# IP Office

## IP Office Softphone User Guide (Windows)

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# Chapter 1. Introduction

# 1. Introduction

The IP Office Softphone from Avaya enables you to make voice and video phone calls using SIP-based standards.

### Standard Telephone Features

The Avaya IP Office Softphone has all standard telephone features, including:

- Call display and Message Waiting Indicator (MWI)
- Speakerphone and Mute
- Redial, Hold, Do Not Disturb
- Call history – list of received, missed, and dialed calls
- Access to IP Office directory
- Call forward
- Call transfer
- Six-party audio conferencing
- Six-party video conferencing

### Enhanced Features and Functions

The IP Office Softphone also supports the following features and functions:

- Video
- Support for several languages in addition to English: French, German, Italian, Portuguese, and Spanish.
- Contact list containing the individual user's contacts
- Directory containing names from central and personal IP Office directory
- Automatic detection and configuration of audio and video devices
- Acoustic echo cancellation, automatic gain control, voice activity detection
- Support for DTMF (RFC 2833, inband DTMF or SIP INFO messages).
- Support for the following audio codecs: G.711, G.723.1, G.729a, G.722
- Support for the following video codecs: H.263, H.263+, H.264
- Compliance to 3261 SIP standard
- Support for these firewall traversal solutions: STUN, TURN, or ICE
- The IP Office Softphone includes an icon to indicate your do not disturb status. The icon can be clicked to change the status
- A Speed Dials tab is available. It contains buttons to which you can assign numbers to dial and name labels. For buttons that match another extension number, the button color indicates when that user is busy

## 1.1 IP Office Application mode

For users of IP Office productivity applications such as one-X Portal for IP Office, IP Office Softphone can be used with the application.

For all standard calls, with IP Office Softphone minimized to the system tray, the user can answer, make and terminate calls using the one-X Portal for IP Office. All the one-X Portal for IP Office features like centralized call log and busy lamp are available to the user. A user can pre-select to accept audio calls or select calls as Video calls when receiving and making calls from an application like one-X Portal for IP Office.

This mode is not covered in detail in this manual, please refer to the user manual of the productivity application like one-X Portal for IP Office.

# 1.2 Getting Ready

## SIP Account Information

You will need the following information:

- User name and password
- Login Server (IP Office)

If you have not been provided this data, please contact your IP Office administrator for the details.

## System Requirements

| | |
|---|---|
| **Processor** | • Minimum: Pentium 4 2.4 GHz or equivalent.<br>• Optimal: Intel Core 2 Duo or equivalent, Video Card with DirectX 9.0c support. |
| **Memory** | • Minimum: 1 GB RAM<br>• Optimal: 2 GB RAM |
| **Hard Disk Space** | • 50 MB |
| **Operating System** | • Microsoft Windows XP Service Pack 2<br>• Microsoft Windows Vista, 32-bit and 64-bit arch<br>• Microsoft Windows 7 |
| **Additional** | • Microsoft .NET Framework 4<br>• Microsoft Visual C++ 2008 SP1<br>• Microsoft KB967634 Hotfix<br>Note that the installer will take care of installing those if you do not have them. |
| **Connection** | • IP network connection (broadband, LAN, wireless) |
| **Sound Card** | • Full-duplex, 16-bit or use USB headset |
| **Browser Support** | • Microsoft Internet Explorer 6.0 or later |

## Multimedia Device Requirements

The IP Office Softphone requires both speakers and a microphone to make calls. Any of the following configurations are acceptable:

- External speakers and microphone
- Built-in speakers and microphone
- Dual-jack multimedia headset
- USB multimedia headset
- USB phone.

HID-compliant devices can be configured to work with the IP Office Softphone to support e.g. hook-switch functionality.

## Video Cameras

Calls made with the IP Office Softphone will work without a video camera, but a video camera is necessary to allow other parties to see your image. The IP Office Softphone will work with most USB video cameras.

# 1.3 Installing IP Office Softphone

Run the IP Office Softphone installer and follow the prompts in the install wizard.

To start the softphone, select **Launch the IP Office Softphone** when the installation is complete.

Alternatively, use the **Windows Start** menu or double-click the IP Office Softphone desktop icon:

# 1.4 IP Office Softphone Login

The **Softphone Login** window appears once the IP Office Softphone has been started.

1. Enter your user name, password and login server into the corresponding fields.
2. Select the bandwidth profile for your network.
   - Use the standard setting **Default** to let IP Office select the best available transmission rate.
   - Select **Low Bandwidth** if you are working at a location where bandwidth is limited.
   - Selected **High Bandwidth** only if you are sure that you are connected to a network with no bandwidth limitation.
3. If you are the only person who uses the PC, you can use the **Remember login information** setting to have IP Office Softphone remember the name and password.
4. Selecting the **Login automatically** option will allow you to skip the login process the next time you start the IP Office Softphone. The logging in process is still displayed for a few seconds in order to allow you to interrupt it if necessary.
5. **Minimize to System Tray** will do just that after the login has been completed successfully. Use this option if you don't immediately intend to use IP Office Softphone but want it running and available.
6. Click **Log in**. The progress of the login is displayed and details of which audio devices the IP Office Softphone is using are also shown.

### Hot Desking with IP Office Softphone

If you normally work from a phone on the IP Office telephone system or are temporarily logged in at one, logging in to IP Office Softphone will automatically log you off that phone and redirect your calls to your IP Office Softphone.

# 1.5 Troubleshooting

The IP Office Softphone includes three tools for helping you troubleshoot problems:

- You can verify that your microphone, speakers and camera are working and can set the volume to a comfortable level without having to actually place a phone call.
- You can verify that you are successfully connected to the network.
- While you are on a phone call, you can test the quality of the audio. Note that to perform a valid test, you should be on an established call (not a call attempt).

**Note:** Audio quality is dependent on several parameters that IP Office Softphone can not completely influence. When troubleshooting, please also take those parameters into account:

A. Network quality:

   a. If audio problems occur, try to select the "Low Bandwidth" setting when logging into the IP Office Softphone. The softphone will then use bandwidth efficient transmission of audio streams.

   b. If using Video, select a lower video resolution in **Softphone > Preferences > Media Quality** tab. Also, try to use the H.264 Codec instead of H.263 if possible (for settings please see Media Quality 38 and Video Codecs 37)

   c. Refrain from using video

B. Competing processes and resources
   While every possible attempt has been taken to give IP Office Softphone priority over other applications, there is a chance that those applications, e.g. Virus scan software, can impact performance from the softphone, The following actions can be taken.

   a. Close unused applications to e.g. avoid memory swapping

   b. Postpone activities like virus scans to a time when IP Office Softphone is not needed

   c. Use a single screen PC, not dual monitor if possible.

   d. Parallel usage of other communication tools, like e.g. NetMeeting for application sharing can impact voice-quality, especially if used with a low-bandwidth network. If audio quality issues appear, refrain from using other communication applications

## Known Issue

If you select menus or click on contacts and the dropdown/pullout menu is not visible (it appears behind the main Softphone panel instead of in front of it), do not be concerned. Softphone itself is not experiencing a problem. This is known to occur with lower-end graphics chipsets and outdated graphics drivers. Updating your drivers and/or upgrading to Windows 7 should resolve this problem completely. The only workaround for this issue is to reboot the PC.

# Chapter 2.

# Using the IP Office Video Softphone

# 2. Using the IP Office Video Softphone

## 2.1 Starting the IP Office Softphone

If the IP Office Softphone is not already running, start it as you would any other program: Use the **Windows Start** menu or double-click the desktop icon. The IP Office Softphone appears.

IP Office Softphone can be set to start automatically when you start Windows. This is controlled through the IP Office Softphone preferences 34, which you can set on the **Preferences > Application** panel.

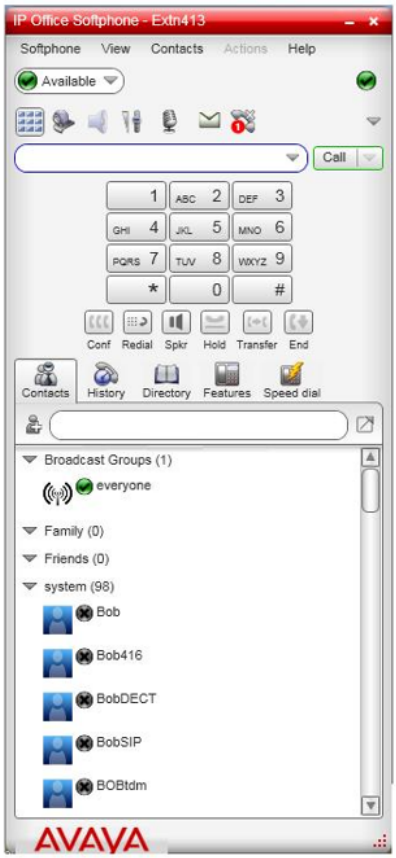
## 2.2 Shutting Down

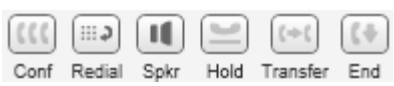
To shut down the IP Office Softphone, either select **Softphone > Exit** or press **Ctrl-Q**. You can also right-click on the tray icon and select **Exit** to shut down the IP Office Softphone.

- Note that clicking the icon on the softphone title bar minimizes the IP Office Softphone to the system tray; it does not exit the IP Office Softphone

## 2.3 The IP Office Softphone Windows

You can arrange the IP Office Softphone window to suit your needs, showing or hiding many of the controls.




- **Online Status**
  This icon indicates your online status. For a list of status icons and their meanings, see Setting your status 25.
- / **Allow Calls/Do Not Disturb**
  This icon, located on the right side of the panel, indicates whether you have do not disturb on or off. Clicking on the icon makes a call to the IP Office phone system to change the current state. When you have do not disturb on ( ), calls to you are redirected to your voicemail if available, otherwise they receive busy.
- **Show/Hide the dial pad**.
  You can type numbers and names directly into the call entry field or you can show and use the on screen dial pad.
- 

**In Call Control Buttons**
  These buttons appear below the dial pad when it is shown. To show or hide them select **Softphone > Preferences > Application > Display in-call buttons on the dialpad**. By default, these buttons are hidden.

- **Show/Hide video.**
  Click to show or hide the video window.
- **Speaker/Headset mode.**
  Switch between headset and PC speaker modes.
- **Adjust speaker volume.**
- **Mute/Unmute microphone.**
- **Message waiting indicator.**
  Click to access your voicemail mailbox. You need the dialpad visible in order to drive the mailbox prompts.
- **Missed call indicator.**
  Click this icon to open the History tab and view a list of missed calls.

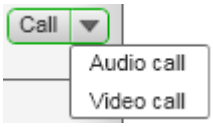
- **View Menu Options**
  The view menu provides the following options:
- **Select which tabs to show**
  Show or hide the **Contacts** 22, **History** 27, **Directory** 27, **Features** 29 and **Speed Dial** 30 tabs.
  - **Detach/Reattach Tabs**
    When displayed, you can use these icons to select whether each tab appears as part of the main windows or as a separately sizeable and positionable window.
- **Always on Top**
  Set the IP Office Softphone to remain on top of other application windows.
- **Zoom**
  Change the size of the text and controls used in the IP Office Softphone windows.
- **Message Archive**
  View you recent IM activity for any contact, group chat session, or chat room session.
- **Chat Rooms**
  View the chat rooms that you belong to.
- **Minimize to the system tray**
  Run the IP Office Softphone as an icon in your Windows system tray (normally bottom right of your Windows desktop). To reopen IP Office Softphone double click on that icon.
  - While minimized to the system tray, you can use the popup alerts to handle incoming calls. Select **Softphone > Preferences > Alerts & Sounds > Enable alert displays** to switch alerts on or off.
  - Alternatively minimize the IP Office Softphone to the system tray if you want to use another IP Office application such as the one-X Portal for IP Office to make and answer your calls.
  - If you exit when the IP Office Softphone is minimized; the IP Office Softphone will start as minimized next time.
- **Minimize to taskbar**
  Minimizes the IP Office Softphone to the Windows taskbar.
- **Close the IP Office Softphone**
  To close the IP Office Softphone select **Softphone > Exit**. You can also right-click on the tray icon and select **Exit** to close the IP Office Softphone.

## 2.4 Placing a Call

The simplest method to make a call is to enter the name or number into the call entry field. As you enter the name or number, matches from your Contacts and History are shown and can be selected to complete the name or number.

Click ✕ to clear the entry or Call to make the call.

You can also click on the ▼ down arrow icon and select **Audio Call** or **Video Call**.




There are many ways in which you can select or enter a number and then make a call. They are outlined in the table below. Once started, the outgoing call opens in its own panel within the main IP Office Softphone window. You will hear a ringing tone while the IP Office Softphone attempts to make a connection.

| How | From the... | Description |
|---|---|---|
| **Keying** | Dialpad or computer keyboard | 1. Enter the number or address in the call entry field using the dialpad or the computer keyboard.<br>• As you type, a suggestion for completing the entry may appear. Choose the suggestion or keep typing.<br>2. Click the **Call** button or press **Enter**. |
| **Drag-and-drop contact or previous call** | Contacts or History tab | Drag an entry from the **Contacts** or **History** tab. If the tab contains lots of contacts, first search or filter the list. |
| **Right-click a contact or previous call** | Contacts or History tab | Right-click an entry from the Contacts or History tab and choose **Call**.<br>If the tab contains lots of entries, first search or filter the list. |
| **Double-click a contact** | Contacts tab | Contacts have a "double-click" action that either makes an audio phone call. Each contact can be configured separately for this action. |
| **Double-click a previous call** | History tab | Double-click an entry. An audio call is placed. |
| **Redial** | Redial button | • When the call entry field is empty, click the **Call** button. The last number dialed is shown. Click **Call** again to call it.<br>• Or click the ▼ down arrow in the call entry field and select a recent call. The Softphone will redial the call immediately if you have selected the option to "Call immediately when a number is selected" in the **Preferences > Application** menu. |
| **Dialing** | Dialpad | 1. If the dialpad is not visible, click the **Show/Hide dialpad** button.<br>2. Click the numbers on the dialpad to enter the phone number or enter the number or address in the call entry field using the dialpad or the computer keyboard.<br>3. Click the **Call** button or press **Enter**. |

## 2.5 Placing Another Call

To place a new call without hanging up on the current call, simply place a call 14 in the normal way. A second call panel appear below the existing call and the existing call is automatically put on hold.

Switch between the different calls by clicking **Resume** on the desired call panel. That call becomes the active call and all other calls are on hold.

## 2.6 Ending a Call

Click the **End** button on the call panel (the call can be active or on hold). The call panel closes after a few seconds.

## 2.7 Handling Incoming Calls

As soon as an incoming call is received, a call panel appears, showing information about the call. In addition, call alert boxes appear even if IP Office Softphone is minimized.

You can disable the call alert box through the IP Office Softphone preferences 34 available on the **Preferences > Alerts & Sounds** panel.

*Incoming call alert for audio only.*

*Incoming call alert with video.*

| Action | From the... | Description |
|---|---|---|
| **Answer** | **Call panel or Call Alert box** | Click **Answer**. Or press **Enter** (on the keyboard), if the IP Office Softphone is the active application.<br>If you are on another call, that first call is automatically put on hold. You are now talking to the new caller. |
| **Forward** | **Features tab** | Select the Features tab to access the call forwarding feature. For information about how to program a Feature button for call forwarding, see Features Tab 29. |
| **Decline** | **Call panel or Call Alert box** | Click **Decline**. There will be a busy signal. |
| **Video** | **Call panel or Call Alert box** | The caller wants to include video.<br>Click to answer a video call and start sending your video immediately |
| **Audio** | **Call panel or Call Alert box** | The caller wants to include video.<br>Click to answer without video; if you want (and if you have a camera), you will be able to add video later. |

## 2.8 Auto Answer

To turn auto-answer off and on, in the call panel click ▼ and select **Auto Answer**.

Auto answer is initially configured to auto-answer after one ring, and to send only your audio when the call is established. To change this configuration choose **Softphone > Preferences > Call Automation 39**.

Auto answer is automatically turned off when you shut down.

## 2.9 Handling an Established Call

While the call is in progress details of the call are displayed in a call panel.

You can use the icons and buttons to control the call.

- **Hold the Call:** Click **Hold**. To take the call back off hold click **Resume**.
- **Transfer the call:** Click .
- **Add video:** Click . To switch back to audio only click .
- **Record the call:** Click  and select **Start Call Recording**.
- **End the Call:** Click **End**.

## 2.10 Transfering a Call

### Basic (Unattended) Transfer – Transfer this Call

You can transfer a call to any number without first speaking to the other person.

1. While connected to the call that you want to transfer, click on the transfer icon.
2. The call is put on hold. Below the call details enter the name or number for the transfer destination.
3. Click on **Transfer Now**. A call is placed to the transfer destination.
4. To complete the transfer without waiting for the call to be answered click on **End**.

### Attended Transfer – Call then Transfer

You can first speak to the target (the person you are transferring the call to).

1. While connected to the call that you want to transfer, click on the transfer icon.
2. The call is put on hold. Below the call details enter the name or number for the transfer destination.
3. Click on **Call**. A call is placed to the transfer destination.
4. If the call is not answered or the transfer destination doesn't want the call, click **Resume** to return to the held call. To complete the transfer click **Transfer Now**.

## 2.11 Handling Video Calls

### Placing a Video Call

You can start a call with video. See the table.

| How | From the... | Description |
|---|---|---|
| **Keying** | **Dialpad or computer keyboard** | 1. Enter the number or address in the call entry field using the dialpad or the computer keyboard<br>• As you type, a suggestion for completing the entry may appear. Choose the suggestion or keep typing.<br>2. Click the ▼ arrow beside the **Call** button and choose **Video call**. |
| **Right-click a contact or previous call** | **Contacts or History tab** | Right-click an entry from the **Contacts** or **History** tab and choose **Video Call**. |

### Adding Video

If you have a camera, you can click **Start Video** to add video to an established call. When you add video, the other party may (or may not) start sending their video to you.

### Other Party Adds Video

If the other party starts their video, your video window automatically opens and the video is played. You can start sending your own video, if desired (and assuming you have a camera) by clicking **Start Video**.

### Pausing and Resuming Video

Click **Stop Video** or close the video window to pause sending your video.

Click **Start Video** to resume sending your video; the video window will open.

Click to show or hide your video window (this does not stop the video).

### Grandstream Users

If you use Grandstream, or if the person with whom you wish to have a video call uses Grandstream, ensure that all participants in the video call switch to video codec H.264. Participants who do not switch codecs will be able to send and see their own video, but the intended recipient(s) will not see anything due to a codec negotiation error. See the section on Video Codecs 37 for more information.

## 2.12 Voicemail

You can click the icon to automatically connect to voicemail and listen to your messages.

You will need to have the dialpad visible in order to move around the mailbox options. Click on the Dialpad icon if the dialpad is not already displayed.

## 2.13 Conference Calls

### Starting a Conference Call

You can conference separate calls together once each call is established 14.

- In the current Call panel, click on ▼ and select **Merge Calls**. All of the established calls will be merged.

  Alternatively, you can click on the button if it is shown on the In Call Control Buttons panel. To view this button, refer to The IP Office Softphone Windows 12 section of this document.

### Video Conference Calls

Calls made with the IP Office Softphone will work without a video camera, but a video camera is necessary to allow other parties to see your video image. The IP Office Softphone will work with most USB video cameras.

To begin, ensure that all the participants you invite to the conference are sending video prior to merging their calls.

- Click on ▼ and select **Merge Calls,** or click on the button.

After the conference is established, participants may have to resend their video. When participants are removed from "Hold" or new participants join the conference, each participant must resend their video when the conference session continues.

### Including Video in a Conference

When you start a conference from established calls, video is automatically included if at least one of the calls already includes video and is sent to all the participants.

When you start an audio conference from scratch, video is not included. Once you begin an audio conference, you cannot change the conference into a video conference.

### How Video is Shared

The conference host (the person who starts the conference) serves as the host for other video. Whatever the conference host is receiving will automatically be sent to the other parties. If the conference host pauses or stops video, the other participants will no longer receive video. As such, in the event that you experience video errors, request that the conference host reestablish video to all parties by disabling and re-enabling video.

## 2.14 Instant Messaging

You can send an Instant Message (IM) to a contact who has a softphone or XMPP address, but you must be connected to one-X Portal. The IP Office Softphone allows you to send IMs to individuals or broadcast groups, and also supports IM conferencing and chat rooms (including ad-hoc group chat). In addition, you can send files to any user who has an XMPP address.

### Sending an IM

1. From the **Contacts** tab, right-click on the contact and choose **Send Instant Message**. The contact must have a softphone address. Alternately, click on the IM icon that appears to the right of the contact name.
2. Type the message, including any emoticons and formatting that you wish. To insert a return in the message, press Enter. (You can control the behaviour of Enter and of Ctrl-Enter on the **Softphone > Preferences > Application** panel.)
3. Click **Send**.

   **Note:** If the status of the recipient is set to Do Not Disturb, the message will not be received.

### Receiving an IM

When you receive an IM, either the IM window, or a Call Alert displays without opening the IM window. You can choose which window displays using the **Preferences > Alerts & Sounds > Alerts** panel.

### Sending a Broadcast IM

You can send an IM to several people at one time. A broadcast IM is different than a group chat:

- With a broadcast IM, each recipient can reply to the IM, but only the sender will see these replies; the other recipients will not see these replies.
- With a group chat, the messages that each participant sends are seen by all participants.

1. Select the parties from the **Contacts** tab in one of the following ways:
   - Select one or more contacts in the usual ways (using Shift-click or Ctrl-click and/or Shift+Ctrl+click).
   - Select one or more groups in the usual way.
2. Right-click and choose **Broadcast IM**. The Broadcast Instant Message window appears.
3. Type the message including any emoticons and formatting that you wish. To insert a return in the message, press **Enter**. (You can control the behaviour of Enter and of Ctrl-Enter on the **Softphone > Preferences > Application** panel.)
4. Press **Send** or **Enter**. The IM is sent and the window remains open. If a recipient sends you a response, the response will display in your regular Instant Message window; you will then be in a regular IM exchange with that one individual.

### Sending a Broadcast IM to 'everyone'

You can send a broadcast IM to everyone in the system using the 'everyone' contact located under the "Broadcast Groups" group.

1. In the **Contacts** tab, right-click 'everyone' and select **Send Instant Message**.
2. Type your message and press **Send** or **Enter**. The message is sent to all contacts in the system group.

Alternatively, you can use the process outlined in "Sending a Broadcast IM" to right-click on the system group and send a broadcast IM to all the users in the system. The difference is that you have the option to selectively remove individual users, which is not possible with the 'everyone' broadcast method.

When you receive a broadcast message from 'everyone,' the sender is indicated in square brackets but you will not be able to reply. Any attempt to reply is met with the error message "**Replies to broadcast messages are not allowed**."

### Group Chat (ad-hoc conference IM)

Softphone's ad-hoc Group Chat feature allows you to exchange instant messages with a group of people in a session that is created on the fly (to participate in a chat session that is *not* ad-hoc, see Chat Rooms below).

All people in a group chat must have XMPP accounts configured in order to participate in the session. There is no limit to the number of participants in a group chat session, and you can invite more participants during the session.

1. In the **Contacts** tab, select the desired online contacts.

2. Right-click the last selected contact and choose **Start Group Chat**. The invitation dialog appears.
3. Enter your invitation text and click **Invite**.
4. To invite additional participants to a group chat, select online contacts (who have XMPP addresses) from your Contact List and drag them to the Group Chat window. Any participant in the group chat can invite more participants.

   **Note:** You cannot start a group chat with the 'everyone' contact because it is a special user. If you right click 'everyone' and select **Start Group Chat**, nothing will happen.

## Leaving a Group Chat

To leave an ad-hoc group chat, close the Group Chat window. The session continues with the remaining participants. You will not be able to rejoin an ad-hoc group chat unless you are re-invited.

## Chat Rooms

Chat rooms are set up to allow the same groups of people to have regular and recurring group IM sessions. For example, your system administrator may create a chat room called "Marketing" and add the marketing staff as members. Every Monday at 8:00 a.m., each member opens the chat room on the IP Office Softphone and joins the "Marketing" conference.

## Joining a Chat Room

Chat rooms are unlike group chat sessions in that they are not ad-hoc. So, unlike group chat sessions, you are able to view a list of available chat rooms via the View menu.

1. Obtain the names of the chat rooms you wish to enter from your system administrator.
2. Select **View > Chat Rooms**. If the menu item does not display, make sure that the appropriate XMPP account is enabled. If you have more than one XMPP account, an account prompt appears.
3. Select the appropriate account and click **OK**. The group chat appears on this list until the last person leaves.
4. Select the chat room and click **Join Conference**. The Chat Room window displays, listing the participants who have joined the chat room session.

## Rejoining a Chat Room

If you leave a chat room, you can rejoin it using the procedure above.

## Viewing the IM Message Archive

You can view your recent IM activity for any contact, group chat session, or chat room session. Do one of the following:

- On the menu, click **View > Message Archive**.
  - Select your own name to view your group chat and chat room sessions.
  - Select another person to view instant message exchanges with that person.
  - Select one or more names and then right-click to save or delete all conversations with the selected people.
  - Select a conversation and right-click to delete or save the selected conversation.
- Right-click a contact and choose **View Message Archive**.

## Sending and Receiving Files

If you have an XMPP account, you can send files to another contact who has also has an XMPP account. You can also receive files from a contact who has an XMPP account.

### Sending Files

Choose one of the following options:

- Right-click a contact and choose **Send Files**. A standard Open dialog box displays. Select the files to send and click **Open**. The Send Files dialog displays a status message to show the progress of the file transfer.
- Drag a file from a folder to the IM window.

To cancel the file transfer before the other person retrieves the files, click **Cancel**.

### Receiving Files

When you receive files from another person, a File Transfer dialog box displays. Choose one of the following options:

- Click **Save** to accept the file transfer and select the location where you want to save the file.

- Click **Decline** if you do not want to receive the file transfer.

# Chapter 3.
# Dialing Tabs

# 3. Dialing Tabs

There are a set of tabs that can be displayed either as part of the main IP Office Softphone display, or as separate floating windows.

The tabs are:

- **Contacts** 22
  A directory of contacts stored by IP Office Softphone.
- **History** 27
  Details of your calls made, received and missed while IP Office Softphone is running.
- **Directory** 27
  A directory of contacts supplied by the IP Office telephone system.
- **Features** 29
  A set of clickable buttons (up to 30) each of which can be assigned to a specific IP Office feature.
- **Speed Dial** 30
  A set of clickable buttons (up to 60) which can be used to fast dial preset numbers.

### Detaching a Tab

1. Select the tab.
2. Click on the icon. The tab is changed to be a separate floating window which you can move, resize and position separately from the main IP Office Softphone window.

### Reattaching a Tab

1. Click on the icon at the top right of the floating window.

### Showing/Hiding the Tabs

The set of tabs can be hidden when not required. This option affects all the tabs and includes tabs that have been detached.

- To change the current status (shown or hidden), select **View** and then choose one of the following options: **Show Contacts**, **Show History**, **Show Directory**, **Show Features**, or **Show Speed Dial**.

## 3.1 Contacts Tab

The **Contacts** tab displays your contacts and lets you specify multiple contact methods for them, including:

- Softphone address
- Home phone number, business phone number, mobile phone number.

Contacts are typically organized into groups. The IP Office Softphone includes built-in groups: Broadcast Groups, Family, Friends, system, and Work. You can add more groups by specifying a new group name when you add or edit a contact.

From the Contacts tab, you can perform the following actions:

- **Add a contact**
  Select this option to add a new contact.
- **View Details of a Contact**
  Click on a contact to view the full details of that contact and select to see your call history filtered around calls to or from the contact or select to edit the contact.
- **Call a Contact**
  Double-click on the contact to make a call.
- 
  When the contacts are shown in their groups, you can use the arrow icon next to each group to expand or collapse that group.

You can also right-click on a contact to select additional options for that contact. The following options are available:

- Call
- Video Call
- Send Instant Message
- Start Group Chat
- Send Files
- Edit a Contact
- View Call history

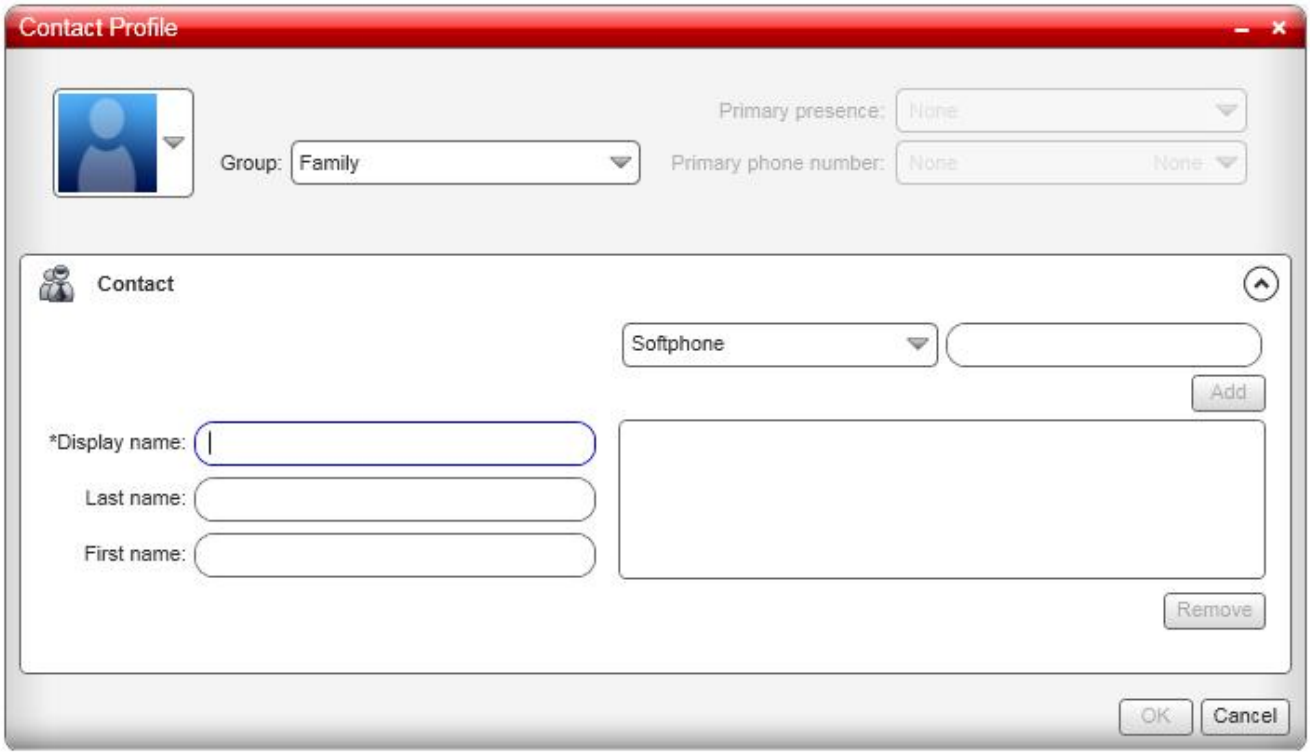
- View Message Archive
- Add to Alert List
- Split Contact
- Delete Contact

**Note:** The contacts are not identical to the personnel directory on IP Office. Access to IP Office personnel directory on softphone is possible through the **Directory** tab but it is not possible, to edit this directory from IP Office. However, if used in application mode with one-X Portal for IP Office as the front end, full editing of personal directory is possible.

## 3.1.1 Managing Contacts and Groups

### 3.1.1.1 Adding a Contact

Click or right-click a group and choose **Add Contact to Group**. The **Contact Profile** dialog appears.




| Field | Description |
|---|---|
| **Contact** | Only the "Display name" is required. This is the name that will appear in the call panel and the Call Alert when this person phones you.<br>You can specify the contact method on the right side of the screen. Select a method from the drop-down menu and enter the contact information. You must enter at least one contact method. Enter as many contact methods as you want. Softphone entries and e-mail entries must have the format <name>@<domain>. |
| **Group** | Click to show the list of groups and check each group to add this contact to. |
| **Primary presence** | This field displays only when the contact has more than one Softphone number or Instant Message address. The primary presence is used as follows:<br>• The presence icon on the contact list shows the online status for this address.<br>• The single-click and double-click actions for instant messaging use this address.<br>You can still send IMs to this person at their other addresses, but you must right-click and choose from the context menu. |
| **Primary phone number** | If the contact has more than one number, select the primary number. This number is used with single-click and double-click calling. |

### 3.1.1.2 Adding a Contact using an Existing Address

1. You can add a contact by capturing existing information:
    - If you are on a phone call with a person who is not a contact, click the **Add to Contacts** button in the call panel.
    - On the **History** tab, select an entry that is not a contact. Right-click and choose **Add as Contact**.
2. The **Contact Profile** dialog appears. Complete the dialog as desired and press **OK**.

### 3.1.1.3 Importing Contacts

You can populate the IP Office Softphone contact list by importing from an external file or files. The new contacts will be added to the existing contacts.

You can import a contact list from:

- A comma-separated file. Use this method to import from a Microsoft Excel file. You will first have to set up the file; see below.
- A vCard file (*.vcf file). A vCard is an electronic business card that is often attached to an e-mail.

1. From the main menu, click the **Contacts** menu and choose **Import Contacts**. The **Import Contacts** wizard starts.
2. As soon as you click **Finish** on the wizard, the **Contacts** tab in the IP Office Softphone is updated to show the imported entries.

## Setting up an Excel File for Import

1. Remove any introductory text or headings from the top of the file. (You can keep text at the end of the file; it will be ignored during the import.)
2. Insert a blank row as the first row, then insert the headings that the IP Office Softphone will use to interpret the meaning of each column. The columns can be in any order. The most popular headings are:
    - display-name
    - entry_id
    - given_name
    - surname
    - postal_address
3. Save the file as *.csv.

### 3.1.1.4 Exporting Contacts

You can export a contact list to a comma-separated file or a vcf file.

1. From the main menu, click the **Contacts** menu and choose **Export Contacts**. The **Export Contacts** wizard starts.
2. When you click **Next**, the export begins. A new file of the specified type is created.

### 3.1.1.5 Changing Contact Information

To change the information for a contact, right-click the contact and choose **Edit Profile**.

### 3.1.1.6 Moving or Deleting a Contact

- To drag one or more contacts to a different group, select them and drag to the title bar of the new group.
- To delete one or more contacts, select them, right-click, and choose **Delete Contact** or **Delete Selected**. The contacts are removed from this group. If a contact belongs to several groups, it is removed from all groups.

**Note:** The System group is configured on the IP Office server and is populated on your softphone each time that you log in (and only users with valid XMPP accounts appear in the System group). If you move or delete contacts from the System group, the contact is restored to the System group when you log in again. To include a contact in a group other than the System group, right-click the contact and select **Edit Profile** to display the Contact Profile screen. Select an additional group from the **Group** menu and click **OK**.

### 3.1.1.7 Adding, Deleting or Renaming Groups

Select any group, right-click, and choose the appropriate menu item.

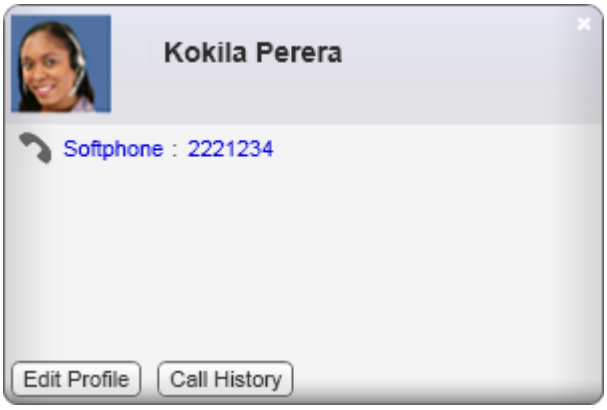
## 3.1.2 Using Contacts

**To phone the person:**

- Double-click the contact to start a phone call
- Right-click and choose **Call**. If necessary, click the desired number.
- Drag the contact to the call entry field to start a phone call.

### Contact Flyout

Click a contact to show the Contact flyout. This flyout shows all the contact methods set up for the contact. You can click a contact method to perform its action.




## 3.1.3 Using My Buddy

My Buddy is a notification and command interface that can be used in conjunction with any XMPP-based messaging client. The user 'mybuddy' should appear in your System contacts list and will assist you with many softphone tasks.

### To view the commands available through My Buddy

1. Begin an IM session with 'mybuddy' (right-click, Start Group Chat).
2. In the IM window, type 'help' and press Enter.
   My Buddy replies with a list of available commands. To view information about each command, type 'help' followed by the command name and press Enter.

### To enable a particular command

1. Begin an IM session with 'mybuddy.'
2. In the IM window, type the command name, followed by the name or extension of the person you wish to perform the command on, and press Enter. Some commands will work on their own, but other factors might be extenuating (for example, the command 'lock' requires you to be hosting a conference).

## 3.1.4 Sharing Online Status

You can publish your online status to contacts who have a softphone address, and you can set up the IP Office Softphone to view the online status of other contacts.

### Watching the Status of Others

To watch a contact's status, that contact must be tagged for presence:

- If you create a contact through the Contact Profile, the softphone automatically obtains status information if the contact has a valid XMPP address.
- If you create a contacts through the Contact Profile and you include an XMPP address, you can click the Enable XMPP Presence button to obtain status information for this address.
- If you create contacts by importing a contact list, you can specify during the import whether you want to share presence information. See Importing Contacts 24.

## Setting your status

Click the down arrow beside the online status indicator on the IP Office Softphone, and select the desired online status. The table below lists the status indicators.

| Indicator | Meaning for your Status | Meaning for Status of Others |
|---|---|---|
| Available | Either:<br>• You have set your status to this value.<br>• The softphone has determined that you are logged on but not on the phone or idle.<br>When you have this status, the softphone will automatically detect when you are idle or on the phone, and change the status to match. For more information about the **On the Phone** or **Idle** statuses, see the descriptions below. | You can contact this person. |
| Busy | You have set your status to this value. the softphone does not automatically switch you out of this status; you must switch yourself. | You can contact this person. |
| Away | You have set your status to this value. The softphone does not automatically switch you out of this status; you must switch yourself. | You can contact this person. |
| On the phone | Either:<br>• You have set your status to this value. In this case, the softphone will never automatically switch you out of this status; you must switch yourself.<br>• You started a phone call when your status was "Available". When your call finishes, your status reverts to "Available". | You can contact this person. |
| Not available for calls | You have set your status to this value. The softphone does not automatically switch you out of this status; you must switch yourself. | You can contact this person, but do not expect a reply. |
| Do not disturb | You have set your status to this value. The softphone does not automatically switch you out of this status; you must switch yourself. | You can call this person, but you cannot send IMs. |
| Idle | You cannot select this status. This status displays automatically if you have not moved or clicked the mouse or pressed a keyboard key for the Idle period. To set the Idle period see **Softphone > Preferences > Application**.<br>As soon as you click the mouse or keyboard, your status changes to "Available". | You can contact this person. |
| Appear offline | You have set your status to this value. The other person sees you as offline, even though you are actually online. The other person cannot tell the difference between this status and you really being offline. | The contact is either not logged on or does not want to share online status. |
| No icon | Not applicable | You are not watching the other person's status. |

### Customizing your status

You can create a custom status indicator.

1. Click the down arrow beside the status indicator, and double-click on one of the existing indicators.
2. Type your custom status.

### Adding Contacts to the Alert List

You can add a contact to the Alert List in order to request to be notified when the online status of a contact changes.

Right-click the contact or contacts and choose Add to Alert List. The Alert List icon appears beside the contact.

When the contact's status changes, a notification displays. Choose one of the following options:

- Click the phone icon or the IM icon on the notification window to call or IM the contact.
- Select the Keep contact on Alert List checkbox to continue receiving notifications of status changes for this contact. If you do not select the checkbox, you will not receive further notifications.

## 3.2 History Tab

The **History** tab shows a record of calls that have occurred while IP Office Softphone is running.

Click on the ▼ icon to select the type of call records to display in the call history.

- **All**
  All calls of the various types listed below.
- **Received**
  Incoming calls that you have answered using IP Office Softphone.
- **Dialed**
  Outgoing calls you have made using IP Office Softphone.
- **Missed**
  Incoming calls that have alerted your IP Office Softphone but were not answered using IP Office Softphone.
  - The icon appears in the main IP Office Softphone window to show when there are missed calls in the call history. It also shows the number of missed calls. Clicking on the icon will display the **History** tab.

### Managing the Lists of Calls

You can right-click on an entry in a list to:

- **Call**
- **Video Call**
- **Add as Contact**
- **Delete**
- **Delete All Calls**

### Phoning from History

You can:

- Right-click on an entry to place a call to this person, using the contact method that was used for this call.
- You can double-click to place an audio call.
- Place a call to this person and add them to a conference call that is in progress.

**Note:** Contacts are only recorded when the softphone is running. Calls received when the softphone is not active will not be shown.

If IP Office Softphone is used in combination with one-X Portal for IP Office as the front end, the call log functionality of one-X Portal for IP Office can be used that will record all incoming calls including those received when the softphone is not active.

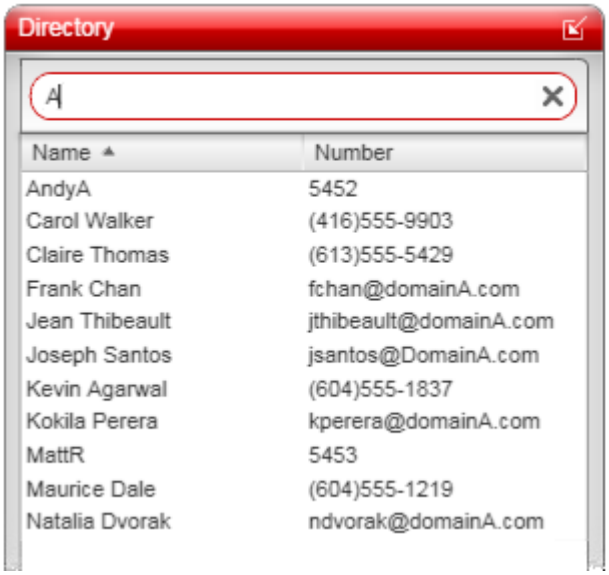
## 3.3 The Directory Tab

The **Directory** tab links directly to your local IP Office. Your directory will contain contact entries from the following IP Office contact stores: local IP Office directory, local IP Office Small Community network numbers, Local & IP Office Small Community Network Hunt Groups, Private user Directory.

## Search for a Contact

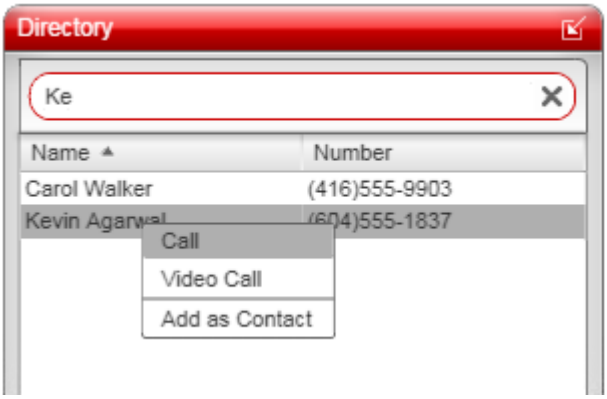
The search box is context sensitive and allows you to search by name or by number. Start typing in the search box and the displayed list of contacts will automatically start to narrow down based on your input.

You can clear the Search Box by clicking the '**X**' displayed at the far right of the Search Box.




## Phone a Person

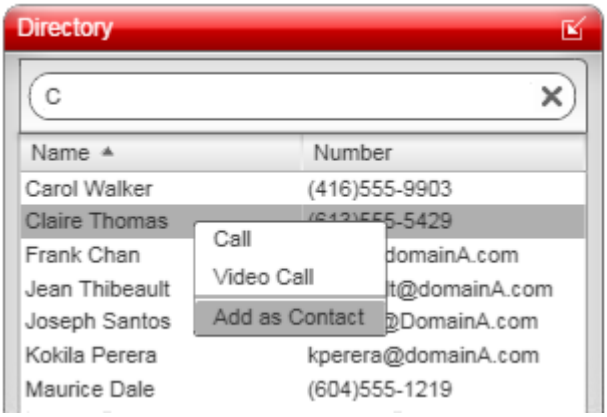
You can phone a person directly from the **Directory**. Right-click a directory entry and choose **Call** or **Video Call**. A new call panel will appear and the call is placed immediately.




## Create a Contact

Right-click an entry and choose **Add as Contact**. The contact profile window appears, populated with all the information from the IP Office directories.

Complete the window with any missing information that you want to record and press **OK**. The contact will now be listed on your **Contact** tab.




### Note

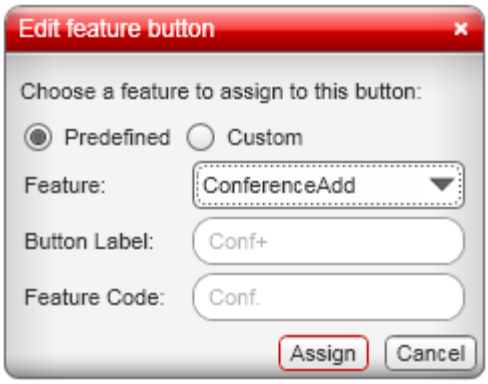
While it is possible to access the centralized private directory on IP Office, it is not possible to change the directory on IP Office from IP Office Softphone. Please change it from your desktop phone or one-X Portal for IP Office .

## 3.4 Features Tab

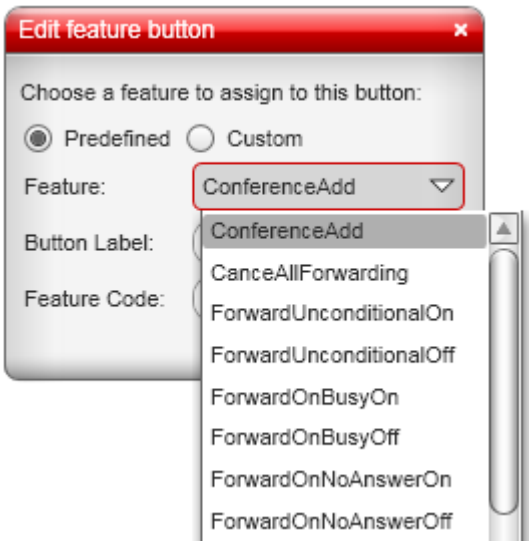
The **Features** tab allows you to access a set of button which can be used to control various IP Office call features.

### Configuring a Feature Button

1. To configure a button, right-click on the button and select **Edit**. A menu with the button options appears.



2. To use one of the existing IP Office features, select **Predefined** and select the required feature from the drop down feature list.




3. To use a custom feature, select **Custom**. Enter the label and feature code manually.
4. Click **Assign**.

### To Display More Buttons

1. Right click on the page and select **Show rows**.
2. Select the number of rows of buttons to be displayed on the tab.

## 3.5 Speed Dial Tab

The **Speed Dial** tab allows you to create a set of buttons for numbers you want to dial in a single click. You can set a text label for each button, and you can choose whether to view the status of the extensions that you add.

## Configuring a Speed Dial Button

1. To configure a button, right-click on the button and select Edit.
2. Enter a name and number for the contact.
3. If you select **Show status**, the button will indicate the busy status of the number if it matches an internal extension.

   When you select Show status, you will see a visual indicator of the status. You can also choose to receive an audio notification when there is an incoming call to an extension that you are monitoring. This feature is useful if you need to monitor calls to other extensions and answer them if the user at that extension is not available. For more information, see Alerts & Sounds 34.
4. Click **OK**.

## To Display More Buttons

1. Right click on the page and select **Show rows**.
2. Select the number of rows of buttons to be displayed on the tab.

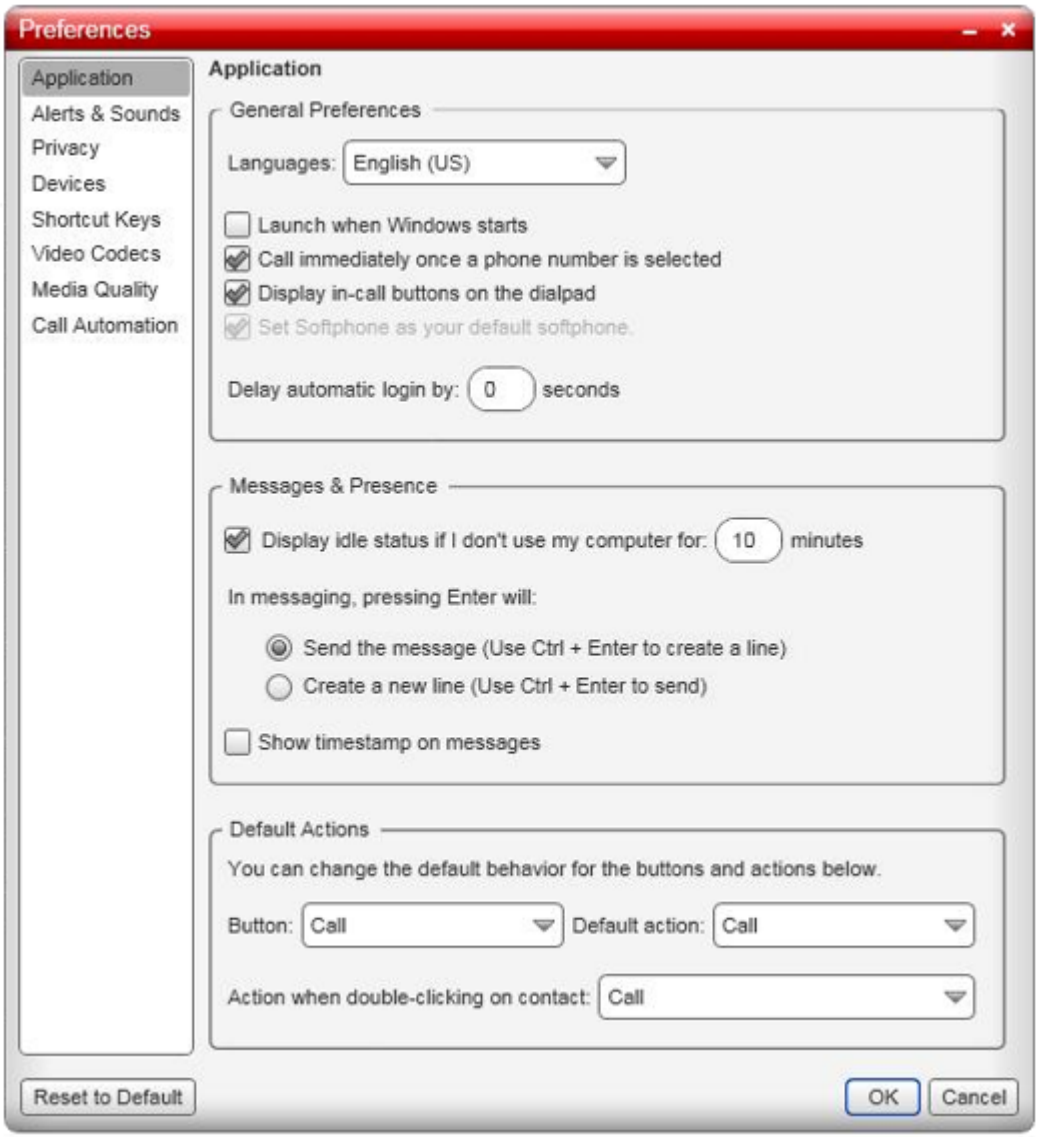
# Chapter 4.
# Configuring Preferences

# 4. Configuring Preferences

Choose **Softphone > Preferences**. The **Preferences** window appears. The **Preferences** panels let you control the way that you work with the IP Office Softphone.

## 4.1 Application

This panel lets you set your preferences for general GUI behavior and lets you set up for login.

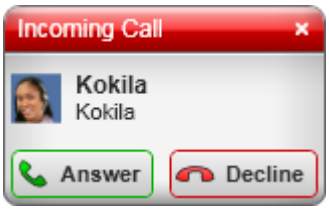



## 4.2 Alerts & Sounds

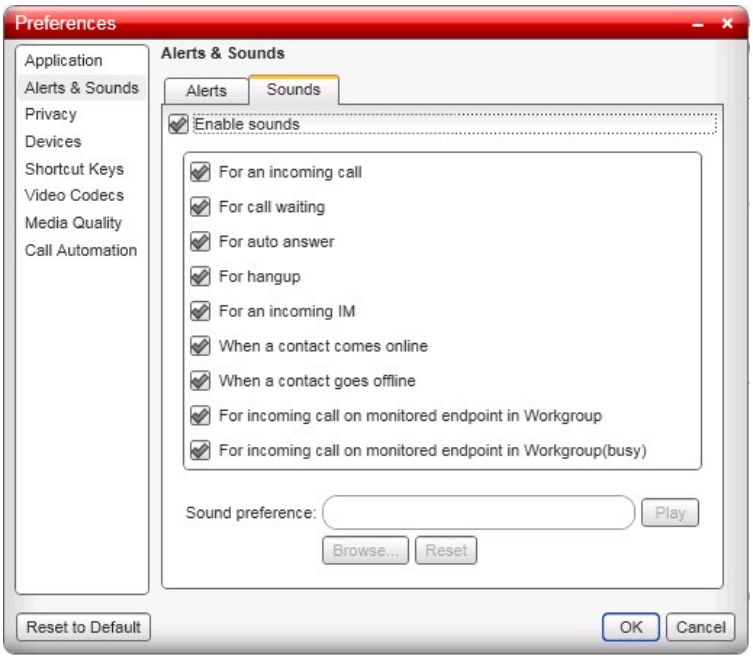
This panel lets you choose how you will be notified of events on your IP Office Softphone.

On the Alerts tab, you can enable a call alert dialog box:

The call alert box is a small menu that is displayed when an incoming call arrives.




You can use the Sounds tab to also enable audio notifications for different call scenarios. These notifications can be a default sounds provided by IP Office Softphone, or you can select a sound file that you want used for each scenario:




You can also choose to receive an audio notification when there is an incoming call to an extension that you are monitoring. This feature is useful if you need to monitor calls to other extensions and answer them if the user at that extension is not available. The options are:

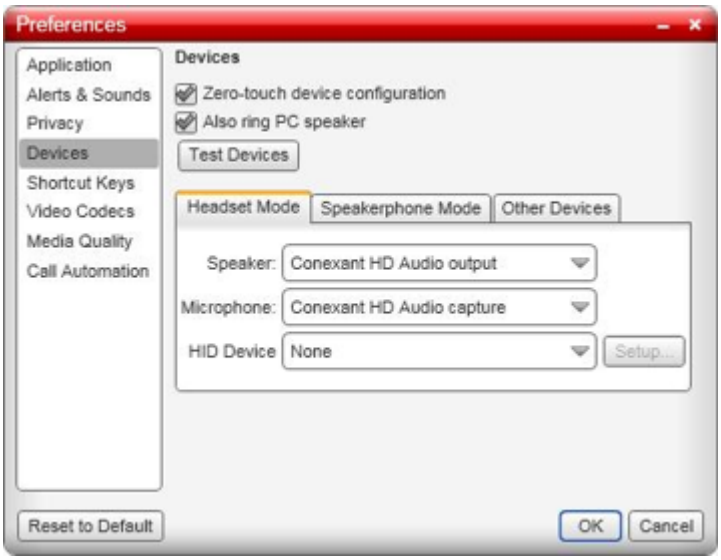
Select **For incoming call on a monitored endpoint in Workgroup** to receive an audio notification when there is an incoming call to an extension that you are monitoring. Select **For incoming call on a monitored endpoint in Workgroup (busy)** to receive an audio notification when there is an incoming call to an extension that you are monitoring while you are in a call.

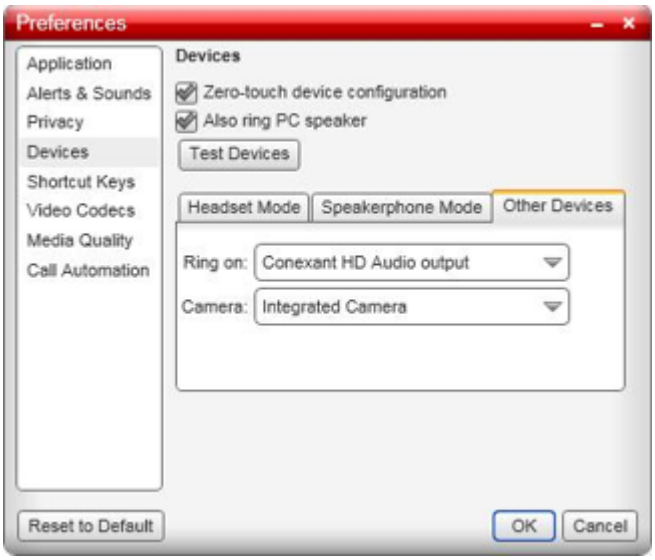
You can monitor an extension by configuring it on a speed dial button and selecting **Show Status**. For information about how to configure a speed dial button, see Speed Dial Tab 30.

## 4.3 Devices

The IP Office Softphone automatically detects devices at each startup and selects the most appropriate device for each purpose. If you do not like this selection, you can override it on this panel. If you override a selection, it will apply the next time you start the softphone, unless the device is no longer available, in which case the softphone will again automatically select the device to use.

When **Zero-touch device configuration** is enabled, the Softphone will automatically detect the new device and start using it whenever you change your audio or video device.



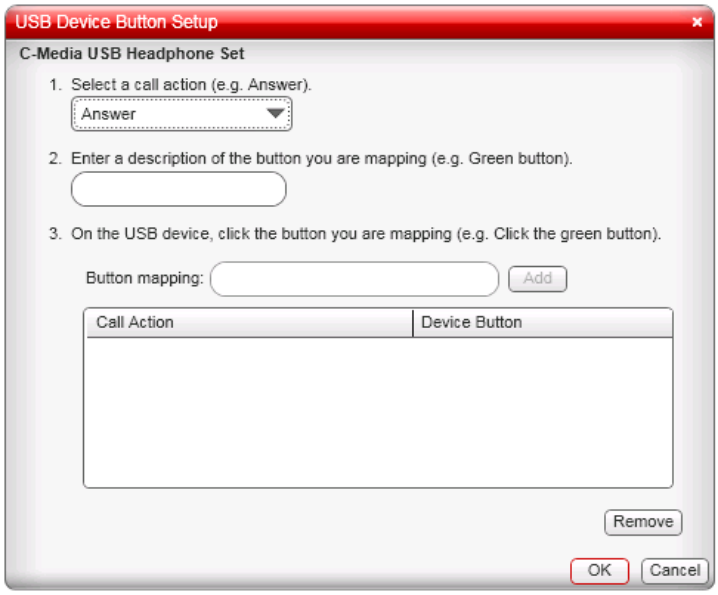

However, if you have more than one device available at the same time and you wish to change from one device to another, you will need to do the following:

1. Restart the application.
2. Go to Softphone > Preferences and select the desired headset/speakerphone under the Devices tab.
3. Go to Help > Troubleshoot and select the audio device you wish to use under the Devices tab.
4. Restart the application.

If you continue to have problems, disable Zero-touch device configuration and try the procedure again.

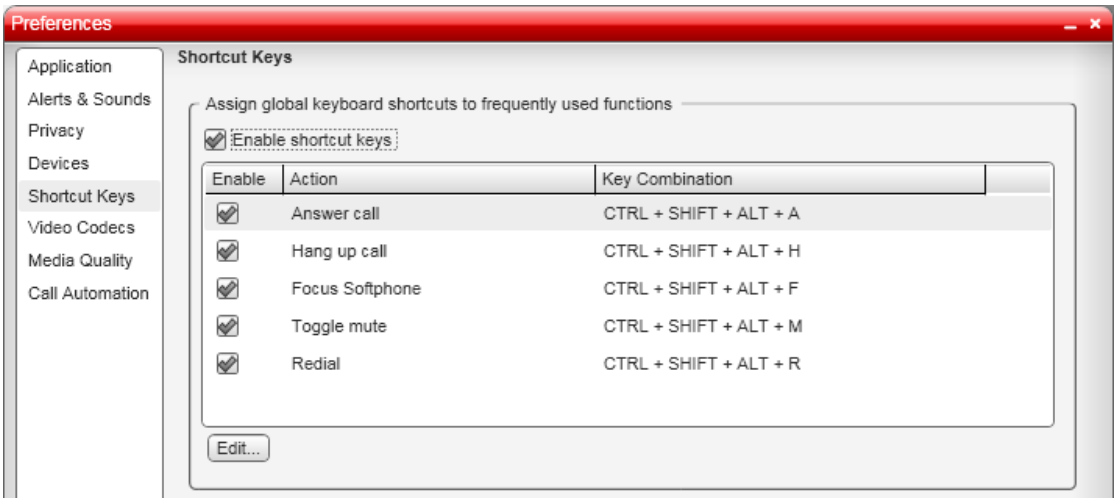
### 4.3.1 HID Devices: USB Device Button Setup

You can assign functions to a HID-compliant device. For example, you can set the green button so that it answers an incoming call.



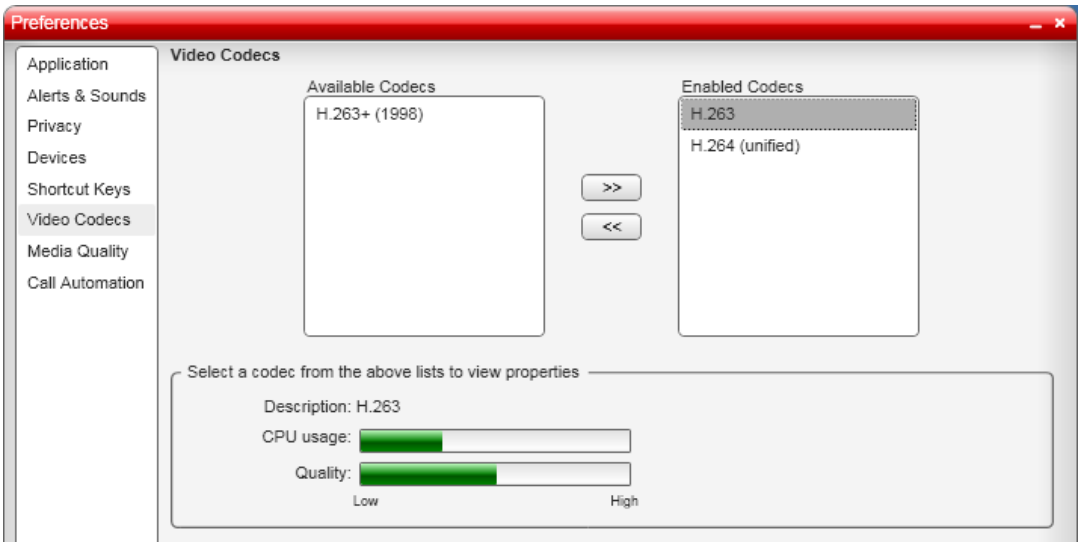

## 4.4 Shortcut Keys

This menu allows you to select whether you want to use shortcut key combinations for certain actions and to edit what those key combinations are.




## 4.5 Video Codecs

Video codecs describe the format by which video streams are compressed for transmission over networks. Some codecs require less bandwidth than others, but may result in lower video quality. Change the settings on this tab only if advised to do so by your system administrator.

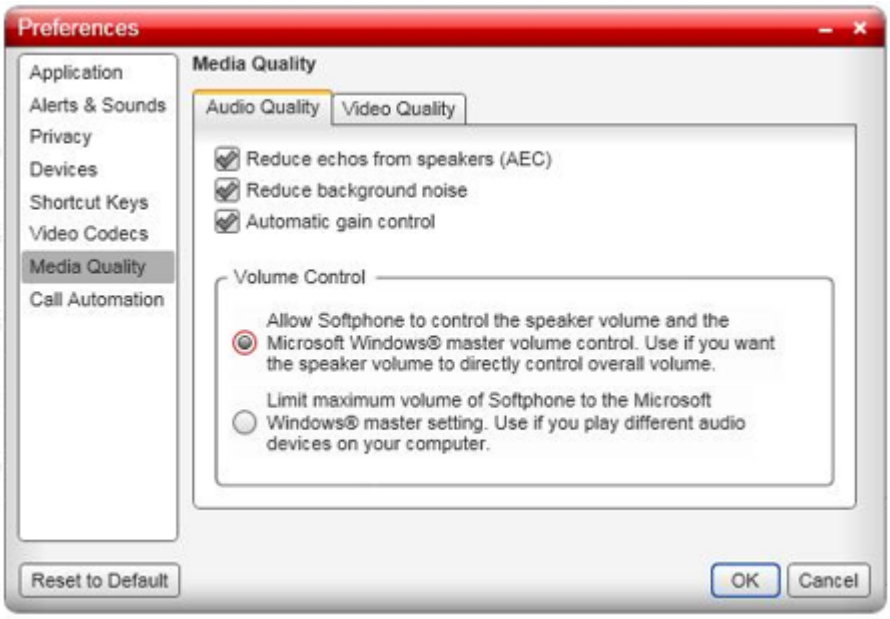



With only one codec enabled, all calls made will use that particular compression format. With more than one codec enabled, the IP Office Softphone automatically chooses the best codec based on the other party's capability, the available bandwidth, and network conditions.

Note that it is not possible to set a 'preferred' video codec, nor does IP Office negotiate one.

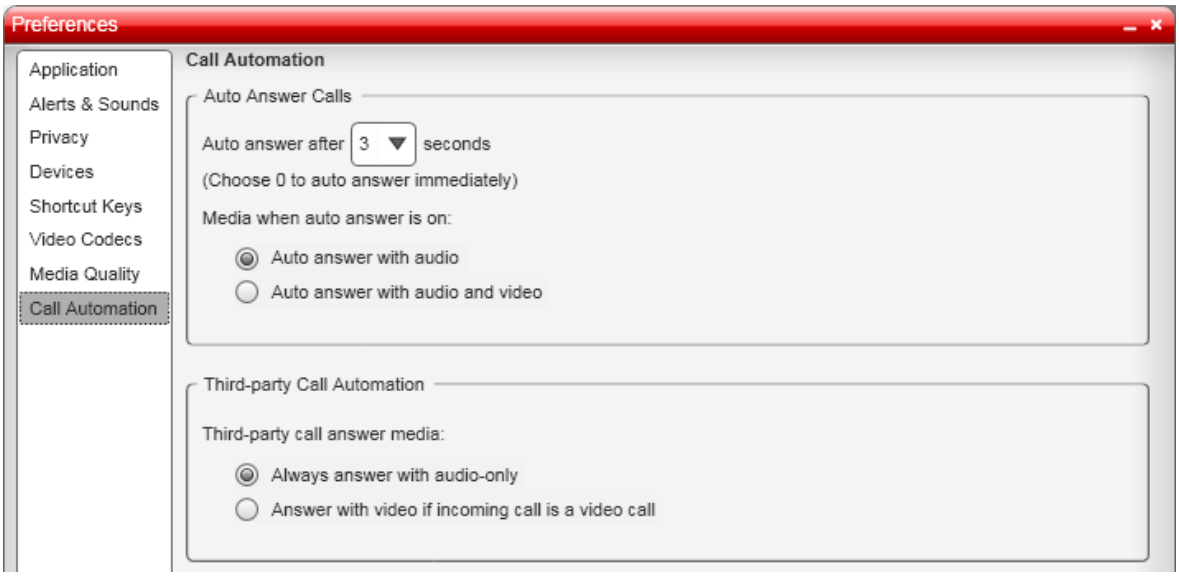
## 4.6 Media Quality

These settings are used to adjust the IP Office Softphones video and audio operation.



## 4.7 Call Automation

These settings let you configure how you want auto answer to handle incoming calls, when Auto Answer is enabled.




- **Auto Answer Calls**
  Use the settings in the **Auto Answer Calls** area when you have selected auto answer 15 in the IP Office Softphone call panel.
- **Third-party Call Automation**
  The Third-party Call Automation feature controls how the softphone handles external auto-answer requests. Ensure that this option is set to **Auto-answer with audio-only**.

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