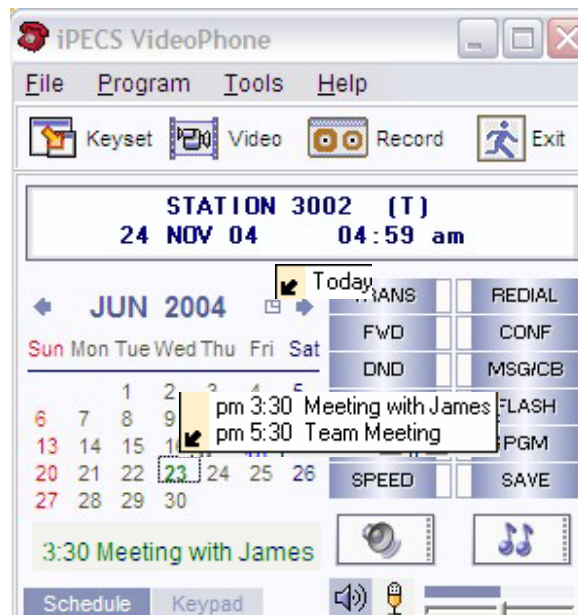


Figure 3.4c Today button in Schedule window

3.5 Keypad Folder Operation

The *Keypad* view adds the 4 *Keypad* folders including the Flex Btn (Flexible or Flex Button), PhoneBook, Call Log and Schedule Dial folders to the right side of the *Phone* view, Figure 3.5. The separate folders are accessed by selecting the folder tab at the top of the *Keypad* folder window.

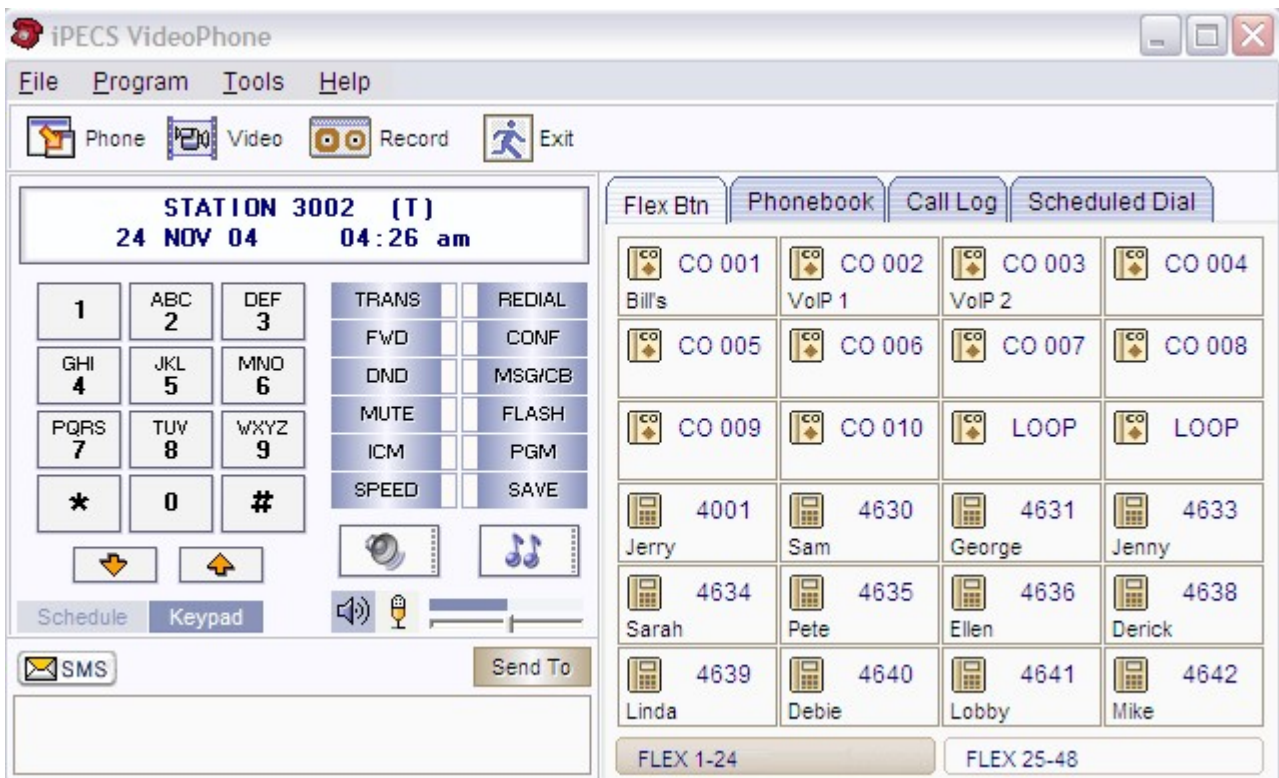


Figure 3.5 Keypad view

A PhoneBook database can also be opened from the File menu, [section 5.1](#). Once accessed from the File menu, operation in the folder is the same as described in the following sections.

3.5.1 Flex Btn Folder

The Flex Btn folder provides access to “48 Flex buttons’ in two windows, FLEX 1-24 and FLEX 25-48. Flex button windows display a 4 by 6 array of ‘Flex buttons’, total of 24, Figure 3.5.1. Each button includes a status icon, which displays the status of the CO Line or station associated with the button. The button also displays a designation from the *iPECS* system database, such as CO 001, SPD 001, etc. A further label, which will be displayed in the button, can be assigned by the *Video/SoftPhone* user under the Program menu, [section 5.2.2](#).

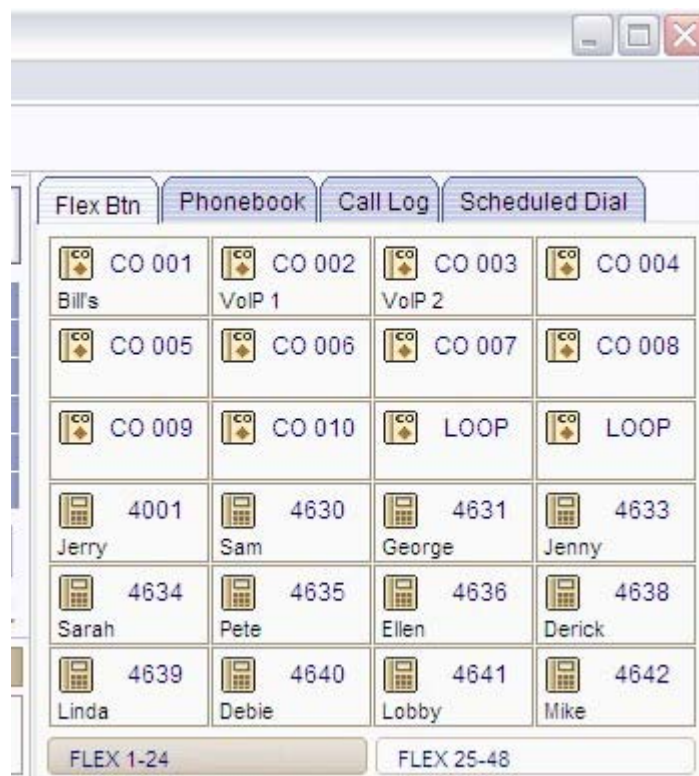


Figure 3.5.1 Flex Btn Folder

Selecting a Flex button with the mouse will access a CO line, call a station, or activate a feature based on the function assigned to the Flex Button in the *iPECS* system database.

3.5.2 PhoneBook Folder

iPECS Video/SoftPhone maintains a PhoneBook database, Figure 3.5.2a, of the users' contacts, both other *iPECS* users and external contacts. The user can place calls and send e-mails to contacts selected from the database employing the search, sort and record management tools in the PhoneBook Tool bar. When a record is added, edited or deleted in the PhoneBook, the *Video/SoftPhone* can also update (synchronize) the original source database, refer to [section 5.1.1](#).

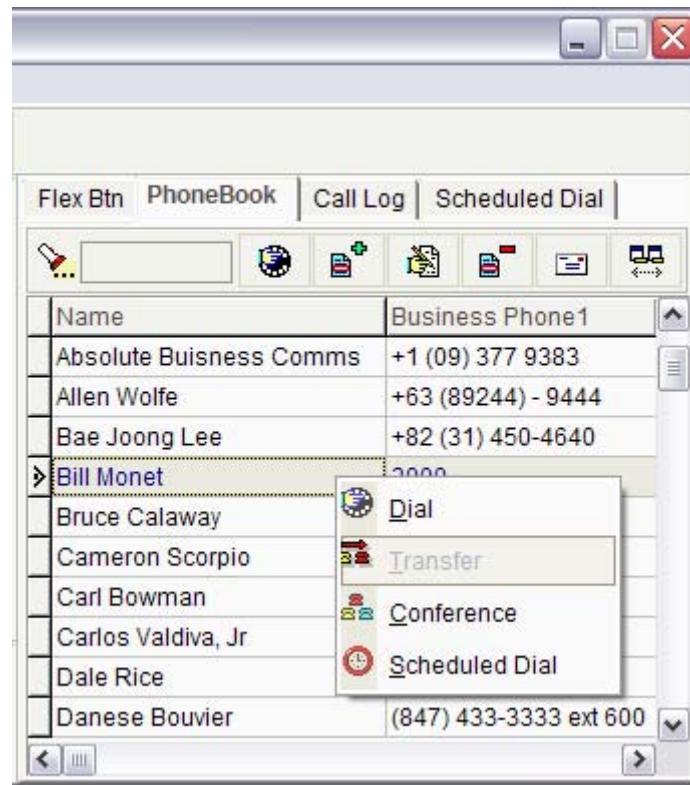


Figure 3.5.2a PhoneBook Folder with Call window

To call a number from the PhoneBook;

- right click on the desired record, see search & sort below, and
- click the icon from the Call window: Dial, Transfer, Conference or Scheduled Dial.

or

- select the desired record and,
- click the Dial icon from the PhoneBook Tool bar.

or

- double click on the desired record or phone number field.

To send an e-mail from the database;

- select the desired record(s),
- select the e-Mail icon from the PhoneBook Tool bar, the Outlook e-mail program is called and loaded with the selected recipients,
- type in subject, message, and send the e-mail.

To search the PhoneBook database;

- key in alphanumeric string in the search box.

To sort records in the PhoneBook;

- Click on the header field at the top of the PhoneBook to sort alphabetically/numerically, click again for reverse order.

To add or edit a record;

- select desired record for edit,
- click the add or edit icon to view the Contact Record form, Figure 3.5.2b,
- key entries for available fields. Fields include:
 - ✓ * Name, required field
 - ✓ Multiple Phone Numbers
 - ✓ E-mail address
 - ✓ Company information
 - ✓ Address
 - ✓ Note
 - ✓ Image, to remove an image from the contact record, right click on the image to view the Clear Image pop-up dialog box. Select Clear Image and OK.
- Select OK to save the record in the PhoneBook and synchronize the source database.

*	Name	Bill Monet	Business Phone1	3000	
	e-Mail	bmonet@here.com	Business Phone2	(630) 985-8494	
	Company	Here Inc.	Home Phone	4649	
	Department	BCS	Mobile Phone		
	Fax		Load Image		<div style="text-align: right;"> <input type="button" value="Ok"/> <input type="button" value="Close"/> </div>
	Address1				
	Address2				
	Note				

Figure 3.5.2b Contact Record Form

To delete a record;

- select the desired record(s),

- click the delete icon in the PhoneBook Tool bar, the Confirmation window, Figure 3.5.2c will appear,
- confirm to remove the record(s).

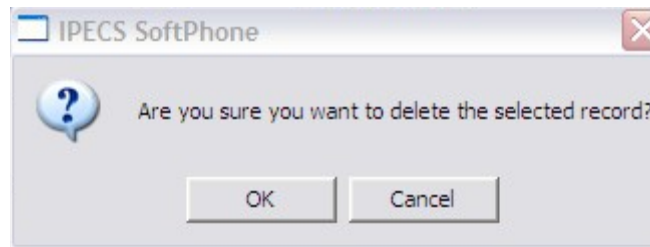


Figure 3.5.2c Delete Confirmation window

3.5.3 Call Log Folder

The Call Log folder, Figure 3.5.3, provides a log of all calls placed or received by the *iPECS Video/SoftPhone*. If Call Log is enabled under the File menu, each call, initiated or received, will generate a record which will contain information on the call as well as data derived from the PhoneBook. Once the call is completed, a record is stored in the Call Log database. The record will contain the following fields:

- ❖ Date & Time: date and time of the call from the user's PC
- ❖ Name: name of connected party from the PhoneBook
- ❖ Phone: the called or calling party phone number, from the *iPECS* or carrier
- ❖ Call Type: type of call, incoming/outgoing and answer/no answer
- ❖ Duration: duration the call was connected in hours, minutes and seconds
- ❖ Note: note entered by user
- ❖ Company: from the PhoneBook

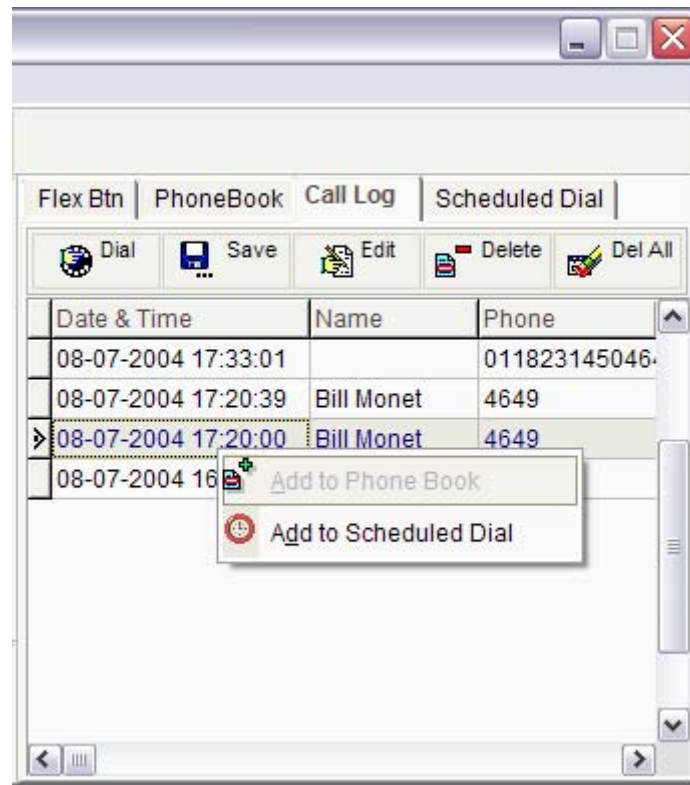


Figure 3.5.3 Call Log Folder

The Tool bar at the top of the logs, allows the user to place a call and manage the Call Log database. To place a call from the Call Log;

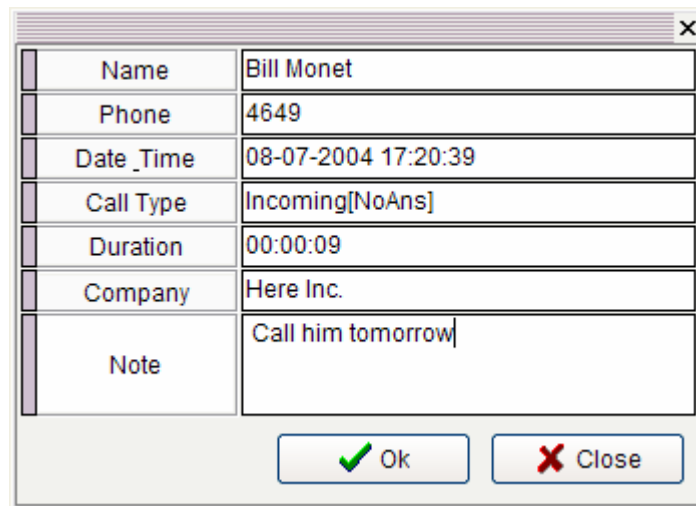
- Double click on the record to place the call
- or
- select a record,
- click the Dial icon, *iPECS Video/SoftPhone* will place a call to the phone number of record.

To store the Call Log;

- click the Save icon. The familiar Save As dialog box will appear, select a folder, if other than *iPECS Video/SoftPhone*,
- enter the filename
- select Save. The file is saved in an *.xls format for easy future access and all records in the Call Log folder are deleted.

To add or edit a note or name to a record;

- click the Edit icon,
- type the note or name in the edit dialog box,



Name	Bill Monet
Phone	4649
Date_Time	08-07-2004 17:20:39
Call Type	Incoming[NoAns]
Duration	00:00:09
Company	Here Inc.
Note	Call him tomorrow

Ok Close

- Select OK to save in the Call Log. Although all the fields of the call record are shown in the Edit dialog box only the Note and Name field can be edited and the Note field supports up to 250 characters.

To copy a record to the PhoneBook or Scheduled Dial database;

- right click on the desired record
- click the Add to the Phone Book or Add to the Scheduled Dial selection.

Selecting the Delete icon will remove the selected record(s) and selecting the Del All icon will delete all records in the Call Log. In both cases, the user is asked to confirm the record deletion.

3.5.4 Scheduled Dial Folder

Scheduled Dialing permits the user to enter a phone number for dialing at a later scheduled time. When the scheduled time is reached, the Dial Confirmation window, Figure 3.5.4a, will appear and must be confirmed by the user before dialing will begin.

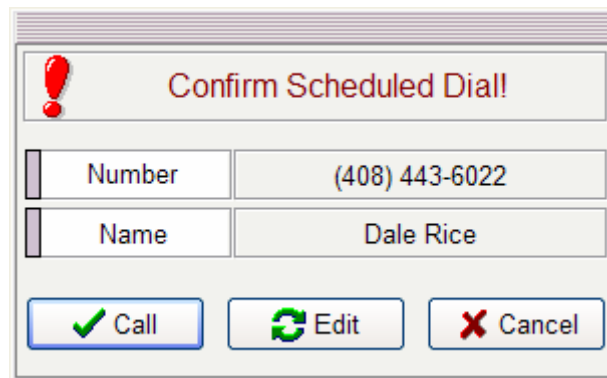


Figure 3.5.4a Dial Confirmation window

The Scheduled Dial folder, Figure 3.5.4b contains a list of the phone numbers and schedules entered by the user. The folder Tool bar permits the user to manage the Scheduled dialing feature.

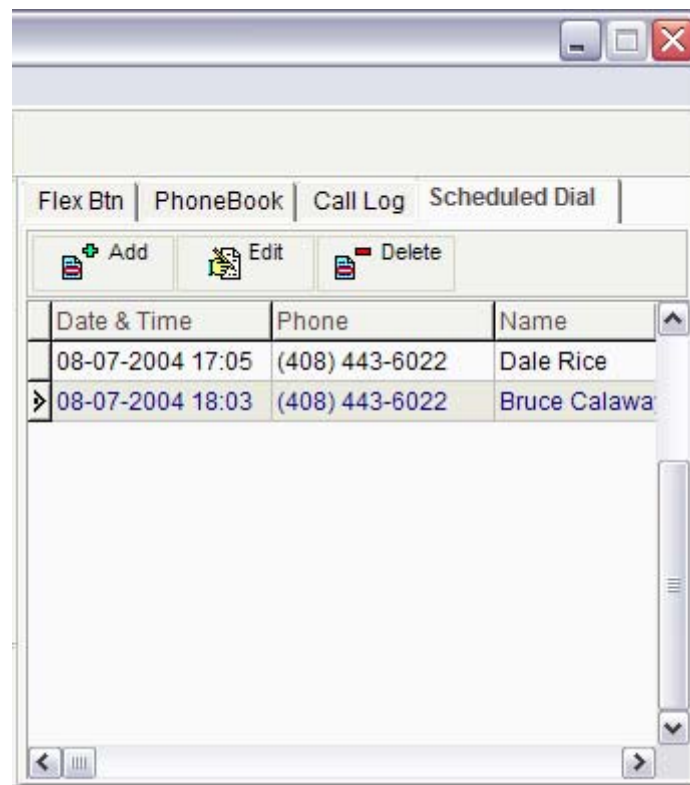


Figure 3.5.4b Schedule Dial folder

To add or edit a Schedule Dial;

- click the Add or Edit button on the Schedule Dial Tool bar icon and the Schedule Dial dialog box, Figure 3.5.4c appears,

- click the calendar to input the date, date is a required entry,
- select the time (in 24 hour mode) from drop down selection menu, time is a required entry,
- input or edit the telephone number, the telephone number is a required entry,
- input or edit name,
- select OK to save the schedule and number for later dialing. A date, time and number must be entered.

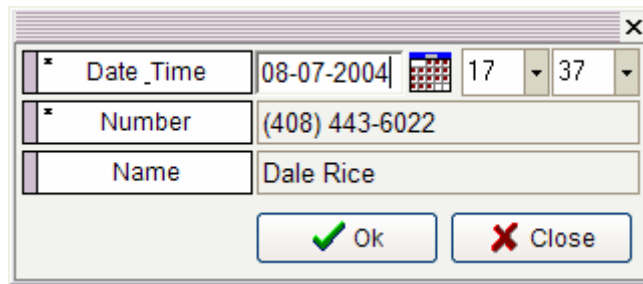


Figure 3.5.4c Schedule Dial dialog box

To delete an entry from the Scheduled Dial folder;

- select Delete to remove the record. The user will be asked to confirm the record deletion.

3.6 SMS (Short Message Service)

SMS (Short Message Service), which is typically provided in GSM mobile networks, is a service permitting users to share (send and receive) text messages with other users. A text message is comprised of an alphanumeric combination of up to 100 characters. When an SMS message is received, the Message Wait indication will activate and the user's *iPECS Video/SoftPhone* or display phone, can review the received message. The *iPECS Video/SoftPhone* can maintain up to ten received messages after which, new messages are ignored.

To send a text message to other users;

- enter the message in the SMS window, Figure 3.6a,
- select Send To in the SMS window, the Recipient window, Figure 3.6b, appears,
- select the desired recipients with the check boxes or range (From & To) boxes,
- select Send, the message is delivered.

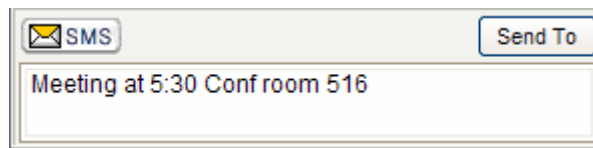


Figure 3.6a SMS window

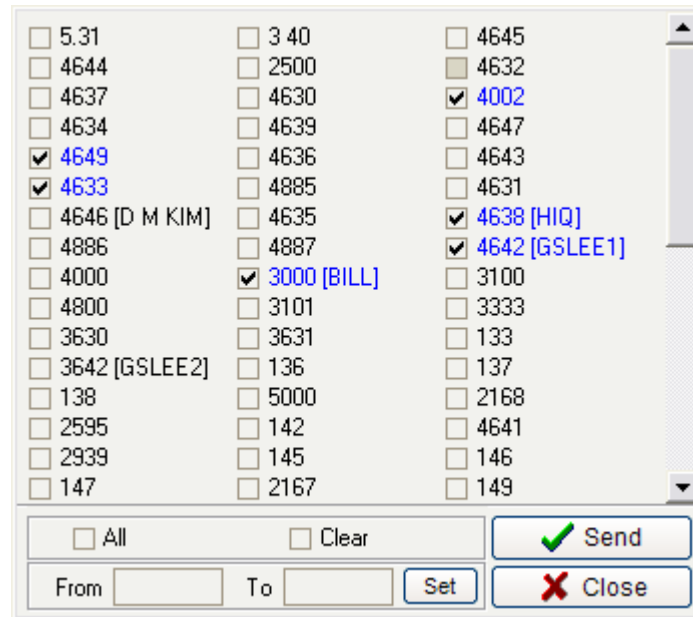


Figure 3.6b SMS Recipient window

To review received SMS messages, the **MSG/CB** button will flash;

- select the flashing **MSG/CB** button, the SMS Receive window with a radio button for each SMS message will appear, Figure 3.6c,
- select the desired radio button,
- select Delete to remove the message.

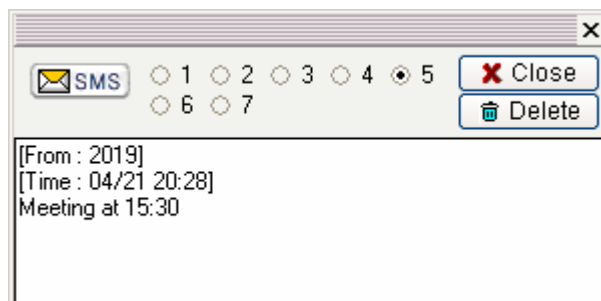


Figure 3.6c SMS Receive window

4 iPECS Video/SoftPhone Tool Bar Operation

4.1 Phone Views

iPECS Video/SoftPhone provides the user with a visual representation of a Phone on the desk-top. There are two views for the *Video/SoftPhone*, *Phone* and *Keypad*. The *Phone* view emulates the appearance of the traditional iPECS phone displaying an LCD area, keypad and fixed feature buttons. The *Keypad* view adds the *Keypad* folders window. This window has 4 tabbed folders; the Flex Btn folder with two arrays of 24 Flex buttons each, the PhoneBook folder displays the user's Phonebook, the Call Log folder displays records for each call placed or received by the *Video/SoftPhone*, and the Scheduled Dial folder, which permits the user to assign a phone number for dialing at a scheduled time.

The view is controlled by the *Phone/Keypad* icon at the far left of the *Video/SoftPhone* Tool bar, Figure 4.1. When selected, the *Video/SoftPhone* view will toggle between the *Phone* and *Keypad* views.

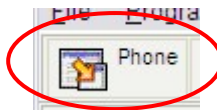


Figure 4.1 *Phone/Keypad* Tool bar icon

4.2 Video Operation

With the iPECS *Video/SoftPhone*, the user can access the PC's default video cam application to send and receive real-time video of the connected party. Access to the video application is controlled by the Video icon on the *Video/SoftPhone* Tool bar, Figure 4.2a or the Video item in the Tools Menu, [section 5.3.1](#).

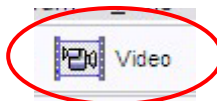


Figure 4.2a Tool bar Video icon


After selecting the Video icon, select the  (start) button in the Multi-Media Comms screen to begin real-time video transmission, Figure 4.2b.



Figure 4.2b Multi Media Comms screen

Tools available in this application include start transmit, stop transmit, video attributes, frame rate, receive video size (up to 2 x) and close.

A text channel is also opened for Chat as well as voice and video communications. The Chat thread is shown in the Chat window.

4.3 Record Operation

iPECS Video/SoftPhone allows the user to record an active conversation to the PC's hard disk. Recording is controlled using the Record icon on the *Video/SoftPhone* Tool bar, Figure 4.3 or the Voice Record item in the Tools menu, [section 5.3.3](#).

- Select the Record icon to start recording,
- select the icon again to stop recording,
- when the recording is complete, *Video/SoftPhone* will ask the user for a filename to use for storing the recording.



Figure 4.3 Tool bar Voice Record icon

iPECS Video/SoftPhone generates a single “record-start” tone; you should notify other parties to any recording. Playback and management of recorded voice files is accomplished under the Tools menu Voice Record item, [section 5.3.3](#).

4.4 Exit

The user may terminate the *iPECS Video/SoftPhone* application using the Exit icon on the Tool bar, Figure 4.4.

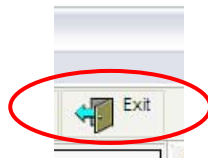


Figure 4.4 Tool bar Exit icon

5 Menu Bar Operation

5.1 File Menu

The File menu gives access to the PhoneBook and Call Log database management functions.

5.1.1 PhoneBook

Selecting Phone Book from the File menu will present the Phone Book menu where the user may manage the PhoneBook database, Figure 5.1.1. From this menu, the user may select to open a new or existing database, save a database, import or export a database or maintain synchronization with an external database. Once a PhoneBook is opened, operation of the folder is the same as discussed in [section 3.5.2](#).

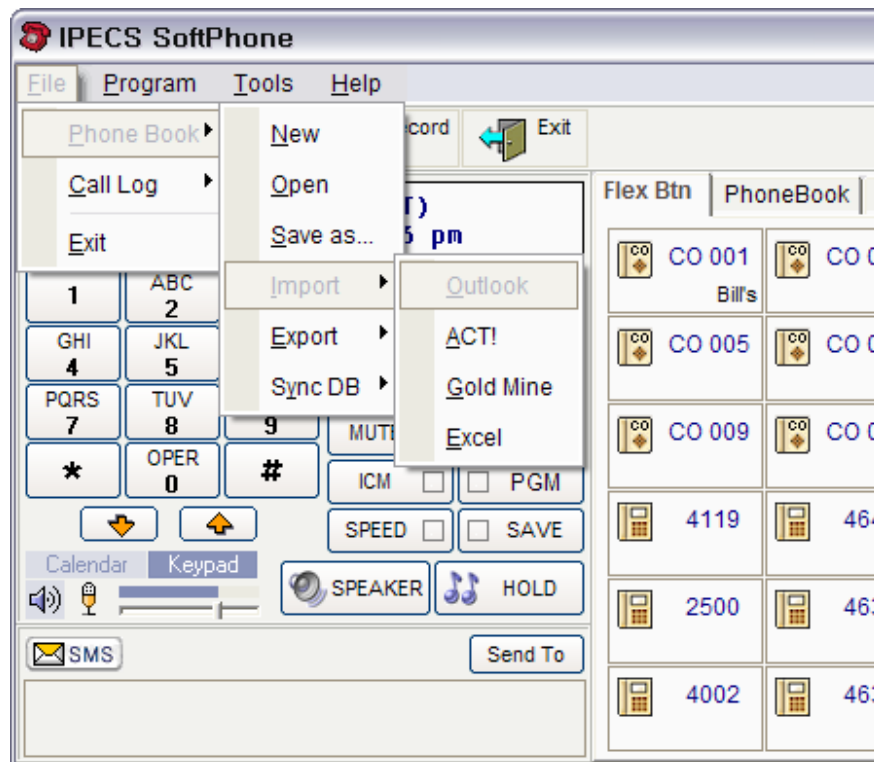


Figure 5.1.1 Phone Book Menu

The user may open a new blank database for use with the PhoneBook folder;

- select New from the menu,
- select a folder location,
- enter a filename.

The user may select the database to employ for the PhoneBook folder. Once selected, the selected database name will appear on the PhoneBook folder tab and the database is used for *iPECS Video/SoftPhone* PhoneBook until a new selection is made by the user. To open a selected database;

- select Open from the menu,
- select a database. The file format of the database must be consistent with the *.DB file format of the *iPECS Video/SoftPhone* database; other file type selections will receive a warning message.

Various contact manager applications employ different data formats. To permit use of common formats, *iPECS Video/SoftPhone* allows the user to import databases from Outlook, GoldMine, and ACT! or Excel applications. When imported, the database format is modified to match the PhoneBook database and displayed in the PhoneBook folder. To import a database;

- select Import from the Phone Book menu,
- select the application type, Outlook, Gold Mine, ACT! or Excel,
- select the database.

The user may save a copy of the PhoneBook database as a back-up copy or for future use. To save a copy of a database;

- select Save As... from the Phone Book menu,
- select a folder, if different than the *iPECS Video/SoftPhone* folder,
- select the filename,
- select Save.

The PhoneBook database can be exported for use in other applications including Outlook, Gold Mine, and ACT! or Excel. To export a PhoneBook database;

- select Export from the Phone Book menu,

- select the application type, Outlook, Gold Mine, ACT! or Excel,
- select the database.

The PhoneBook can be synchronized with an external Outlook, Gold Mine or ACT! database automatically. When synchronized, each time the *iPECS Video/SoftPhone* is started it will use the external database as the PhoneBook and will update the external database after any changes in the PhoneBook. To enable automatic synchronization,

- select Sync DB from the Phone Book menu,
- select the application type, Outlook, Gold Mine, ACT! or Excel,
- select the database.

Note that changes made directly to an external database are not effective in an active *iPECS Video/SoftPhone*. Such changes require a restart of the *iPECS Video/SoftPhone* application to update the active PhoneBook database.

5.1.2 Call Log

Selecting Call Log from the File menu will display the Call Log menu, Figure 5.1.2. From the Call Log menu, the user may enable or disable the Call Log function.

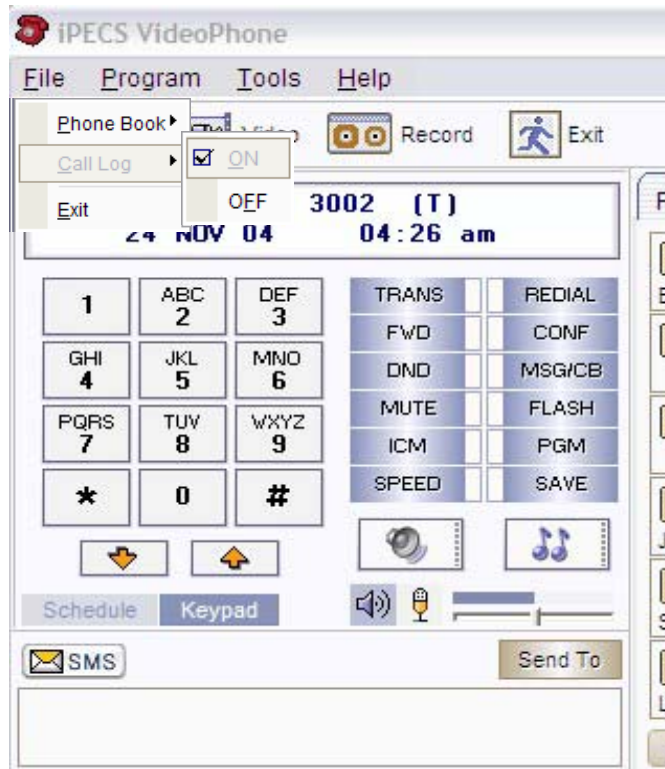


Figure 5.1.2 Call Log menu

5.2 Program Menu

Selecting the Program Menu accesses iPECS Video/SoftPhone settings and the users e-mail program. The user can set different ring signals, establish dialing rules and enter Flex data labels, as well as access their e-mail program through the Program menu, refer to Figure 5.2.

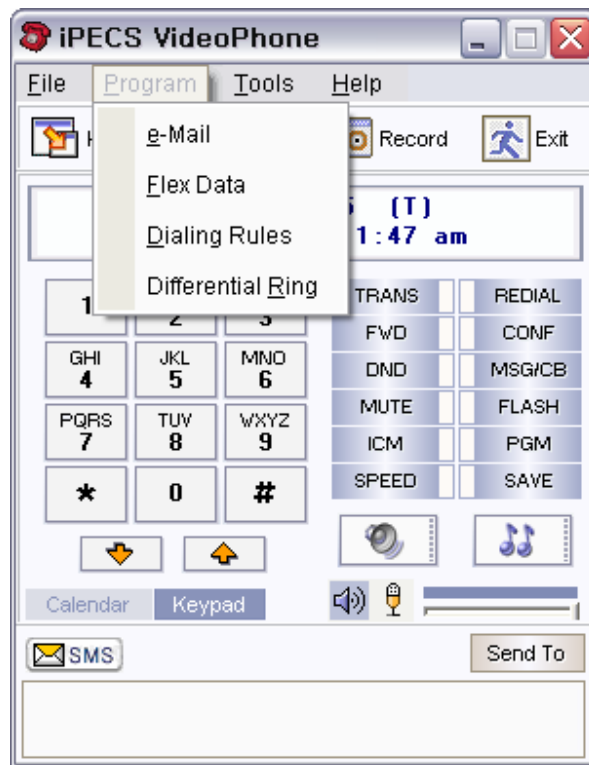


Figure 5.2 Program Menu

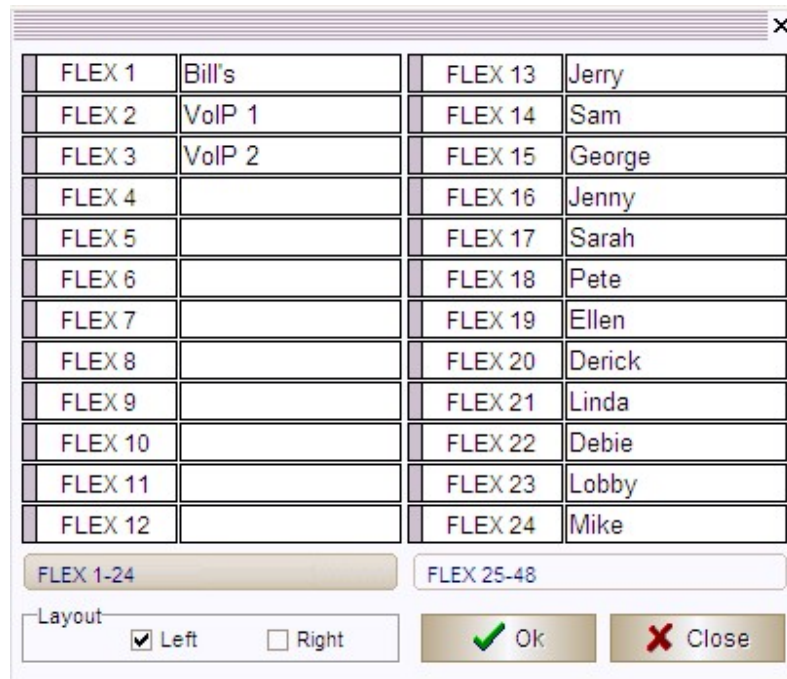
5.2.1 e-Mail

With the *iPECS Video/SoftPhone*, the user can access the Outlook e-mail application to send ad hoc e-mails. Access to the e-mail application is provided by the e-Mail item in the Program menu, which, when select, will call the Outlook e-mail application. The e-mail application can also be called from the or from the PhoneBook folder [section 3.5.2](#).

5.2.2 Flex Data

In the Flex Btn folder, each button is displayed with a status icon and a designation provided to the *Video/SoftPhone* by the *iPECS* system, refer to [section 3.5.1](#). For convenience, the user can enter a label that will be shown in the lower portion of the button. To assign Flex button labels;

- select the Flex Data item from the Program menu, the Flex Data window, Figure 5.2.2a, will appear,



FLEX 1	Bill's	FLEX 13	Jerry
FLEX 2	VoIP 1	FLEX 14	Sam
FLEX 3	VoIP 2	FLEX 15	George
FLEX 4		FLEX 16	Jenny
FLEX 5		FLEX 17	Sarah
FLEX 6		FLEX 18	Pete
FLEX 7		FLEX 19	Ellen
FLEX 8		FLEX 20	Derick
FLEX 9		FLEX 21	Linda
FLEX 10		FLEX 22	Debie
FLEX 11		FLEX 23	Lobby
FLEX 12		FLEX 24	Mike

FLEX 1-24 FLEX 25-48

Layout Left Right

Figure 5.2.2a Flex Data Window

- select the desired Flex button (FLEX 1 to FLEX 24) label field,
- type in the desired label, up to 12 characters,
- click OK,
- repeat for additional Flex buttons
- when complete, select Left or Right in the Layout box to align the label to the left or right in the Flex button,
- click on the Close icon to return to the *iPECS Video/SoftPhone* screen, the new labels will be shown in the Flex Btn folder, 5.2.2b.

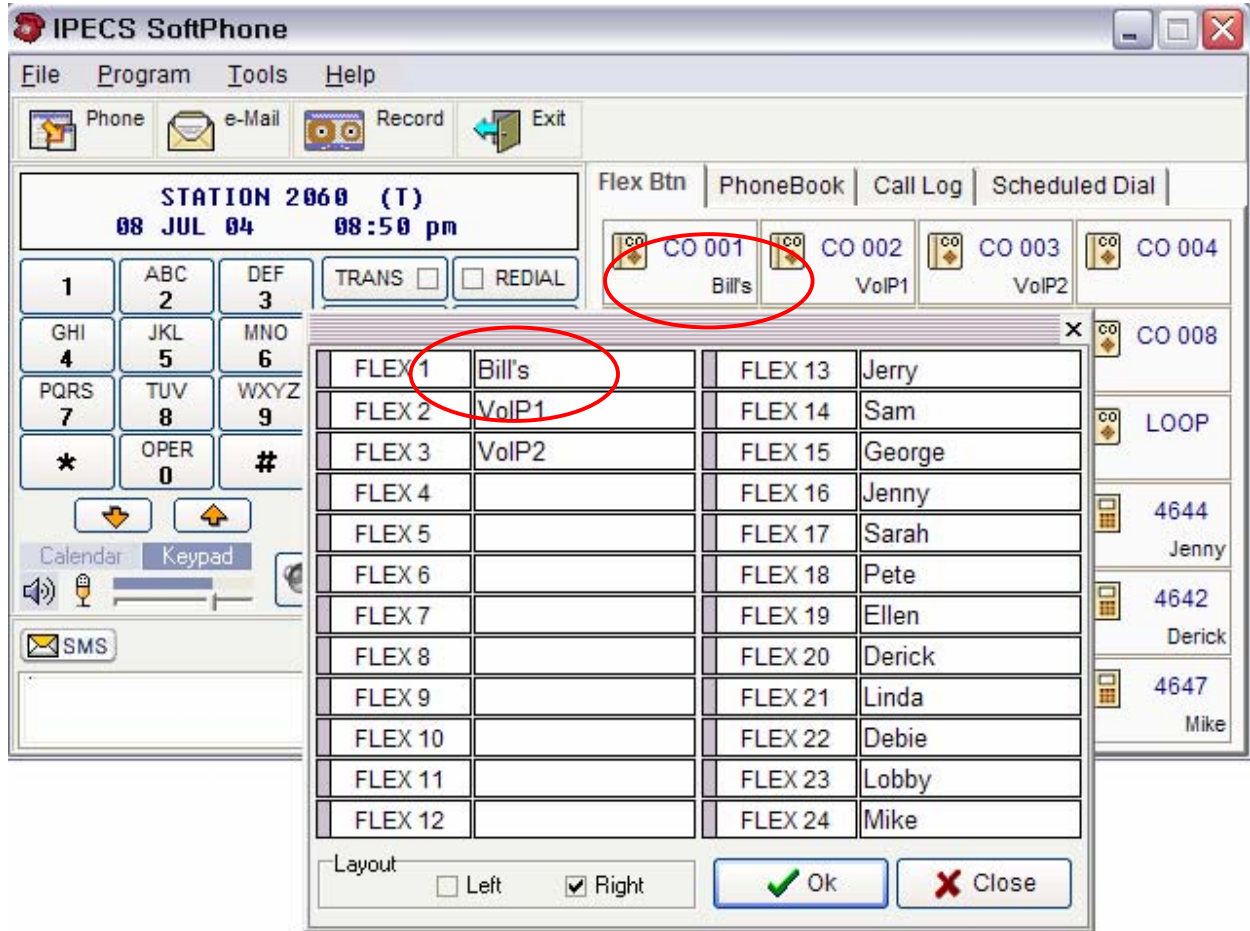


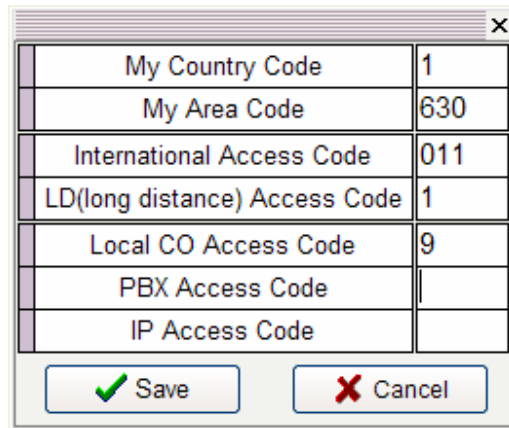
Figure 5.2.2b iPECS Video/SoftPhone screen with Flex Data labels

5.2.3 Dialing Rules

When the user places an outside call from the PhoneBook or Call Log folder, the *iPECS Video/SoftPhone* must include certain dial codes to assure proper dialing through the *iPECS* system. When a number is selected from either database, the system will determine the type of call and insert any CO Access Code, LD Access Code or International Access Code required for the host *iPECS* to properly establish the call. Codes are entered in the Dialing Rules dialog box, Figure 5.2.3, along with local codes for comparison. To enter codes;

- select Dialing Rules from the Program menu,

- enter the various codes,
- select OK.



The image shows a dialog box titled "Dialing Rules" with a close button (X) in the top right corner. It contains a table with the following fields and values:

My Country Code	1
My Area Code	630
International Access Code	011
LD(long distance) Access Code	1
Local CO Access Code	9
PBX Access Code	
IP Access Code	

At the bottom of the dialog box, there are two buttons: "Save" with a green checkmark icon and "Cancel" with a red X icon.

Figure 5.2.3 Dialing Rules dialog box

5.2.4 Differential Ring

The *iPECS Video/SoftPhone* can provide one of 4 different ring signals with separate assignments for internal and external calls. Each of the 4 ring signals is contained in a *.wav file. The user may select one of the 4 predefined *.wav files (ring1.wav, ring2.wav, ring3.wav and ring4.wav) or may replace any of these files with a desired *.wav or *.mp3 file.

Selecting Program > Differential Ring displays the Ring tone files window, Figure 5.2.4. To change a Ring tone file,

- select the change icon next to file to be replaced,
- select the desired *.wav or *.mp3 file from the PC's file system, and
- select Change,
- close the Ring tone files window and the new file may be selected for use.

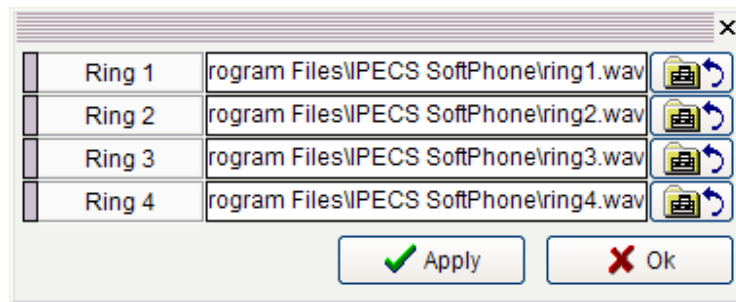


Figure 5.2.4 Ring tone files window

To select a Ring Tone for use;

- click the PGM fixed feature button,
- dial 1 for Ring Tone Selection,
- dial 1 for Intercom Ring or 2 for CO/IP ring,
- dial desired Ring Tone (1-4), a short burst of the tone is generated,
- press SAVE.

5.3 Tools Menu

Selecting the Tools Menu various tools and applications are accessed. Real-time video, collaborative program sharing, voice recording, and other tools are accessed through the Tools menu, refer to Figure 5.3.

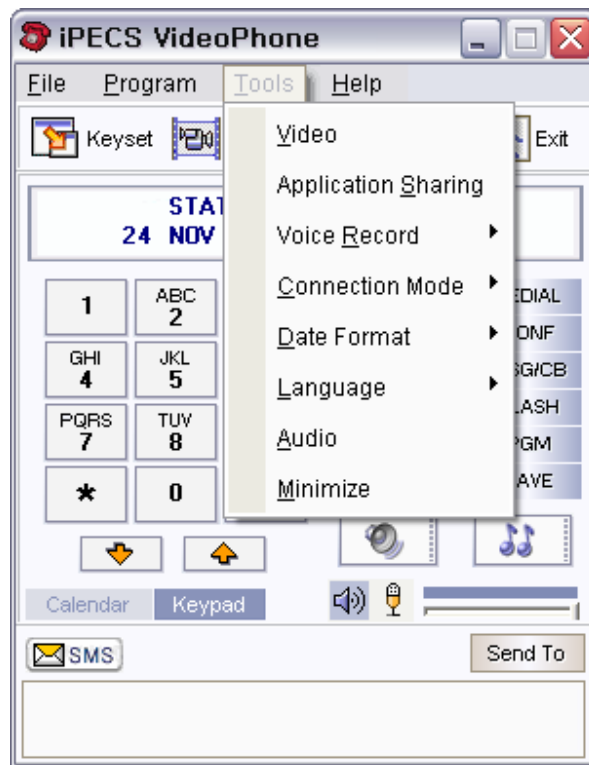




Figure 5.3 Tools Menu

5.3.1 Video

The *iPECS Video/SoftPhone* will employ the user's PC cam and application to implement real-time video communications over an IP based network. The real-time video supports transport of H.263 and MPEG 4 standard video codecs. The frame rate may be increased to 15-frames/second but packet loss and delay may become excessive and lower frame rates may perform better with other services. The video channel also opens a separate "chat" channel for text communication as well as video and voice for multi-media communications.

Selecting **T**ools > **V**ideo displays the Video preview screen, which may also be accessed from the *Video/SoftPhone* Tool bar, refer to [section 4.2](#).

To open the video channel;

- select the  (start) button, and video is sent to the far end user. Text may be input in the  **Chat**

text entry box and a chat thread is displayed in the CHAT area as shown in Figure 5.3.1. Tools available in this application include start transmit, stop transmit, video attributes, frame rate, receive video size (up to 2 x) and close.

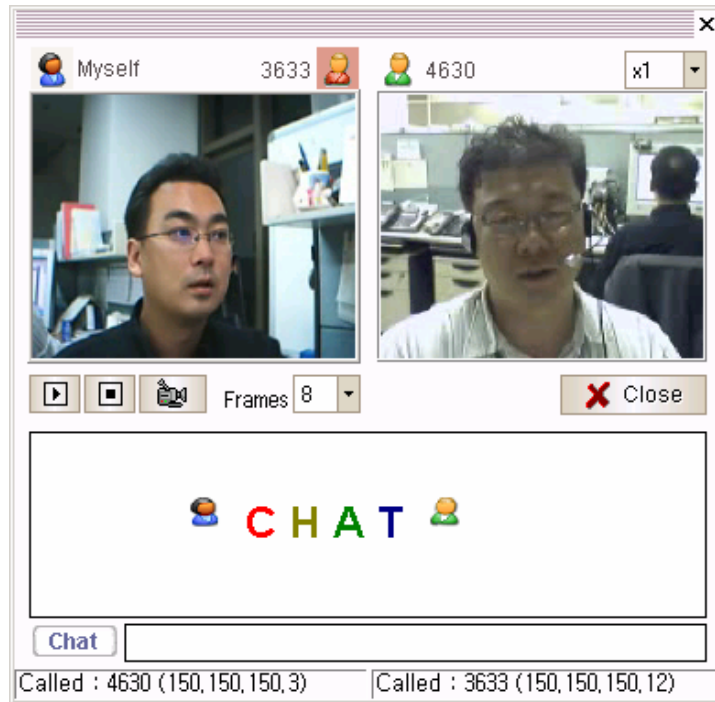


Figure 5.3.1 Multi-media Comms Screen

5.3.2 File Collaboration

iPECS Video/SoftPhone users can share file applications over the *iPECS* RTP connection. Any active or minimized file can be viewed and manipulated by all parties. Control over the file and application can be shared for a collaborative session handling presentations, drawings, documents, etc.

Selecting Tools > Program Share displays the Program selection window, Figure 5.3.2a. The Program selection window displays files available for collaborative sharing. Only active or minimized files can be accessed by the *iPECS Video/SoftPhone* sharing application.

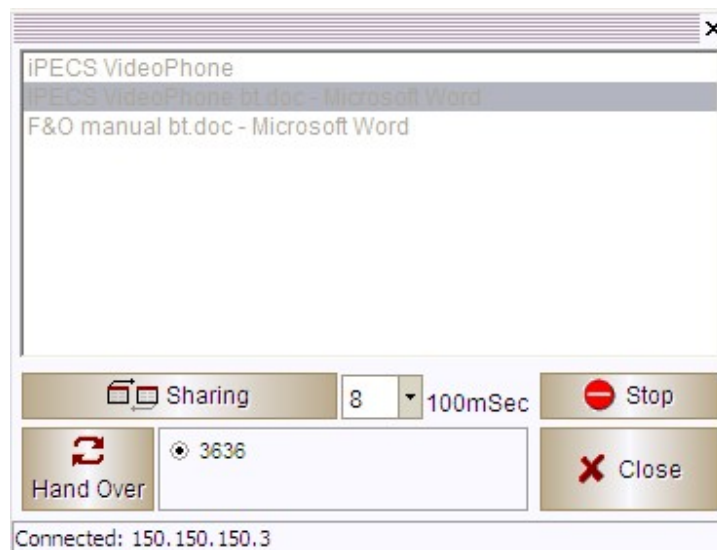
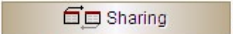


Figure 5.3.2a Program Selection Window

To share an application file;

- select the file in the Program selection window and select . This will transmit the application file to the connected parties, refer to Figure 5.3.2b.

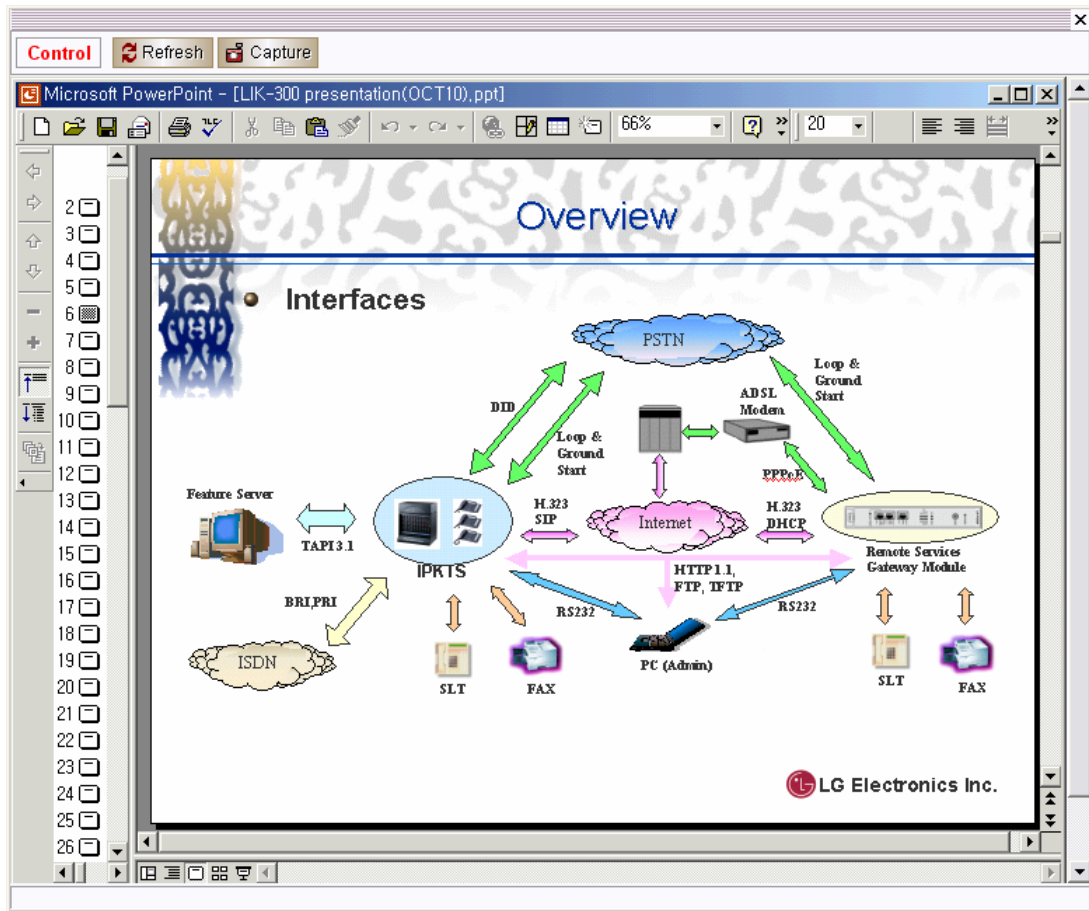


Figure 5.3.2b Application Sharing

The Application sharing window includes a Menu bar at the top. When a user is given control, the text “Control” turns to a red color. The connected party may be allowed control for input and locally storing the file. To shift the controlling user;

- select “Hand over Control”.
- select the radio button for the desired user, the “Control” text in the upper menu bar turns to a red color.

Files are sent by the controller to the other party periodically. The interval is adjustable in 1/10th of a second (100 msec) increments from 0.1 to 10.0 seconds, 0.5 seconds generally appears acceptable for most collaborative work while longer periods are acceptable for reviews. To adjust the interval;

- select the transmit Interval drop-down menu
- select the desired 1/10th of a second interval.

5.3.3 Voice Record

iPECS Video/SoftPhone permits recording of a conversation onto the PC's hard drive. Recorded conversations can be reviewed after recording. In addition, a voice memo can be added to the recording and the recording with memo sent by e-mail as attached *.wav files.

Selecting Tools > Voice Record displays the Record/Play selection menu. Selecting Record while in a conversation will activate the recording function; recording both sides of the *iPECS Video/SoftPhone* conversation. Recording may also be activated from the *Video/SoftPhone* Tool bar, refer to [section 4.3](#). *iPECS Video/SoftPhone* sends a single “record-start” tone; you should notify the other parties to any recording.

Selecting Play will show a list of recorded files in the Playback window, Figure 5.3.1. The window includes playback controls for playing a selected file. The user may delete a file, record a comment, and/or e-mail the recording using the Playback window controls.

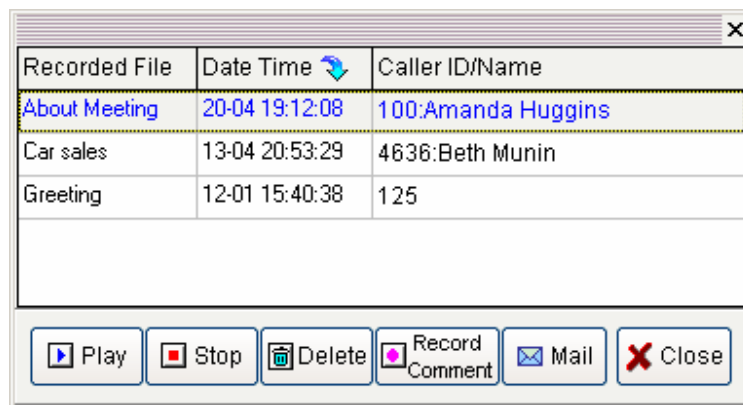


Figure 5.3.1 Recorded Files & Playback Window & Controls

5.3.4 Connection Mode

iPECS Video/SoftPhone can be registered to an *iPECS* system in Local or Remote Mode. In the Remote Mode, *iPECS* allocates a VoIP channel to support the call. The VoIP channel implements NAPT (Network Address & Port Translation) compatibility and packet forwarding to internal appliances.

Selecting Tools then Connection Mode will display the Local/Remote selection window with the present mode checked. When either mode is selected, which is done with the mouse, the *iPECS Video/SoftPhone* will terminate and re-connect with the host *iPECS* system to establish the selected connection mode.

5.3.5 Date Format

The format used for the date display of the PhoneBook, Call log and Scheduled Dial folders can be changed from day/month/year to month/day/year. Selecting Tools then Date Format will display the format selection window with the present selection checked. Click the desired Date Format in the menu.

The date display for the *iPECS Video/SoftPhone* LCD area is controlled by the *iPECS* system and may be different from the selected Date Format.

5.3.6 Language

The *iPECS Video/SoftPhone* supports two languages, English and Local Language. The Local Language is translated from English and edited into the 'language.txt' file located in the *iPECS Video/SoftPhone* directory. For additional help, access the 'language.txt' text file in the *iPECS Video/SoftPhone* folder.

Selecting Tools then Language, will display the English/Local Language selection window with the present mode checked. After selecting the desired language you must restart the *iPECS Video/SoftPhone* application. Also, if any changes are made to the language.txt file, restart *iPECS Video/SoftPhone* to load the changes in the *Video/SoftPhone*'s active memory.

5.3.7 Audio Controls

The *Video/SoftPhone* can control the audio input/output device employed. The device for audio input and output is selected in the Audio Device Controls screen, figure 5.3.7. The audio output device (received audio) can be defined separately for voice and ring signals. Selecting the Audio device drop-down menu will display the device choices available.

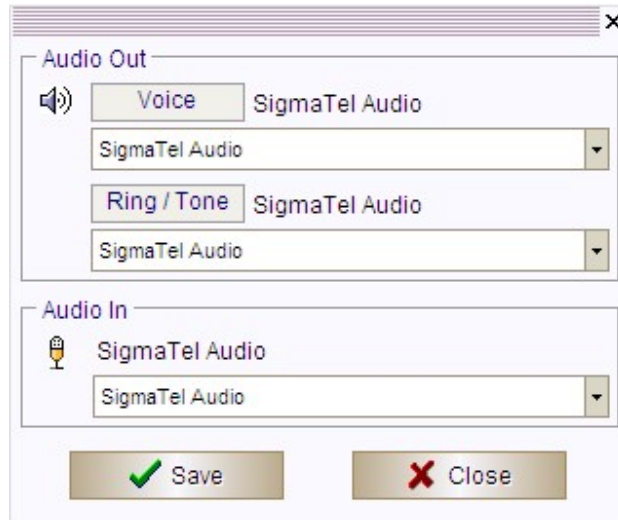


Figure 5.3.7 *iPECS Video/SoftPhone* Audio Device Controls screen

5.3.8 Minimize

When the *iPECS Video/SoftPhone* application is executed, a tray icon is created, Figure 5.3.8a. When the application is “minimized”, the *iPECS Video/SoftPhone* icon is moved to the desk-top tray. In this way, the application does not clog the program tray.



Figure 5.3.8a *iPECS Video/SoftPhone* Desk-top Tray icon

To restore the *iPECS Video/SoftPhone*;

- click the tray icon,
- or
- ‘right-click’ with the mouse pointer on the icon and
- select Show or Exit from the pop-up menu.



Figure 5.3.8b *iPECS Video/SoftPhone* Desk-top Tray Menu

5.4 Help Menu

5.4.1 Help

The *iPECS Video/SoftPhone* Help yields a wealth of information on the operation of the *Video/SoftPhone* specific features as well as standard *iPECS* station features available to the *Video/SoftPhone*. To access the Help menu, select the Help item from the menu or press the “F1” key.

The *iPECS Video/SoftPhone* Help window, Figure 5.4.1, appears showing major topics covered for the *iPECS Video/SoftPhone*. Additional topics are available under the Help Topics menu and include operation of standard *iPECS* user features.

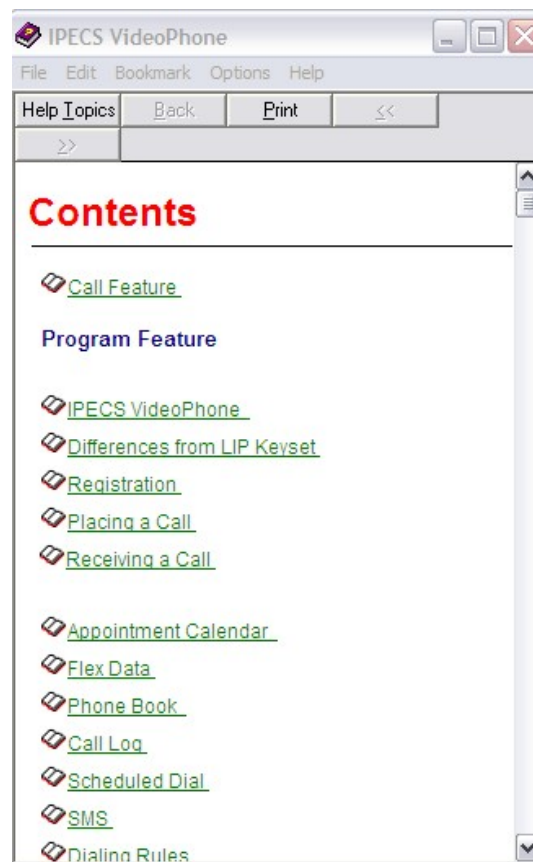


Figure 5.4.1 Help Window

5.4.2 About

The About item from the Help menu displays the version, IP address, MAC address, and connection mode for the *iPECS Video/SoftPhone*, Figure 5.4.2.



Figure 5.4.2 Help Menu About screen

5.5 iPECS Video/SoftPhone User Programming

As previously noted, the *iPECS Video/SoftPhone* operates in the same manner as the traditional *iPECS* phone. There are however several user programmable functions which are not supported due to differences in the platform, i.e. PC versus *iPECS* Phone. The user programmable functions not supported by the *Video/SoftPhone* include:

Station Answer mode, *iPECS Video/SoftPhone* does not support Intercom Call Announce and, thus supports only Privacy for the Station Answer mode.

Station Ring Download, *iPECS Video/SoftPhone* can not download ring tone files from the *iPECS* system, the *Video/SoftPhone* user can change the ring tone files stored in the *iPECS Video/SoftPhone* folder, see [section 5.2.4](#).

Audio source control, *iPECS Video/SoftPhone* has a single audio path and thus can not support the dual path (headset and speaker) controls available with the traditional *iPECS* phone.