

HOSTED VOIP - PC CLIENT

Getting started user guide

June 2012

Application release 8.0 | Document version 1



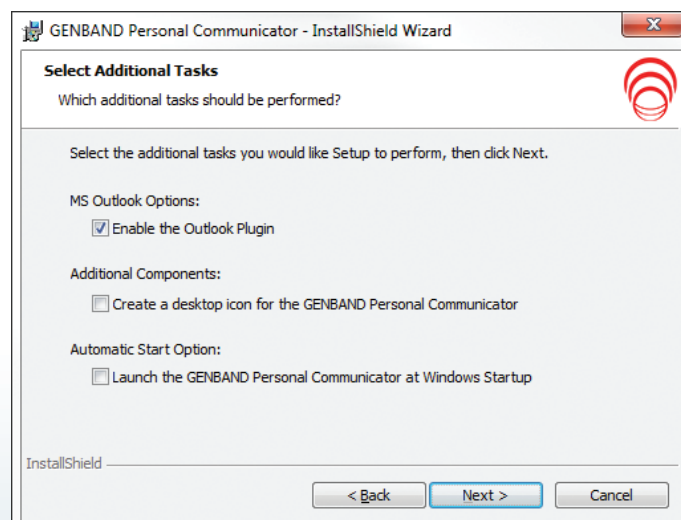
The Personal Communicator Client (PC Client) is a feature-rich user interface that transforms your Windows PC into a powerful telephony and multimedia communications tool. In addition to basic soft phone capability, PC Client users can enjoy the full range of UC features such as Presence, IM, Sharing and Video as well as integration with Microsoft Outlook.

Step 1 – Installation

Log into your Personal Agent and click the 'Download PC Client' link from the top right hand side of the portal. Follow the on screen instructions until the installation has completed.



You will notice one of the installation screens allows you to enable or disable the Microsoft Outlook plug-in. By default, this will be selected automatically, integrating your PC Client with Microsoft Outlook. Un-check this option during this screen if you do not wish to install the plug-in, alternatively it can be removed later if no longer required. See Step 6 for details on using the Outlook plug-in.

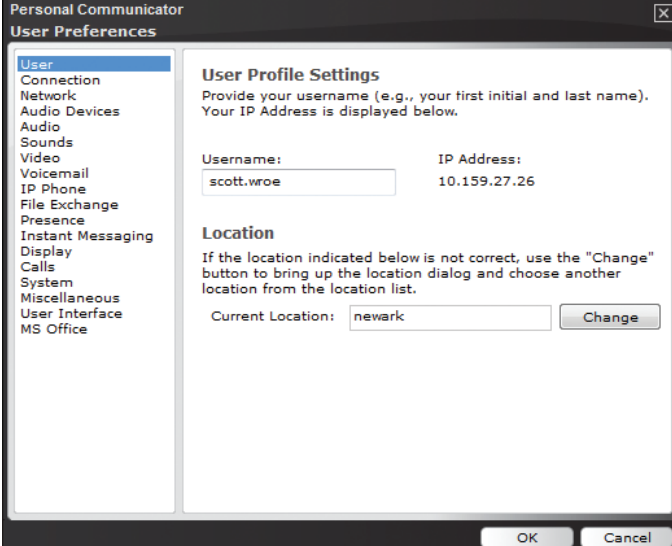


Once the installation has completed, you can launch the PC Client and configure it to be used with your VoIP account.

Step 2 – Launch the Client

The first time you use the application, a wizard will walk you through the PC Client configuration. Follow the prompts that appear on your screen, or should the wizard not appear, select '**Preferences**' from the menu and fill in the requested details as below.

Under the '**User**' settings fill in the following details as supplied to you by Timico.



The screenshot shows the 'Personal Communicator User Preferences' dialog box with the 'User' tab selected. The 'User Profile Settings' section contains a 'Username' field with 'scott.wroe' and an 'IP Address' field with '10.159.27.26'. The 'Location' section has a 'Current Location' field with 'newark' and a 'Change' button. The left sidebar lists various settings categories, with 'User' currently selected.

Personal Communicator
User Preferences

User
Connection
Network
Audio Devices
Audio
Sounds
Video
Voicemail
IP Phone
File Exchange
Presence
Instant Messaging
Display
Calls
System
Miscellaneous
User Interface
MS Office

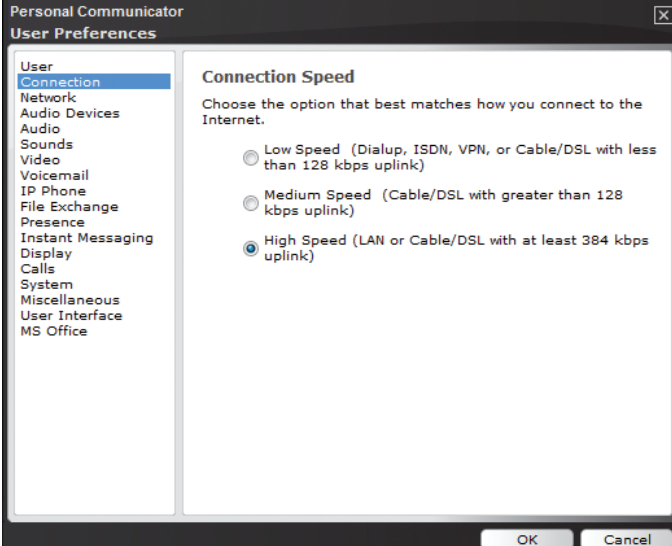
User Profile Settings
Provide your username (e.g., your first initial and last name).
Your IP Address is displayed below.

Username: IP Address:

Location
If the location indicated below is not correct, use the "Change" button to bring up the location dialog and choose another location from the location list.

Current Location:

Under '**Connection**' set the connection speed relevant to your network.



The screenshot shows the 'Personal Communicator User Preferences' dialog box with the 'Connection' tab selected. The 'Connection Speed' section has three radio button options: 'Low Speed', 'Medium Speed', and 'High Speed'. The 'High Speed' option is selected. The left sidebar lists various settings categories, with 'Connection' currently selected.

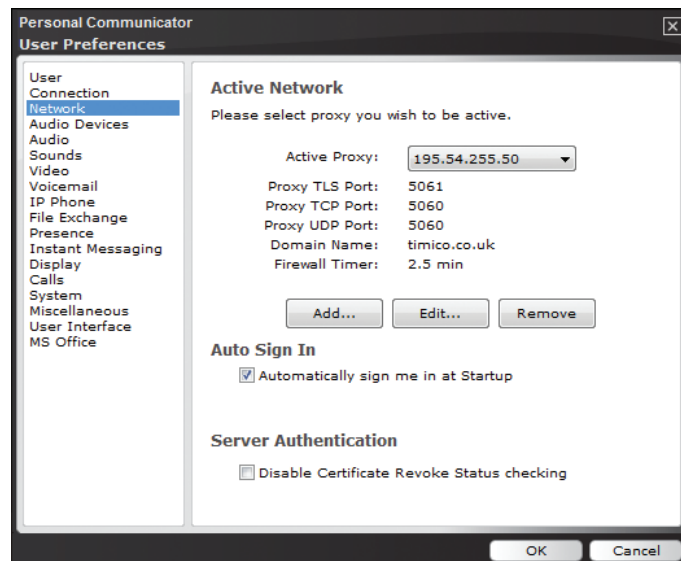
Personal Communicator
User Preferences

User
Connection
Network
Audio Devices
Audio
Sounds
Video
Voicemail
IP Phone
File Exchange
Presence
Instant Messaging
Display
Calls
System
Miscellaneous
User Interface
MS Office

Connection Speed
Choose the option that best matches how you connect to the Internet.

☐ Low Speed (Dialup, ISDN, VPN, or Cable/DSL with less than 128 kbps uplink)
☐ Medium Speed (Cable/DSL with greater than 128 kbps uplink)
☒ High Speed (LAN or Cable/DSL with at least 384 kbps uplink)

Also under the '**Network**' settings, ensure the active proxy IP is always set to **195.54.255.50**, the proxy port is 5060 and the domain name is as supplied to you by Timico.

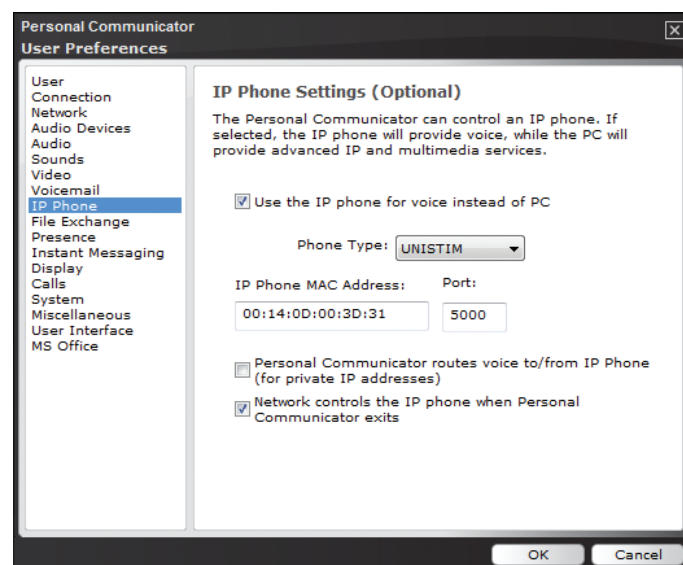


Once the steps have been completed, click 'OK' which will return you to the main PC Client interface. From here you should be able to 'Login' from the menu bar. If all the above details are correct, a pop-up box may appear asking you to select a location so choose the relevant entry from the list.

Step 3 – Using your PC Client: Link to your phone

Many users opt for a headset as their main audio device for making and receiving calls when using the PC Client. Optionally, you can use a separate microphone and your computer's speakers for the voice part of the call, which is ideal when making and receiving calls when working from home or out of the office, but not as suitable in open office environments.

Alternatively, you can use a Nortel/Avaya desk phone, purchased as part of your Hosted VoIP solution. The IP phone provides premium-quality voice, while your computer is dedicated to the data and video components of the multimedia conversation.



To set up your Nortel/Avaya phone, first ensure that the handset is connected to your PC via the network cable.

Select **Tools, Preferences** and then select the **IP Phone** list item.

Select the option for **Use the IP telephone for voice instead of PC** to indicate that you want the IP phone to provide voice while allowing the PC to provide advanced IP and multimedia services.

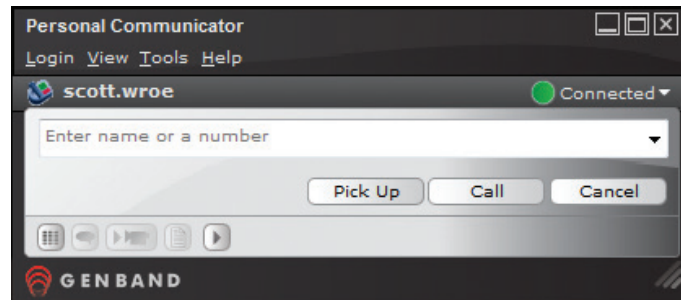
The PC Client should automatically detect and fill in the MAC address field for the phone connected.

The phone must be connected to the Ethernet port of the PC or both the phone and PC must be connected to the same Ethernet local network.

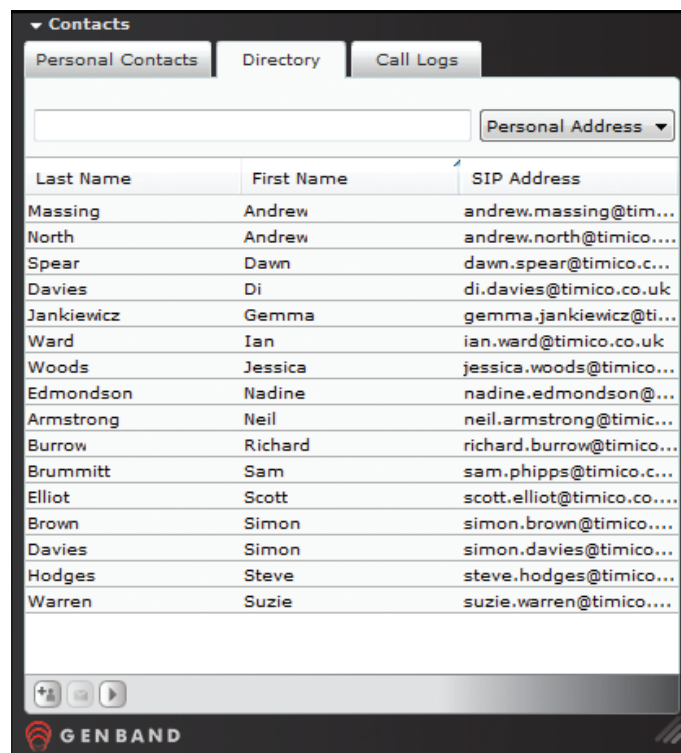
Step 4 – Using your PC Client: Make your first call

There are multiple ways to initiate a call using the PC Client:

1. Type the telephone number directly into the text box and click 'Call'.



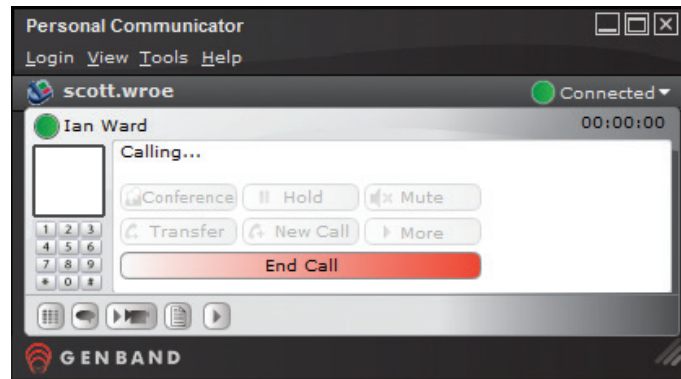
2. Use the 'Directory' tab to search for contacts in your Global Address Book, and then double click on their name to begin calling.



Online help - from **Help** on the toolbar, click **Contents** to view a PDF-based user guide..

Online help - from Help on the toolbar, click Contents to view a PDF-based user guide.

3. The PC Client will then display the call as shown. For both calls made and received, the window displays various details including the contact's name (if in address book), telephone number, and Photo ID if the other user has provided one.



Various actions can be taken directly from this window during a call. For example, muting the call, putting the call on hold, transferring the call elsewhere, initiating a conference and parking the call for someone else to retrieve it. As well as the voice element of the call, multimedia features can be activated too such as Instant Messaging and sharing files, web pages and whiteboards, by using the other tables on the conversation window.

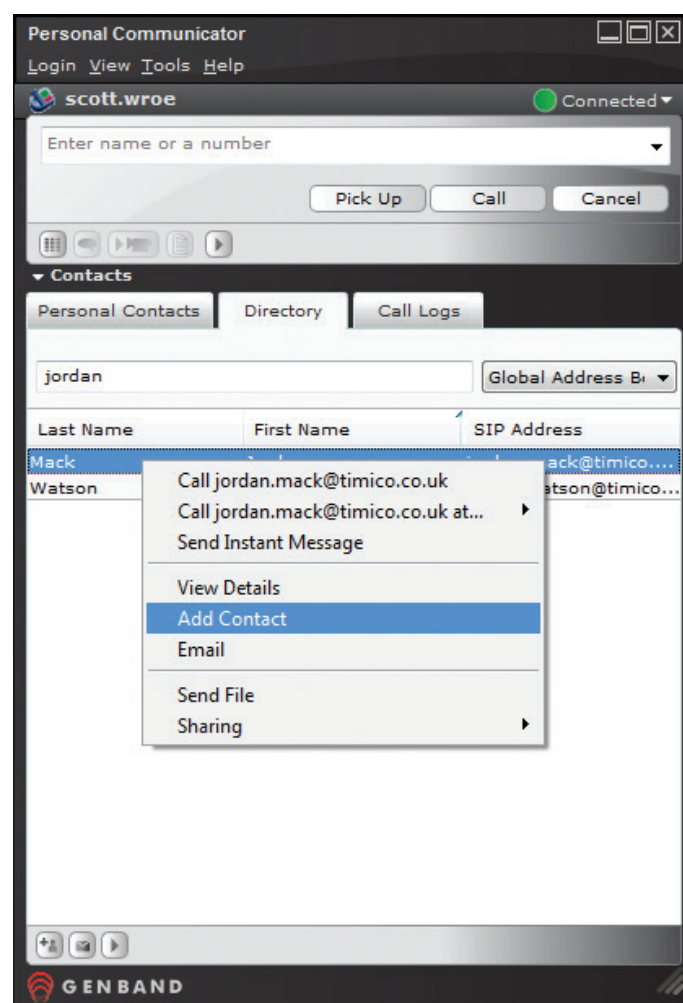
Step 5 – Using your PC Client: Other features

As well as being able to make and receive calls via the PC Client, it also gives you access to many other features straight from your desktop.

Personal contacts

For contacts that you regularly call, or need to communicate with daily, you can add them to your '**Personal Address Book**' so that they appear in the first tab on the PC Client making it quicker to click and call.

Search for the contact in your '**Global Address Book**' using the Directory tab. Right-click and select '**Add Contact**'. A new window will be displayed showing the contact's details, which can also be amended here. Clicking '**Save**' will add the contact to your Personal Address Book.

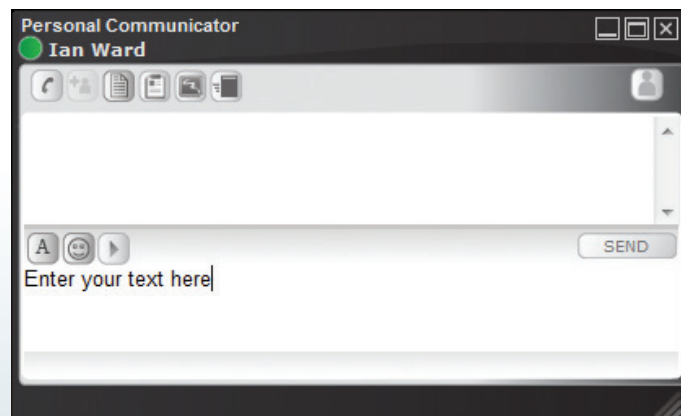
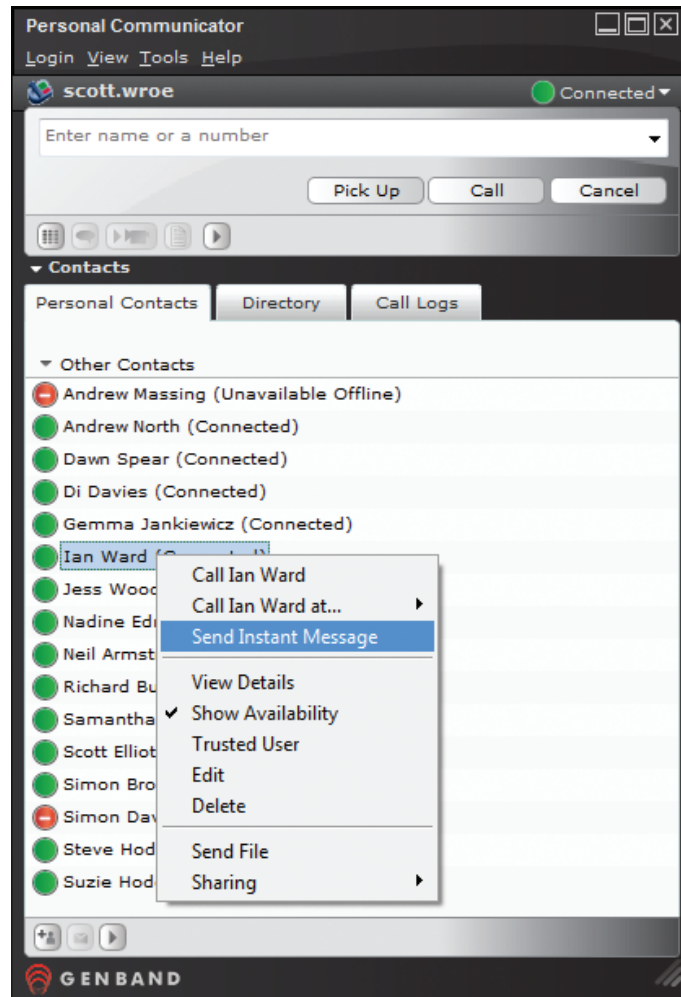


Instant Messaging

Use Instant Messaging as an alternative to email to allow faster communications with other users.

Right-click on the contact that you wish to message and from the menu that appears choose **'Send Instant Message'**.

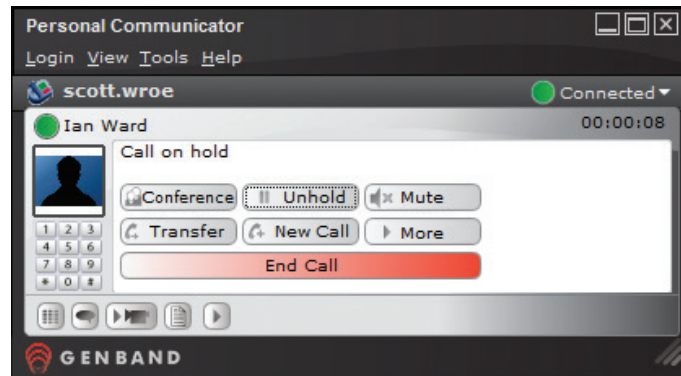
A pop-up conversation window will appear. Type your message in the text box at the bottom of the window and press **'Send'**. All previous conversations with this contact will be displayed in the above dialogue box.



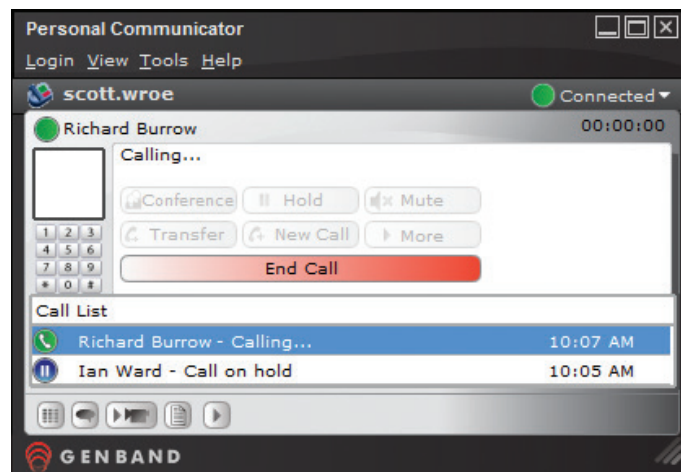
In-Call functions

When a call is made / received you will see the following action buttons appear in the call window of the PC Client:

To place a call on hold:



1. Make a voice call or answer an incoming voice call.
2. Click '**Hold**'.
3. The call will now be on hold, and the caller will hear music.
4. While the call is on hold, you can make and answer other calls.
5. To retrieve a call on hold, click '**Unhold**'.
6. If you retrieve a held call while on another call, the Client automatically places the active call on hold.

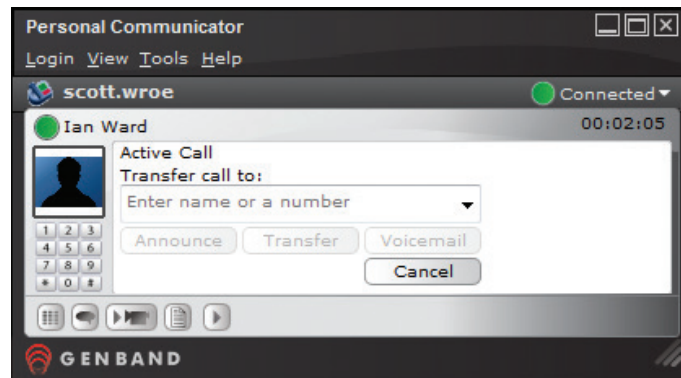


To join another person into the call (Ad-Hoc Conferencing):

1. During any call, either click on another contact to call straight from your Personal Contacts list, or click '**New Call**' to search for the contact.
2. Each time you make a new call, the active caller is placed on hold.
3. Once you have called all of those needed for the conference, press the **Conference** button.
4. Select the parties you want to add to the conference.
5. Press **Join** to add all parties into the conference.

To transfer a call:

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



To perform a cold transfer of an active call:

1. Click the **Transfer** button for the conversation you wish to transfer. The Transfer window appears.
2. Enter a transfer address, such as a telephone number or SIP address.
3. Click **Transfer**. The PC Client transfers the call to the named destination, closes the window, and disconnects the call.

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

1. Click the **Transfer** button for the conversation you wish to transfer. The Transfer window appears.
2. Enter a transfer address, such as a telephone number or SIP address.
3. Click **Announce**. The PC Client initiates a new call to the transfer destination Client and places the call between you and the transferee on hold.
4. After talking to the transfer destination, select the option to complete the transfer. The other parties are both connected while you are dropped from the call.

Voicemail

You can access your voicemail in a number of ways. Select the voicemail option on your handset (if this feature is available to you), click to call from your PC Client (click **Tools** on the menu bar, and **Voicemail**), or you if you need to access your voicemail externally, you can request an external voicemail number from Timico.

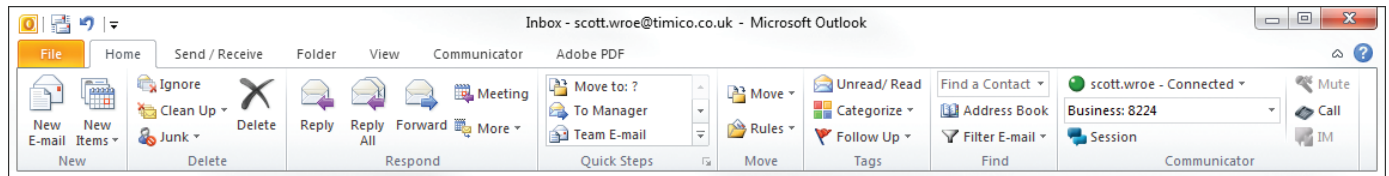
On making a call to your voicemail you will hear an initial greeting and be asked to enter your mailbox number followed by the # key.

Timico will give you your mailbox number as part of your order confirmation.

The first time you use your voicemail box, you will be prompted to create your own voicemail PIN. As part of this process you will be given a default number from Timico with confirmation of your completed order.

Step 6 – Microsoft Outlook plug-in

As well as the standalone PC Client, you will also be able to take advantage of the Communicator tab that you will now see has been installed into Outlook (unless this was disabled during the installation process).



The Communicator tab allows you to access almost all of the PC Client functions directly from Outlook such as:

Logout

Logs you out of the Personal Communicator and updates your Presence information to represent this in Outlook as well.

IP Phone

Initiates control to your IP Phone if your Personal Communicator is configured to do so. Refer back to Step 3 for more information on how to set this up.

Preferences

Opens the User Preferences window of Personal Communicator.

Agent

Opens (in the default web browser) the Personal Agent web portal. Note that the plug-in passes your VoIP credentials to the Personal Agent (PA), enabling the PA to auto-login and present the main screen. Please see the separate Personal Agent User Guide for more information on how you can use this portal.

Presence status

Displays your current Presence status as seen on the Personal Communicator and by all others who check your availability. Click to select another Presence status (this will auto-update the Presence on the Personal Communicator as well).

My Friends

Brings up the Personal Contacts window of Personal Communicator to display your Friends list and their presence.

Session

Brings up a separate window that allows you to connect to someone in a selectable way, for example, direct-dial calling or Instant Messaging.

Contact information

Displays the most readily available contact information of the sender of the email currently selected.

- If the user is in your Personal Address Book, their SIP address is displayed.
- If the user is only in the Global Address Book, their primary telephone number is displayed.
- If the user is in neither address book, the field prompts for information so as to then contact them via the Call or IM button etc.

Call/IM/Send a File

Brings the Personal Communicator to the forefront and starts the chosen communication to the email sender.

Voicemail

Brings Personal Communicator to the forefront and places a call to your voicemail, provided the voicemail information has been filled out in the Preferences panel.

Incoming/Outgoing Calls

Brings Personal Communicator to the forefront with Call Logs, with either Inbox or Outbox selected.

Import Contacts

Brings up a window that allows you to add users from the Global Address Book into your Outlook Contacts.

Manage Groups

Brings up a window that allows you to add, delete, or edit the groups you have used to organise your Personal Contacts.

For more detailed information on how to use the Outlook plug-in, please refer to the 'Using the Outlook plug-in' section of the full Personal Communicator user guide. To access this click on the Help button in the Communicator tab.