# **IPFX Director Softphone**

Product version 4.3 SP4



# **About This Guide**

The purpose of this document is to provide the user with information on how to use this IPFX product.

# **Typographical Conventions**

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(Ø)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.
DIR ✓	Information that applies to the IPFX Director platform only.
©CM ✓	Information that applies to the IPFX for CallManager platform only.
NEC V	Information that applies to the IPFX for NEC platform only.

#### See Also

**About This Guide** 

# **Description**

IPFX Director Softphone is a computer program that emulates a physical telephone and is IPFX Director dependant. It is offered as an alternative to a physical IP phone, such as a Cisco 7940 or 7960 phone.

In order to emulate a physical telephone IPFX Director Softphone requires that your computer have both a microphone and a speaker device installed and functioning correctly. It also requires access to the IPFX Director server via a network. This means that an installed and correctly functioning Network Interface Card (NIC) or modem is required, and that the device functions correctly over an IP network.

# **Microphone and Speaker devices**

IPFX Director Softphone uses Microsoft DirectX 8.0 to access the microphone and speaker devices and is therefore DirectX dependant. IPFX Director Softphone install program will install Microsoft DirectX 8.0 if your computer does not have at least this version.

IPFX Director Softphone can use any microphone and speaker device that functions correctly with Microsoft DirectX 8.0 or later. You can test if a device is supported by Microsoft DirectX 8.0 by running the DirectX Diagnostic Tool that Microsoft supplies (press Start, then Run, type "dxdiag" and press enter). This program can give you information about the audio devices installed in your computer.

#### See Also

**Description** 

**IP Network** 

#### **IP Network**

IPFX Director Softphone performs Voice over IP (VoIP). This requires a functioning Internet Protocol (IP) network and therefore is dependant on access to that network, and is subject to all of its security measures that may be in place.

Your computer may have more than one network device installed, and each device may be part of a different IP network. You therefore must indicate to IPFX Director Softphone which network device, and therefore which network, you wish to use. When you launch IPFX Director Softphone and it detects more than one network device, choose the device that is on the same network as IPFX Director server. Your Network Administrator can inform you what network the IPFX Director server is on.

Security measures such as a Firewall may cause the VoIP traffic to be blocked, meaning that you may not be heard during a phone call, you may not be able to hear the remote party, or both. Consult your Network Administrator to resolve any Firewall problems on your computer or network.

Note: IPFX Director Softphone will only work on genuine Intel hardware.

#### See Also

**Description** 

Microphone and Speaker devices

# **Minimum Requirements**

PBX Dependent Feature!



# **Operating System**

IPFX Director Softphone will run on Microsoft Windows 98/2000/XP

#### See Also

**Minimum Requirements** 

Minimum hardware requirements

Recommended hardware

# **Minimum hardware requirements**

Computer/Processor: PIII / Celeron - 1GHz or Better

Memory: 256MB RAM

#### See Also

**Minimum Requirements** 

**Operating System** 

Recommended hardware

### **Recommended hardware**

Computer/Processor: Pentium 4+

Memory: 512MB RAM or better

#### See Also

**Minimum Requirements** 

**Operating System** 

Minimum hardware requirements

# How to Install IPFX Director Softphone on your PC

- Place the IPFX Director Softphone CD into your computer's CD/DVD drive.
- 2. Press the Windows Start button and select Run...
- 3. Type in x:\IPFX Director Softphone Install (where x: is your CD/DVD drive) and press **OK**.
- 4. The first screen of the IPFX Director Softphone install programme is the InstallShield Wizard welcome page:



Press **Next** to continue.

5. The license agreement page appears:



Read through the agreement, select "I accept the terms of the license agreement" and press **Next** to continue.

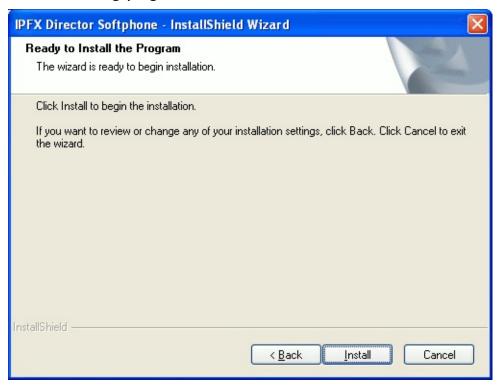
6. The next page asks you to specify where the IPFX Director Softphone files should be installed to:



If you would like to install the software to a location other than the default folder, you may use the **Change...** button to select an alternate folder.

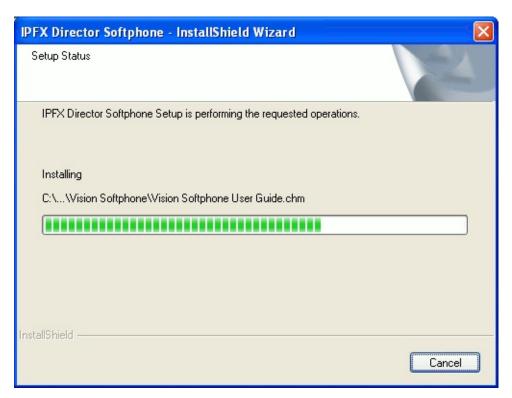
When you have chosen the destination location, press **Next** to continue.

7. The following page indicates that the installation is about to begin:



Press **Install** to begin the installation.

8. The following page shows the progress of the installation:



9. Once the installation is complete, a final confirmation page displays:



Press **Finish** to close the installation.

A Desktop and a Start Menu shortcut will have been created, use either to begin using IPFX Director Softphone.

# **Running First Time**

 To launch IPFX Director Softphone, double-click the IPFX Director Softphone shortcut on your Desktop:



or press the **IPFX Director Softphone** shortcut on Start\All Programs\IPFX menu:



2. IPFX Director Softphone requires some information about the environment in which it is running much like its physical counterpart, the hardware IP phone.

Some of this information may optionally be downloaded from IPFX Director server. When IPFX Director Softphone launches it checks your computer to see if it has this information available to it. If this information is not available, it will run a Configuration Wizard to obtain this information from you.

The first page of the Configuration Wizard is as follows:



This is displayed so that you know IPFX Director Softphone requires information from you before it can start. Press **Next** to continue.

3. The next page is where you may optionally download part of the required information:



- If your personal extension has been created on the IPFX Director server, you may download its information by entering the IP address of IPFX Director server (which you can get from your Network Administrator) and pressing the **Download** button. If you do no want to download the information, you may press **Next** to skip this step.
- If you choose to download the information and have more than one device on your computer, you will get the following dialog box:



1. Select the device and press **OK** to continue with the configuration (your Network Administrator can tell you which device to use).

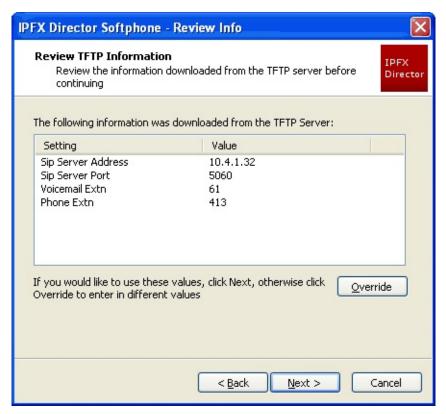
The following progress dialog box will display:



2. Once the configuration is downloaded, the following dialog box displays:



3. Press **OK** to review the information downloaded from the TFTP server:



As the page suggests, if you are unhappy with the information you may override the values by pressing the **Override** button. If you are satisfied with the values, you may press the **Next** button.

4. The following page displays after the TFTP Server Address screen (and when you press the Override button above). This page allows you to specify what the IP address and port are for the IPFX Director server:



Your Network Administrator can inform you of the details for this page. Press **Next** to continue.

5. The next page allows you to specify which extension you have been allocated on IPFX Director server, and which number you call to access the Voicemail system:



Your Network Administrator can inform you of the details for this page. Press Next to continue.

6. The next page displays after the Extensions screen (and the Review TFTP Information screen if you pressed the **Next** button). This page allows you to specify which microphone and speaker you would like IPFX Director Softphone to use.



You must choose a microphone device and a speaker device, and also devices to control the volume of the audio data. Most of the time the volume devices are the same as the streaming devices.

7. First choose your streaming devices by pressing the **Choose Devices...** button. The following dialog box will appear:



Use the drop-down list boxes to specify a speaker device (Playback) and a microphone device (Capture). Press **OK** to choose these devices and return to the Media Devices screen.

8. The Media Devices screen automatically chooses the volume devices that best suit your chosen streaming devices. If you would like to choose different volume devices, press the **Choose Mixers...** button for the Mixers dialog box:



The drop-down box will be populated with the recommended mixer. If a recommendation is not displayed, choose the mixer that is most appropriate (you may change these later if required). Press **OK** to accept the mixers and return to the Devices screen.

- 9. On the Devices screen, press **OK** to continue.
- 10. The next page allows you to specify which network device and, therefore, which network you want IPFX Director Softphone to operate on:



Press Choose Profile... to open the next dialog box.

11. This dialog box shows you the IP addresses allocated to your local computer:



In most cases you will only have one IP address here but, if you have more than one IP address, your Network Administrator can tell you which one will allow your local computer to communicate with

IPFX Director server. Highlight the appropriate IP address and press **OK** to move to return to the Profile screen.

12. On the Profile screen, press **Next** to go to the Conclusion screen:



You may review the information collected by scrolling through the list view control. If you're unsatisfied with any of the values you may use the **Back** button to return to the relevant page and correct the values. Press **Finish** to close the Configuration Wizard.

# **How to use the IPFX Director Softphone**

When you launch IPFX Director Softphone (and complete the Configuration Wizard when run the first time), the main IPFX Director Softphone window appears:



# **Enabling Call Control**

IPFX Director Softphone is capable of performing call control on calls made through IPFX Director server. Examples of call control are dialing, answering, holding etc.

In order to do this IPFX Director Softphone must first "register" with the IPFX Director server so that the server knows about IPFX Director Softphone. Registering consists of IPFX Director Softphone sending a message to the server that contains a unique extension number. There are three ways to do this:

- Manually Registering manually registering can only happen if you use the options to disable both the "AutoRegister" feature and the TETP mechanism.
- Using the AutoRegister feature if you did not use Configuration Wizard to download information, IPFX Director Softphone will use the "AutoRegister" feature.
- Using TFTP if you used Configuration Wizard to download information from the IPFX Director server, IPFX Director Softphone will use this method.

#### See Also How to use the IPFX **Director Softphone** Call Control DTMF Entry In This Section **Multiple Calls** Manually Registering **Profiles** <u>Using the AutoRegister</u> **Extensions** Feature Media **Using TFTP Options** Registration Status <u>Help</u> Voicemail Messages **Hot Desking** Telnet

# Suppressing Voice Capture

#### **Manually Registering**

To manually register an extension with IPFX Server, select Extensions on the IPFX Director Softphone toolbar. The following dialog appears:



Press the Register button to display the following dialog:

Enter an extension number and press OK. Upon closing of this dialog IPFX Director Softphone will send a message to IPFX Director server.

The extensions dialog shows the progress of the registration. Once successful the extensions dialog will change the state of the extension to "Registered". At this time, call control is enabled for that extension. You may choose that extension by ticking the checkbox next to the extension number and pressing the Close button to return to the main window.

# Enabling Call Control Using the AutoRegister Feature Using TFTP Registration Status

#### **Using the AutoRegister Feature**

The AutoRegister feature attempts to register IPFX Director Softphone automatically on startup. It uses whichever extension has been previously entered into the configuration, either via Configuration Wizard or via Options on the IPFX Director Softphone toolbar.

IPFX Director Softphone shows the AutoRegister in progress as follows:



You may enable/disable AutoRegister from via Options on the IPFX Director Softphone toolbar, and also change which extension it will send in the registration message. See the section on Options for more information.

**Note:** If the Configuration Wizard did not download registration information, it will have configured IPFX Director Softphone to use the AutoRegister feature.

### See Also

**Enabling Call Control** 

**Manually Registering** 

**Using TFTP** 

# Registration Status

#### **Using TFTP**

IPFX Director Softphone can be configured to download registration information when it starts and, once downloaded, uses that information to automatically register.

IPFX Director Softphone uses whichever TFTP address was entered in the Configuration Wizard (or via options on the IPFX Director Softphone toolbar) as the TFTP Server to download information from. The TFTP address is typically the same as the IPFX Director server address.

IPFX Director Softphone shows a TFTP download in progress as follows:



If this succeeds, it will then attempt to register with the IPFX Director server contained in the downloaded information. This downloaded information contains the IPFX Director server address and port, the IPFX Director Softphone extension and the voicemail number.

If the Configuration Wizard was used to download registration information, it will have configured the IPFX Director Softphone to use the TFTP feature.

#### See Also

**Enabling Call Control** 

**Manually Registering** 

Using the AutoRegister Feature

**Registration Status** 

#### **Registration Status**

When an extension is registered with IPFX Director server, the following popup window is displayed in the bottom-right of the desktop screen to indicate call control is enabled on IPFX Director Softphone:



Similarly, when an extension is unregistered with IPFX Director server, the following popup window is displayed in the bottom-right of the desktop screen to indicate call control is disabled on IPFX Director Softphone:



#### **See Also**

**Enabling Call Control** 

**Manually Registering** 

**Using the AutoRegister Feature** 

**Using TFTP** 

#### **Call Control**

Call control can be defined as the actions taken to manage calls within IPFX Director Softphone. All call control happens within the main window of IPFX Director Softphone and is managed within the main list box control within the Graphical User Interface (GUI), shown here:



This screen shot shows a call to extension 474. It indicates that it's a connected call, meaning IPFX Director Softphone is currently streaming audio to the remote party, and streaming audio from the remote party. The screen shot also shows the remote party's IP address, which audio codec is being used to compress/decompress the audio data, and that the call has been connected for 2 seconds.

The screen shot also shows which call control mechanisms are available given the call's current state. In this example this call has available to it: **EndCall**, **Hold**, **BlindXfer**, **Transfer** and **Confrn**. Each of these call control mechanisms is a link that can be clicked on with the mouse cursor to perform the corresponding action. Each call control mechanism is discussed in the following sections.

See Also

#### In This Section

**Making Calls** 

**Answering Calls** 

**Hanging Up Calls** 

**Holding Calls** 

**Resuming Calls** 

**Blind Transferring Calls** 

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Calls

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#### **Making Calls**

Making a call from IPFX Director Softphone adds a new call to the GUI, and thereafter allows you to control this call. There's a couple of ways to make a call, but they're all based on the same theme of entering digits and pressing Dial.

Pressing the Dial button causes IPFX Director to prompt you for digits, as shown here:



You may enter digits using either the GUI's number pad, or by pressing the corresponding keys on your keyboard.

In fact, you don't have to press the **Dial** button before entering digits, you can just enter them and IPFX Director Softphone will automatically add the prompt to the GUI.

After entering digits press either the Dial button to make the call, or press the blue **Dial** link. The prompt will be removed from the GUI and a new call will be added, the state of this new call will be "Ringing Out", as shown here:



During this state IPFX Director Softphone will play a ringing sound on your computer. When the remote party answers, the ringing sound stops, and the call transitions to the "Connected" state, at which time you and the remote party may begin your conversation. If the remote party does not answer, you may press the **EndCall** link to terminate the call. The "Connected" state is shown here:



When calling another extension on IPFX Director server you may enter the extension number directly i.e. 413, 474, 488 etc and press the **Dial** button.

Calling a number external to IPFX Director server e.g. a land line or a mobile phone, may require you to enter a prefix digit first, often this is the number 1. For example to call the mobile phone with the number 021 123 4567 you may have to enter 10211234567 into IPFX Director Softphone. Your Network Administrator can inform you if this is necessary and, if so, which digit is used.

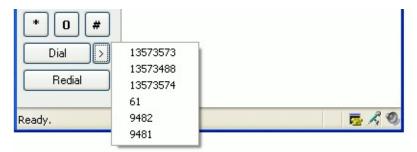
When you call a number external to the IPFX Director server, IPFX Director Softphone will transition to an additional state from "Ringing Out" that is known as "Session Progress", shown here:



During this state the ringing sound played by IPFX Director Softphone will be stopped, and the audio streaming will be in progress i.e. you will hear whatever audio is being sent down the line most likely "ring back" from the underlying telephone provider.

Another way to make a call is to use the **Redial** button. If you have made one or more previous calls pressing the **Redial** button will cause IPFX Director Softphone to call the last number dialed.

A further way to make a call is to use the Recently Used Numbers menu. Pressing the > button (at the right of the Dial button) accesses the menu, shown here:



Selecting one of these menu items causes IPFX Director Softphone to call that number. If you have never made a call before then there will be only one menu item with the text "(empty)", and clicking it does nothing.

This menu will store up to the last 10 called numbers and is maintained between invocations of IPFX Director Softphone.

# **See Also**

**Call Control** 

**Answering Calls** 

**Hanging Up Calls** 

**Holding Calls** 

**Resuming Calls** 

**Blind Transferring Calls** 

**Supervised Transferring Calls** 

**Conference Calls** 

# **Answering Calls**

Another phone calling your IPFX Director Softphone adds a new call to the GUI, and thereafter allows you to control this call. The new call will be in the "Ringing In" state, shown here:



During this state, IPFX Director Softphone will play a ringing sound on your computer. To answer the call, press the blue Answer link for that call. This causes the ringing sound to stop and the call to transition to the "Connected" state, at which time you and the remote party may begin your conversation. The "Connected" state is shown here:



# **See Also**

**Call Control** 

**Making Calls** 

**Hanging Up Calls** 

**Holding Calls** 

**Resuming Calls** 

**Blind Transferring Calls** 

**Supervised Transferring Calls** 

**Conference Calls** 

# **Hanging Up Calls**

To hang up a call you may press the blue **EndCall** link for a call. This link is available in every state of a call except for the "Ringing In" state. Shown next is the link for a call that has been made from IPFX Director Softphone:



Because you do not have the **EndCall** link available to you during the "Ringing In" state, shown here:



You are forced to sit and wait for the caller to stop calling. If you do not wish to be disturbed by such an event, you may use the "Do Not Disturb" feature. See the section on Options discussed later in this document.

# See Also Call Control Making Calls Answering Calls Holding Calls Resuming Calls Blind Transferring Calls Supervised Transferring Calls Conference Calls

# **Holding Calls**

You may place a call in the "Connected" state on hold, by pressing blue **Hold** link for a call, shown here:



This stops IPFX Director Softphone streaming audio to/from the remote party, and instead directs the IPFX Music On Hold Server to stream audio to this remote party. The call is transitioned from "Connected" to "On Hold" on the IPFX Director Softphone, shown here:



During this state the remote party cannot hear anything you say, and you cannot hear anything they say. The remote party hears only music from IPFX Music On Hold Server.



# **Resuming Calls**

You may resume a call that's been put on hold by pressing the blue **Resume** link for that call, shown here:



This causes IPFX Server to move the call away from IPFX Music On Hold Server back to IPFX Director Softphone. This stops music being played to the remote party and restores the audio path between the remote party and IPFX Director Softphone. The call will return to the familiar "Connected" state at which time you and the remote party can hear one another again.



# **Conference Calls**

# **Blind Transferring Calls**

You may Blind Transfer a call that is in the "Connected" state. A Blind Transfer is when you transfer a call to another number, without knowing whether there is anybody at that number to answer the call or not, or even whether or not the number is valid.

The blue link **BlndXfr** is available for "Connected" calls as shown here:



Clicking this link places the connected party on hold, and invokes the number prompt, shown here:



At this stage you may enter a number either with the GUI's number pad or the number pad on your keyboard. Clicking the blue **Dial** link causes IPFX Director Softphone to execute the Blind Transfer. This removes both the number prompt and the held call from the GUI, and the call will now be ringing at the transfer destination.

If after pressing the blue **BlndXfr** link you decide you don't want to transfer the call, you may press the blue **Close** link. This will remove the number prompt from the screen. You may press the blue **Resume** link for the call on hold to begin speaking to the remote party again.

# Call Control Making Calls Answering Calls Hanging Up Calls Holding Calls Resuming Calls Supervised Transferring Calls

# **Conference Calls**

# **Supervised Transferring Calls**

You may Supervise Transfer a call that is in the "Connected" state. A Supervised Transfer is when you transfer a call to another number by first making an "Inquiry" call to that number. If the "Inquiry" call is answered, you may talk to that remote party before "Completing" the transfer, which is where you drop out of the conversation and transfer the "Inquiry" call to the original call.

If the "Inquiry" call is not answered, you may still "Complete" the transfer, and this scenario is termed an "Incomplete Transfer". In this case you drop out of the conversation while the "Inquiry" call is still ringing, if the "Inquiry" call is answered, the call is transferred to the original call by IPFX Server. If it's not answered, the original call may hang up.

The blue link **Trnsfer** is available for "Connected" calls as shown here:



Clicking this link places the connected party on hold, and invokes the number prompt, shown here:



At this stage you may enter a number either with the GUI's number pad or the number pad on your keyboard. Clicking the blue **Dial** link causes IPFX Director Softphone to make the "Inquiry" call. This removes the number prompt from the GUI and adds the "Inquiry" call to the GUI, shown here:



In this example our "Inquiry" call is to the extension 9482 and the original call from Pete Dunville is on hold. If we press the blue Complete link now, we would drop out of both calls and extension 9482 would have a ringing call from Pete Dunville instead of from our extension. This is an "Incomplete Transfer".

If extension 9482 answered the call you would be able to talk to that party before completing the transfer. This is shown here:



At this stage the call to Pete Dunville is still on hold and you're talking to extension 9482. Pressing the blue Complete button now completes the "Supervised Transfer". This causes you to drop out of both calls, and transfer the "Inquiry" call to the original call.

If at any stage of the transfer, you decide you don't want to continue, you may end either call by pressing the relevant blue **EndCall** link, and possibly resuming a party from hold.



Hanging Up Calls

**Holding Calls** 

**Resuming Calls** 

**Blind Transferring Calls** 

Conference Calls

#### **Conference Calls**

You may perform a Conference call for a call that is in the "Connected" state. A Conference call is when you make an "Inquiry" call to another number and upon it being answered, "Join" it with your original call so that all 3 parties can hear one another.

The blue link **Confrn** is available for "Connected" calls as shown here:



Clicking this link places the connected party on hold, and invokes the number prompt, shown here:



At this stage you may enter a number either with the GUI's number pad or the number pad on your keyboard. Clicking the blue **Dial** link causes IPFX Director Softphone to make the "Inquiry" call. This removes the number prompt from the GUI and adds the "Inquiry" call to the GUI, shown here:



In this example our "Inquiry" call is to the extension 9481 and the original call to extension 9482 is on hold. If we press the blue **Complete** link now, extension 9482 is resumed from hold and you may talk to that party while you wait for the "Inquiry" call to be answered if you click on that party on the GUI.



You may press the blue **Complete** link after the "Inquiry" call is answered if you want to talk to that party before joining them into the conference. This next screen shot shows the "Inquiry" call answered, but not yet joined into the conference call:



At this stage the call to extension 9482 is still on hold and you're talking to extension 4981. Pressing the blue **Complete** button now "joins" all 3 parties together so that they can all hear one another. A completed conference removes the blue **Complete** link from the GUI, shown here:



The previous screen shot shows a completed conference call; at this

point each party can hear all other parties.

Hanging up in a conference call works almost exactly as you would expect. During the setup of the call, you may end any call by simply clicking the appropriate blue **EndCall** link. Likewise, any party may hang up at any time during setup. You may have to resume a party from hold to restore the audio path, but this is intuitive in the GUI.

In a completed conference where all parties are "joined" to one another, if a remote party hangs up, you will still be connected to the other party. However, if it is you who hangs up on either party, you will be dropped out of both calls and the other two parties will still be connected to one another.

**Note:** Please be aware that IPFX Director Softphone's conference ability is different than "Meet Me" conferences that you setup using IPFX Live Desktop. They have nothing to do with one another, other than both using the word "Conference".

**Note 2:** You may only conference in one other party to a connected call. However, be aware that either or both of the parties may conference in a second party to themselves, essentially "h Daisy-Chaining" an infinite number of conference calls together.

#### See Also

Call Control

**Making Calls** 

**Answering Calls** 

**Hanging Up Calls** 

**Holding Calls** 

**Resuming Calls** 

**Blind Transferring Calls** 

**Supervised Transferring Calls** 

# **DTMF Entry**

Services that operate over telephone systems such as Voicemail and Banking services require you to enter digits during the conversation as a means of controlling the service. IPFX Director Softphone provides this ability by allowing you to press the GUIs number pad buttons and/or the keyboard's number keys during a call. The GUI's number pad is shown here:



Please be aware that you must have selected the call in the GUI that you wish to send digits to. The section titled Multiple Calls discusses selecting calls.

#### See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**Multiple Calls** 

**Profiles** 

**Extensions** 

**Media** 

**Options** 

Help

Voicemail Messages

**Hot Desking** 

**Telnet** 

**Suppressing Voice Capture** 

# **Multiple Calls**

You may have multiple calls at one time in IPFX Director Softphone. Each Call is represented by a separate item in the GUI's main list box, shown here:



The call that is currently the "active" or the "selected" call, is the call that is tan colored, all other calls are colored white. You may have as many calls as your computer can handle - technically an infinite amount, but realistically, it's based on the amount of memory your computer has available to it.

You "select" a call as your "current" call by clicking on its box with the mouse cursor. When you do this, the previous current call will be placed on hold and be colored white. The new current call will be colored tan, if it is not on hold you will now be able to talk to that party.

Be aware that DTMF digits are sent to the "current" call, therefore to use a Voicemail or Banking service over the phone, you must ensure that the call you want digits to be sent over is the currently selected call. In the case where there's only one call in the list, it will always be the "current" call.

At any time you may click the Dial button on the left side of the GUI to

display IPFX Director Softphone's number prompt, thereby enabling you to make a new call.

If you have more calls than there is room to display on the GUI, IPFX Director Softphone adds a vertical scrollbar to the right side of the GUI. This enables you to scroll through the list of available calls, shown next:



#### See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**DTMF Entry** 

**Profiles** 

Extensions

**Media** 

**Options** 

<u>Help</u>

Voicemail Messages

**Hot Desking** 

<u>Telnet</u>

**Suppressing Voice Capture** 

# **Profiles**

The first time you start IPFX Director Softphone the Profiles dialog will be displayed. It looks as follows:



If you leave the check box "Choose profile at startup" checked each time you start IPFX Director Softphone then this dialog will be displayed.

You may invoke this dialog at any time by pressing blue Profiles link on the main window, shown here:



The Profiles dialog lists any existing Profiles and provides the ability to add a new profile, and remove or edit an existing profile.

A profile is simply a mapping of a local IP address to a name. Your computer may have more than one IP address associated with it, and if so you will need to inform IPFX Director Softphone of which one to use when it communicates with IPFX Server. Giving an IP address a name makes it easier to identify what you intend the IP address to be used for. For example you may use one address for calls made when at the office, another for when you're at home.

You may add a new profile by pressing the Add button, it invokes the

# following dialog:



Enter a name for your profile, and select an IP address from the list. Press OK to accept and close the dialog. Upon returning from this dialog the new profile is added to the main list:



Check the box next to the list view item of the profile that you want to be your current one.

To remove a profile simply select the item and press the **Remove** button.

To edit a profile simply select the item and press the **Edit** button, this invokes the same Profile dialog that you used to a add profile. You may

edit the data and click the **OK** button to accept any changes.

Be aware one profile must be named Office - this is to guarantee that there's always a profile in the configuration. IPFX Director Softphone must have at least one local IP address associated with it so that IPFX Server knows to direct phone calls to, it will look for the Office profile as a last resort. IPFX Director Softphone will neither allow you to remove the Office profile, nor change its name. You may change its IP address though.

#### See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**DTMF Entry** 

**Multiple Calls** 

**Extensions** 

<u>Media</u>

**Options** 

Help

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# **Extensions**

The extensions dialog may be invoked by pressing the blue Extensions link on the main window, shown here:



This Extensions dialog appears as follows:



This dialog lists the Extensions that IPFX Director Softphone is currently using. At least one extension must be registered before you may make or receive any calls.

To register a new extension with IPFX Server, press the Register button. This invokes the following dialog:



Enter a number and press the **OK** button. Upon return from this dialog a register message is sent to IPFX server and the new extension number is added to the extensions list box:



The new extension's state will be set to "Registering". When IPFX Server informs IPFX Director Softphone that it accepted the registration attempt the state will change to "Registered".

Unregistering an extension is a similar process, select the extension you want to unregister and press the Unregister button. The extension's state will transition to "Unregistering". When IPFX Server informs IPFX Director Softphone that it accepted the unregistration attempt the state will change to "Unregistered".

**Note:** If an extension's state stays on "Registering" or "Unregistering" it means IPFX Server has not responded to the request. Likely causes are

as follows:

You've selected an invalid local IP address. See the section titled Profiles for more information.

You've entered an invalid address for IPFX Server in the options. See the section titled Options for more information.

There is no physical connection between IPFX Director Softphone and IPFX Server i.e. a network fault is occurring, or there's no cabling between the two computers involved.

#### See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**DTMF Entry** 

**Multiple Calls** 

**Profiles** 

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Voicemail Messages

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**Suppressing Voice Capture** 

# Media

# See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**DTMF Entry** 

**Multiple Calls** 

**Profiles** 

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**Suppressing Voice Capture** 

# **In This Section**

**Basic Options** 

**Auto Greeting** 

**Devices Dialog** 

**Mixers Dialog** 

### **Basic Options**

IPFX Director Softphone allows you to configure options related to the Media support within the program. All related options are grouped under the Media tab in the Options dialog. For quick access you may click the blue **Media** tab in the main window, shown here:



### The Media tab appears as follows:



### Option Meaning

Enable Media

This option enables/disables the entire media subsystem. Keep in mind that if you disable this you will not be able to be heard or hear the remote party in phone calls.



Mute capture device

When checked this option mutes your microphone. This option is accessible quickly from the main window's status bar (above). The mute status of the microphone device is shown here by the microphone icon. Double clicking it mutes/un-mutes the microphone.

Mute playback device

When checked this option mutes your speaker. This option is accessible quickly from the main window's status bar (above). The mute status of the speaker device is shown here by the speaker icon. Double clicking it mutes/un-mutes the speaker.

Beep PC speaker when a call rings in

Checking this item causes the computer's PC Speaker to beep when a call rings into IPFX Director Softphone. Useful when you're using headphones with your computer and the headphones are placed on the desk.

Enable auto greeting

Auto Greetings are discussed below.

Preferred audio codec

Which audio codec to use to compress/decompress audio during a call. If you're using IPFX Director Softphone over a dial-up connection you will need to choose G729. G729 compresses data to a rate that a dial-up connection can handle, however, at the expense of quality. Both G711 variants have better quality, but require a faster connection.

Audio data is streamed using the Real-time Protocol (RTP). This protocol uses IP port numbers as a source and destination. Use specific RTP port range. Firewalls often block all but specifically chosen ports. Enabling this

> option allows you to type in a specific range of ports to use so that IPFX Director Softphone works better will Firewall software.

Pressing this button opens the Devices dialog, discussed below. Choose mixers Pressing this button opens the Mixers dialog,

discussed below.

### See Also

Choose devices

Media

Auto Greeting

**Devices Dialog** 

**Mixers Dialog** 

### **Auto Greeting**

An Auto Greeting is a sound file that's automatically played whenever a call goes to the "Connected" state this is typically when a call is answered.

You enable the Auto Greeting feature by checking the box labeled "Enable auto greeting" in the media tab of the Options dialog:



When this box is checked the button Auto greeting becomes enabled, press it to open the following dialog:



If you have an existing Auto Greeting you may press Play to listen to it.

To record a new Auto Greeting press the **Record** button and speak into the microphone. To stop the recording press the **Stop** button. You may play the recorded Auto Greeting by pressing the **Play** button.

The **Close** button will dismiss the dialog.



### **Devices Dialog**

The devices dialog is invoked by pressing the Choose devices button in the media tab of the Options dialog:



The devices dialog appears as follows:



This dialog allows you to choose both a speaker device (playback) and a microphone device (capture) that will be used as a source and a destination for audio. Audio captured from the microphone will be streamed to remote parties. Audio streamed from remote parties will be played back on the speaker.

When this dialog is invoked IPFX Director Softphone asks Microsoft DirectX for the available devices, therefore the devices that are listed in the drop down list boxes are those that are DirectX compatible.

The playback device does not need to match the capture device, you may mix and match devices as you please.

**Note:** If either your microphone or your speaker device become unavailable during a call e.g. you pull your headset out, IPFX Director Softphone will prompt you, as follows:



If you press No you will be returned to your call, but you will not be heard or be able to be hear audio in the call.

If you press Yes you will be brought back to the Devices dialog to rechoose your devices. Depending on the audio device chosen, you may have to hang up the call and redial the remote party, due to windows sometimes re-initializing drivers.

### See Also

Media

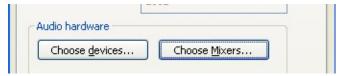
**Basic Options** 

**Auto Greeting** 

**Mixers Dialog** 

### **Mixers Dialog**

The mixers dialog is invoked by pressing the Choose mixers button in the media tab of the Options dialog:

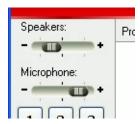


The mixers dialog appears as follows:



Mixer devices control the volume of the microphone and speaker. This dialog allows you to choose which mixer controls the speaker volume, and which mixer controls microphone volume.

It also provides the ability to set the volume of both mixers. IPFX Director Softphone provides a quick way to set the volume via the slider controls on the main window:



These sliders on the main window provide a convenient way during a call

to modify the volume of the speaker and microphone.

## See Also

<u>Media</u>

**Basic Options** 

**Auto Greeting** 

**Devices Dialog** 

## **Options**

The options dialog is displayed by pressing the blue Options link, shown here:



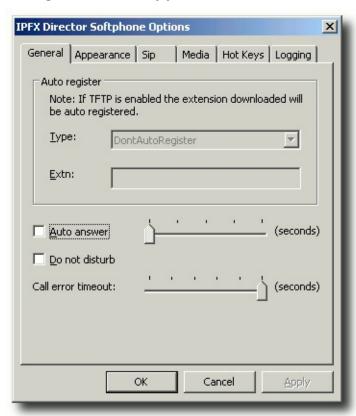
The options dialog contains tabs that group the major areas of configurable options together:





### General

The general tab appears as follows:



Option	Meaning
Auto register	This feature is mutually exclusive with TFTP downloading. If TFTP downloading is off then you can configure IPFX Director Softphone to automatically register when it starts.
	Whether or not TFTP downloading is enabled is configured in the Sip page, covered in a following section.
	The auto register feature can be configured as follows:
	None auto register is turned off
	UseThisExtn the extension typed into the edit box is the extension to register as
	LoadExtnFromRegistry the extension read from the registry is the extension to register as. This is the same extension as the IPFX Live Desktop program uses. The key is "HKEY_CURRENT_USER\Software\Performance Solutions\Settings" and the value is a string with the name "PCExtn" LoadExtnFromProfileUtil the extension returned from ProfileUtil is the
	extension to register as.
Auto answer	This feature causes IPFX Director Softphone to automatically answer any incoming calls. The period of time it waits to answer the call is governed by the slider.
	Note that IPFX Director Softphone plays a beep sound when it is about to

auto answer a call.

Do not disturb Enabling this feature causes any incoming calls to be silently rejected.

The **Call error timeout** determines how long error messages will linger in the Softphone's list box before disappearing (0 to 5 seconds). This setting also determines the duration of the 'busy' tone that will be played when you

Call error timeout attempt to dial a busy telephone.

**NB:** When set to 0 seconds, no error messages will be displayed and no busy tones will be received!

### See Also

**Options** 

**Appearance** 

**Collapsing/Expanding** 

Sip

**Hot Keys** 

Logging

## **Appearance**

The appearance tab appears as follows:



Option	Meaning
Main window style	This option governs how the main window is presented, as follows:  TaskBar The main window is a button on the taskbar  SysTray The main window is an icon in the system tray  Both both of the above
Hang up action	This option defines an action that is taken when a call is hung up, as follows:  DoNothing nothing happens  Minimize the main window is minimized  Collapse the main window is collapse, see the following section.
Stay on top of all other windows	The main window remains on top of all other windows
Bring to front when a call rings in	When a call rings into IPFX Director Softphone it moves to the front of the $\ensuremath{Z}$ order.
Expand from collapsed when a call rings in	The main window expands to a full sized window, see the following section.
Show letters on buttons	Displays alphabetical characters on the Softphone keypad.

<u>Options</u>

<u>General</u>

Collapsing/Expanding

<u>Sip</u>

Hot Keys

Logging

## Collapsing/Expanding

Double clicking the red band at the top of the main window's GUI causes the IPFX Director Softphone to collapse to a small window, shown here:



Double clicking it again causes IPFX Director Softphone to expand back to its original size. Combined with the stay on top feature, this provides a convenient mechanism for keeping IPFX Director Softphone on screen, but not intrusive.



## Sip

## The Sip tab appears as follows:



Option	Meaning
Enable TFTP	If this option is enable then the values specified in the top part of this tab will be downloaded via TFTP when IPFX Director Softphone starts.  This also negates the need for the Auto Register feature discussed in a previous section, and configured in the "General" tab.
	Is one of the following:
	UseThisAddress the address of the SIP server to use is the address typed into the edit box.
Address type	LoadFromRegistry the address of the SIP server to use is loaded from the registry. The key is "HKEY_LOCAL_MACHINE\SOFTWARE\Performance Solutions\Settings" and the value is a string with the name "SipServerAddress".
	LoadFromProfileUtil the address of the SIP server to use is the loaded from ProfileUtil
Server address	The address to use as the SIP server when the address type is "UseThisAddress"?
Server port	The port of the SIP server to use when the address type is "UseThisAddress"?Voicemail extension The extension to dial to check Voicemail messages. See the section titled Voicemail Messages for more information.

## See Also

<u>Options</u>

<u>General</u>

<u>Appearance</u>

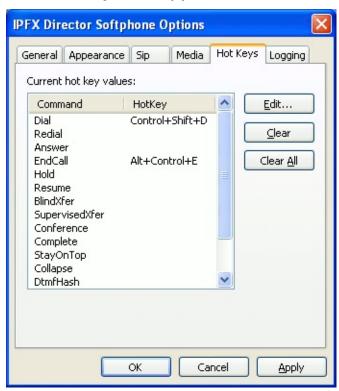
Collapsing/Expanding

Hot Keys

Logging

### **Hot Keys**

The Hot Keys tab appears as follows:



Hot Keys are special key sequences that are always active when IPFX Director Softphone is running regardless of whether or not it is the foreground window.

This means that you could change the window appearance of IPFX Director Softphone to be "SysTray" (see the section titled Appearance) and minimize IPFX Director Softphone. You could be working in another application and press the Answer Hot Key and have IPFX Director Softphone answer a call even though it is minimized to the system tray.

The Hot Keys tab lists the current state of all available hot keys. To set a new hot key select the command that you want and press the Edit button. The following dialog appears:



Choose a key from the drop list, and choose zero, one or more modifiers. For example, if you wanted CTRL+ALT+A to be the hot key for answering a call, you'd choose 'A' from the drop down list, and check the boxes Control and Alt, as shown next:



Press the button OK to set this hot key, the list box in the Hot Keys page is updated as follows:



To clear a hot key, select it from the list view and press the Clear button. To clear all hot keys press the Clear All button.

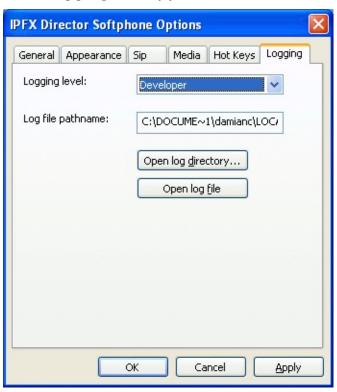
**Note:** Hot keys are a powerful concept; use them only if you're ready to accept the consequences. As an example of the consequences, say you set the hot key CTRL+F as the hot key for Dial you would not be able to use CTRL+F to invoke the Find mechanism in any other application that uses CTRL+F to perform a find. Every time you pressed CTRL+F IPFX Director Softphone would jump to the foreground and ask you to dial a number. You would have to shut IPFX Director Softphone down before the CTRL+F combination could be used as find again in other applications.

# See Also Options General Appearance Collapsing/Expanding Sip

## Logging

## Logging

The Logging tab appears as follows:



Option	Meaning
Logging level	This may be one of the following: Critical only Informational Technician Developer IPFX support staff may ask you to change this during support calls.
Log file pathname	Informational only, so you can see where the log file is currently being written to.
Open log directory	Button to explore to the directory in the previous edit box.
Open log file	Button to open the current log file in Notepad

## See Also

**Options** 

<u>General</u>

<u>Appearance</u>

Collapsing/Expanding

<u>Sip</u>

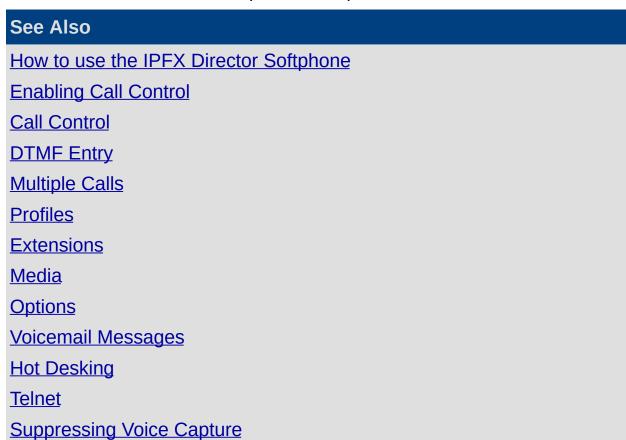
Hot Keys

## Help

Pressing the F1 key on the keyboard, or pressing the blue Help link shown here:



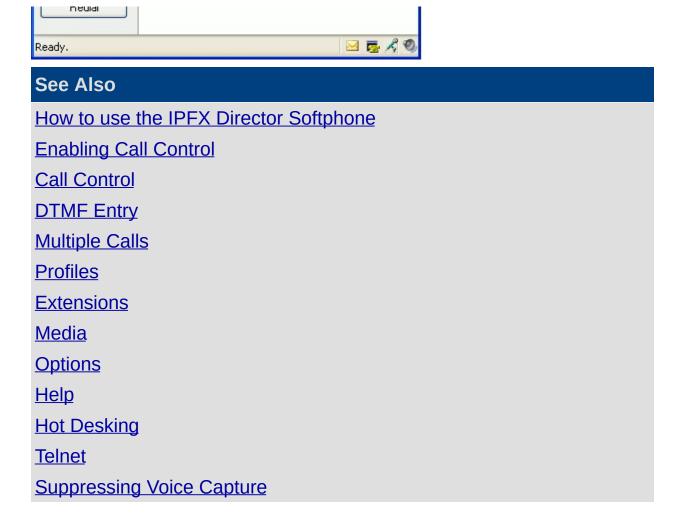
Launches IPFX Director Softphone's help file.



## **Voicemail Messages**

When a voicemail message is left for you on IPFX Server, IPFX Director Softphone gets informed and adds an envelope icon to its status bar.

Double clicking this icon dials the number you have set up in the Options dialog as the voicemail extension.



## **Hot Desking**

IPFX Director Softphone supports IPFX Hot Desking. You access this feature by dialing the Hot Desking extension, which your Network Administrator can tell you.

Dial the Hot Desking extension and follow the prompts. Once completed, IPFX Server will ask IPFX Director Softphone to reset itself and download its new configuration. The dialog appears as follows:



Press the OK button to cause IPFX Director Softphone to download the new configuration.

The downloaded information comprises the IPFX Server address, its port, the voicemail extension and the extension for IPFX Director Softphone to register as.

After a hotdesk operation is performed, the phone will be added to the local region for the purposes of Call Admission Control (CAC) and bandwidth accounting.



**Options** 

<u>Help</u>

Voicemail Messages

<u>Telnet</u>

Suppressing Voice Capture

### **Telnet**

IPFX Live Desktop and IPFX for Outlook can remotely control IPFX Director Softphone. This is achieved through the Telnet protocol.

When IPFX Server returns a successful registration to IPFX Director Softphone, IPFX Director Softphone responds by placing a "Telnet Connected" icon in IPFX Director Softphone's status bar, shown next:



A computer can have only one Telnet connection active at one time. If some other application has grabbed the Telnet port, the icon appears as follows:



In this case IPFX Live Desktop and IPFX for Outlook will not be able to control IPFX Director Softphone, due to some other application being in control of the Telnet port.



# Suppressing Voice Capture

## **Suppressing Voice Capture**



### **PBX Dependent Feature!**

**Note:** Voice capture suppression is only available if specifically enabled by your organisation. Check with your Administrator whether you can use voice capture suppression.

### **About voice capture**

At any time, your calls may be recorded by the IPFX system: either continuously as part of your organisation's standard policy, or on ad hoc basis by a supervisor.

However, under certain circumstances for example, for legal reasons you may wish to prevent a call from being recorded. IPFX calls this ability *voice capture suppression*.

### To prevent a call from being recorded

- 1. Contact your organisation's IPFX Administrator to obtain the voice capture suppression code.
- 2. During the call, enter the voice capture suppression code using the keypad on your phone. Don't spend too long entering the code: you only have limited amount time to complete the sequence after pressing the first key (usually 2 seconds, but check with your Administrator).

#### **Notes:**

- Voice Capture suppression may be initiated by either party in a call.
- Voice Capture Suppression can only prevent calls from being recorded by the IPFX System. It cannot prevent calls from being recorded by external parties to a phone call.
- On a call where an internal extension has dialled your direct dial number (as opposed to your extension number), Voice Capture suppression will only prevent the call from being recorded on your own extension. Both sides of the conversation may still be recorded from the other extension.

## See Also

How to use the IPFX Director Softphone

**Enabling Call Control** 

**Call Control** 

**DTMF Entry** 

**Multiple Calls** 

**Profiles** 

**Extensions** 

**Media** 

**Options** 

Help

**Voicemail Messages** 

**Hot Desking** 

<u>Telnet</u>