Configuring and Using the FacetPhone Mobile app for the iPhone

FacetCorp

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What is the FacetPhone Mobile app for the iPhone?

The FacetPhone Mobile app for the iPhone connects to your company's FacetPhone system and provides much of the functionality of the FacetPhone computer user interface. You can watch the status and activity of users in a group and you can watch the list of current calls in a group. You can view a voice mail folder that is either your own personal voice mail folder or a group folder. The app also has the ability to participate in FacetPhone instant messaging (IM) sessions. Note that with the computer user interface you can watch multiple groups of user and calls and multiple voice mail folders at the same time. With the iPhone app you only watch one group of users and calls and one voice mail folder at a time. However, it is quick and easy to change what you are viewing.

The app also includes a soft phone and has all the call handling functionality that the computer user interface has. You can put your calls on hold and pick them up. You can pickup parked calls. You can transfer calls to a user or group or directly to the voice mail of a user or group. You can turn recording of your current call on and off. You can create conferences the same as with the user interface by putting one call on hold, making another call and then conferencing them together. This can be repeated to add as many parties as you want to the conference (there is a maximum number of parties to a call but it is configurable). Locally on the iPhone you can turn the speaker on and off and mute your microphone input to the call. There is also an auto-speaker feature that you can turn on which puts the call on the earpiece when you are holding the phone to your ear and puts it on the speaker when you take it away from your ear.

Preparing Your Company Network for iPhone app Users

In order for users to seamlessly use the FacetPhone iPhone app both inside and outside the office, there are changes needed on your outside router. This section is for the person who manages your company's outside router.

TCP port 6500 must be forwarded to the FacetPhone system. You may use an alternate port on the outside, but it must be forwarded to port 6500 on the FacetPhone system. If you use an alternate port on the outside, your users must use this port in the configuration of their app.

The range of UDP ports 11,000-11,999 must be forwarded to the FacetPhone server.

Users will configure their iPhone apps to always point to your public address. When in the office with their iPhone connected to wifi, the wireless router they are using should have your outside router as its default route and the iPhone app can therefore work inside and outside the office with the same configuration.

Configuring Your Soft Phone on the FacetPhone System

Before you can connect your iPhone to your FacetPhone system, you must define the app's soft phone as a phone on the system. This must be done by a user with Administrative privileges on the FacetPhone system.

To define the phone with the FacetPhone user interface choose on the menu:

> Admin -> Change system configuration

The Administration window will be presented. On the menu for the Administration window, choose:

> Add -> Add an IP Phone

The new IP phone entry screen will be displayed:

IP Phone <New>

Use next available station number

Station number: 151

Manufacturer: FacetPhone softphone

IP phone description: Joe's iPhone

☑ Dynamic IP address

IP address of the IP phone:

MAC address of the IP phone:

Default route:

NAT address: 74.7.152.227

Domain:

User name:

Password:

Expires:

SIP port:

Branch where IP phone located: Dallas office

Operator group: FacetCorp

Dialing restriction: <none>

Default outgoing trunk group(s): 0

☐ Digits transmitted in audio

☑ Transmit digits as RFC 2833 packets

☑ Route all audio through the server

☐ Route audio through the server for different branch

OK   Cancel

Enter the station number that the soft phone will use.

For "Manufacturer" choose "FacetPhone softphone".

Enter whatever description you want for the phone. It is best to indicate that it is someone's iPhone such as "Joe's iPhone".

The box for "Dynamic IP address" will be checked by default for a FacetPhone soft phone.

The "MAC address of the IP phone" and "Default route" entries should be left blank.

The "NAT address" should be set to your public IP address that is having the ports forwarded as described in the previous section.

"Domain", "User name", "Password", "Expires" and "SIP port" are all irrelevant for the app's soft phone and should be left blank.

"Branch where the IP phone is located" should be set to the branch where you normally work.

"Operator group" should be set to the main group that you are a member of.

"Dialing restriction" should be set to <none>. The soft phone cannot be used without logging in, so the user's dialing restriction will always be the one in effect.

"Default outgoing trunk group" should be set to whatever is appropriate for choosing a line for an outgoing call from the soft phone.

"Digits transmitted in audio" should be unchecked.

"Transmit digits as RFC 2833 packets" should be checked.

"Route all audio through the server" should be checked.

"Route audio through the server for different branch" should be unchecked.

Click the OK button to save the new phone's configuration.

Enabling Mobile Access for the User

Before a user is allowed to login using the mobile app, they must be given the "Allow mobile app usage" privilege. This must be done by an administrator.

On the user interface menu choose:

Admin -> Change system configuration

On the menu for the Administration window choose:

Configure -> Configure Users

Click on the name of the desired user from the list and choose Edit. This will display the user's configuration screen.

Check the box for "Allow mobile app usage". And click on the OK button to save the setting.

Configuring Your Mobile Location Profile

The final configuration required on the FacetPhone system can be performed by an administrator or the user themselves if they are allowed to change their own configuration.

For a user making the configuration change yourself, choose on the user interface menu:

Action -> My Configuration

The "My Configuration" window will be displayed. On that window's menu choose:

Configure -> My User Configuration

This will display your user configuration screen.

If the change is being made by an administrator, then to get to this same point, choose on the user interface menu:

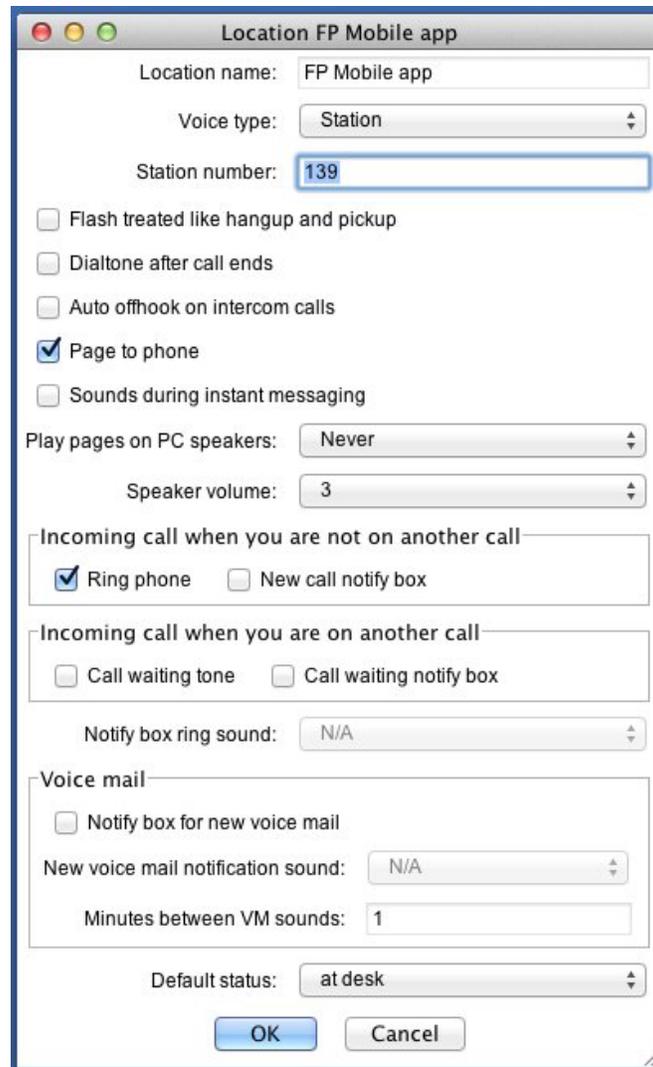Admin -> Change system configuration

On the menu for the Administration window choose:

Configure -> Configure Users

Click on the name of the desired user from the list and choose Edit. This will display the administrator's view of the user's configuration screen.

On either the user's or administrator's view of the user configuration screen, click on the "Locations" button. Select the "FP Mobile app" location from the drop list and then click the "Edit" button. This is a built-in location profile that each user automatically has included in their list of locations.

The Location configuration screen will be displayed:

For the "Voice type", choose "Station".

For "Station number" use the number associated with the phone defined in the previous section.

"Flash treated like hangup and pickup" and "Dialtone after call ends" are irrelevant so leave them unchecked.

"Auto offhook on intercom calls" and "Page to phone" are up to your personal preferences. However, in the current version of the app they do not operate properly when the phone has gone to sleep or the mobile app is not active.

"Sounds during instant messaging" is irrelevant to the iPhone app at this time so you can leave it unchecked.

"Play pages on PC speakers" and "Speaker volume" are irrelevant. The Play setting should be set to "Never".

In the section "Incoming call when you are not on another call", check the box for "Ring phone". The new call notify box is irrelevant to the mobile app.

In the section "Incoming call when you are on another call", leave both boxes unchecked. Call waiting does not currently work on the mobile app.

In the section "Voice mail", leave the "Notify box for new voice mail" unchecked.

Set the default status for this location to whatever you want.
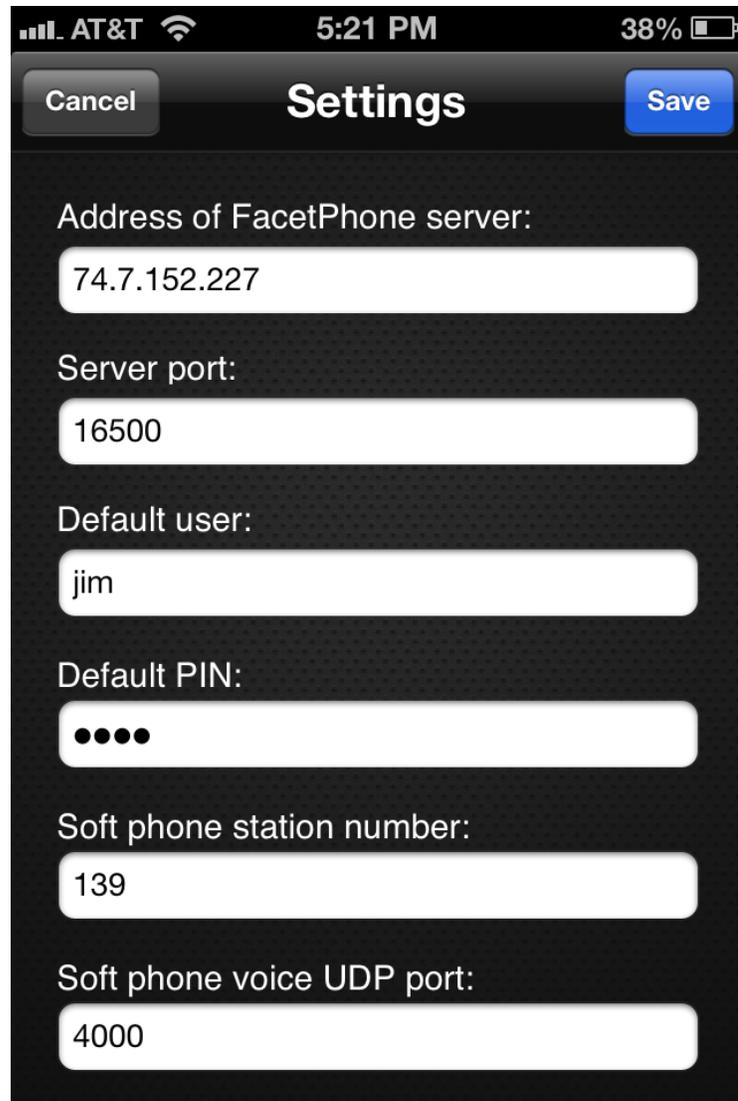
Click OK, then click OK again on the main user configuration screen.

Configuring the App on Your iPhone

Open the FacetPhone Mobile app on your iPhone. On the login screen there will be a gear icon in the upper left corner:

Tap the gear icon and the settings screen will be displayed:

For the Server address, enter the public address that has had the port forwards setup on your company's outside router as described in the section above on your company's outside router.

For the Server port enter 6500 or an alternate port that your network administrator gives you. If an alternate port is used, the router must forward it to 6500 on the FacetPhone server.

If you want to have a user name filled in for you on the login screen, enter it in the Default user setting.

If you want to have your PIN filled in for you on the login screen, enter it in the Default PIN setting. Note that if you enter a default user name and PIN, anyone with access to your iPhone can log in as

you on the FacetPhone system. Since the iPhone is a personal device, this may be appropriate. We're just pointing it out.

For the soft phone station number, enter the number of the station created above and entered as the station in the mobile app location profile.

The soft phone voice UDP port is the port that the app will receive voice packets on. The value probably doesn't matter, but you are able to change it if necessary. We usually use 4000.

There are several on-off settings at the bottom of the Settings screen when you scroll down:

The Auto Speaker mode will switch the audio of your call between the earpiece and the speaker automatically depending on whether you have the phone to your ear or not. Note, this proximity detection is in the earpiece so if you have the phone away from your ear, moving your hand or anything else over the earpiece will move the audio to the earpiece until it is clear again.

The settings to ring the phone or vibrate will determine what is done when a call is ringing to the phone. Note that the silence switch on the side of the iPhone does not silence the app when it is in the foreground.
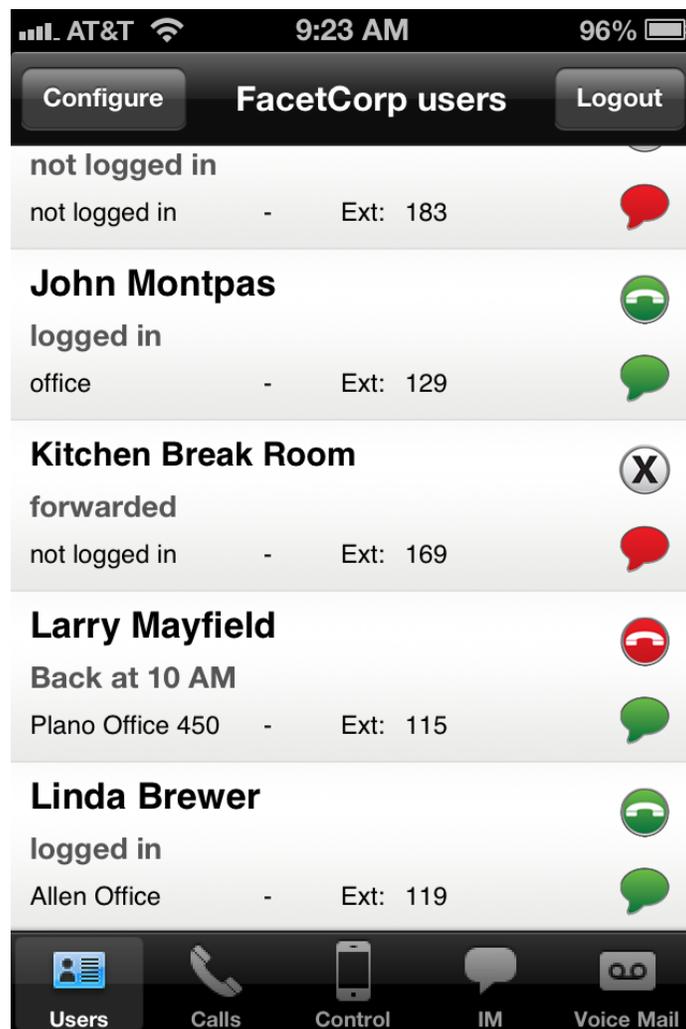
Now you are ready to login.

Using the App

On the login screen enter your user name and PIN if they are not already filled in and tap the Login button. When you are logged in the app will display the Users screen. The tab bar at the bottom of the screen allows you to switch between the Users, Calls, Control, IM and Voice Mail screens.
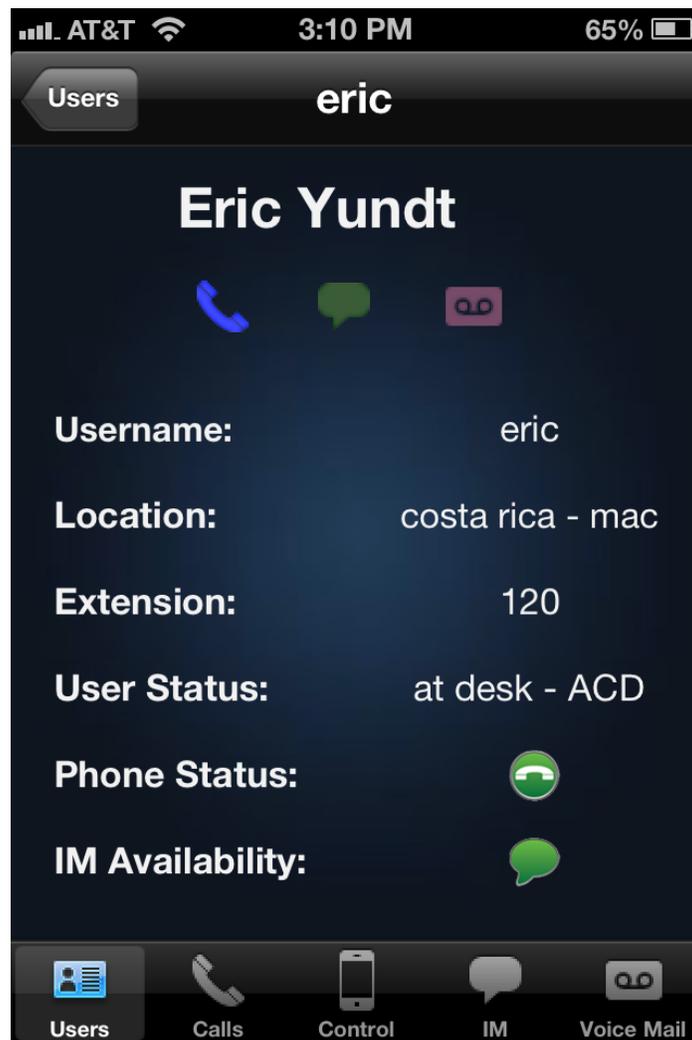
The Users screen

The Users screen shows the list of users in the selected group. To change the group, tap the Configure button and select the group you want to watch and whether you want the users sorted by name or extension number.

For each user in the group being displayed, you can see the user's name, their status, their location (or not logged in), their extension number, and and icons representing their phone status and instant messaging availability.

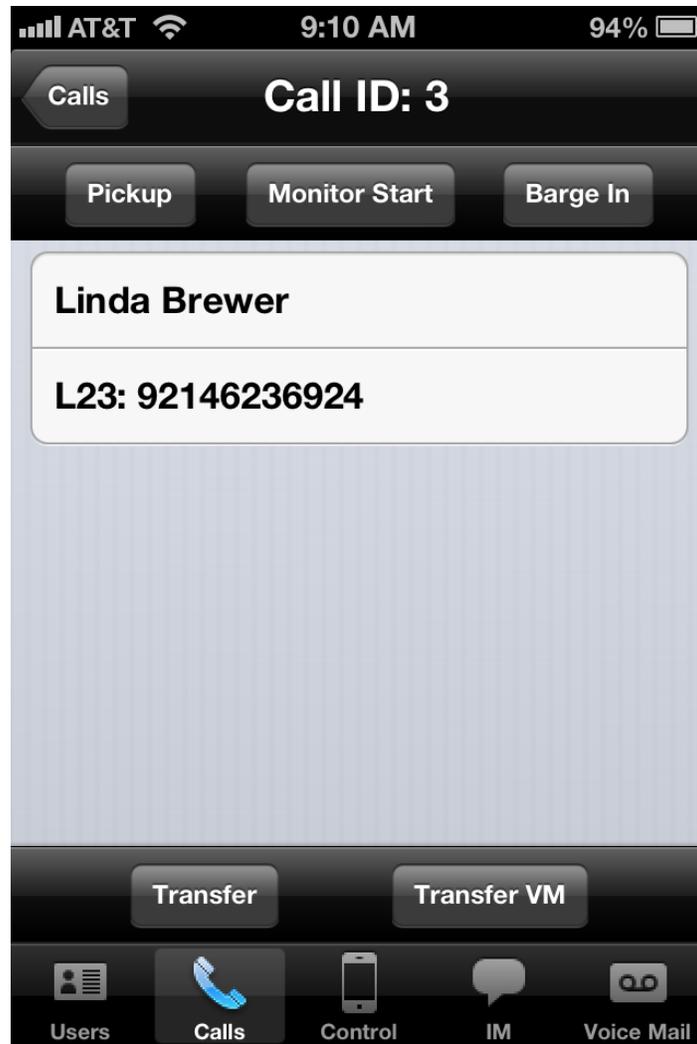When you tap on a user's entry in the list, it displays the user's detail screen.

The three icons at the top of the screen just under the user's name can be used for placing a call to the user, starting an instant messaging session with the user, or leaving the user a voice mail. The information from the user list screen is included here also so that you can see if the user's status changes in some way while you are on this screen.

The Calls Screen

The Calls screen shows a list of all the calls in the selected group currently in progress. To change the group, tap the Configure button and select the group whose calls you want to watch.

For each call, it shows the call's ID number, the call state as an icon, the first two call parties, the amount of time the call has been in progress, and the amount of time that it has been on hold, parked or queued. When you tap on a call entry it shows the detail screen for the call.

This screen will show all the parties to the call if it is a conference and has more than the two parties that are shown on the call list screen. The buttons available on the screen depend on whether you are a party in the call or not. In the view above, the call is not the iPhone user's call. Just because a button is present does not mean the operation will be allowed. For example you will not be able to monitor the call unless you have the privilege to do that. If you are not allowed to do an operation, the server will send a message to that effect that the app will display.

The Control Screen

The control screen is where you can see your current status, number of new voice mails and your active and on-hold calls:

To change your status you can tap on your current status and it will present a picker for you to choose a new status. Tap the new status and it will set it as your current status.

It will show the number of new voice mails in the voice mail folder you are currently watching.

If you have an active call, the caller ID of the other party will be displayed. Tapping this will take you to the active call screen which will be discussed below.

If you have one or more calls on hold, they will be in the list of On Hold Calls. Tapping on one of these calls will take you to the Call Detail screen for that call where you can pick it back up or select any of the other actions available on that screen.
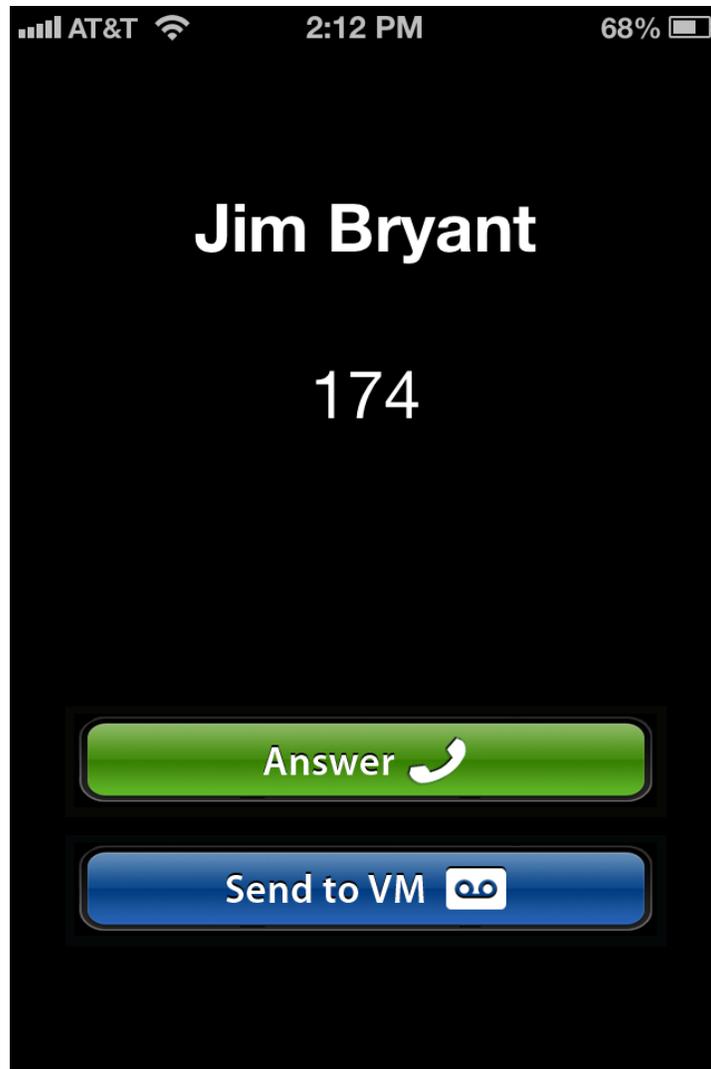
Placing an Outgoing Call

Currently all outgoing calls must be dialed from the dial pad. Tap the "DialPad" button to have the dial pad displayed. To dial an outside number you must enter the leading 9 or 8 plus trunk group and then the phone number just as you would on a FacetPhone desk phone. Anything you can do on a desk phone's dial pad can be done on this dial pad. You may use the backspace key to erase keys you have pressed. When you have the number you want to dial, press the call button and the call will be started.
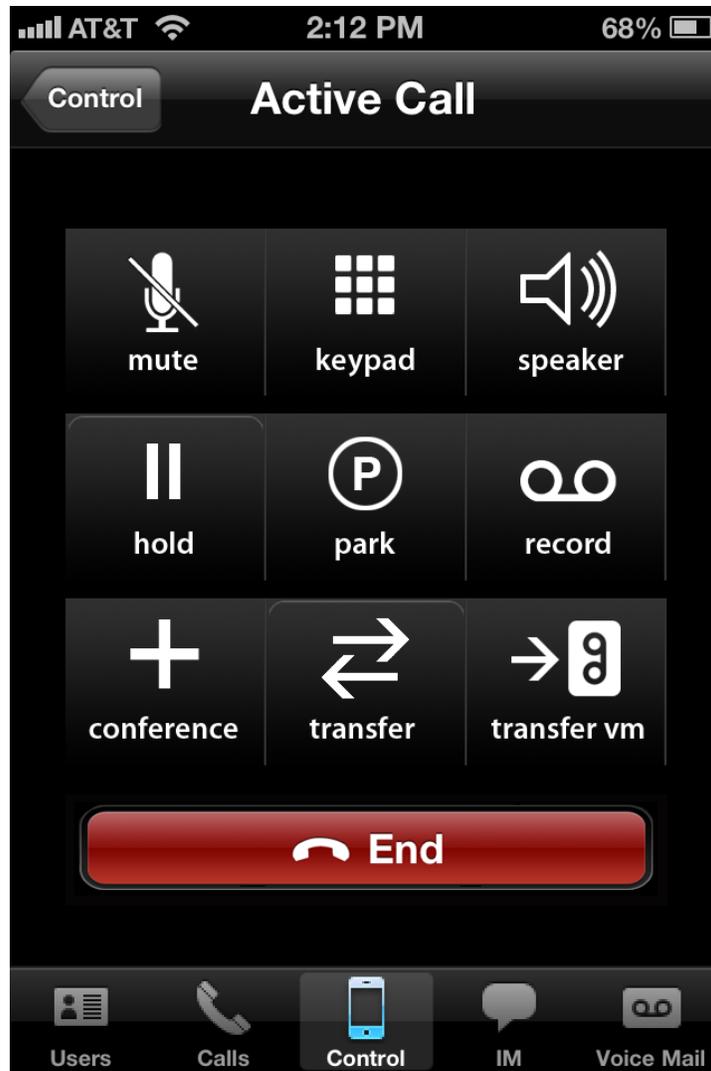
Answering an Incoming Call

When you receive a call, the behavior will depend on whether the app is active or not. If the iPhone is asleep, you will receive an alert. It will also ring unless the Ring/Silent switch is set on Silent mode.

When you slide the arrow, the app will become active and the incoming call screen will be displayed.

You can either answer the call or send it directly to your voice mail.

When you answer the call, the app will display the active call screen.

Tapping the mute button will turn the microphone off and back on. When the button is highlighted, the microphone is muted.

Tapping the keypad button will bring up a dial pad that you can use to enter digits to an auto-attendant.

Tapping the speaker button will route the audio between the earpiece and the speaker. When the speaker button is highlighted the audio will come out the speaker. When it is not highlighted, the audio will come out of the earpiece.

Tapping the hold button will put your active call on hold. The active call display will go away and you will be on the control screen and can see your call on hold. Tapping on the call in the on-hold call list will

bring up the call detail screen for the call where you will have a button to pick it back up.

Tapping the park button will park the call. It will no longer be your call and someone else can pick it up.

Tapping the record button will turn recording of the call on and off. When the record button is highlighted, it means recording is on.

Tapping the conference button will conference together your active call with the one call that you have on hold. If you do not have one and only one call on hold, then the conference button won't work.

Tapping the transfer button will bring up a selector for you to choose the user extension, group or outside number that you want to transfer the call to. When "Users" is selected, a list of users will appear on the right:
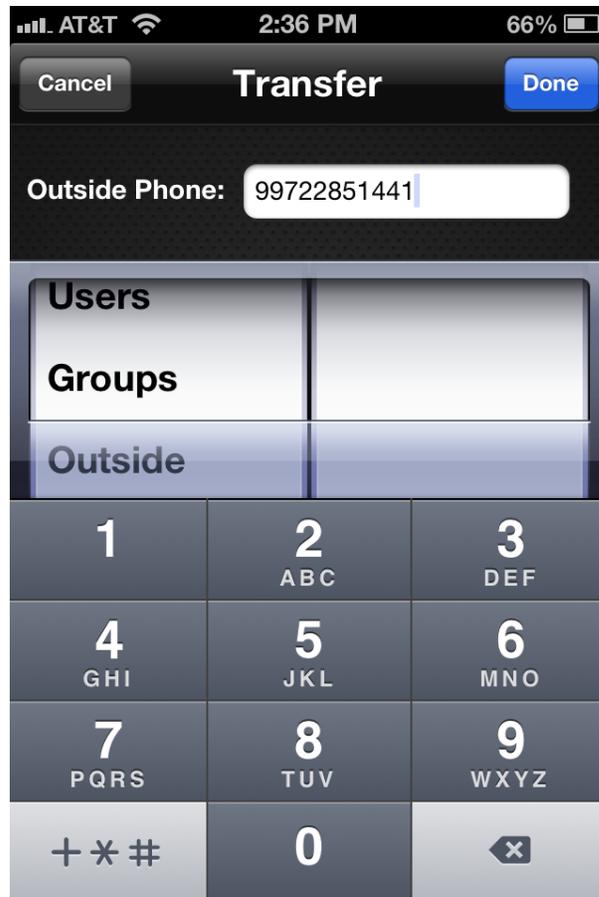

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Choose the user you want to transfer the call to, and tap the Done button.

When you select "Groups" on the left picker, the list of groups you can transfer the call to will be displayed:

When you have the group selected that you want to transfer to, tap the Done button.

When you choose "Outside" on the left picker, a box will be presented where you can enter the outside phone number to transfer the call to. Tap on the "Outside Phone" box and the numeric pad will be entered for you to enter the phone number:
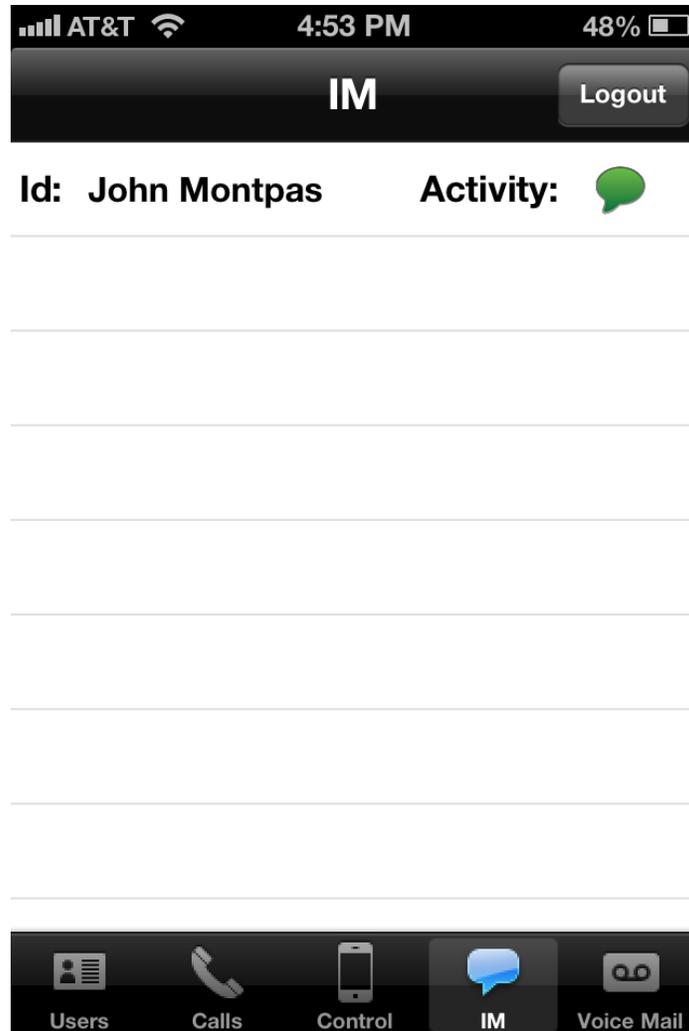
Be sure to enter the leading 9 or 8 plus trunk group number and then the outside number to be dialed. Then tap the "Done" button and the call will be transferred.

Tapping the "transfer vm" button on the active call display will bring up pickers similar to the one for transfer, but it will not include the "Outside" option. The operation is similar to the transfer except when you tap the "Done" button it transfers the call directly to the recipient's voice mail instead of ringing to them.
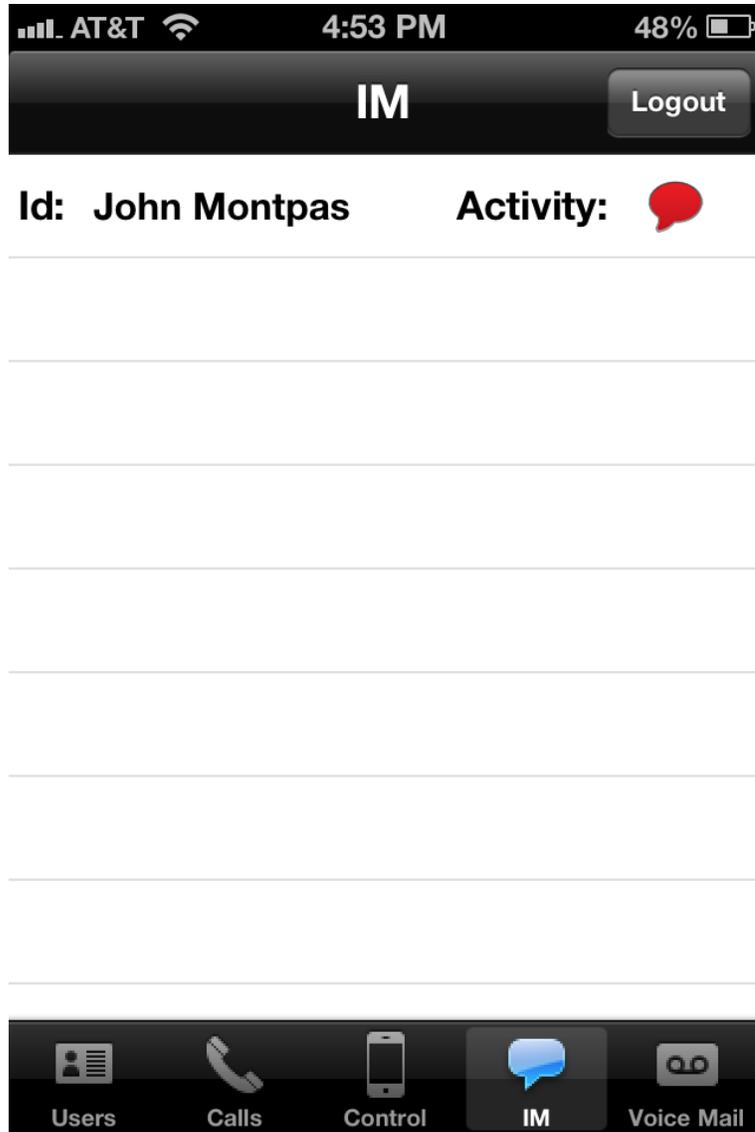
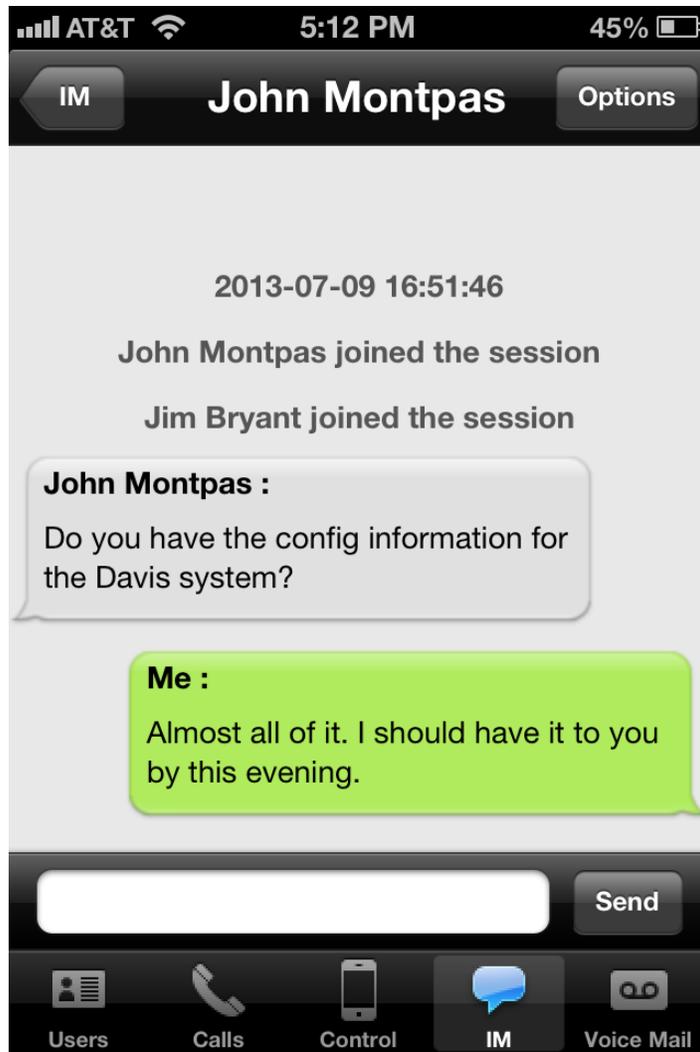Tapping the "End" button on the active call display will hang up the call.

The IM Screen

The IM screen is where instant messaging sessions are managed.
The IM session list will show all the active and finished IM sessions
since you have last logged in on the app. At this time, the app does
not save IM sessions after you logout. If a session is active, it will
have a green chat balloon icon:

If the session is over, it will appear in the list with a red chat balloon
icon:

To start an instant messaging session with another user, go to the detail screen for that user and tap the instant messaging balloon icon. When a session starts you will be directed to the IM session window where you will interact with the other parties in the session:

If you tap the Options button while in a session you will be given the options of adding another party to the group or leaving the session:

When you add a party, you can choose to add an individual user or you can add a whole group of users at once. When you pick "User", it will display a list of users to choose from:
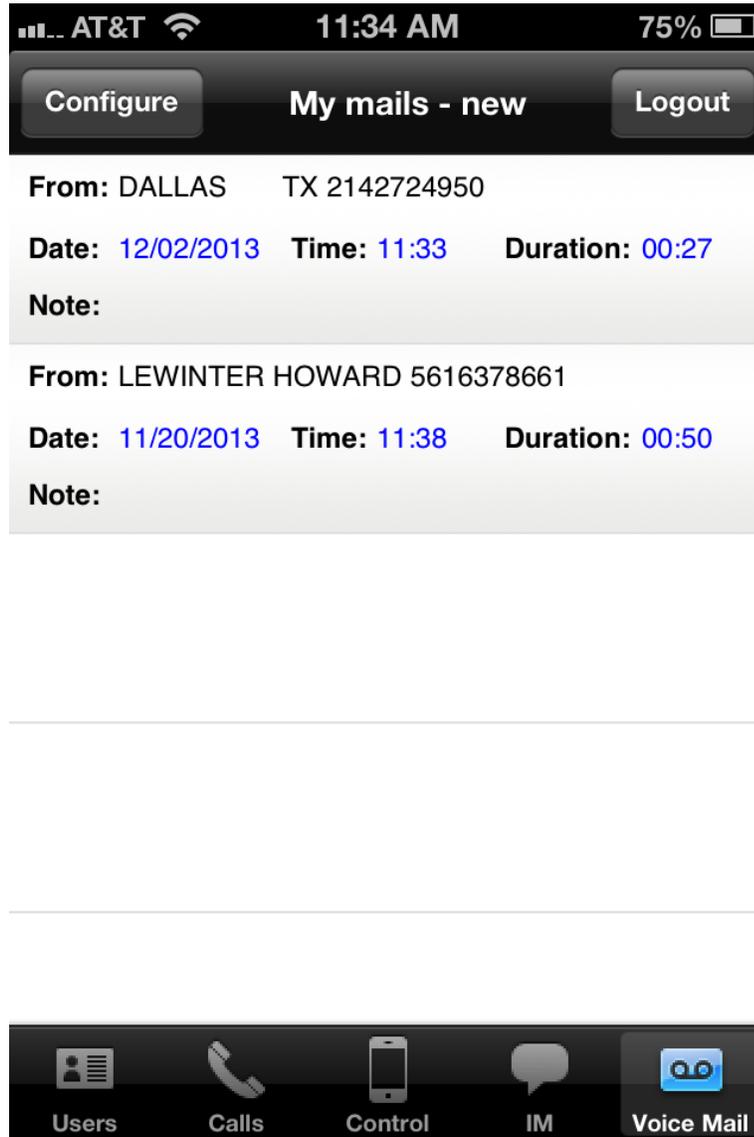
When you have the user you want to add to the session selected, tap the "Done" button and that user will be added to the session.

If you choose to add a group, then all the members of that group will be added to the IM session at once.
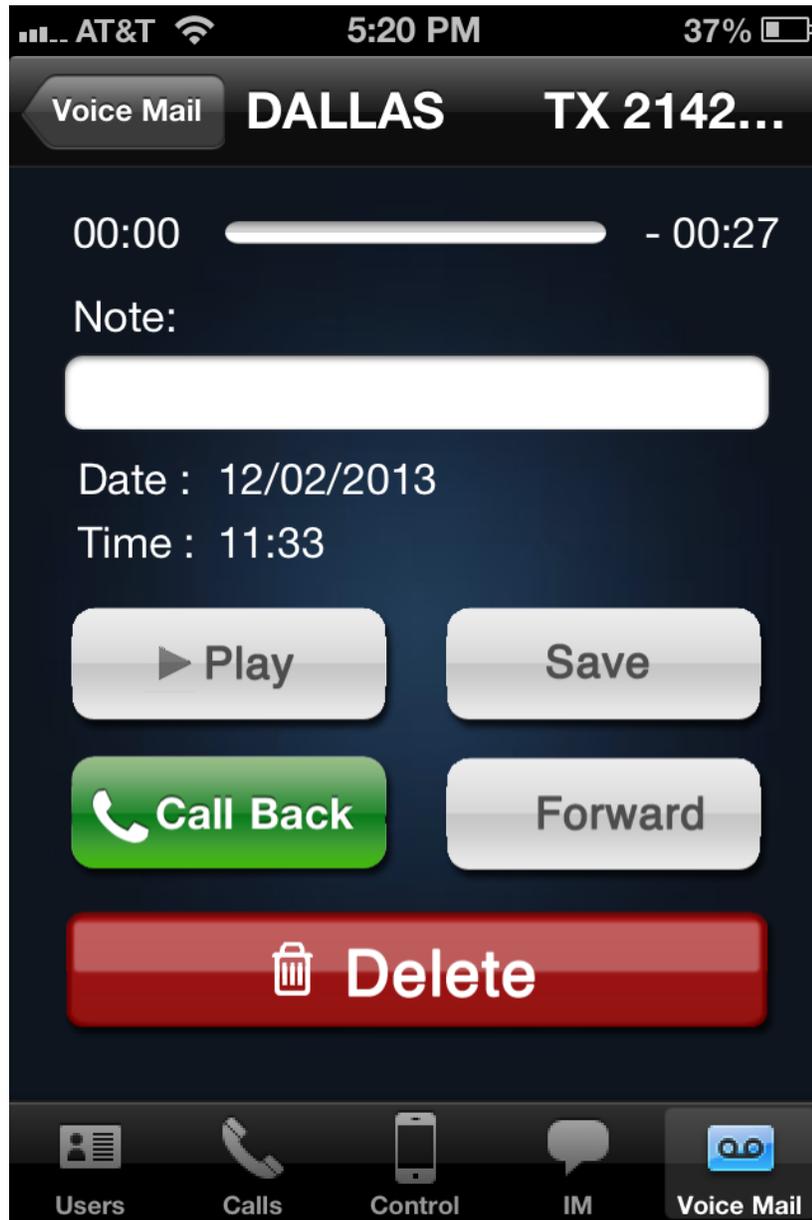
The Voice Mail Screen

The voice mail screen is where you can see a list of your personal voice mails or voice mails for any group mailboxes that you are allowed to access.

You can view the new or saved folder of the mailbox you have selected. To choose the mailbox and folder, tap on the Configure button and select your personal voice mailbox or a group mailbox and then whether you want to view the new or saved folder.
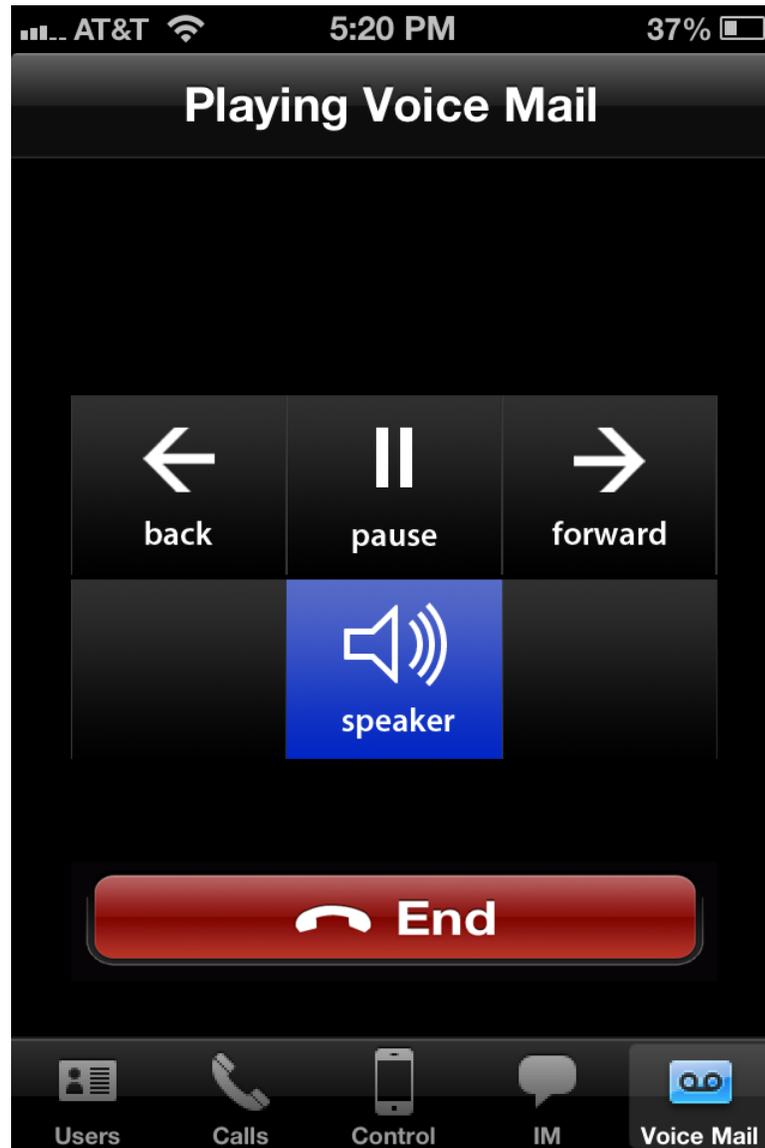
When you tap on a voice mail entry in the list, the voice mail detail screen will be presented:

On this screen you can add a note to the voice mail, play the voice mail, save it to the saved folder, call the party back who left the voice mail (if there is caller ID available), forward the voice mail to another user or a group voice mailbox or delete the voice mail.

If you tap the text field below the Note label, a keyboard will be presented. Once you have finished entering the note, tap the Done button on the keyboard.

If you tap the Play button, the voice mail will be played on your app. While it is playing, the voice mail playback screen will be presented:

You can pause and resume the playback, skip back or forward in the voice mail by 4 seconds of each tap of the back and forward buttons. You can switch the playback between the speaker and earpiece with the speaker button. If you have the auto-speaker feature turned on, then it will be used in voice mail playback the same as on a live call. To end playback before playback of the voice mail is complete, tap the End button.

If you are watching a new folder, tapping the Save button will move the voice mail to the saved folder. If you are watching a saved folder, it will move the voice mail to the new folder.

If there is caller ID associated with the voice mail, you can call the number back by tapping the Call Back button. A pop-up box will be presented that has a text field where you can adjust the number to call back, such as adding a leading 1 before the area code. After the number is correct, tap the Dial button.

If you tap the Forward button, you will be presented with pickers where you can choose a user or a group to forward the voice mail to. If you choose E-mail, it will present a text box where you can enter the email address where you want the voice mail sent as an attachment. When you have chosen the destination for the forward, tap the Done button at the top left of the screen to forward the voice mail. To quit without forwarding, tap the Cancel button at the top left of the screen.

To delete the voice mail, tap the Delete button.