



IP Office

IP Office Softphone Installation

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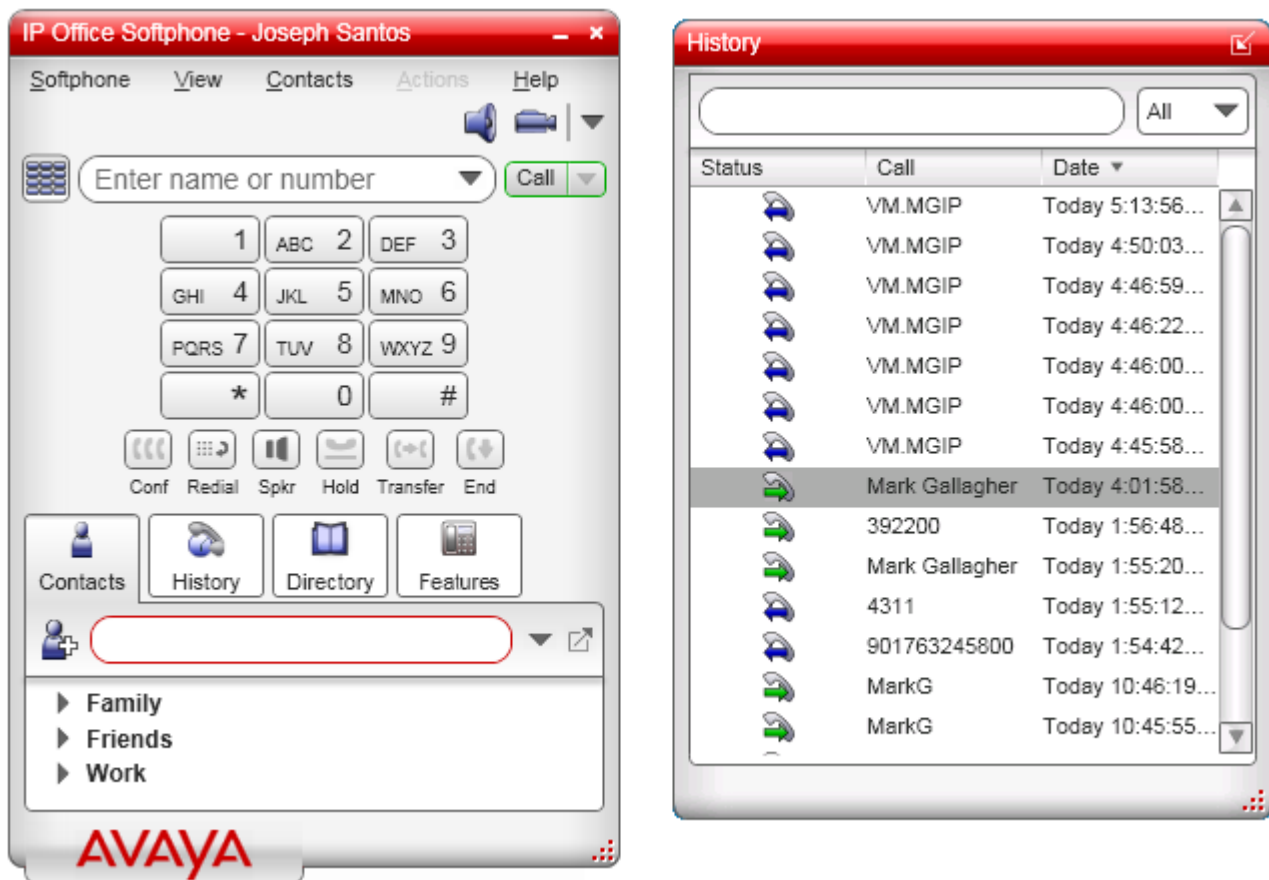
Chapter 1.

IP Office Softphone Installation

1. IP Office Softphone Installation

This guide covers the installation of the IP Office Softphone application. Though the application is installed on an individual user PC, it requires configuration changes on the IP Office system and so installation must be done only by an installer with system configuration access and experience.

This manual covers both the Windows and MAC versions of the IP Office Softphone application. The Windows version of IP Office Softphone is supported with IP Office Release 6.0 and higher. The Mac version of IP Office Softphone is supported with IP Office Release 8.0 and higher.



- When the IP Office Softphone software is started and registers with the IP Office, it creates an extension record in the system configuration using the next available extension number. While extension record appears in the system configuration, it cannot be edited. The record is automatically deleted a few minutes after the IP Office Softphone is logged off.
- The user is logged onto the IP Office Softphone using their extension number in the same way as for users hot desking onto a physical phone extension.
- If the user was previously using another extension, they are automatically logged off that extension when they login to the IP Office Softphone.
 - If the user logs into IP Office Softphone on another PC having already logged in on one PC, the previous session is automatically logged out. It may take up to 3 minutes for that to be reflected by the previous session, however incoming calls are redirected immediately.
- When the user logs off from the IP Office Softphone, they will be automatically logged back in at their desk phone if they have one and they are not set to **Forced Login**.

1.1 Pre-Requisites

Hardware

- The IP Office system must include VCM channels. These can be provided by installation of an IP500 VCM card or IP500 Combination card.

General

- IP Office details: IP address and subnet mask.
- User name and password for IP Office configuration access using IP Office.
 - If HTTPS is required: User name and password for IP Office security settings access.
- IP Office Softphone user details. The IP Office user name and password for each user.
- For presences and IM functions:
 - User name and password for one-X Portal for IP Office administration access.
 - The XMPP domain that the applications (one-X Portal for IP Office and IP Office Softphone) should use.

License Requirements

Use of IP Office Softphone requires the IP Office system to contain the following licenses:

- **System Licenses**
For Server Edition systems, no additional system licenses are required. However, user licenses are required, as shown below. For other IP Office systems running IP Office Release 7.0 or higher, the system must have **Essential Edition** and **Preferred Edition** licenses.
- **User Licenses**
IP Office Softphone can be used by user's who have their **Profile** setting set to **Power User**. The number of **Power User** licenses entered into the IP Office system's configuration sets the number of configurable users, regardless of whether they are currently using the application. For non-Server Edition systems, the **Teleworker** profile and **Teleworker** licenses can also be used for IP Office Softphone.

Software

The following software is required for installation of the IP Office Softphone application:

- **IP Office**
A PC with IP Office is required for configuration of the IP Office system. This is only required during installation.
- **IP Office Softphone Software**
The IP Office Softphone installation software is part of the IP Office Administrator Applications suite. On the IP Office Applications DVD, the IP Office Softphone software is located in the **AdminCD/Softphone** folder.
- **Other Software Pre-Requisites**
The following software items are pre-requisites for the IP Office Softphone. If not already installed, the IP Office Softphone installer will attempt to download and install these items before allowing IP Office Softphone installation:
 - If the user PC is not able to connect to the Internet, the pre-requisites must be manually pre-installed. The necessary files can be downloaded from Microsoft (<http://download.microsoft.com>). Ensure that you download the full package for each rather than just the initial installer setup package.
- **Windows Installation**
For installation on Windows PCs, access to the following Windows updates, appropriate to the user's version of Windows operating system, is required if not already installed.
 - Microsoft .NET Framework 4.
 - Microsoft Visual C++ 2008 SP1.
 - Microsoft KB967634 Hotfix.
 - See [Note on Windows 7 QoS](#)^[10].

Note on Windows 7 Quality of Service (QoS)

IP Office Manager provides the ability to specify the use of Quality of Service (QoS) settings by the IP Office Softphone. The settings are downloaded to the application when the Softphone user logs into IP Office. These settings are used to mark RTP packets with DSCP values, which in turn allow network devices to prioritize the packets.

In Windows 7, Microsoft introduced significant changes to the handling of QoS settings. For Windows users without administrative privileges, Windows will not allow Softphone to respect the requested DSCP values by default. In this case, a DSCP value of 0 will be inserted in place of the value set by the Manager.

In order to effectively use the desired DSCP values, try one of the following options:

1. Always run Softphone as a Windows 7 Administrator,

or

2. Create a Group Policy on the computer running Softphone to define the DSCP settings for users without administrative privileges.

It is the prerogative of the system administrator to determine the most appropriate solution for the network.

User PC Requirements

The following are the minimum and recommended requirements for IP Office Softphone.

Feature	Windows PC	Mac PC
Operating System	<ul style="list-style-type: none"> • Microsoft Windows XP Service Pack 3. • Microsoft Windows Vista (32-bit and 64-bit). Vista support is only on Business, Enterprise and Ultimate versions. • Microsoft Windows 7 (32-bit and 64-bit). Windows 7 support is only on Professional, Enterprise and Ultimate versions. See Note on Windows 7 QoS. 	<ul style="list-style-type: none"> • Mac OS 10.6 to 10.8.
Processor	<ul style="list-style-type: none"> • Minimum: Pentium 4 2.4 GHz or equivalent. Video Card with DirectX 9.0c support. • Optimal: Intel Core 2 Duo or equivalent. Video Card with DirectX 9.0c support. For HD video, the minimum requirements are Intel Core 2 Duo 2.3 GHz or equivalent, hardware video acceleration, camera, 2GB RAM and DirectX 9.0c support. 	<ul style="list-style-type: none"> • Intel Core i5.
Memory	<ul style="list-style-type: none"> • Minimum: 1GB RAM. • Optimal: 2GB RAM. 	
Hard Disk Space	<ul style="list-style-type: none"> • 50MB. 	
Sound Card	<ul style="list-style-type: none"> • Full-duplex, 16-bit or use USB headset. 	
Additional	<ul style="list-style-type: none"> • Windows Installation For installation on Windows PCs, access to the following Windows updates, appropriate to the user's version of Windows operating system, is required if not already installed. <ul style="list-style-type: none"> • Microsoft .NET Framework 4. • Microsoft Visual C++ 2008 SP1. • Microsoft KB967634 Hotfix. • See Note on Windows 7 QoS. 	-

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 functions such as hook-switch control.

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.

1.2 Licenses




Use of IP Office Softphone requires the IP Office system to contain the following licenses:

- **System Licenses**

For Server Edition systems, no additional system licenses are required. However, user licenses are required, as shown below. For other IP Office systems running IP Office Release 7.0 or higher, the system must have **Essential Edition** and **Preferred Edition** licenses.

- **User Licenses**

IP Office Softphone can be used by user's who have their **Profile** setting set to **Power User**. The number of **Power User** licenses entered into the IP Office system's configuration sets the number of configurable users, regardless of whether they are currently using the application. For non-Server Edition systems, the **Teleworker** profile and **Teleworker** licenses can also be used for IP Office Softphone.

1. Using IP Office, receive the current configuration from the IP Office.
2. Click on  **License** in the navigation pane.
3. Click on the  icon.
4. Paste the license key into the field for the new license and click **OK**.
5. The name of the license and the number of users it enables should be displayed. The **Status** will be listed as **Unknown**.
6. Click **OK**.
7. Click on  to save the configuration back to the IP Office system.
8. Receive the configuration from the IP Office again.
9. Check that the **Status** of the newly added license is now listed as **Valid**.

1.3 IP Office System Configuration

The following changes are required for the IP Office system to support the logging in and out of IP Office Softphone extensions.

- ⚠ **Warning:** This process will require the IP Office system to be rebooted to be completed.

1. Using IP Office receive the current configuration from the IP Office system.

2. Select **System**.

The screenshot shows the 'System' configuration page with the following fields and values:

Name	00E007053B1D	Locale	United States (US English)
Time Offset (hours:minutes)	00:00	Branch Prefix	
TFTP Server IP Address	0 . 0 . 0 . 0	Local Number Length	
HTTP Server IP Address	0 . 0 . 0 . 0		
Phone File Server Type	Memory Card		
Manager PC IP Address	0 . 0 . 0 . 0		
Avaya HTTP Clients Only	<input type="checkbox"/>		
Enable SoftPhone HTTP Provisioning	<input checked="" type="checkbox"/>		
Time Server IP Address	0 . 0 . 0 . 0		

- Check that **Enable Softphone HTTP Provisioning** is enabled.

3. Select the **LAN1** or **LAN2** tab depending on which LAN interface will be used by IP Office Softphone users to connect to the IP Office.

4. Select the **VoIP** sub-tab.

The screenshot shows the 'LAN Settings' page with the 'VoIP' sub-tab selected. The following options are checked:

- H323 Gatekeeper Enable
- SIP Trunks Enable
- SIP Registrar Enable

- Check that **SIP Registrar Enable** is enabled. When enabled, a separate **SIP Registrar** sub-tab should also be visible.


5. Select the **SIP Registrar** sub-tab.

The screenshot shows the 'SIP Registrar' sub-tab with the following fields and values:

Domain Name	
Layer 4 Protocol	Both TCP & UDP
TCP Port	5060
UDP Port	5060
Challenge Expiry Time (secs)	10
Auto-create Extn/User	<input checked="" type="checkbox"/>

- Check that the option **Auto-create Extn/User** is selected.

6. Click **OK**.

7. Click on  to save the configuration back to the IP Office system. If a reboot is requested allow the IP Office system to reboot.

1.4 IP Office User Configuration

The process below will vary depending on whether the user has a normal IP Office extension and will only use the IP Office Softphone occasionally or whether they will be using the IP Office Softphone as their regular extension.

- **Occasional IP Office Softphone User**


If the user will normally be using another IP Office extension, the existing user record and matching extension record can be left largely unchanged. The user will be automatically logged off their normal extension when they log in to IP Office Softphone.


- **Regular IP Office Softphone User**

If the user will be using IP Office Softphone as their main extension device do either of the following:

- If the user is new, create a new user record for the user. There is no requirement to create a matching extension record.
- If the user already exists, remove their extension number from which ever extension record it is currently assigned.

1. Using IP Office receive the current configuration from the IP Office system.

2. Select  **User** in the navigation pane.

- For a new user click on the  new icon and enter a **Name** and **Extension**.
- For an existing user locate and select their current entry.

3. Select the **User** tab.

The screenshot shows the 'User' configuration page in IP Office. The 'User' tab is active. The form contains the following fields and options:

- Name: Extn316
- Password: [Empty]
- Confirm Password: [Empty]
- Full Name: MarkG
- Extension: 316
- Locale: [Dropdown]
- Priority: 5
- System Phone Rights: None
- Profile: Power User
- Receptionist
- Enable SoftPhone

- The user's **Name** and, if set, **Password** are used for logging in to IP Office Softphone.
- Depending on the user's requirements and the licenses entered into the system configuration, set the **Profile** to be either **Teleworker User** or **Power User**.
- Check that the **Enable Softphone** option is selected.

4. Select the **Telephony** tab.

The screenshot shows the 'Telephony' configuration page in IP Office. The 'Telephony' tab is active. The 'Call Settings' section contains the following options:

- Outside Call Sequence: Default Ring
- Inside Call Sequence: Default Ring
- Ringback Sequence: Default Ring
- Call Waiting On
- Answer Call Waiting On Hold
- Busy On Held

- Ensure that the **Call Waiting On** option is selected. This setting is necessary for the IP Office Softphone to be able to perform actions such as transferring calls.
- Check that the **Enable Softphone** option is selected.

5. Select the **Supervisor Settings** sub-tab.

The screenshot shows a configuration window with several tabs. The 'Supervisor Settings' tab is selected and highlighted in orange. Below the tabs, there are two rows of settings. The first row has a text field labeled 'Login Code' containing '****', and a checkbox labeled 'Force Login'. The second row has a text field labeled 'Login Idle Period (secs)' and a checkbox labeled 'Force Account Code'. A red box highlights the 'Login Code' field.

- In the **Login Code** field enter a login code for the user. Note that while this must be set it is not the password used for logging in to the IP Office Softphone application.

6. Click on **OK**.

7. Repeat the process for any other IP Office Softphone users.

8. Click on  to save the configuration back to the IP Office system.

1.5 Configuring the XMPP Domain

Use the following procedure to configure the XMPP domain that will be used by the IP Office Softphone application. This process assumes that you are familiar with one-X Portal for IP Office installation and configuration. For full details refer to the one-X Portal for IP Office Installation and Administration manuals.

- The XMPP Domain name can be a DNS domain name or the IP address of the one-X Portal server. If you want to support server federation, or if you deploy the one-X Mobile Preferred for IP Office, then the XMPP domain name must be one that allows federated servers to resolve the DNS.

1. Using a web browser, login to the one-X Portal for IP Office using the administrator access address.

- **New one-X Portal for IP Office Configuration**

If you are launching the one-X Portal for IP Office for the first time, the installation wizard is displayed. Proceed with installation as per the one-X Portal for IP Office Installation manual but with the following additional actions:

- a. In Step 2, after having checked the connection to the IP Office system, select **Advanced Installation** and click on **Advanced Provider Options**.
- b. Select the **IM/Presence** tab.
- c. In the **XMPP Domain Name** field enter the IP address or fully qualified domain name that should be used.
- d. Continue with the initial one-X Portal for IP Office configuration as per the one-X Portal for IP Office Installation manual

- **Existing one-X Portal for IP Office Configuration**

If the one-X Portal for IP Office has already been installed and configured

- a. Select **Configuration**.
- b. Select **IM/Presence**.
- c. In the **XMPP Domain Name** field enter the IP address or fully qualified domain name that should be used.
- d. Click Save.
- e. Restart the one-X Portal for IP Office server or service.

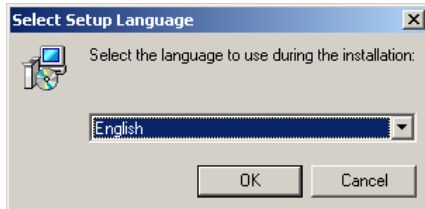
Creating Chat Rooms

As the system administrator, you can create chat rooms for softphone users to access. Chat rooms allow users to have a group IM session, usually on a regular basis. For example, you can create a chat room called "Marketing" so that members of the marketing staff can open the chat room on the IP Office Softphone and join the conference.

You can create a chat room by creating a user account to act as the conference host. In this example, the user account is "Marketing." When you create a user account, the system automatically creates a chat room. For information about how to create a user account, see IP Office Manager.

1.6 Software Installation (Windows)

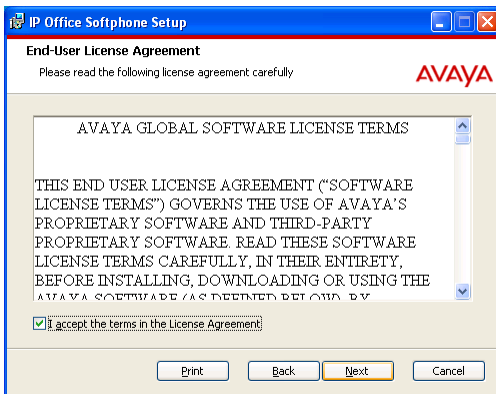
1. **Warning:** Only install the software after having completed the preceding processes in this documentation.
2. Check the following on the user PC before installing the IP Office Softphone.
 - Check that the PC can connect to the Internet. This may be necessary for the installation of software pre-requisites.
 - Check the operation of the PCs sound and video devices using the instructions provided by the manufacturers.
3. Double click on **IPOffice_Softphone.exe**.
4. The installer will first check for various [software pre-requisites](#)^[10]. If not present it will attempt to download and install them. Following the installation of any pre-requisites, the IP Office Softphone installer will start.



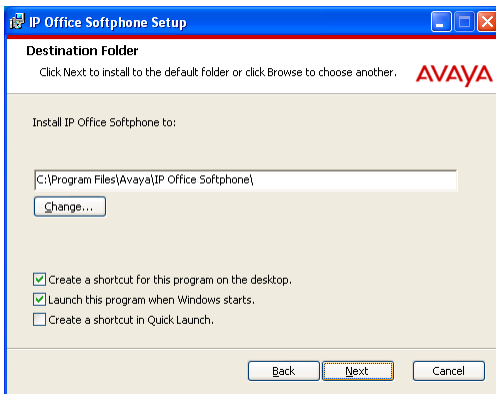
5. Select the language for the installation process. This does not affect the language used by IP Office Softphone when running. Click **OK**.



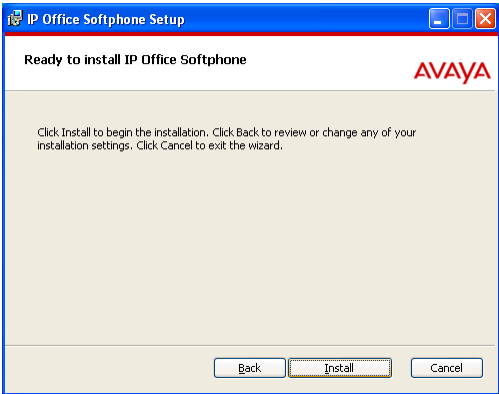
6. Click **Next**.



7. Select **I accept the terms in the License Agreement** and click **Next**.



8. The next option affect where the software is installed and how it can be started.
 - For ease of maintenance only change the destination folder if absolutely necessary.
 - Only select **Launch this program when Windows starts** if IP Office Softphone will be the user's main IP Office extension device. Click **Next**.



9. Click **Install**. The IP Office Softphone software installation is begun.



10. When the software installation has been completed, select **Launch IP Office Softphone**.

11. Click **Finish**.



12. When the IP Office Softphone starts, enter the information necessary for logging in.

- **Profile**
Leave this set to **IP Office: Default** for initial login. For details of profiles refer to the IP Office Softphone User Guide.
- **Login server**
Enter the IP address of the IP Office system. To use HTTPS prefix the address with **https://** .
- **Username**
This should match the user's IP Office Name setting.
- **Password**
This should match the user's IP Office Password setting.
- **Remember login information**
Select this option to save the username and password options entered above. Do not select this option if the IP Office Softphone has been installed on a shared PC.
- **Log in automatically**
Select this option if IP Office Softphone is the user's regular IP Office extension device.



13. If the PC is running the Windows firewall, you may be prompted whether to allow the IP Office Softphone application to connect.

- Select **Unblock**.
- If the PC has a different firewall, the prompts and method for allowing connection may differ.

14. Make a test call using the IP Office Softphone.

1.7 Software Installation (Mac)

Use the following procedure to install the IP Office Softphone on a user's Mac PC.

1. Double-click the Softphone setup file to begin installation.
The installation window appears.
2. From the installation window, click and drag the **Softphone** icon to the **Applications** folder.
A progress bar appears briefly to indicate the installation process.
3. When the installation is complete, double-click the **Softphone** icon in the **Applications** folder.
The **Softphone Login** window appears.
4. Enter the user name, password and login server into the corresponding fields.
5. Select the appropriate bandwidth profile for the network:
 - use the standard setting **Default** to let IP Office select the best available transmission rate
 - select **Low Bandwidth** if the user is working at a location where bandwidth is limited
 - select **High Bandwidth** only if the user is connected to a network with no bandwidth limitation
6. If you are the only person who uses the PC, select the **Remember login information** setting to have IP Office Softphone remember the name and password.
7. Selecting the **Login automatically** option will allow you to skip the login process the next time the IP Office Softphone application is started. The login process is still displayed for a few seconds.
8. 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.

Chapter 2.

Additional Processes


2. Additional Processes

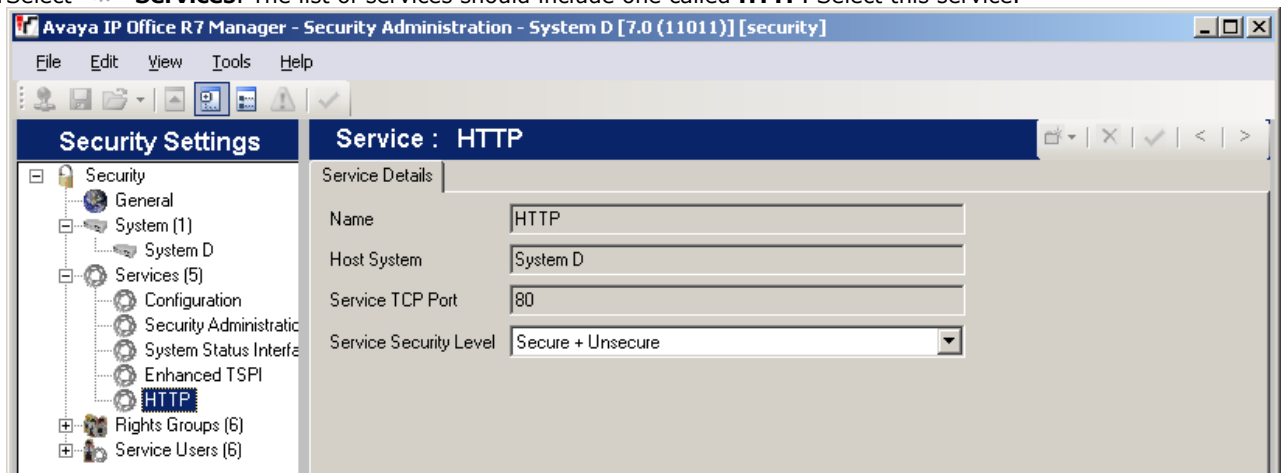
2.1 Using HTTPS

For additional security, IP Office Softphone users can be connected to the IP Office using HTTPS rather than HTTP. The IP Office Softphone users then need to prefix the **Log in Server** address they use with **https://** .

In addition to the process below to enable HTTPS support, the IP Office may also require a security certificate. A certificate can either be generated by the IP Office or downloaded to it. If the IP Office generates its own certificate, while it does this the system may be unresponsive for up to 5 minutes. The same certificate then also needs to be installed on the IP Office Softphone user's PC.

Enabling HTTPS

1. Start IP Office and receive the configuration from the system.
2. Receiving the configuration will switch IP Office from simplified view mode to advanced view mode (security settings are not accessible in simplified view mode).
3. Select **File | Advanced | Security Settings....**
4. From the discovery menu select the IP Office and click **OK**.
5. Enter the systems user name and password for the security service user login. They will be different from the name and password used for IP Office configuration access.
6. Select  **Services**. The list of services should include one called **HTTP**. Select this service.



- a. If the service is not present then the system has not been upgraded to run IP Office Release 7.0 or higher software.
- b. The HTTP service affects all HTTP connections provided by the IP Office system. Changing its setting will affect applications that use HTTP connections to the IP Office. The only option that change be changed is the **Service Security Level**. The default is **Secure + Unsecure**, meaning both http and https can be used.

- **Unsecure Only**
HTTP port 80 available and used for phone files, embedded file manager, system file upgrade, one-X Portal directory services, DECT R4 provisioning, IP Office Video Softphone provisioning.
- **Secure + Unsecure**
This mode (the default) allows both unsecure HTTP (see above) and secure HTTPS (see below) connections.
- **Secure, Low**
HTTPS port 443 available and used for DECT R4 provisioning, IP Office Video Softphone provisioning. This option allows secure access to that service using TLS, and demands weak (for example DES_40 + MD5) encryption and authentication or higher. The service's unsecured TCP port is disabled.
- **Secure, Medium**
This option allows secure access to that service using TLS, and demands moderate (for example DES_56 + SHA-1) encryption and authentication or higher. The service's unsecured TCP port is disabled.
- **Secure, High**
This option allows secure access to that service using TLS and demands strong (for example 3DES + SHA-1) encryption and authentication, or higher. In addition, a certificate is required from the client (usually IP Office). For further details of security certificates see the IP Office Security Mode section in the IP Office manual.

7. Click on the  icon to save any changes you have made to the security settings.

2.2 Using DHCP

This manual shows the user login being performed by directly entering the IP address of the IP Office as the **Login Server**.

If the user PC is configured as a DHCP client, DHCP can be used to automatically provide the **Login Server** details to IP Office Softphone. This is done by adding an **Option 120** to the DHCP scope used for the user PCs. The option value should contain the IP address or the domain name of the IP Office.

Note that this method cannot be used for HTTP login to IP Office Softphone.

2.3 Troubleshooting

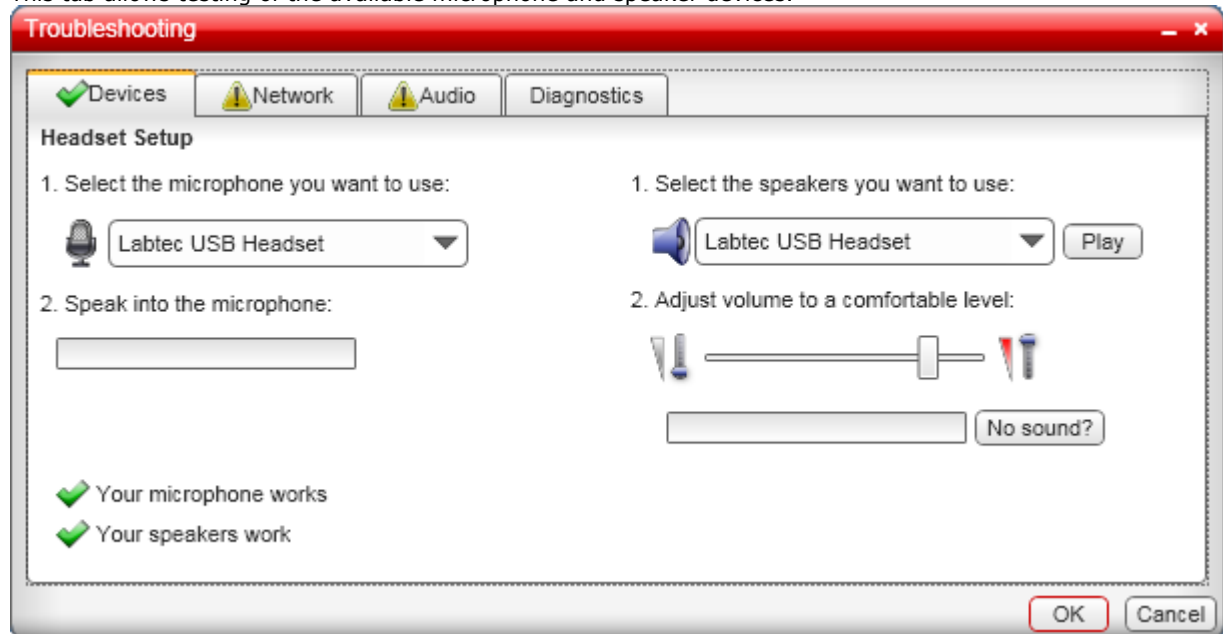
The IP Office Softphone application includes a number of internal menus to add with troubleshooting of user call issues. You can use these while at the user PC or you can guide the user through the use of these screens and have them provide you with the log file of results.

1. Select **Help | Troubleshooting**.

2. The **Troubleshooting** tool is displayed. The tool is divided into 4 tabs.

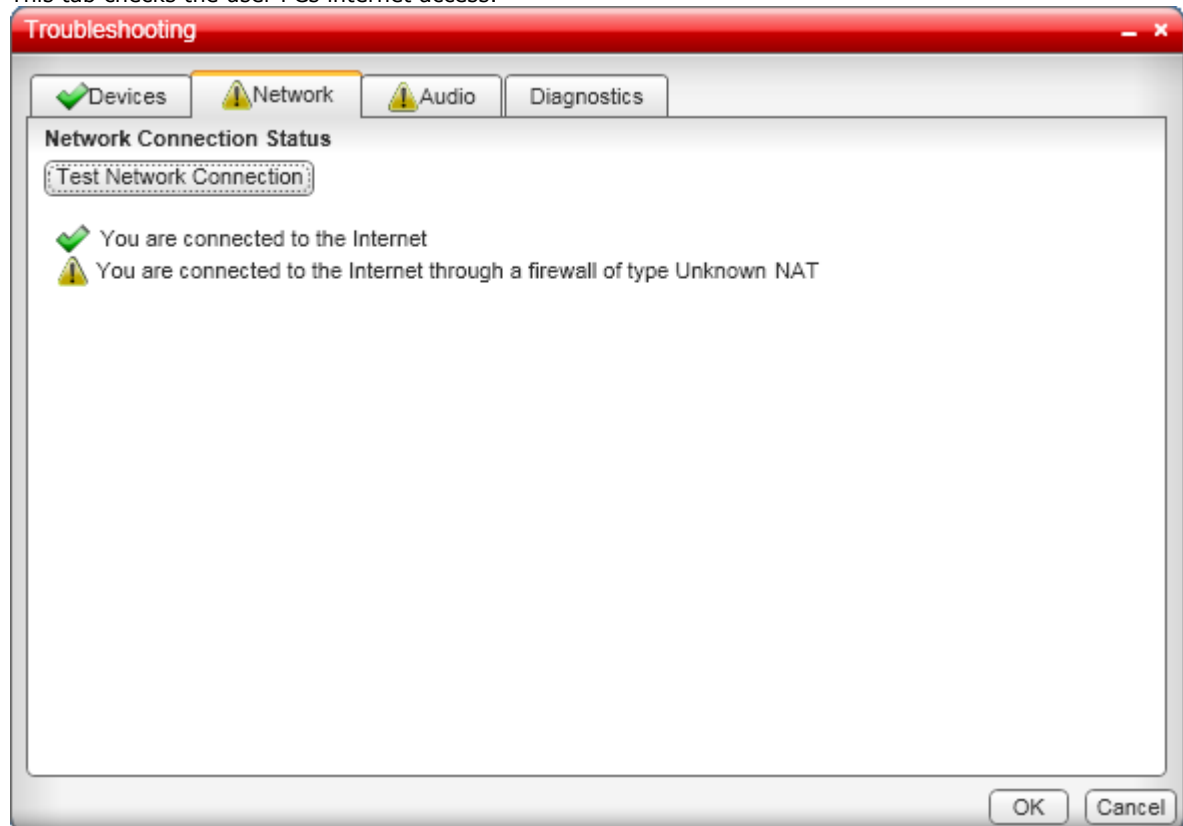
- **Devices**

This tab allows testing of the available microphone and speaker devices.



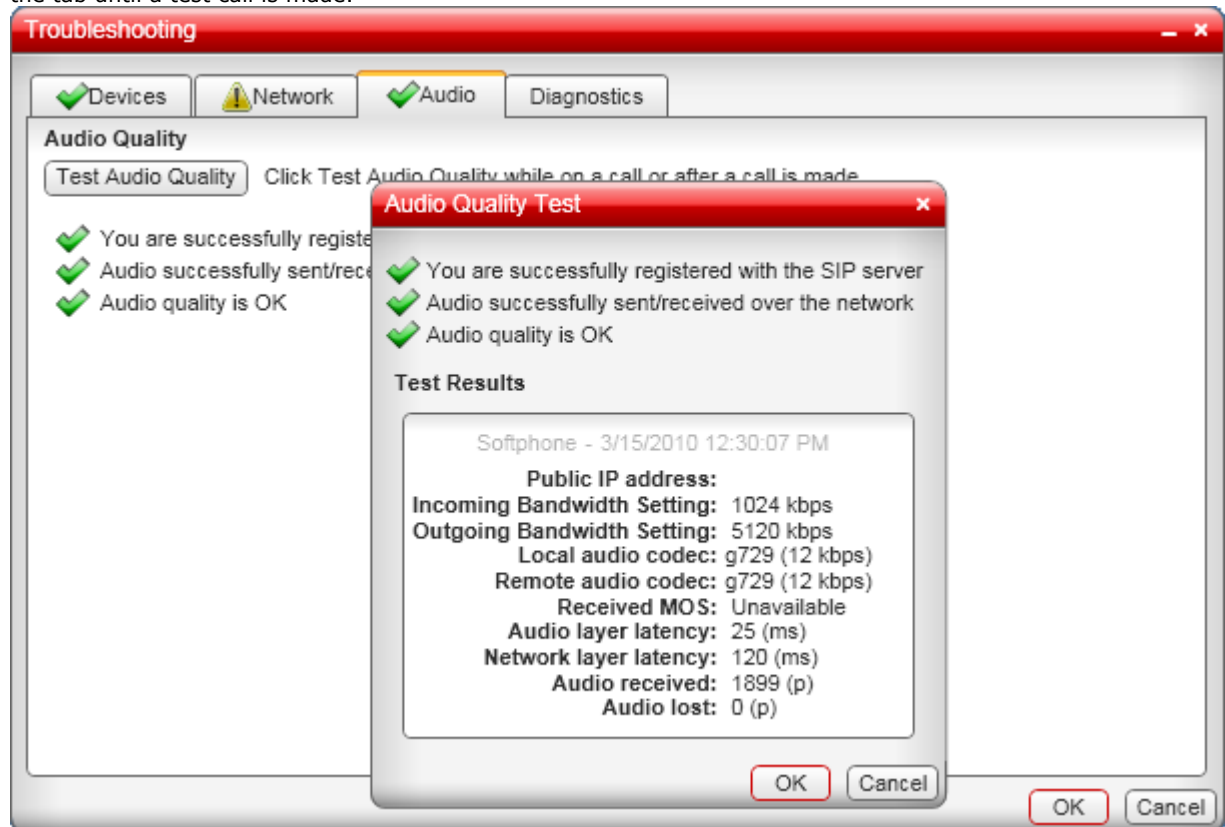
- **Network**

This tab checks the user PCs internet access.



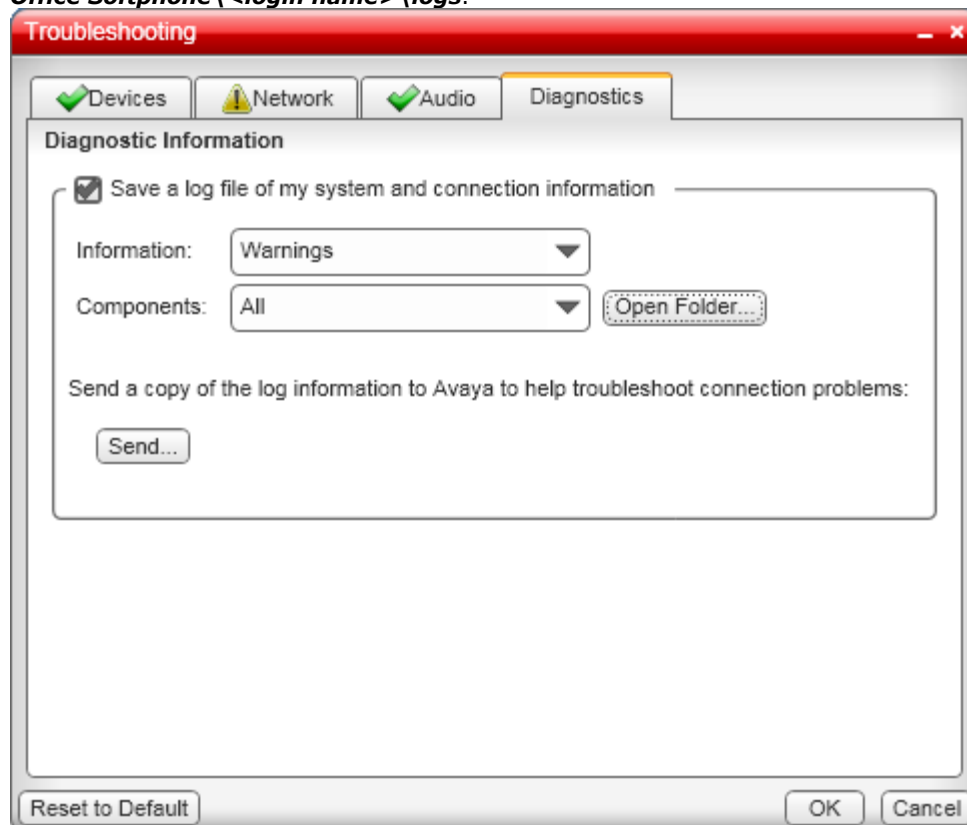
- **Audio**

This tab allows measurement of audio performance during a call or after a call. Ignore any errors shown by the tab until a test call is made.



- **Diagnostics**

This tab allows you to configure the IP Office Softphone to keep a log file of its operation. On a Windows PC the file is saved to **C:\Documents and Settings\<Windows user name>\Application Data\Avaya\IP Office Softphone\<login name>\logs**.



- A separate log file may be produced for IP Office Softphone crashes. On a Windows PC the file is saved to **C:\Documents and Settings\<Windows user name>\Local Settings\Temp\Avaya**.

2.3.1 Frequently Asked Questions

The following are common questions regarding IP Office Softphone operation.

Problem: The IP Office Softphone cannot log into even though the username and password are correctly entered.

- **Answer:** In many cases, this is because the **System/LAN1/SIP Registrar** tab has a **Domain Name** entered for SIP registration purposes that is not actually qualified on the network, in other words it is not a true DNS Name. The workaround is to just delete this entry and just use the IP Address of the IP Office.

Problem: I see a number of SIP Extensions created in IP Office that I cannot delete.

- **Answer:** When you log in with IP Office Softphone, a temporary extension is created in the IP Office configuration. The extension record cannot be edited or deleted. The extension record is automatically deleted approximately 5 minutes after the IP Office Softphone is logged out.

Problem: After first use of IP Office Softphone, subsequent changes to users and group are not reflected in the IP Office Softphone directory until the IP office is rebooted

- **Answer:** The IP office can take up to an hour to update IP Office Softphone directories with IP Office directory changes. Patience my young Padawan.

Problem: How do I fully remove IP Office Softphone to a state as if it had never been previously installed.

- **Answer:** If you want to repeat the first time install factory default settings, after removing the existing IP Office Softphone using the Windows Control Panel, delete or rename the following folders.

```
<system-drive>:\Documents and Settings\<windows username>\Application Data\Avaya\IP Office Softphone  
<system-drive>:\Documents and Settings\<windows username>\Local Settings\Application Data\Avaya
```

2.3.2 Notes

The following special notes apply to softphone operation on IP Office compared to other phone types:

- When a video call is put on hold, any hold reminder call will be audio only when answered.
- A softphone user can reject a reminder call, other type of phone users cannot.
- The IP Office Softphone does not support IP Office account codes.

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