



User Guide  
is-phone for IBM Lotus Notes 8.0.1

Version 7.0.2

**Note:** Before using this information and the product it supports, read the information „Notices“ on page 3.



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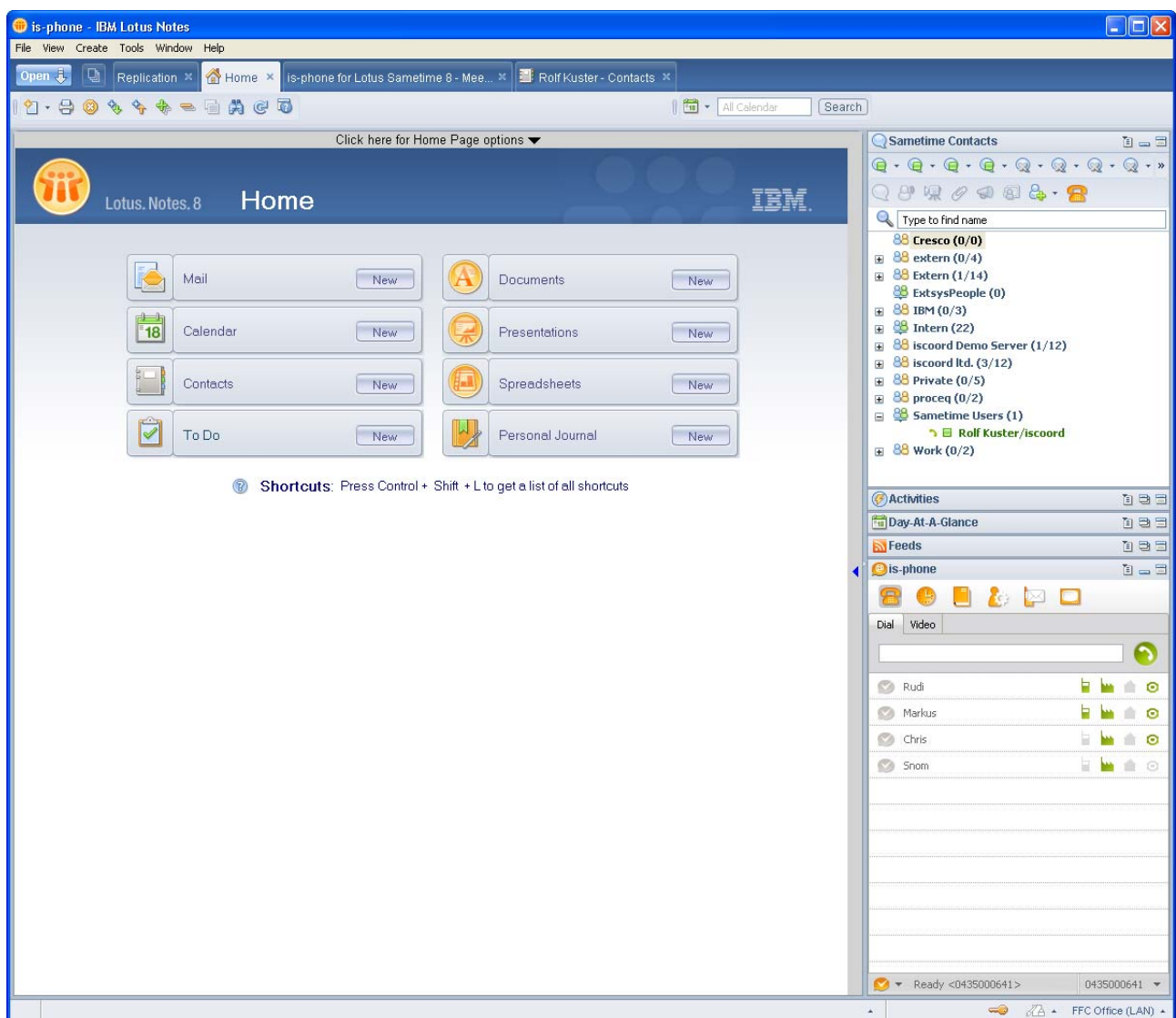
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# 1. Introduction

This operating guide gives a very detailed description of the functions and settings of the telephone and the possibilities it offers. You can read the brief description instead if all you need is a quick overview of the most important options. You will have no trouble operating the telephone if you are already familiar with Lotus Notes. In addition, you can press the *F1* key at any time to call the help function and receive detailed, context-sensitive information on using the individual functions.

Depending on the specific software release employed for IBM Lotus Notes and the telephone, the illustrations in this operating guide may be slightly different from how they appear on the screen, but the functions will be the same.



You will soon discover that the telephone works very similarly to IBM Lotus Notes, because IBM Lotus Notes can now be used for phone calls, too!




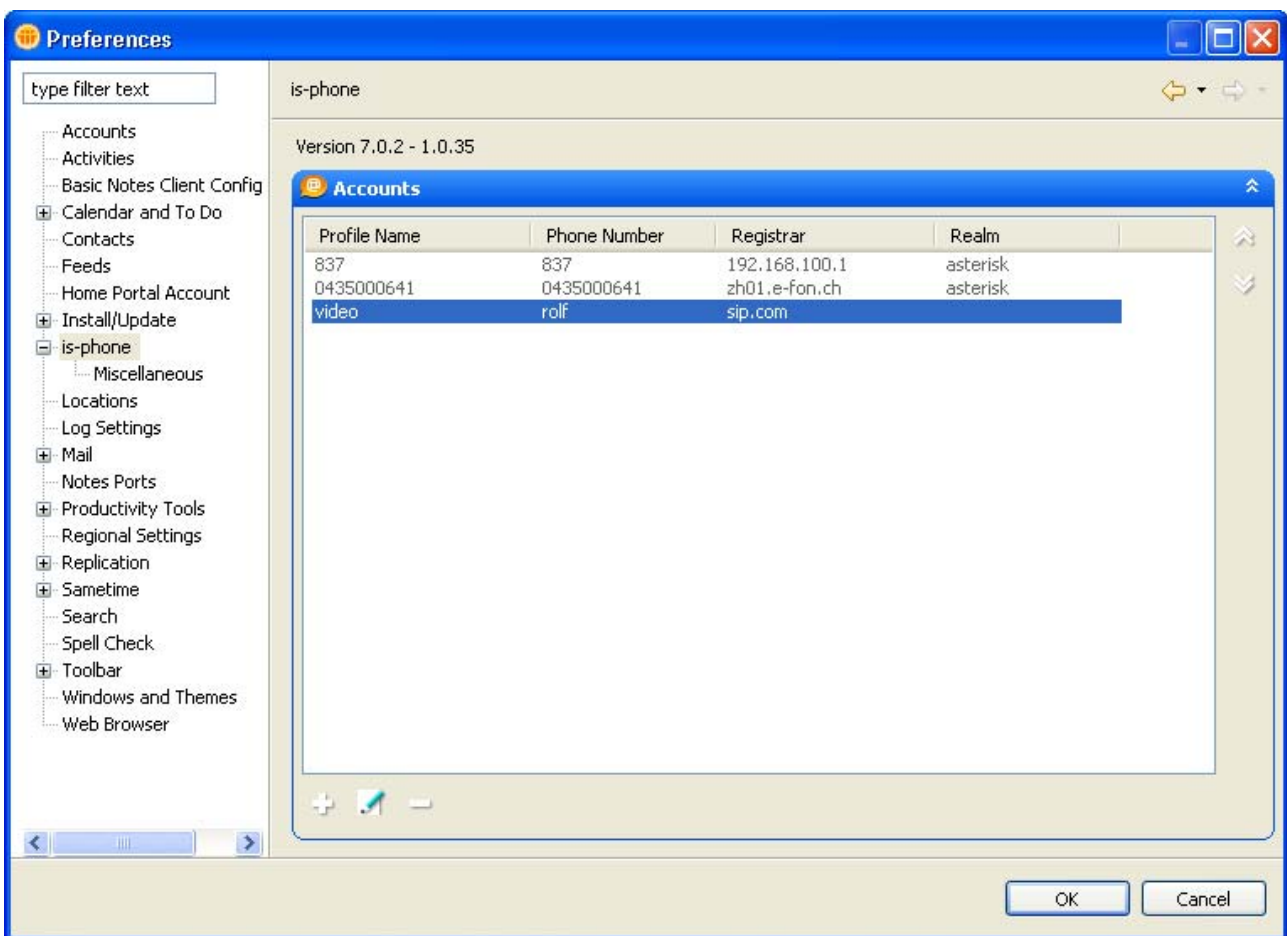
## 2. Configuration

Under the Notes Preferences you can configure your is-phone plug-in.

### 2.1. Profiles

If you click on the preferences menu of Notes (*File - Preferences*) - you get the is-phone account preferences by clicking on is-phone.

Click on the  icon to create a new profile:





## 2.2. Profile/Account

### IMPORTANT:

Most of the following information you will get from your PBX/SIP Proxy Administrator or from your SIP Provider.

If an audio device is not available (disconnected from the PC/Laptop), then automatically the default device of Windows will be used.

It is recommended that you restart Notes when you added a new Audio Device!

For each profile / account, following settings can be defined:

#### Tab: General

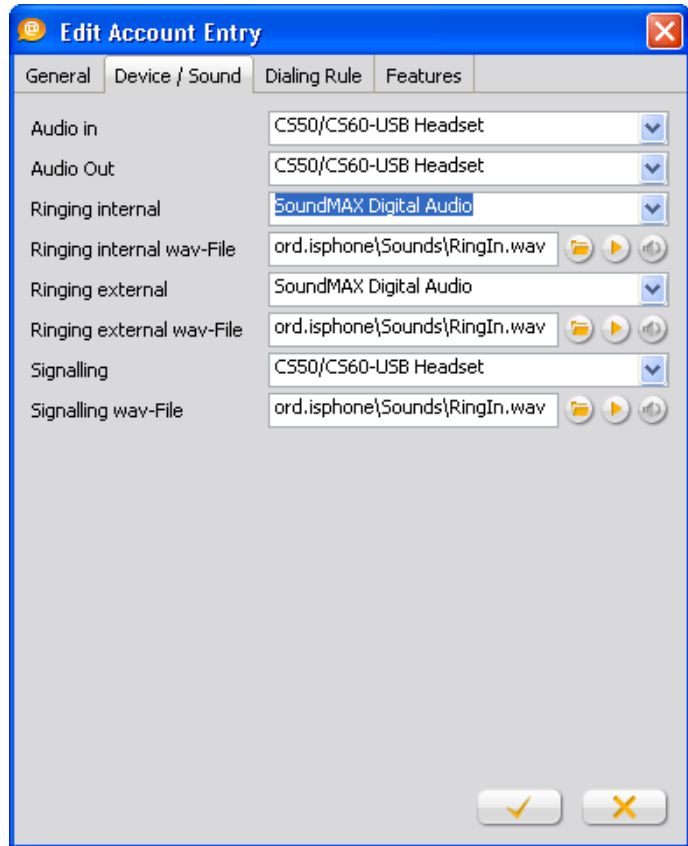
- Profile Name: User definable name
- Phone Number: Phone number under which the plug-in will register
- Username: Username for proxy/PBX authentication
- Password: Password for proxy/PBX authentication
- Registrar: TCP/IP Number or DNS name of your registrar
- Domain: Enter the Domain (e.g. iscoord.net)  
Note: Normally leave this empty (except for Nortel CS1000 where you have to enter the domain name)
- Identity: Enter the SIP identity in SIP Format (e.g. "4444" <sip:4444@iscord.net> or <sip:4444@iscord.net>)  
Note: Normally leave this empty - the identity is generated automatically
- Realm: Some PBX/Registrar needs a Realm for MD5 authentication
- Listening Port: TCP/IP Port number for SIP (normally 5060)
- Protocol: Select UDP, TCP or TLS (normally UDP is used)
- Codecs: You can change the order of the codecs. The client will then negotiate with the PBX/Proxy the codec
- DTMF Mode: Select the supported DTMF Mode (Inbound / RFC 2976)
- Port Range: Select a port range that can be used for the RTP packets. If you leave it open, a random port will be used for each phone call
- STUN Server: Enter the TCP/IP Number or the DNS name of your STUN Server. Leave it blank if no STUN server is used
- Reregister interval: Reregistration happens in the defined interval - if empty or 0 - no reregistration will be done with the registrar
- Supported extensions (SIP): Turn Prack on / off
- Send UDP keep alive packets: Turn this on to send every 2 seconds empty UDP packets. This is sometimes used to keep the session open thru firewalls.



Tab: Device / Sound

- Audio In: Select the device you want to use for talking
- Audio Out: Select the device you want to use for listening
- Ringing internal: Select the device you want to use for signaling / ringing of incoming calls
- Ringing internal wav-File: Select the wav file that should be played for internal ringing
- Ringing external: Select the device you want to use for signaling / ringing of external calls
- Ringing external wav-File: Select the wav file that should be played for external ringing
- Signaling: Select the device you want to use for signaling / ringing of incoming calls
- Signaling wav-File: Select the wav file that should be played for internal ringing

*Signaling is used for 2<sup>nd</sup> incoming calls*





**Tab: Dialing Rule**

- Country Code: Enter your country code (without leading 0)
- Area Code: Enter your Area code (without leading 0)
- Outbound Line: Enter the prefix for an outside line
- Long Distance: Enter the prefix for a long distance line
- International: Enter the prefix for an international line
- Internal Phone Range: Enter the internal phone number ranges (this is used for signaling/ringing)

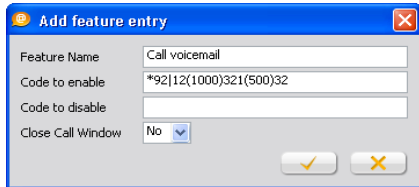
General	Device / Sound	Dialing Rule	Features
Country Code		41	
Area Code		44	
Outbound Line		0	
Long Distance		0	
International		00	
Internal Phone Range		0442588800 - 0442588899	



Tab: Features

- Voicemail: Enter phone access code to your voicemail box. By clicking on the voicemail icon in the status bar, then this number will be dialed

You can add/edit/delete additional features - they will be displayed in the feature tab of the is-phone plugin

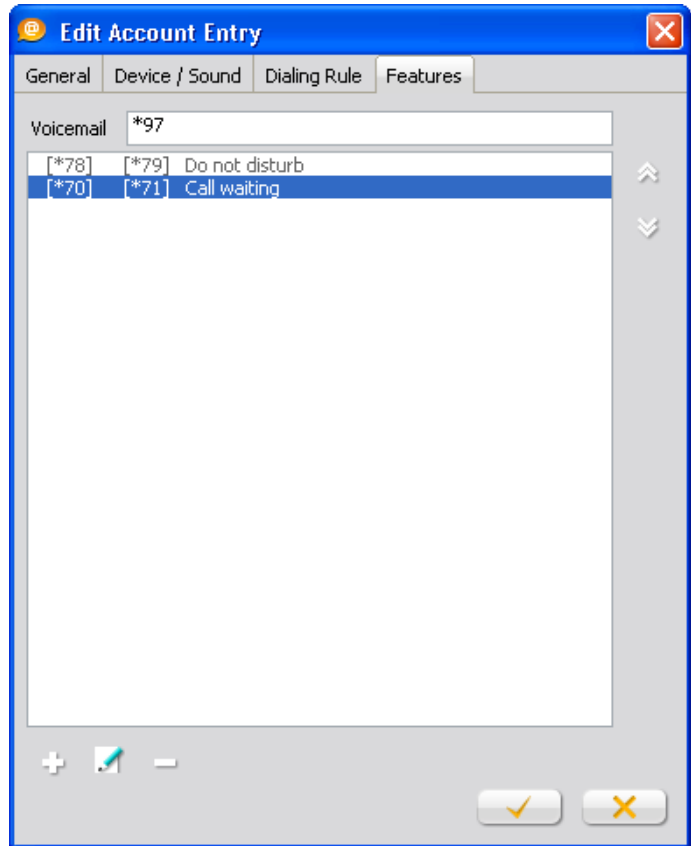


You can also enter DTMF codes that should be sent after dialing a number.

\*92|12(1000)321(500)32%  
or  
sip:\*92@192.168.0.1|12(1000)321(500)32%

- | - indicates the end of the number that should be dialed
- 12 - DTMF code 12 will be sent
- (1000) - waiting time in millisecond
- 321 - DTMF code 321 will be sent
- (500) - waiting time in millisecond
- 32 - DTM code 32 will be sent
- % - Terminate the call

Close call window: the call window will be closed automatically after terminating that call





## 2.3. Miscellaneous configuration

### Miscellaneous:

- Close Call Tab automatically: After ending a call - the call tab stays open until the user closes it manually. By enabling *Close call tab automatically*, the call tab will close automatically unless the user enters text in the note tab (Subject/Notes).
- Automatically off Hold: Takes the call automatically off hold before transfer
- Enable STUN Server: If you have defined a STUN server in your account/profile and want to use it, then this check box needs to be selected
- Hold before transfer: puts the call on hold before unattended transfer (blind transfer)
- Show phone status: Displays additional phone status icons in the buddy list.
- Change my status: Changing of Notes Status when on the phone (yellow)
- Reject 2<sup>nd</sup> call: if you are in an active call and another call comes in, the 2<sup>nd</sup> call will automatically rejected
- Forward 2<sup>nd</sup> call: Enter the forwarding phone number. If Reject 2<sup>nd</sup> call is enabled, the 2<sup>nd</sup> call will be automatically forwarded to this number.
- Call forward unconditional to: forwards any call to this number if activated by the user
- enable Music on Hold: plays "music on hold" from the client when put the call on hold

### Activation:

- After obtaining a license, you will get a license key. Please enter the license key in that field and press the activation button (Time license or Full license - depending your license key).  
**Note:** If you are connecting through an http proxy server, then you have to enter the proxy server information here (username / password / http proxy servername or TCP/IP address).

### Addressbook (LDAP):

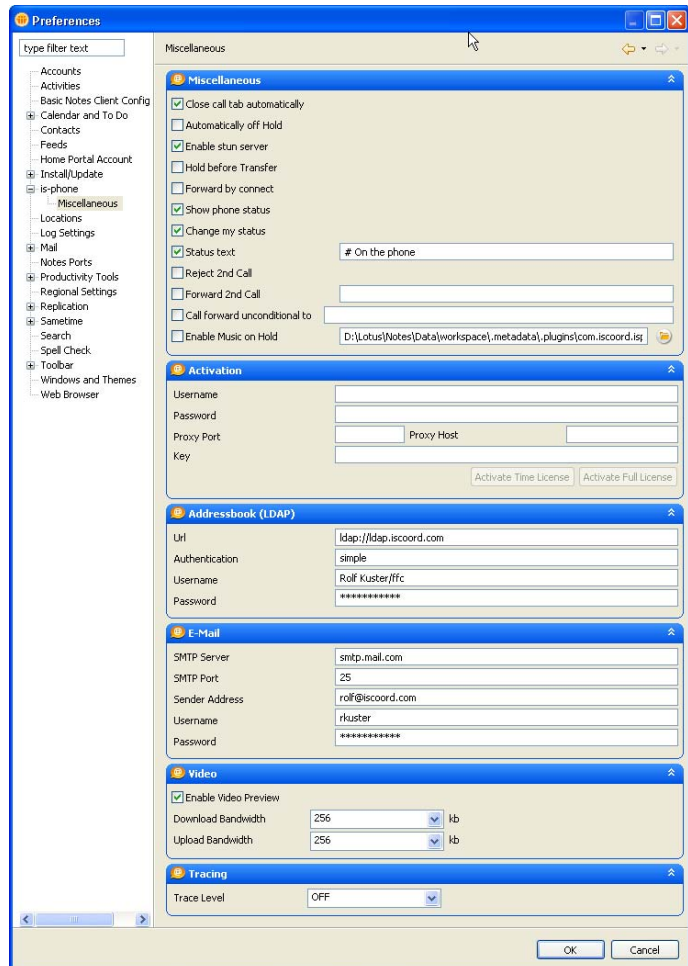
- You can connect an LDAP directory. Enter the server/authentication information

### E-Mail:

- By entering an SMTP Server, you are able to send the call notes/recordings via email.

### Video:

- Enable Video Preview
- Download Bandwidth: Default 256 KB
- Upload Bandwidth: Default 256 KB





### 3. Basic functions

#### 3.1. Starting Lotus Notes

When starting Lotus Notes you will normally see the message *Connecting* in the status bar of the is-phone plug-in. Afterwards your communication tool is ready for you to phone.

The Notes status bar will provide you with information about the status of your telephone at all times:

- *Ready* <your phone number> - your softphone is ready to use
- *Connecting...* (searching your telephony server)
- *No answer* (could not access the telephony server) - check your preferences or contact your local administrator
- *Rejected* (userid/password authentication failed) - check your preferences or contact your local administrator








If your phone is not *Ready*, try restarting Lotus Notes. You will find more information about possible faults and their causes in the section entitled *Error messages*.

#### 3.2. Switching between different functions

##### Icon Bar

You have an icon bar where you can switch between the different implemented functions. Greyed out icons (inactive icons) mean that this function is not enabled / configured in your is-phone.

-  Phone calls / Dial
-  History
-  Directory (LDAP)
-  Features
-  SMS (sending short messages)





### 3.3. Outgoing calls

Enter a phone number in the *Dial* field. Please note that for outside calls you first have to dial the external line prefix (the trunk access code). Here are some examples:

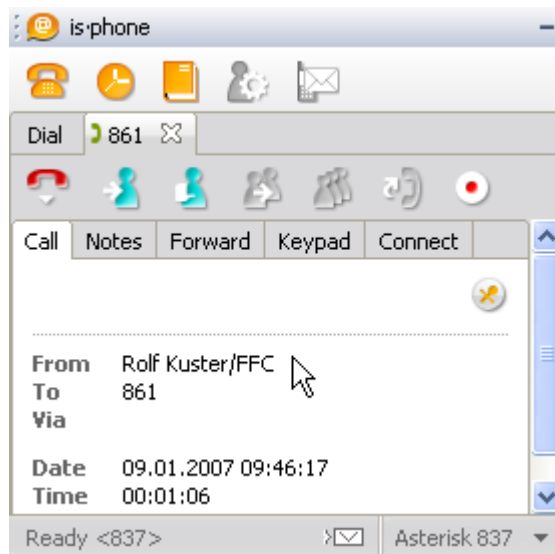
- internal 856
- local 0 456 3445
- regional 0 031 456 3445
- international 0 0041 31 456 3445
- or
- formatted +1 719 535 9007 (recommended)

Spaces and special characters such as / and - may, as a general rule, be included in the phone numbers. The trunk access code is 0 or 9 in many companies.

The Notes status bar will provide you with information about the status of your telephone at all times.



As a check, while the call is being set up you will see a new tab in the is-phone client that displays the phone number and a *green Handset icon (active call)* in the tab title.





### 3.4. Incoming call

When someone calls you, the caller's phone number will always be shown on your screen (except if numbers are suppressed). Don't be surprised if the caller's name is displayed, too. Names are always displayed for in-house calls.

When someone calls you, a pop-up window will appear on the screen to signal the incoming call. It will be acoustically signaled as well on the ringing device, of course. You then have the following options:

- *Accept* the call (you can then converse)
- *Reject* the call (the caller will receive a busy tone)

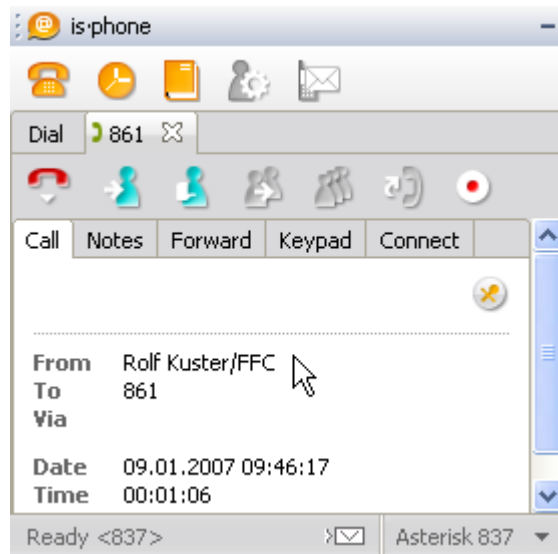




### 3.5. In the call condition

Every call you conduct will open a call window tab in the is-phone plug-in, in the same way that every chat you receive is opened in a separate window. So if you conduct two calls simultaneously you will have two window tabs open in the plug-in at the same time. In addition, the icon in the tab is indicated with different colors (green for active call, red for terminated call). You have the following options:

- Initiate an additional call (see 3.4.1)
- Attended transfer / connect (see 3.4.2)
- Unattended transfer / forward (see 3.4.3)
- Hold (see 3.4.4)
- Switch between active calls (see 3.4.5)
- Conference (see 3.4.6)
- Record call (see 3.4.7)
- Send DTMF (see 3.4.8)
- Microphone (see 3.4.9)
- Take call notes (see 3.4.10)
- Disconnect a call (see 3.4.11)

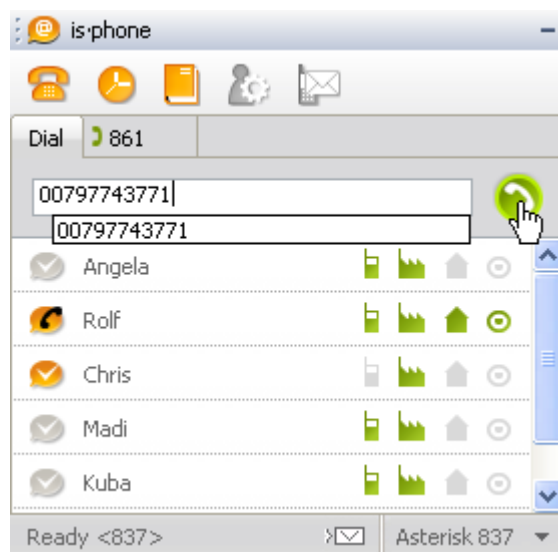


#### 3.5.1. Additional call

You are in an active call and want to initiate an additional call (e. g. Consultation). You do the following:

When someone calls you, a pop-up window will appear on the screen to signal the incoming call. It will be acoustically signaled as well, of course. You then have the following options:

- Click in the is-phone plug-in on the *dial* tab
- Enter the phone number
- Press the *enter* key or click on the green *dial icon*. A second call tab window will open and the first call will automatically be put on Hold.





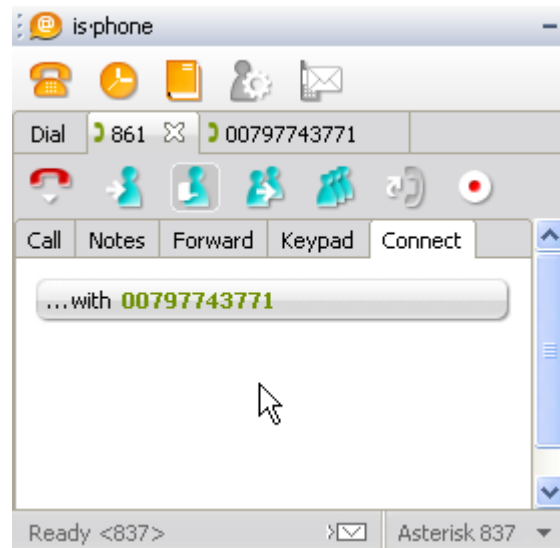
### 3.5.2. Attended transfer (connect)

You have answered a call and want to forward it to someone else, but before doing so you want to make sure the other person is there to take the call. You do the following:

When someone calls you, a pop-up window will appear on the screen to signal the incoming call. It will be acoustically signaled as well, of course. You then have the following options:

- Click in the is-phone plug-in on the *dial* tab
- Enter the phone number
- Press the *enter* key or click on the green *dial icon*. A second call tab window will open and the first call will automatically be put on *Hold*.
- Set up the second call. Tell your second call partner that you have a call for him or her on the other line.
- Click on the *Connect* tab
- Click on the *number* button to connect the active call to (the number in the tab will be connected to the number displayed in the button you pressed)

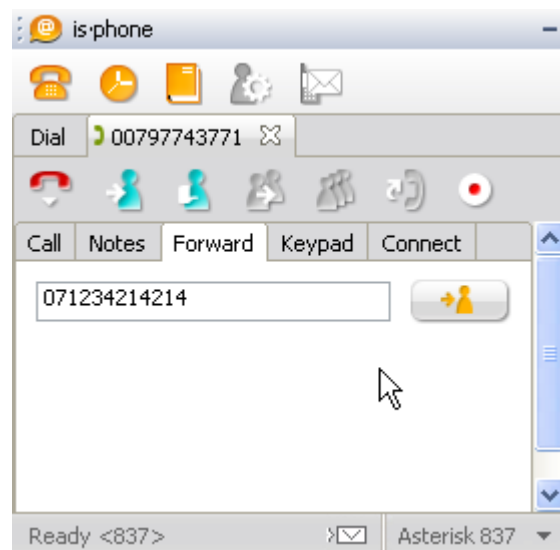
*Note: If you have several calls active, a list with all other active calls appears in the Connect window and you can forward the call by simply double click on the appropriate call.*



### 3.5.3. Unattended transfer (forward)

You have answered a call and want to pass it on to someone else. As you know the person concerned is at his/her desk, you want to forward the call directly.

When you click on *Forward* tab in the active call tab window, the call will automatically be put on *Hold* and you can enter the new phone number (the forwarding destination). When you click on *Forward* again or press the enter key, the call will be connected directly and you can close the call window.





### 3.5.4. Hold

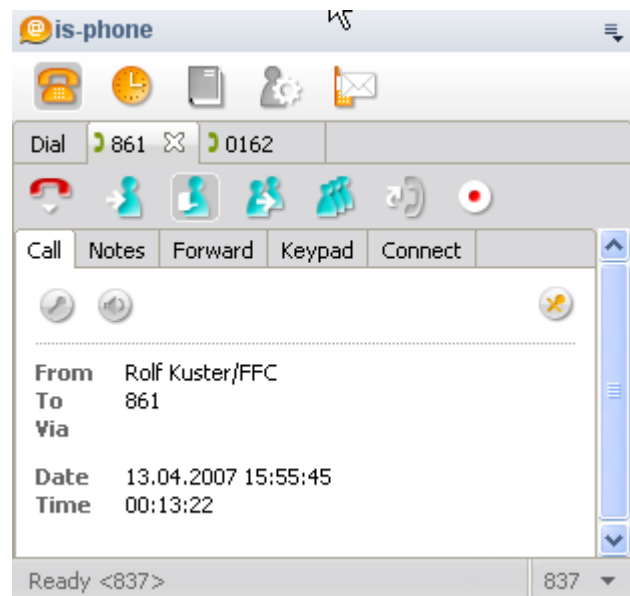
When you click on *Hold*, the call in progress will be interrupted and your call partner will hear pre-set music on hold (if configured on your PBX). You can return to your call partner at any time by clicking on *Hold* Button again. Your call will be put on *Hold* automatically when you use the consultation or forward function.



### 3.5.5. Switch between active calls

You can switch between active calls.

- Click on the *call tab* of the party you like to speak with
- The other party goes automatically on hold

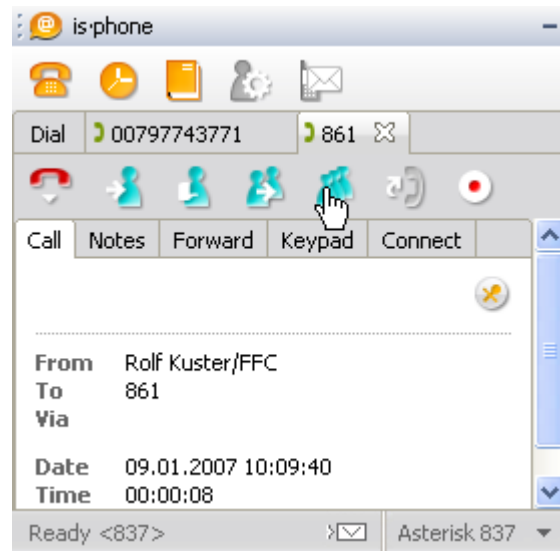




### 3.5.6. Conference

You can conduct conference calls with up to 16 participants. The following options are available:

- *Set up conference:* All active calls are linked into a conference.
- *End conference:* End the conference either by hanging up or by ending the individual calls.



### 3.5.7. Record call

Calls can be recorded for your own personal use. This function can be totally barred by the administrator and a maximum duration can also be set for recording. Please note that your use of the call recording function is subject to your own country's legal requirements.

- *Record:* The call in progress will be recorded after an appropriate advisory announcement has been played.
- *Stop record:* Call recording will be stopped.

The call entry will then contain a *wav* file (history tab). Double-click on this to open it and listen to it. A special playback device will start automatically.

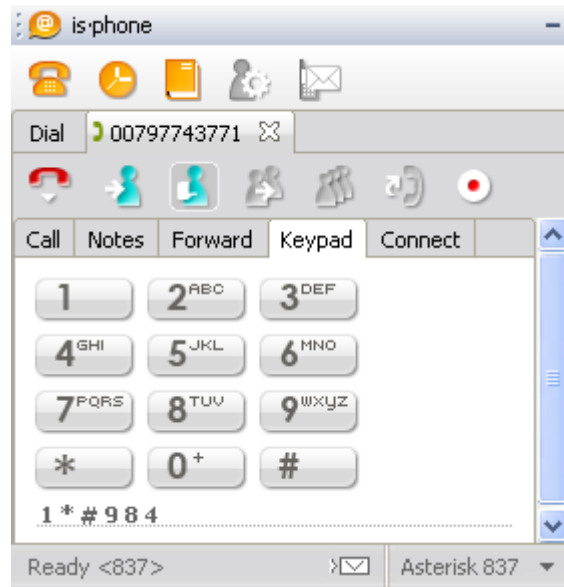




### 3.5.8. Send DTMF

To retrieve messages from an answering machine at home, for instance, or when ringing a call center, it's often necessary to enter a code ("... for information in English, select 1, for ...").

To do this, click on the *DTMF* tab window. The window shown on the right will be opened and you can enter the required digits/characters either using the mouse or directly on your keyboard.

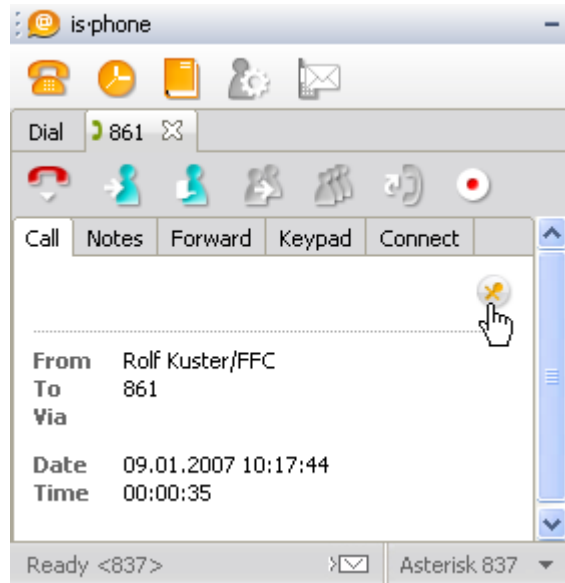




### 3.5.9. Microphone

During a call different temporary audio settings can be made. Please refer to the section entitled *Audio devices*, to permanently set up or pre-set the handset volume. The following settings are possible:

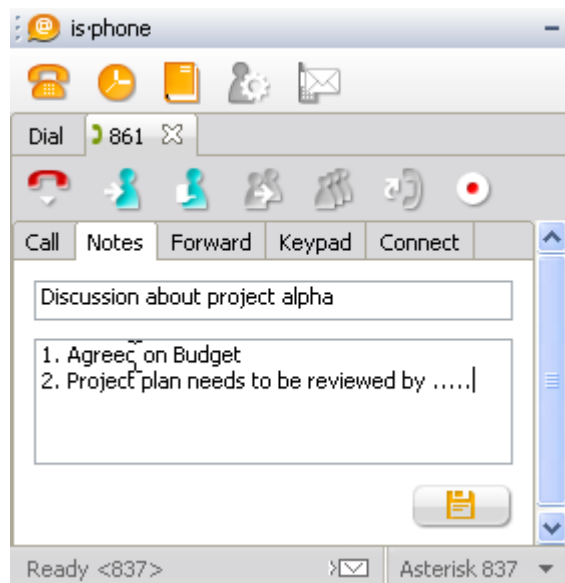
- *Switch on/off microphone:* When you switch off the microphone your call partner will no longer be able to hear you, but you will still be able to hear your call partner (mute).



### 3.5.10. Take call notes

You can make notes directly in the call window at any time while a call is in progress or finished. These notes will remain in the *History* (local file system).

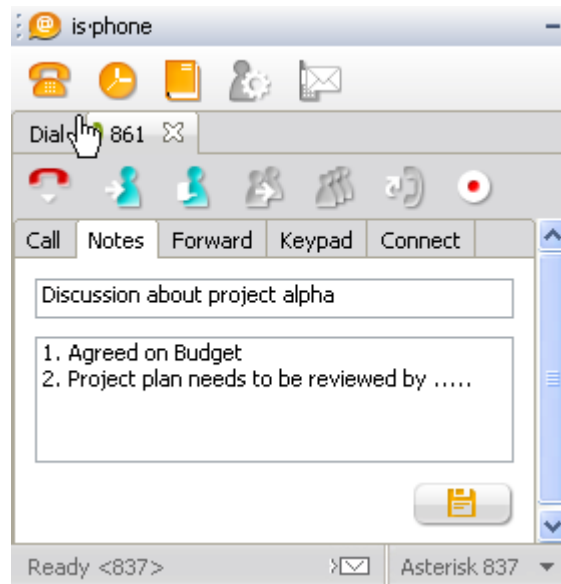
This means you will always know why a certain person called you, for example by entering a meaningful subject line to a call.





### 3.5.11. Disconnect

You finish a call by clicking on *Disconnect*, by pressing the *Escape* button, or by closing the call tab window.

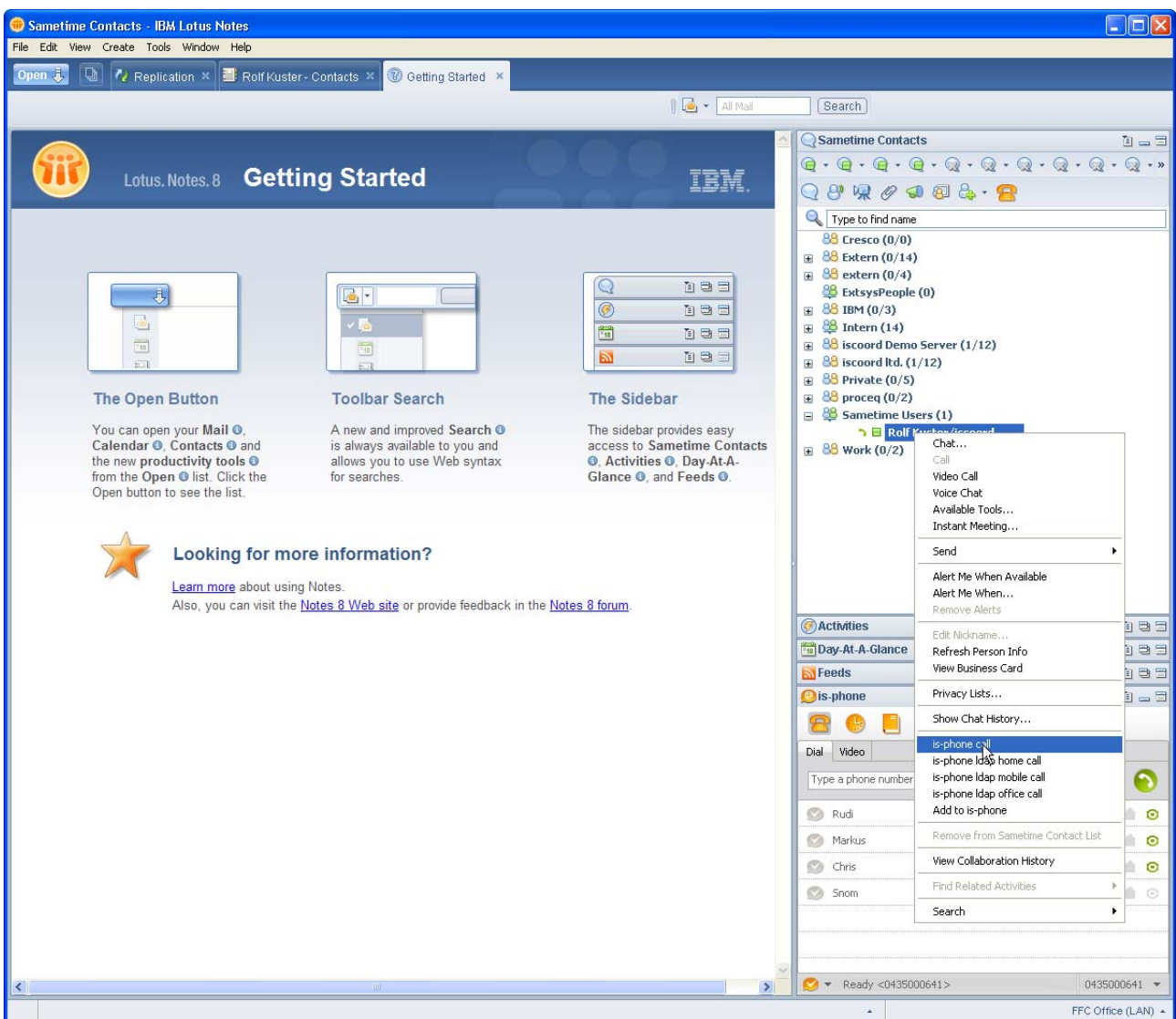




## 4. Other functions

### 4.1. Dialing from buddy list

You initiate a call directly from any contact list (personal or public) by right-clicking on the required contact entry and selecting *is-phone call*. The number stored in the users location document will then be dialed automatically.

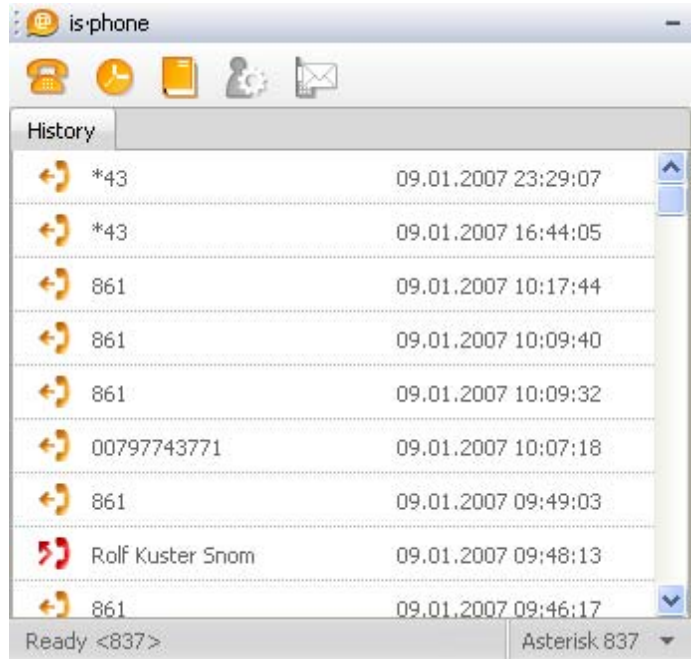




## 4.2. History

All calls are logged in the *History Tab Window*. You can select one or more entries. Following functions are available:

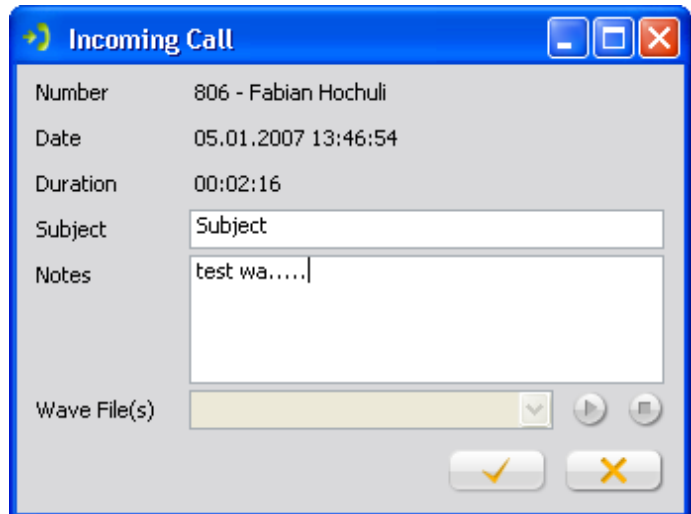
- *Double click on the entry:* You can see/edit the call entry
- *Press the DEL key:* The selected entries are erased/deleted from the history
- Click on the right mouse button to call the number



By double clicking a call entry on the history tab, a window with all call details opens. There you can see all details about the call.

You can make changes on the Subject or Notes anytime.

If you made recordings during the phone call, then you can play the wave files.





### 4.3. Quick dial list

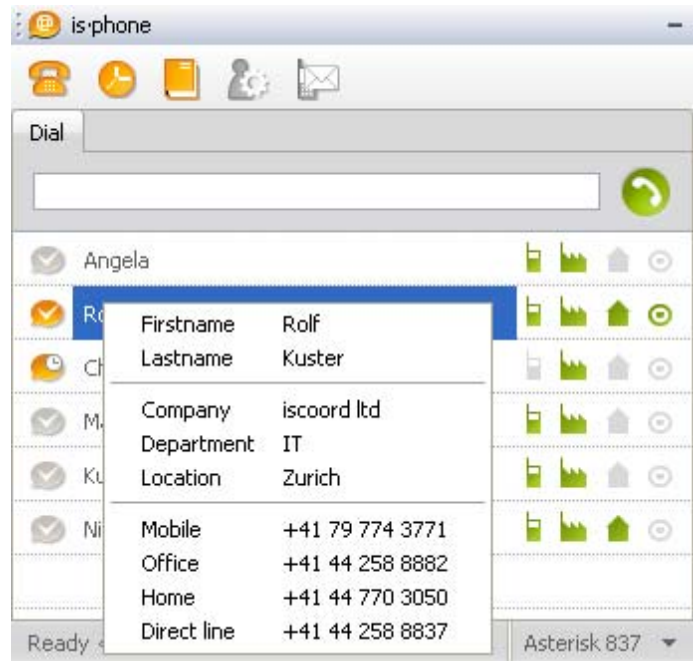
In the *Dial Tab Window* you have the possibility of defining direct access keys:

By double clicking in an empty area of the quick dial list or pressing the *ins* key, a new entry can be defined.

If you click the right mouse button, you can see the detailed information about the entry.

- Mobile
- Office
- Home
- Direct Line

By clicking on one of the green icons, a call can be immediately initiated (Mobile, Office, Home, Direct Line).



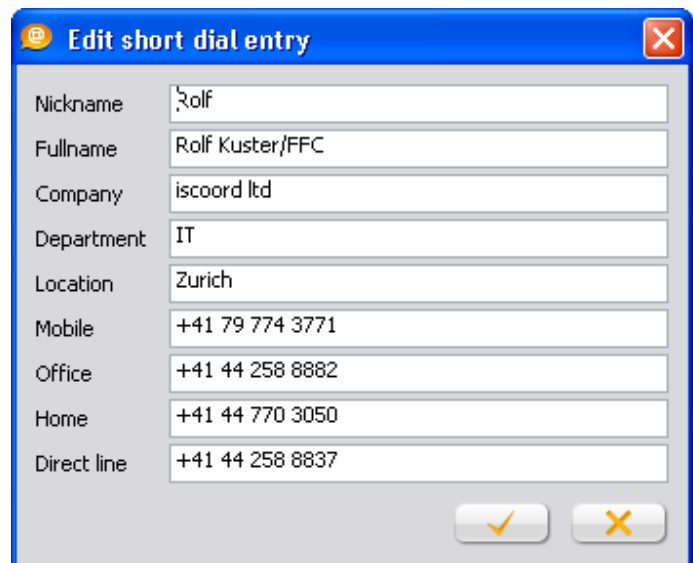
#### 4.3.1. Add / delete quick dial entries

If you add or edit an entry, a pop-up window appears. Following information can be entered:

- Nickname: Enter a Nickname
- Fullname: Enter the Notes user name. The Notes status of this user will then displayed in the quick dial list
- Company: optional
- Department: optional
- Location: optional
- Mobile: Enter a phone number
- Office: phone number
- Home: phone number
- Direct line: phone number

Note: Only enter phone numbers that can be dialed (formatted or unformatted).

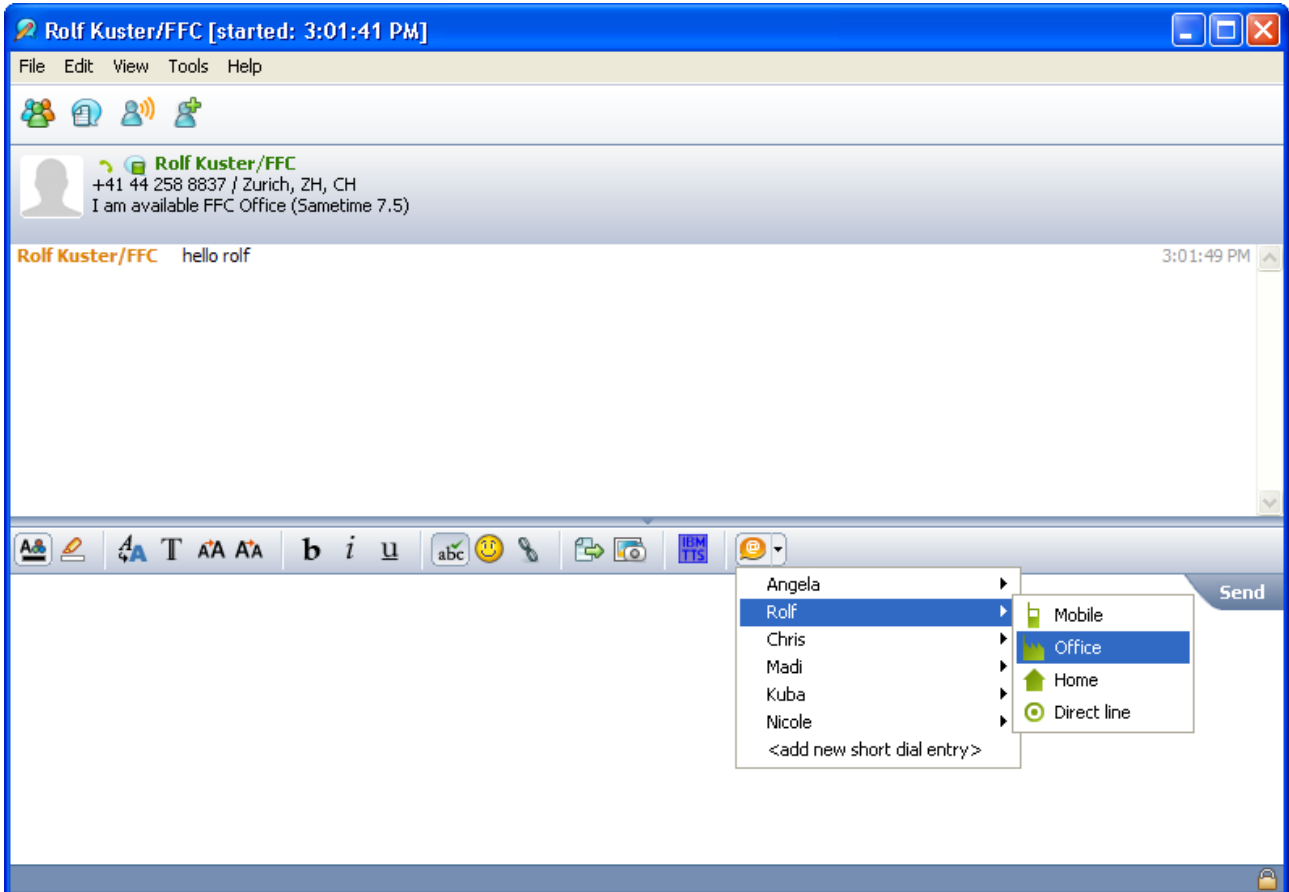
Note: You can also copy entries from your Notes buddy list to your quick dial list





## 4.4. Chat window

You can start phone calls to people defined in the quick dial list out of the chat window.





## 5. Troubleshooting / Debugging

### 5.1.1. Trace

You can select different trace levels in the is-phone / miscellaneous configuration window. Please leave it on *all*. If you encounter an error, please report it to iscoord (support@isccord.com). Please also send us the trace file. It is normally located in (Filename: log.xml.txt):

C:\Documents and Settings\\Application Data\Notes\.metadata\plugins\com.iscoord.isphone



## 6. Error messages

### 6.1. Registration problems

When you start Notes, the plug-in automatically tries to register at your SIP Proxy/Telephony Server that you have defined in your configuration. In the status bar of the plug-in, you see following messages:

- *Connecting...*: The client is searching for your SIP Proxy/ telephony server
- *No answer*: The client could not reach your SIP Proxy/ telephony server. In that case you should check your TCP/IP connections and your local firewall settings
- *Rejected*: The client could connect to the SIP Proxy/ telephony server, but the authentication failed. Please check your userid/password in the is-phone configuration or contact your local administrator

### 6.2. License problems

Trial versions are limited to 30 days. To obtain a full version, please contact iscoord sales department (phone: +41 44 258 8882 or send an email to sales@iscoord.com).

### 6.3. Error messages while telephoning

#### 6.3.1. Double calls

The system prevents you from call the same number twice.

#### 6.3.2. Loop

The system prevents you from calling yourself, which would place an unnecessary strain on your PC's computing capability.

### 6.4. General errors

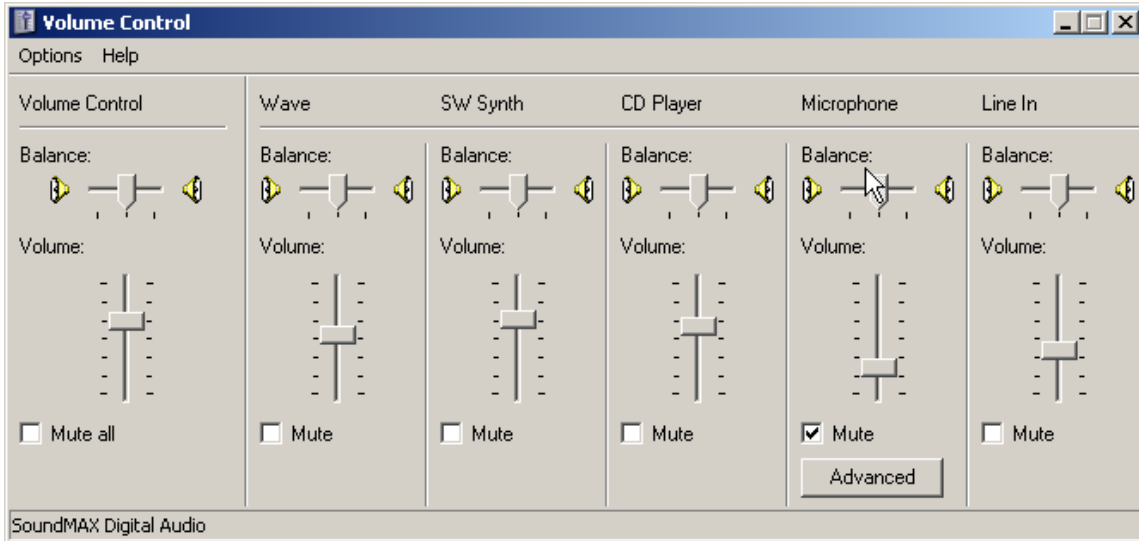
#### 6.4.1. Audio device problems

Most problems occurs due to wrong audio settings. You can define audio devices for each profile. When you change the profile, the appropriate audio devices will be initialized. If for any reason a defined audio device is not available at that time, is-phone is switching automatically to the default device of the operating system (*Control Panel* in Windows).



### 6.4.2. Audio quality problems

If you have bad audio quality, then please check the audio definitions of your device (*Windows Control Panel - Sounds and Audio Devices - Windows Volume Control*).



Following settings are important and needs to be adjusted for proper sound quality:

- Volume Control
- Wave
- Microphone
- Line In

Please check if no one of the devices is muted and if they are adjusted accordingly.