



Meridian 1, Succession 1000, Succession 1000M  
Succession 3.0 Software

# i2050 Software Phone User Guide





# Revision history

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# Overview

The i2050 Software Phone turns your computer into a telephone. To make a call, you dial with your keyboard or mouse. To answer a call, you simply click a button. Instead of holding a telephone receiver to hear and speak to callers, you wear a headset.

Designed to work with IP-based phone systems, the i2050 Software Phone provides Voice Over IP (VoIP) services using a telephony server and your company's local area network (LAN).

The server that supports your i2050 Software Phone will determine that features that you can receive. For example, your server might provide Call Conference, Call Transfer, and Call Forwarding.

## i2050 Software Phone features

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The i2050 Software Phone supports the following features:

- Twelve programmable feature keys: six Programmable Line (DN)/Feature Keys (self-labeled) and six lines/features accessed by pressing the shift key.
- Four Soft Keys (self-labeled) providing access to ten features.
- Multi-field display.
- Powerful directory capabilities: locally stored on the PC or linked to external directories such as LDAP, Microsoft Outlook, and ACT! contact management software.
- “One-click” direct dialing from various windows and applications.
- Six specialized fixed keys:
  - DN/ Feature Tray selection
  - Directory
  - Inbox (Message)
  - Shift
  - Services
  - Expand to PC
- Dedicated call processing indication keys:
  - Hold
  - Goodbye
  - Answer

- Volume
- Mute
- Navigation
- Message waiting
- User-selectable ringer that enables the PC speakers or the headset to ring for incoming calls.
- Macro functions for programming lengthy dialing patterns.

## Main parts

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The i2050 Software Phone consists of four main parts, the i2050 Software Phone window, the Local Directory window, the i2050srv application, and the System Tray icon and menu.

### The i2050 Software Phone Call Control window

This window displays the line keys, feature buttons, and call display. You use this window to make and manage your telephone calls. You also use this window to access your network Directory (if one is available) and your Local Directory.

### The Local Directory window

This window enables you to create, manage, and use a telephone directory stored on your computer.

### The i2050srv application

The i2050srv application is the software on your computer that enables the i2050 Software Phone to communicate with the communications server you are connected to. This application is launched when you start your computer, but remains “hidden” in the background. You'll see it if you open the Windows Task Manager.

### The System Tray icon and menu

You can right-click on the Software Phone icon to make and manage calls.

# Your Call Control window

There are two Call Control windows for the i2050 Software Phone: Standard and Enhanced. Both windows contain many elements in common that provide access to the i2050 Software Phone features.

**Note:** The Standard Call Control window is the default when you start the i2050 Software Phone for the first time. You can modify the settings such that the Enhanced Call Control window opens subsequently.

**To open the i2050 Software Phone Call Control window:**



On your computer's desktop, click **Start > Programs > Nortel Networks > i2050 Software Phone**.

To access the Standard Call Control window, click:

*File > Select Skin > Standard.*

To access the Enhanced Call Control window, click:

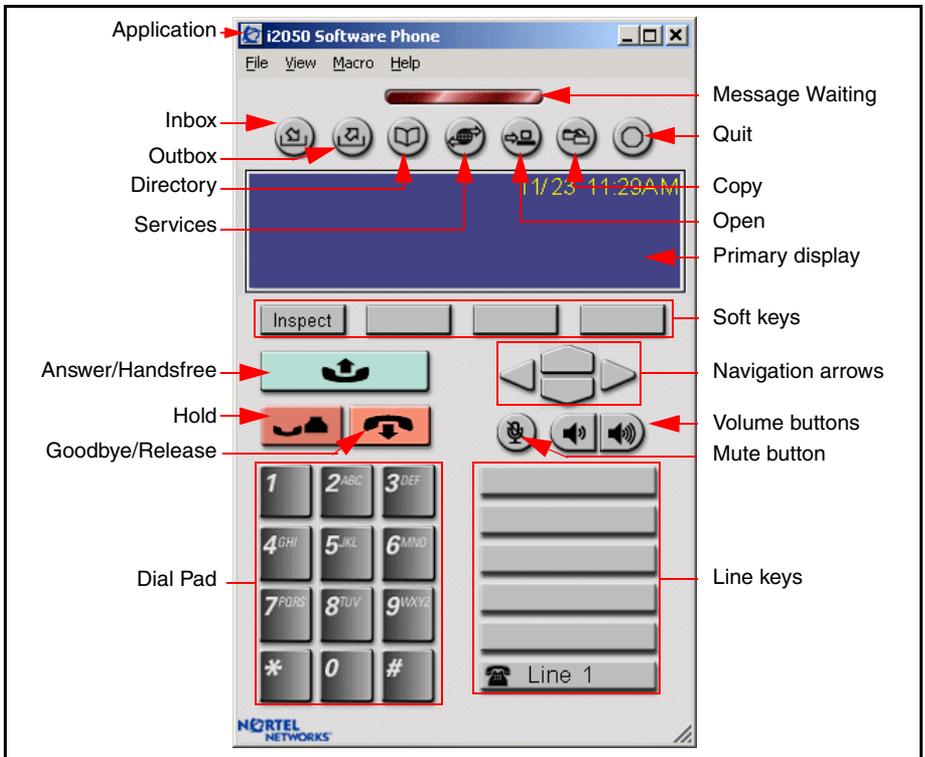
*Application Menu > Select Skin > Enhanced.*

## Standard Call Control window

The Standard Call Control window (shown on page 9) includes the standard features that enable you to make and manage telephone calls.

The elements of the Standard Call Control window are described in Table 1 on page 12.

**Figure 1:**  
Standard Call Control window



### Enhanced Call Control window

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The Enhanced i2050 Software Phone Call Control window (shown on page 11) includes the enhanced features that enable you to make and manage telephone calls.

The elements of the Enhanced Call Control window are described in Table 1 on page 12.

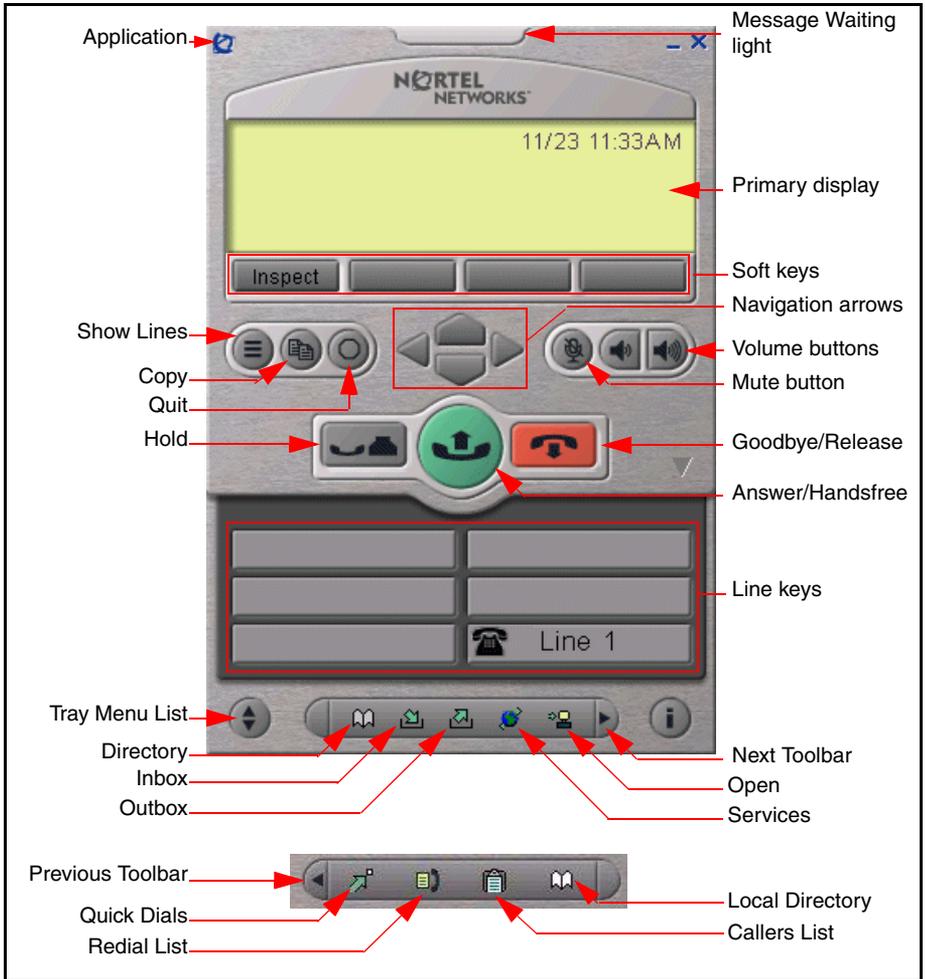
#### To open the Enhanced Call Control window:



On the Standard Window Interface, click **Application menu > Select Skin > Enhanced.**

To change the information that appears on the window, click:  
*Trays > Lines, Trays > Number, or Trays > Combo.*

**Figure 2:**  
**Enhanced Call Control window**



## Call Control window elements and functions

The following table describes the elements and functions of both the Standard and Enhanced Call Control windows.

**Table 1:**  
**i2050 Software Phone components and functions (Part 1 of 3)**

Element	Function
Application	Click the Application button to access the Application menu.
Message Waiting light	The Message Waiting light flashes when there is a message waiting.
Primary display	The Primary display area provides call information (such as Caller ID) and instructions for using certain Soft key features. When the telephone is idle, only the date and time display.
Soft keys	<p>There are four soft-labeled feature keys: <b>Transfer</b> for connecting calls to other people, <b>Conference</b> for group calls, <b>Forward</b>, and <b>More...</b> for accessing additional features.</p> <p>To select a feature, click the appropriate Soft key button, and then follow the instructions on the display.</p> <p>The Soft key features you have to choose from depend on:</p> <ul style="list-style-type: none"> <li>Your current task. The features available at any time depend on your current call activity.</li> <li>The features that are available. Much of the functionality of the i2050 Software Phone is dependent on the communications server configuration.</li> </ul> <p><b>Note:</b> If there are more than four features available, click the More Soft key to see them.</p>
Show Lines	Click the Show Lines button to change the tray on the Call Control window (show or hide the Line buttons).
Copy	Click the Copy button to copy a network service, feature, or folder.
Quit	Click the Quit button to quit a network service or feature.
Navigation arrows	Use the Navigation arrows to scroll through menus and lists in the display area.
Volume	Use the Volume buttons to Increase or decrease the headset volume.
Mute	Click the Mute button to listen to the receiving party without transmitting. Click the Mute button again to return to a two-way conversation. The Mute button applies to Headset microphones.
Answer/Handsfree	Click the Answer/Handsfree key to answer and make calls.

**Table 1:**  
**i2050 Software Phone components and functions (Part 2 of 3)**

Element	Function
Hold	<p>Click the Hold key to place an active call on hold.</p> <p>The feature key label for the held line displays a flashing icon to indicate the call is on hold. Return to the call by clicking the Line button of the call on hold.</p>
Goodbye/Release	Click the Goodbye/Release key to terminate active calls.
Line keys	<p>The Software Phone includes six programmable Line keys that can represent line appearances, DN, or features. The communications server provides the labels that appear on these keys.</p> <p>To use the programmed feature, line, or DN, click on its Line key.</p>
Dial Pad	The Dial Pad lets you dial a telephone number. Simply click on the numbers you want to enter.
<p><b>The following Standard toolbar elements apply to the Standard Call Control window ONLY.</b></p>	
Inbox	Click the Inbox button to access your messages or return a call.
Outbox	Click the Outbox button to see a list of the numbers you have dialed or redial a number.
Directory	<p>Access a Network Directory. Depending on how your system administrator has set up this service, this button may access a Local Directory or some other server-based directory service. You can use the Directory to place a call. Generally, the call will be placed on your prime line unless you select a different line.</p>
Services	Click the Services button to access a list of network services.
Open	Click the Open button to open a network service, feature or folder.
Copy	Click the Copy button to copy a network service, feature or folder.
Quit	Click the Quit button to quit a network service or feature.
<p><b>The following Network Services toolbar elements apply to the Enhanced Call Control window ONLY.</b></p>	
Tray Menu List	The Tray Menu List key scrolls through an opened directory menu.
Directory	<p>Click the Directory button to access a directory.</p> <p>Depending on how your system administrator has set up this service, this button may access a local directory or some other server-based directory service.</p>

**Table 1:**  
**i2050 Software Phone components and functions (Part 3 of 3)**

<b>Element</b>	<b>Function</b>
Inbox	Click the Inbox button to access your messages or return a call.
Outbox	Click the Outbox button to see a list of the numbers you have dialed or to redial a number.
Services	Click the Services button to access a list of network services.
Open	Click the Open button to open a network service, feature, or folder.
Next Toolbar	Click the Next Toolbar button to display the next toolbar.
<b>The following Local Directory Quick Access toolbar elements apply to the Enhanced Call Control window ONLY.</b>	
Previous Toolbar	Click the Previous Toolbar button to display the previous toolbar.
Quick Dials	Click the Quick Dials button to open the list of contacts stored in the Quick Dials section of the Local Directory.
Redial List	Click the Redial List to open the list of the last calls you made.
Callers List	Click the Callers List button to open the list of the calls you have received.
Local Directory	Click the Local Directory button to open the Local Directory.
Show Lines	Click the Show Lines button to change the tray on the Call Control Window (show or hide the line buttons).
Copy	Click the Copy button to copy a network service, feature, or folder.
Quit	Click the Quit button to quit a network service or feature.

## Hot keys

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Within the Call Control window, the computer keyboard provides hot keys to access common features:

- Enter – Answer a call
- F12 – Release or terminate a call
- F5 – Put call on hold
- F1 to F4 – Represent the Soft keys
- Alphabetic keys map to numbers as per Dial Pad mapping
- Arrow keys map to navigation keys
- Alt-V pastes or inserts data into the interface (For example, you can copy a phone number from an application and paste it into the i2050 Software Phone interface.)

## Local Directory

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The i2050 Software Phone Local Directory enables you to store a phone directory on your computer and link to external directories. It even enables you to filter directories so they are easier to use.

**Note:** Do not confuse the i2050 Software Phone Local Directory with the Network Directory you can access by clicking the Directory toolbar button.

To open the Local Directory, click:

*Application Menu > Local Directory > Local Directory, or View > Local Directory.*

The Shortcut Bar on the left side of the Directory lets you access groups and directories. Groups enable you to organize your directories. A group is represented by a button on the Shortcut Bar. Directories appear as icons inside groups.

To select a group, simply click its button. By default, the Local Directory has two groups: Main and Quick Dials.

## The Main Group

If you click the Main Group button, three items appear:

- Local Directory - A list of your Main Directory contacts.
- Redial List - A list of the last telephone calls you made.
- Callers List - A list of the calls you have received.

**Note:** Some communications servers do not provide Calling Party and Called Party identification to the i2050 Software Phone. Therefore, the name and number of the caller may not be available to the i2050 Software Phone, even when it appears on the Primary display.

### The Quick Dials Group

If you click the Quick Dials button, you will see the contacts stored in the Quick Dials group.

### System Tray icon and menu

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The i2050 Software Phone System Tray icon enables you to manage your phone calls and messages without opening the main i2050 Software Phone window.

If the i2050 Software Phone window is minimized on the Taskbar, click either the i2050 Taskbar icon or the System Tray icon to view it.

Right-click the System Tray icon to open a pop-up menu that enables you to make, answer, or manage your calls.

# Installation and setup

## System requirements

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To use the Nortel Networks i2050 Software Phone, you need:

- Pentium-compatible CPU (200 MHz or higher)
- 128 Mbytes RAM (Microsoft Windows 2000)
- 64 Mbytes of RAM (Microsoft Windows 98)
- 55 Mbytes of free hard drive space (all languages)
- 800X600 resolution monitor (16-bit color)
- Universal Serial Bus (USB) port
- Nortel Networks USB Audio Kit

## Supported operating systems

- Microsoft Windows XP
- Microsoft Windows 2000 Professional
- Microsoft Windows 2000 Professional Service Pack 1
- Microsoft Windows 2000 Professional Service Pack 2
- Microsoft Windows 98
- Microsoft Windows 98 Second Edition

## USB Audio Kit

You must have a Nortel Networks USB Audio Kit to use the Software Phone. The USB Audio Kit enables you to hear and speak with your callers.

The USB Audio Kit includes:

- USB Headset Adapter
- Installation Guide (English and French)
- USB cord
- Telephony grade monaural headset
- Lower cordset with quick disconnect

### Install the USB Headset Kit

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Follow these steps to install the USB Headset Kit:

1. Ensure that you have the proper system requirements as listed above.
2. Call your system administrator who may need to change some settings before you can connect the i2050 Software Phone on the communications server.
3. Connect the coiled lower cord to the headset cord with the Quick Disconnect connector. Ensure the Quick Disconnect is securely fastened.
4. Connect the headset cord to the RJ9 jack on the adaptor.
5. Connect the USB cable to the headset adaptor and to one of the USB jacks on the back of your computer or USB hub.

The first time the headset adapter is plugged in, there will be a delay while the Windows operating system configures the device and locates appropriate driver software. During the installation you may be prompted to supply the original Windows CDROM so that the Windows operating system can locate drivers.

For more information on installing the i2050 Software Phone software, contact your system administrator.

# Managing contacts

## Adding contacts

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You can add contacts to the Local Directory in the Main Group, or to any group on the Shortcut Bar.

To add a contact:

1. Do one on the following:
  - a) Click on the *Main* Group and click on the *Local Directory*
  - b) Click on the *Group* in the Shortcut Bar you want to add contacts to. You can click on *Main*, *Quick Dials*, or any custom group that you created.
2. Click on *File > New Contact...* or click on the New Contact toolbar button. The *Properties* dialog box appears.
3. On the Business tab (which is selected by default), enter the contact's name, address, telephone numbers, and other personal information.
4. Select the Email Address tab and enter the contact's e-mail address.
5. Select the Notes tab and enter notes or miscellaneous information.
6. Select the Settings tab and select the contact's default telephone number and assign multimedia (sound and graphic) call announcements.
7. Click on *Save*.

**Note 1:** You cannot add contacts to external directories such as an LDAP directory.

**Note 2:** If the contents of an external directory has changed, you must update the directory before you can see the changes in the i2050 Software Phone. To update the directory, right-click on the imported directory and then click *Refresh*.

### Editing contacts

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To edit a contact:

1. On the Call Control window, click *Application menu > Local Directory > Local Directory* or click *View > Local Directory*. The Directory opens.
2. Find and click on the contact you want to edit.
3. Click *File > Properties* or click on the Properties toolbar button. The Properties dialog box appears.
4. Select each tab and edit the information.
5. Click *Save*.

### Deleting contacts

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To delete a contact:

1. On the Call Control window, click *Application menu > Local Directory > Local Directory* or click *View > Local Directory* to open the Directory window.
2. Find and click on the contact you want to delete. To delete a range of contacts, click on the first contact in the range and then shift-click on the second contact in the range. You can also CTRL-click to select contacts.
3. Click *File > Delete* or click the Delete toolbar button.
4. Click on *Yes* to confirm the deletion.

### Finding contacts

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To find a contact in one of your directories:

1. On the Call Control window, click *Application menu > Local Directory > Local Directory* or click *View > Local Directory*. The Directory opens.
2. Find and click on the directory you want to search in.
3. Click *File > Find Contact...* or click the Find Contact toolbar button. The *Find Contact* dialog box appears.

4. Enter your search criteria. You can enter the name, e-mail address, or phone number. Remember to enter it the way it appears in the directory. For example, the name should be in the format, “last name, first name.”
5. Click *Find Now*. The dialog box expands to display a list of the contacts that fit your search criteria.
6. To stop a search, click *Stop*.

## Filtering a directory

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The i2050 Software Phone directory enables you to filter directories. This makes them smaller and easier to manage and use. This feature is especially useful for dealing with large, cumbersome directories. For example, by filtering a directory you can greatly reduce the number of names you have to search through.

To filter a directory:

1. Select the directory you want to filter in the Shortcut Bar.
2. Click on the Filter toolbar button. The Filter dialog box appears.
3. Add your filter criteria.
4. Click OK.

## Dialing from the directory

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To call a contact stored in the directory:

1. On the Call Control window, click *Application menu > Local Directory > Local Directory* or click *View > Local Directory*. The Directory opens.
2. Locate the contact you want to call, then do one of the following:
  - Double-click on the phone number you want to dial; or
  - Double-click on the contact's name or click on the *Call Contact* toolbar button to dial the default telephone number; or
  - Right-click on the contact's entry and click on the desired telephone number in the pop-up menu; or
  - Click on the arrow beside the *Call Contact* toolbar button and click on the desired telephone number in the pop-up menu.

### Adding a group to the Shortcut Bar

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To add a new group:

1. Right-click on a blank area on the Shortcut Bar and click *Add New Group*. A blank Group button appears at the bottom of the Shortcut Bar with a blinking cursor.
2. Enter the name you want for the group and press Enter.

To view the contents of a group, simply click on the group's button.

### Customizing the Shortcut Bar

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To change the size of the directory icons, right-click on a blank area of the Shortcut Bar and click on either Large Icons or Small Icons.

To change the appearance of the Shortcut Bar:

1. Right-click on a blank area in the Shortcut Bar and click *Properties*. The Shortcut Bar properties dialog box appears.
2. Enter your custom settings.
3. Click on OK.

### Properties dialog box

---

Use the Properties dialog box to enter or change your contacts' information.

To open the Properties dialog box:

1. On the i2050 Software Phone window, click *Application menu > Local Directory > Local Directory* or click *View > Local Directory*. The Directory opens.
2. Click *File > New Contact...* or click the New Contact toolbar button, or click a contact and click on *File > Properties...* or click the *Properties* toolbar button.

This dialog box contains four tabs:

## Properties - Business tab

Use this tab to store a contact's name, address, company information, and telephone numbers. To create a contact record, enter the contact's name and at least one telephone number. All other information is optional.

**Note:** Inserting a comma in the telephone number inserts a 0.5 second delay before dialing the numbers that follow the commas. Insert as many commas as required.

### ***Export button***

This button exports the contact information to a \*.vcf file. This file can then be imported into e-mail or contact manager applications, or other software applications that use the \*.vcf file format.

## Properties - Email Address tab

Use this tab to store e-mail information:

- Email address - Enter the contact's e-mail address.
- Email type - Enter a label for the e-mail address. For example, "Personal e-mail account."

**Note:** You cannot send e-mail using the Software Phone.

## Properties - Notes tab

Use this tab to record miscellaneous information about a contact. You can enter significant dates, recent orders, meeting locations, or any information you need to be available when you call the contact.

## Properties - Settings tab

Use this tab to select which telephone number you dial by default. The Default Dial telephone number setting you specify here applies only to this contact.

**Tip:** You can dial a contact's non-default telephone number by right-clicking on the contact and selecting any other telephone number that appears in the pop-up menu.

# Managing calls

## Making telephone calls

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Before making a call, ensure you are wearing your headset.

To make a call:

1. Select the line you want to use by clicking on a *Line key*.
2. Enter the phone number using the number pad on your keyboard or using the mouse and the i2050 Software Phone Dial Pad.

**Tip:** To make a call on your prime telephone line, click the *Answer/Handsfree* button and dial the telephone number as described above.

## Answering telephone calls

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To answer a call, ensure you are wearing your headset. When you receive a call, you will hear the i2050 Software Phone ringer through the Ringing Speaker and you will see Caller ID (if available) on the display area.

**Note:** The Ringing Speaker is the device you specify on the Select Sound Devices screen of the Configuration Utility.

To answer a call:

1. Click the *Answer/Handsfree* button or click on the *Line key* of the ringing line. If you are on another call, that call is put on Hold.

**Tip:** To switch between callers, click on the appropriate line key.

## Holding and retrieving telephone calls

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To manage calls, ensure you are wearing your headset.

To put a call on Hold, or take a call off Hold:

1. Click on the *Line key* for the call.
2. Click on the *Hold* button.

## Hanging up telephone calls

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To hang up a telephone call:

1. Click on the appropriate *Line* key to ensure it is selected.
2. Click on the *Goodbye/Release* key.

## Using the USB Headset Adapter

### Overview of the USB Headset Adapter

The features of the USB Headset Adapter are briefly described below.

**Table 2: USB Headset Adapter elements and functions**

Element	Function
Message Waiting light	The red Message Waiting light is located at the top of the USB Headset Adapter. This light has the same function as the Message Waiting light on the i2050 Software Phone interface. This light flashes when you have voice mail messages. On most systems, this light also flashes when there is a call ringing on the i2050 Software Phone.
Maximize button	Press the Maximize button to maximize or minimize the i2050 Software Phone. If the i2050 Software Phone is minimized, press this button to maximize the i2050 Software Phone window. If the i2050 Software Phone is maximized, but behind another window, press this button to bring the i2050 Software Phone to the foreground. If the i2050 Software Phone is maximized, press this button to minimize the i2050 Software Phone.
i2050 Smart Functions button	Press this button to access the i2050 Smart Functions Menu. For more information about the i2050 Smart Functions Menu, refer to Using the i2050 Smart Functions button.
Answer button	If there is an incoming call, press the Answer button to answer the call. If there is no incoming call when you press this button, the i2050 Software Phone selects a line and you hear dial tone.
Release button	Press the Release button to hang up the current call.
Mute button	Press the Mute button to put a call on mute or take a call off mute. When you mute a call, you can still hear your caller, but your caller cannot hear you.
Mute light	The Mute light is beside the Mute button. When a call is on mute, the Mute light is on. When a call is not on mute, the Mute light is off.
Volume button	Use the Volume button to control the volume of the headset.  When the i2050 Smart Functions Menu appears, use these buttons to move up and down in the menu.

### Answering calls with the USB Headset Adapter

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You can answer a call using the USB Headset Adapter even if the i2050 Software Phone is minimized or in the background. To answer a call using the USB Headset Adapter:

1. Ensure you are wearing your headset.
2. Press the Answer button.

If the i2050 Software Phone is minimized or in the background and you want to view the Caller ID information before you answer the call:

1. Ensure you are wearing your headset.
2. Press the Maximize button to display the i2050 Software Phone interface.
3. Press the Answer button.

### Hanging up calls with the USB Headset Adapter

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You can hang up a call using the USB Headset Adapter even if the i2050 Software Phone is minimized or in the background. To hang up a telephone call using the USB Headset Adapter:

1. Press the Release button.

### Adjusting the volume with the USB Headset Adapter

---

You can easily adjust the volume of your telephone calls using the USB Headset Adapter. Ensure you are wearing your headset so you can hear the changes as you make them.

To decrease the volume, press the left side of the Volume button. To increase the volume, press the right side of the Volume button.

### Muting a call

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When you mute a call, you can still hear your caller, but your caller cannot hear you.

To mute a call using the Headset adapter, press the Mute button.

### Using the i2050 Smart Functions menu

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The i2050 Smart Functions menu provides quick access to i2050 Software Phone features. You can customize what appears on this menu using the i2050 Configuration Utility.

To access the i2050 Smart Functions menu:

1. Press the i2050 Smart Functions button on the USB Headset Adapter.
2. Use the mouse, the keyboard arrow keys, or the Volume button on the USB Headset Adapter to highlight the feature you want.
3. Click the OK button or press the i2050 Smart Functions button on the USB Headset Adapter to select the feature.

If there is only one feature on the i2050 Smart Functions menu, the *Don't display this dialog again* check box appears. If you select this check box, the i2050 Smart Functions menu does not appear when you press the i2050 Smart Functions button. Instead, the feature on the i2050 Smart Functions menu is automatically executed when you press the i2050 Smart Functions button.

### Customizing the i2050 Smart Functions menu

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You can customize the features that appear on the i2050 Smart Functions menu using the i2050 Configuration Utility.

To customize the i2050 Smart Functions menu:

1. Click the Start button and then click Settings.
2. Click Control Panel.
3. Double click the i2050 Software Phone icon.
4. Click the USB Headset Adapter tab.

5. Click the Configure Smart Functions button.
6. Use the procedures below to change the functions that are available.
7. Click the OK button to close the Configure Smart Functions dialog box.
8. Click the OK button to close the i2050 Configuration Utility.

### **To add a function:**

1. On the Available functions list, click the function you want to add.
2. Click the Add button.

### **To remove a function:**

1. Click the function you want to remove.
2. Click the Remove button.

### **To rearrange the functions on the menu:**

1. Click the function you want to move up or down on the i2050 Smart Functions menu.
2. Click the Move Up button to move the function to a higher position on the menu.
3. Click the Move Down button to move the function to a lower position on the menu.

You can also add special functions to the i2050 Smart Functions menu. For information about how to add special functions, refer to Custom functions for i2050 Smart Functions menu.

## **Custom functions for i2050 Smart Functions menu**

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From the Configure Smart Functions dialog box you can add, delete, and modify custom functions on the i2050 Smart Functions menu.

### **To add a custom function:**

1. Click the New button.
2. In the Name box, enter the name you want to appear on the i2050 Smart Functions menu.

3. In the Command box, enter the pathname and file name of the function you want to add. If you do not know the pathname or file name of the function, click the Browse button beside the Command box. You can then navigate to the correct file, select it, and click the Open button.
4. In the Arguments box, enter any arguments that are required for this function.  
  
If you want the i2050 Software Phone to prompt you for the argument when you select this special function, select the Prompt for arguments check box.
5. In the Initial directory box, enter the pathname of the directory you want this function to use. If you do not know the pathname of the directory, click the Browse button beside the Initial directory box. You can then navigate to the correct directory, select it, and click the OK button.
6. If you want to change the icon that appears beside this function on the i2050 Smart Functions menu, click the Change Icon button and perform steps 7 to 9. If you do not want to change the icon, go to step 10.
7. Click the Browse button.
8. Navigate to the file you entered in the Command box, select it and click the Open button.
9. Click one of the icons that appears and then click the OK button.
10. Click the OK button to add the new function to the i2050 Smart Functions menu.

### **To modify a custom function:**

1. Click the custom function you want to modify.
2. Click the Modify button.
3. Make the required changes.
4. Click the OK button.

### **To remove a custom function:**

1. Click the custom function you want to remove.
2. Click the Delete button.
3. Click the Yes button to confirm the deletion.

# Using macros

## About macros

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The i2050 Software Phone enables you to record macros. A macro is a saved sequence of steps. For example, you can program a macro that selects a particular telephone line and then dials a telephone number automatically. For example, macros are used to ensure that certain numbers are always dialed out on a particular telephone line and to make it easier for you to dial a number.

Once you have recorded a macro, it is saved under the Macro menu.

## Recording a macro

---

You can record macros that will dial telephone numbers or access your Voice Mail.

### To record a macro:

1. Click *Macro > Record* or click *Application Menu > Record*.
2. Complete the sequence of steps you want to record. For example, click on one of your telephone lines and then enter a telephone number using your keyboard. If you want a macro to dial a number, ensure you select a *Line* key.
3. When you are finished, click on the *Finish* button at the bottom of the Call Control window. A dialog box appears.
4. Enter the name of your macro.
5. Select a location for the macro on the Macro menu.

**Note:** If you started recording a macro but you do not complete this function, click on the *Abort* button at the bottom of the Call Control window.

### To delete a macro:

Record a new macro over the existing macro.

### Playing a Macro

---

You can play macros to dial telephone numbers or access your Voice Mail. Once you have recorded a macro, it is saved under the Macro menu.

#### **To play a Macro:**

Click *Macro* > *[Macro name]* or click *Application menu* > *Macro* > *[Macro name]*.

# Menu commands

## Enhanced Window menu

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Click on *Application Menu* to access the menu on the Enhanced Window.

### ***Trays***

Selects the information that appears on the Enhanced Window.

**Retract Tray** - Displays no additional information, so the Enhanced Window takes up less space.

**Lines** - Displays the Line keys in two columns.

**Number Pad** - Displays the Dial pad.

**Combo** - Displays the Line keys and the Dial Pad.

### ***Configure Audio***

Specifies the sound device you want to use with the i2050 Software Phone. A sound device such as the USB Audio Kit enables your computer to send and receive audio (sound) signals.

### ***Select Skin***

Select a Call Control window: Standard or Enhanced.

### ***Select Language***

Selects the language that is used on the i2050 Software Phone.

### ***Local Directory***

Opens the Local Directory.

### ***Macro [Name]***

Executes the macro you saved in this command.

### ***Record***

Starts recording a macro.

### ***Help***

Opens the i2050 Software Phone help window.

### ***About***

Displays information about the i2050 Software Phone.

### ***Exit***

Closes the Call Control window, but does not disconnect your computer from the telephony server so you can still receive telephone calls (i.e., the i2050srv application remains running in the background).

## **Standard Window menu**

---

The Standard Window menu contains the following items:

### ***Configure Audio***

Specifies the sound device you want to use with the i2050 Software Phone. A sound device such as the USB Audio Kit enables your computer to send and receive audio (sound) signals.

### ***Select Skin***

Select a Call Control window: Standard or Enhanced.

### ***Select Language***

Selects the language that is used on the i2050 Software Phone.

### ***Exit***

Closes the application.

## View menu

---

The View menu contains the following items:

### ***Local Directory***

Displays the Local Directory.

### ***Message Waiting***

Shows or hides the Message Waiting Light.

### ***Toolbar***

Shows or hides the Toolbar.

### ***Primary Display***

Shows or hides the Primary Display.

### ***Compact Lines***

Displays the i2050 Software Phone's Line keys in two columns so that the main window takes up less space.

### ***Numeric Pad and Lines***

Displays the Dial Pad and the Line keys in one column.

### ***System Tray***

Shows or hides the i2050 Software Phone task tray icon. Right-click on this icon to make or manage telephone calls.

### Macro menu

---

The Macro menu contains the following items:

***Macro [Name]***

Executes the macro you saved in this command.

***Record***

Starts recording a macro.

***Abort***

Stops recording a macro.

### Help menu

---

The Help menu contains the following items:

***Contents***

Displays the help topics.

***Search***

Searches the help topics for a word or phrase.

***Index***

Displays the index for the help topics.

***What's This?***

Activates Context Sensitive Help. After selecting this command, click on any area of the screen to see help information about it.

***About***

Displays information about the i2050 Software Phone.

# Troubleshooting

## Application interoperability issues

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Some applications do not properly check versions of shared system files at installation time. This can cause interoperability problems between the i2050 Software Phone and other applications.

For example, installing Timbuktu version 2.0 for Windows 2000 overwrites a .dll file that is also used by the i2050 Software Phone. The i2050 Software Phone requires the newer version of the.dll and installs this newer version if necessary. To use the i2050 Software Phone on the same computer as version 2.0 of Timbuktu, you must install Timbuktu first.

The i2050 Software Phone follows Windows and Install Shield standards for version management of system files.

## Connectivity problems

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### Communications Server is unreachable

#### **Symptom:**

One of the following messages appear:

- Connecting...
- Server unreachable. Reconnecting in xx seconds.
- 802.1 QoS is not supported on your network.

#### **Description:**

These messages indicate that the connection with the communications server could not be established. A random retry time is set after which the i2050 Software Phone attempts to re-connect. This process is repeated until successfully connected.

If the communications server is up and reachable and the i2050 Software Phone is pointed to the correct IP address, the Connecting... message should appear briefly or not appear at all.

The Server unreachable message indicates that there is problem contacting the communications server.

## **Potential causes:**

- Network is down
- Computer is not connected to the network
- Invalid communications server settings in the Configuration Utility
- Invalid communications server settings in DHCP configuration
- Communications server is down

## **Action:**

- Try pinging another station on the network.
- Try pinging the communications server.
- Use the Configuration Utility to verify the communications server IP address and port number.
- Verify the communications server configuration is correct (a port is available, a license is available, security is correct, etc.).
- In the i2050 Software Phone Configuration Utility QoS tab, select the off radio button and then restart the i2050 Software Phone application.

## **Connection is reinitializing**

### **Symptom:**

The following message appears: "Connection Established. Reinitializing..."

### **Description:**

This message indicates that the i2050 Software Phone has established a connection and has sent a request to the communications server to resume connection. The communications server is expected to reply to this request. Some communications servers pass the i2050 Software Phone to different sub-components causing this message to appear two or three times in rapid succession during a normal start up.

### **Potential causes:**

- If the message appears briefly then this is part of a normal startup.
- If the message persists, the communications server's programming may be in error.

### **Action:**

Wait to ensure that this message is not a transient start up message. If the message still appears ensure your communications server programming is correct.

## Authorization failed

### **Symptom:**

The following message appears:

- Authorization failed

### **Description:**

Client has not been authorized to use the communications server.

### **Potential causes:**

- The client has not been authorized by your system administrator.
- The HardwareID in your configuration (Configuration Utility) does not match the HardwareID provisioned for the communications server.

### **Action:**

Contact your system administrator.

## Unable to retrieve communications server parameters from DHCP server

### **Symptom:**

The following message appears:

- DHCP server is not available.

### **Description:**

A connection with the DHCP server cannot be established.

### **Potential causes:**

- Network is down
- DHCP server configuration error

### **Action:**

Contact your system administrator.

## Service Denied

### **Symptom:**

The following message appears:

- Service Denied. Reason XXXX

### **Description:**

You are not authorized to use the communications server.

### **Potential causes:**

- Invalid HardwareID in the Configuration Utility
- Invalid communications server configuration

### **Action:**

- Ensure your communications server programming is correct.
- Contact your system administrator

## Display Updates are Very Slow

### **Symptom:**

- Cannot connect properly to the communications server
- Messages written to the i2050 Software Phone are presented very slowly.
- Floppy drive may be active.

### **Potential Causes:**

The Trace utility may be turned on and writing signaling information to a slow disk such as a floppy drive.

### **Action:**

- The Trace feature should be disabled (unchecked) during normal operation. To check the status of the trace feature open the Configuration Utility and then open the Trace tab.
- If you are using the trace feature, the specified directory should be on a local, high-speed disk drive.

## Audio problems

---

### Verify basic audio operation

To verify the physical connection and proper Windows audio configuration, record an audio message and play it back using the USB headset.

### One-way audio

Check that the handsfree option has been programmed for the i2050 Software Phone on the communications server.

Check if the mute option has been turned on. If the mute option is on, the Mute button appears red on the i2050 Software Phone interface.

Check that Network Address Translation (NAT) device is used in the system. If so, check the NAT configuration. You will get one-way audio, if the NAT configuration causes the i2050 Software Phone to attempt to connect to the wrong IP address.

### Broken or choppy speech

The Audio Quality slider adjusts the number of buffers between the computer audio device and the i2050 Software Phone application. Less delay reduces the audio delay but increases the chances of getting broken or absent audio. Higher quality reduces the chances of broken audio but increases the audio delay.

If you are receiving choppy or broken speech, try moving the Audio Quality slider toward Higher Quality.

The Windows operating system uses very high process and thread priorities when performing low level Windows operations, such as minimizing and maximizing applications. This can cause brief breaks in the i2050 Software Phone audio streams. You can reduce the severity of this symptom by turning off the Windows transition effects for menus and tool tips. To turn off the transition effects:

1. Click the Start button and then click Settings.
2. Click Control Panel and click Display.
3. Select the Effects tab.
4. Clear the Use transition effects for menus and tool tips check box.

## ***Other causes of audio issues***

Other applications running on your computer, especially CPU intensive applications or applications that intercept or delay packets (such as firewalls), can cause broken audio.

Multiple Ethernet interfaces on a single PC may not work well together. For example; the i2050 Software Phone may exhibit intermittent breaks in audio when using notebooks that have a Xircom RealPort Cardbus Ethernet 10/100+Modem 56 PC Card (PCMCIA) inserted when the notebook is docked. In the specific case of this PC card, the problem relates to a version of the Xircom driver. This driver takes CPU cycles even when it is not active which in turn causes i2050 Software Phone audio to become choppy.

Solutions for this example are:

- Upgrade your Xircom driver
- Remove the PC card when the notebook is docked

To upgrade your Xircom driver:

Download and install a new PC card driver from the Xircom web site. You will require administrator privileges on Windows 2000 and you should carefully follow the installation instructions provided by Xircom.

## **Windows sounds come out of the headset**

### ***Description:***

I want the Windows sound to come out of the loudspeakers and the Software Phone to come from the headset.

### ***Action:***

In some cases, the Windows operating system defaults all the sounds to the new sound device.

If you want to use the computer speakers for playing the Windows sounds:

1. Click the Start button and click Settings.
2. Click Control Panel and click Sounds and Multimedia.
3. Select the Audio tab.

4. On the Sound Playback Preferred device drop down list, select your computer sound card. Similarly select your computers Sound Recording Preferred device as another device if you do not wish to use the Headset Adapter for this purpose.

## Advanced audio settings

Under normal conditions, you should always select the *Use Communications Server values* option. When you choose this option, the i2050 Software Phone uses the jitter buffer parameters sent from the communications server.

You can override these settings by selecting the *Override Communications Server values* option. Nortel Networks recommends that you do not use this option.

## Reset conditions

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The i2050 Software Phone resets when:

- instructed to do a hard reset or soft reset by the communications server
- when you change the i2050 Software Phone skin
- in some cases, firewall applications that intercept or delay packets can cause the i2050 Software Phone to reset due to the expiration of the Watchdog timer. Exercise care when using firewall applications on the same computer as the i2050 Software Phone.
- there is an excessively long delay or loss of communication with the server.

# USB Headset problems

---

## Headset not functioning

Try the following in order presented:

1. Verify that you have one of the supported operating systems. To check the type of operating system you are using, right click on *My Computer* and then click *Properties*.
2. Check that *Universal Serial Bus controllers* appears in the Windows Device Manager. If it does not appear, you might need to enable USB in your computer's setup menus or get a BIOS upgrade. Contact your computer supplier.
3. Check that *USB Audio Device* appears under "Sound, video and game controllers" in the Windows Device Manager. Also check that HID-compliant device and USB Human Interface Device appears under Human Interface Devices. If they do not, and the above conditions are correct then see the troubleshooting section under USB in Windows Help.
4. Ensure that you have selected *USB Audio Device* as the microphone and speaker for the Software Phone.

## USB Headset Adapter features grayed out

### **Symptoms:**

All of the features on the USB Headset Adapter tab in the i2050 Configuration Utility are grayed out.

### **Description:**

The adapter is not recognized as a Nortel Networks USB Headset Adapter or the version of the USB Headset Adapter is less than 2.0.

### **Potential causes:**

1. The USB Headset Adapter does not support the functions listed on the USB Headset Adapter tab.
2. The USB Headset Adapter has failed to enumerate properly.

### **Action:**

If you suspect potential cause 2, do the following:

1. Unplug the USB cable from the USB Headset Adapter.
2. Wait one minute.
3. Plug the USB cable into the USB Headset Adapter.
4. This forces the USB Headset Adapter to re-enumerate.

## Cannot hear audio through the headset

Ensure that the headset plugged into the USB adapter is the one provided by the manufacturer.

Check the connectors for a loose connection.

## Sound still comes out of my computer speakers

### **Description:**

The i2050 Software Phone is not configured to direct all call audio to the headset.

### **Action:**

1. Configure the USB Headset by going to the i2050 Call Control Window, and clicking on *Application Menu > Configure Audio*.
2. Choose *USB Audio Device* from the drop-down list next to Headset Microphone.
3. Choose *USB Audio Device* from the drop-down list next to Headset Speaker.
4. Chose the desired device from the drop-down list next to Ringing Speaker.
5. Click *OK*.

## Directory problems

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### Call duration values are blank

#### **Symptom:**

The Call Duration field is empty in the Redial List and Callers List of the i2050 Software Phone directory.

### ***Potential causes:***

The i2050 Software Phone Call Duration feature relies on the communication server providing a call timer. The communication server writes this value during a call. The i2050 Software Phone directory records the value provided by the communications server.

The i2050 Software Phone directory records a blank value for Call Duration when the communication server does not provide this value and identify it as a call timer to the i2050 Software Phone.

On some communication servers, the call timer feature can be turned on or off. If your communications server has this feature, the call timer feature may be turned off.

### ***Action:***

Look at the Primary display of the i2050 Software Phone during a call. If no call timer is presented, then the communication server's feature is turned off.

To correct this, follow the communication server specific procedure for activating the feature. Your system administrator can provide details for your specific server type.

## **Callers List records Unknown Name and Unknown Number**

### ***Symptom:***

Unknown Name and Unknown Number are recorded in the Callers List even though one or both of these values are visible in the Primary display of the i2050 Software Phone.

### ***Description:***

Some versions of communications server do not designate the data written to the Primary display of the i2050 Software Phone as caller information. The i2050 Software Phone is therefore unable to determine the caller information. For communications servers that do not identify the caller information, the Callers List always records Unknown Name and Unknown Number.

### ***Action:***

If the communications server does not identify the caller information, there is no i2050 Software Phone remedy available.

## Redial List records Unknown Name and Unknown Number

### **Symptom:**

Unknown Name and Unknown Number are recorded in the Redial List even though one or both of these values are visible in the Primary display of the i2050 Software Phone.

### **Description:**

Some versions of communications server do not designate the data written to the Primary display of the i2050 Software Phone as caller information. The i2050 Software Phone is therefore unable to determine the caller information. For communications servers that do not identify the caller information, the Redial List always records Unknown Name and Unknown Number when numbers are dialed from the primary interface. However, when the number is dialed from the Directory, the Redial List records the name and number from the Directory.

### **Action:**

If the communications server does not identify the caller information, there is no i2050 Software Phone remedy available.





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# i2050 Software Phone User Guide

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