IP Office 9.0

Softphone User Guide (Mac)

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Chapter 1. Introduction

1. Introduction

The Avaya IP Office Softphone enables you to make VoIP voice and video calls, send and receive instant messages, share online status (presence) information, and exchange files. It implements SIP-based standards for phone calls, IM and presence, allowing you to work with different VoIP service providers. The IP Office Softphone also uses XMPP-based standards for IM and presence.

Your system administrator has either configured the Avaya IP Office Softphone on your behalf or has given you instructions on configuring it yourself.

1.1 Standard Telephone Features

The IP Office Softphone for Mac has all standard enterprise telephone features, including:

- Call display and Message Waiting Indicator (MWI)
- Speakerphone and Mute
- Hold
- Call history – list of received, missed, and dialed calls
- Call transfer
- Auto answer
- Six-party audio conferencing
- Six-party video conferencing

1.2 Enhanced Features and Functions

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

- Video
- IM and presence using the SIP SIMPLE protocol or the XMPP protocol
- IM conferencing (group chat) via an XMPP account
- Corporate chat rooms
- Contact list containing the individual user's contacts
- Directory containing names from a shared LDAP directory
- File transfer via an XMPP account
- Automatic detection and configuration of audio and video devices
- Acoustic echo cancellation, automatic gain control, voice activity detection
- Support for DTMF (RFC 2833 or inband DTMF)
- Support for the following audio codecs:
    - DVI4, DVI4 Wideband, G.711aLaw, G.711uLaw, G.722, G.729, GSM, iLBC, L16 PCM Wideband, Speex, Speex FEC, Speex Wideband, Speex Wideband FEC
- Support for the following video codecs:
    - H.263, H.263+ 1998, H.264
- Automatic selection of the best codec based on the other party's capability, the available bandwidth, and network conditions. The softphone switches the codec within a call in response to changing network conditions.
- Integration with a SIP deskphone, so you can use either the deskphone controls or screens to control a phone call
- Compliance to 3261 SIP standard.
- XMPP compliance as follows:
    - RFC 3920
    - RFC 3921

    Supported extensions:
    - XEP-0004
    - XEP-0016
    - XEP-0022
    - XEP-0077
    - XEP-0085
    - XEP-0092
    - XEP-0115
- Support for these firewall traversal solutions: STUN, TURN, or ICE

Chapter 2.
Making Phone Calls

2. Making Phone Calls
2.1 The Onscreen Softphone

The Softphone Menu
The menu contains the following items that are specific to the softphone:

- **Softphone** > **Preferences -** See Configuring the IP Office Softphone 36.
- **Edit -** Lists the actions that you can perform to the content and display of the message you are sending
- **View -** Changes how the softphone looks. Also lets you view the message archive and chat rooms (if you are a member of one; see Chat Rooms 23).
- **Contacts -** Lets you work with contacts
- **Actions -** Lists the actions that you can perform, depending on the current "state" of the softphone. For example, if a contact is selected, it lists all the actions that can be performed on that contact.
- **Help -** Provides access to various service-related features.

The Softphone Toolbar
The toolbar has various buttons, including the voicemail indicator and missed calls indicator. See the following table for a list of buttons and descriptions:

Show or hide the dial pad	Voicemail – a notification icon appears above this icon to indicate the number of available voicemail messages
Show or hide video	Missed calls – a notification icon appears above this icon to indicate the number of missed calls
Speakerphone	Auto Answer
Adjust the speaker volume	Anonymous Calling – does not display your name or number
Mute the call	Dashboard menu – this button is disabled in this release

Receiving an Online Status Request
When you start the IP Office Softphone, one of the first things you will see (if presence is enabled) is an Online Status Request dialog. You can ignore or allow these requests. When you allow this request, your contacts can see if you are busy, away, or free to communicate. For more information see Sharing Online Status 30.

Compact View
To display a compact view of the softphone, hide the dialpad, and hide all the resource tabs click View > Hide.

2.2 Making a Call

Place the call as described in the table below. The outgoing call opens in its own call panel, below any other existing call panels. You will hear a ringing tone while the softphone attempts to make a connection.

Option	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. 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.)
Control-click a contact or previous call	**Contacts or History tab**	Control-click an entry from the Contacts or History tab and choose **Call** or **Video Call**. (If the tab contains lots of entries, first search or filter the list.)
Hover over a contact	**Contacts tab**	Hover over the right side of the contact to reveal contact menu options. Click **Call** to place a call using the primary phone number for this contact. You may have to manually add the primary call account in the contact profile.
Dialing	**Dialpad**	1. If the dialpad is not visible, click the **Show/Hide** dialpad button. 2. Click the numbers on the dialpad to enter the phone number. 3. Click the **Call** button or press **Enter**.
From an instant message	**IM window**	Click the menu at the top of the IM window and choose **Call** (this option is only available if Primary Call has been set for this account in the contact profile).

Using Auto-Attendant

If you know that your call will be answered by an auto attendant and you know what menu items you will choose, you can include those menu items (DTMF) in the phone number when you dial it:

- Before the first DTMF number, include at least one capital P.
- You can include other Ps. Each P causes the softphone to wait one second before sending the next character.
- At the end of the input, you must include a semicolon character.

  Example: To dial a number, add a 3-second delay and then press 44, enter this in the call entry field: *604551212PPP44;*

  Example: To dial a number, add a 6-second delay, then press 1 then 3 then 2, each with a two second delay: *604551212PPPPPP1PP3PP2;*

Hiding your Identity (Anonymous Calling)

You can hide your identity on a call, so that the other person will not see your name or number on their phone. Your ID will be hidden for all outgoing calls until you turn off **Hide my number** mode .

Anonymous Calling is automatically turned off when you shut down.

Placing Multiple Calls

You can place multiple calls. There is no limit to the number of calls you can make, although eventually the quality of audio and video will degrade because of limitations on the computer.

1. Enter the number to call in the call entry field.
2. Click **Call**.
3. Enter the second number to call in the call entry field. The first call is automatically placed on hold.
4. Switch between the calls by clicking Resume on the desired call panel. That call becomes the active call and the other calls are placed on hold.

2.3 Handling Incoming Calls

The IP Office Softphone must be running to answer incoming calls (if it is not running, incoming calls are directed to voicemail; check with your system administrator).

The new call appears in its own call panel. In addition, the **Call Alert** box appears, even if the softphone is minimized. For information on call alerts see Preferences – Alerts & Sounds 36.

Options for incoming calls:

- Click **Answer** to receive the call. If you are on another call, that first call is automatically put on hold. You are now speaking with the new caller.
- Click **Decline**. There will be a busy signal. The call is directed to voicemail if you have this service.
- Click **Video**. To answer a video call and start sending your video immediately.
- Click **Audio**. To answer a video call without video. You can add video to this call if you choose to later in the conversation.

Auto-Answer

Auto-answer is initially configured to automatically answer a call after one ring and to send only your audio when the call is established. You can set the softphone to automatically answer all incoming calls. To change this configuration choose Preferences > Call Automation. From this menu you can select the amount of time desired before the softphone automatically answers a call and you can select the type of media that you wish to answer the call with.

- **Note:** Auto-answer is automatically turned off when you shut down.

2.4 Established Calls

Once a call is placed you can perform a number of actions. See the following for more information:

- Placing multiple calls 13
- Adding a Contact 28
- Transferring a Call 15
- Adding Video 16
- Merging calls 17

You can also adjust Audio Controls such as:

- Speakerphone
- Volume control and mute

Ending a Call

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

2.5 Transferring a Call

2.5.1 Basic (Unattended) Transfer - Transfer this Call

To transfer an active call:

1. Click the **Transfer** button. The call is put on hold and a call entry field appears.
2. Type a name or number, or drag a contact into the field.
3. Click **Transfer**.
4. If the call panel shows **«calling »** do not hang up immediately: if the other person does not answer and has not activated voicemail, the call will return.
    - Alternatively, if your administrator has set a "transfer return time," you can hang up and if the other person does not answer, the call will come back to you once the transfer return time expires. If you have hung up and have not set a transfer return time, the call will not be returned.

2.5.2 Attended Transfer - Call then Transfer

1. Click the **Transfer** button.
2. The call is put on hold and a call entry field appears.
3. Type a name or number, or drag a contact into the field.
4. From the **Transfer** drop-down menu select call or cancel. If you cancel the transfer request you are returned to the first call.
5. The softphone calls the second person.
6. When the other person answers the **Transfer Now** button is enabled.
7. When you are ready, click **Transfer now**. The call panel closes.
8. If the other person does not want to take the call, click **Cancel** and return to the first call.

2.6 Video Calls

2.6.1 Placing a Video Call

To place a video call from the dashboard, click the down arrow from the Call drop-down menu on the dashboard and choose Video call. If you mostly make video calls, you can Option-click this down arrow to reveal the **«Set video Call as default action»** menu item.

To place a video call from the Contact List or History:

1. Control-click on the contact to call.
2. Select **Video Call** from the menu. This option is only available when the Primary Call account has been identified.

2.6.2 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 has the option to send their video to you.

2.6.3 Other Party Adds Video

If the other party starts their video, your video panel 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** on the call panel.

2.6.4 Pausing and Resuming Video

- Click **Stop Video** on the call panel or close the video window to pause sending your video.
- Click **Start Video** on the call panel to resume sending your video; the video window will open.
- Click **Show/Hide Video** on the toolbar to start or stop sending your video.

2.6.5 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 (under **Preferences > Codecs**). 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.

2.7 Conference Calls

2.7.1 Merging Calls

From an existing call:

1. Place and establish a call.
2. Place a second call. The first call is put on hold.
3. From the options menu select **Merge Calls**. A conference is established.
4. You can invite other participants to this conference by placing the additional call to that extension and selecting **Merge Calls** (as in step 3) once the additional call is established.

2.7.2 Ending the Conference

To hang up on everyone, click the **End** button. If participants remain, the conference will continue without you.

2.7.3 Suspending the Conference

To suspend the conference, click the **Hold** button. While the conference is on hold, the participants are still able to speak to one another.

2.7.4 Video Conference Calls

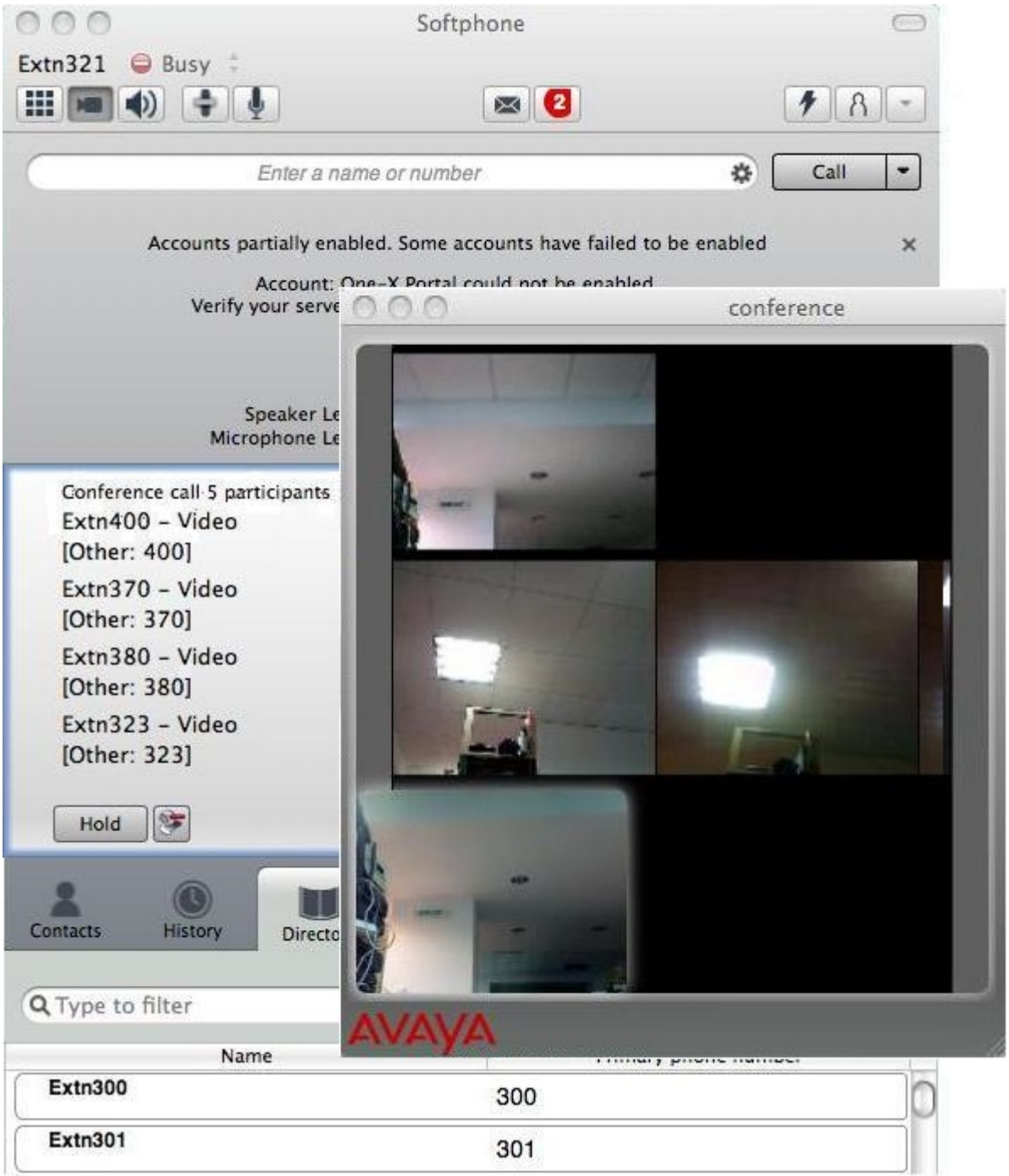
When you start a conference from established calls, video is included if at least one of the calls already includes video. The video is then sent to all participants.

Ensure that all the participants you invite to the conference are sending video prior to merging their calls.

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.

- **Note 1:** If you start an audio conference, video is not included. Once you begin an audio conference, you cannot turn it into a video conference without restarting the process.
- **Note 2:** If you encounter "overlapping" of participants in the video window, enlarge the width of the window by clicking and dragging the left or right edge of the window frame to the desired width. The participants will align themselves horizontally.

The following image illustrates a typical video conference call (one that includes five participants). Note how you can change the size of the video window to manipulate the position of each participant's video feed by clicking and dragging the lower right corner of the video display.



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, other participants will no longer receive video. In the event that you experience video errors, request that the conference host reestablish video to all parties by disabling and re-enabling video.

If the conference host places a conference on hold in order to invite more members, all conference members must manually restart their video when the conference resumes. Members who do not restart their video will be restricted to audio conferencing since, as stated above, the conference host serves as the host for other video.

2.8 Voicemail

The voicemail icon appears at the top of the phone and includes a notification when new voicemail is available. Click the icon to automatically connect to voicemail and listen to available messages.

Chapter 3.
Instant Messaging

3. Instant Messaging

In order to use the instant messaging (IM) feature of the softphone, you must be connected to one-X Portal. You can send and receive IMs, but you can also send and receive files through IM.

- **Using Softphone with No Password**
  You can be configured to use Softphone without requiring a password. However, in that case the IM and presence features do not work and display an error message if used.

3.1 Sending an IM

There are two ways to select the person to send an IM.

1. From the Contacts tab, either:
   - Control-click on the contact and choose **Send IM**. The contact must have a valid XMPP address.
   - Click on the IM icon that appears to the right of the contact name.
2. Type the message. Include emoticons and formatting, as desired.
   - To insert a return in the message, press **Ctrl+Enter**.
3. Press **Enter**.
4. Click in the chat window for more options.
   - **Note:** If the status of the recipient is set to Do Not Disturb, the message will not be received.

3.2 Receiving an IM

When an IM is received, either the IM window or a Call Alert pops up. To control which window appears, from the menu, choose **Softphone > Preferences > Application**.

3.3 Sending a Broadcast IM

You can send an IM to several people at one time. A broadcast IM is not a conference IM.

- With a broadcast IM, each recipient can reply to the IM, but only you will see these replies; the other recipients will not see these replies.
- With a conference IM, everyone can see the messages that each party sends. See Group Chat (ad-hoc conference IM) 23.

1. Command-click two or more contacts to select multiple recipients.
2. Control-click and choose **Broadcast Instant Message**. The Broadcast Instant Message window appears.
3. Click on the **To** button to add more contacts if desired. The window displays names of all the selected contacts and the individual display names of all the contacts in any selected groups. Contacts that do not have a softphone address are not included in the list.
4. Type the message. Include emoticons and formatting, as desired.
5. Press **Send** or **Enter**. The IM is sent.

IM responses are displayed to you in a regular Instant Message window; you are then in a regular IM with that participant.

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, Control-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 22 to Control-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."

3.4 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 23 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 contacts.
   Contacts must be online.
2. Control-click the last selected contact and choose **Start Group Chat with...** The invitation dialog appears.
3. Change the message, if desired, and click **Invite**. The Group Chat window appears.
4. To invite more participants, click the **Add** button and select contacts from the list that appears.
5. To remove participants, select the participant and click the **Remove** button . Alternatively, Control-click the desire contact in the group chat and select **Remove participant**.
6. To start a private conversation with a participant, Control-click their name and select **Start private conversation** .
   - **Note:** You cannot start a group chat with the 'everyone' contact because it is a special user. If you Control-click on 'everyone' and select **Start Group Chat with...** 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.

3.5 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 rooms via the **View** menu.

1. Obtain the names of the chat rooms to which you belong from your system administrator
2. Choose **View > Chat Rooms**. (If the menu item does not show, make sure the appropriate XMPP account is enabled). If you have more than one XMPP account, you will also have to select the account that the chat room belongs to.
3. Select the chat room and click **Join Chat Room**.

The Chat Room window appears showing you and other people who have already joined the chat room session.

Rejoining a Chat Room

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

3.6 Viewing the Call History

You can view your recent activity for any contact or group chat session. This is only possible if you have had call activity with the selected contact.

1. Control-click a contact and choose **View Call History** or go to the menu bar and choose **View > Call History**.
2. Select your name to view your group chat and chat room sessions
3. Select another person to view instant messages with that person.

3.7 Sending and Receiving Files

3.7.1 Sending Files

If you have an XMPP account, you can send files to another contact who has a Jabber address (a contact that has an XMPP account).

1. Control-click a contact and choose **Send Files**. A dialog box opens.
2. Select the files to send and click **Open**. The Send Files dialog appears with a "waiting" message. To cancel the file transfer before the other person retrieves the files, click **Cancel**.

It is possible to drag-and-drop a file into the IM window.

3.7.2 Receiving Files

If you have an XMPP account, another person with an XMPP address can send you files. When a person sends you a file:

1. A File transfer dialog box opens.
2. Click **Save** to receive the file or **Decline** to stop the file transfer.

Chapter 4.
The Contacts Tab

4. The Contacts Tab

The Contacts tab displays your contacts. Each contact is shown with presence information and icons for single-click phoning and IMing. If the Contacts tab is not showing, go to the menu bar and choose **View > Show Contacts**.

Contacts are typically organized into groups. The IP Office softphone includes built-in groups. You can add more groups as desired. To change the detail and layout of the contact list choose Contacts from the menu bar and set the desired options.

4.1 Populating from the Contacts List

At any time, but particularly when you first deploy the IP Office Softphone, you should populate the contact list with contacts from an external source.

4.1.1 Populating from a LDAP Directory

If your system administrator has set up an LDAP directory, you can create contacts from it by doing the following:

1. Make sure the softphone is configured to connect to the LDAP directory.
2. From the menu bar choose **View > Show Directory**.
3. From the **Directory** tab, select people, then Control-click and choose **Add to Contacts**. When you have "contacts created from directory," the contacts are:
   - Automatically updated whenever the corresponding directory entry changes
   - Automatically deleted if the corresponding entry is deleted from the directory

4.1.2 Populating from the Mac Address Book

You can populate the softphone contact list by pulling in the contacts from your Mac Address book.

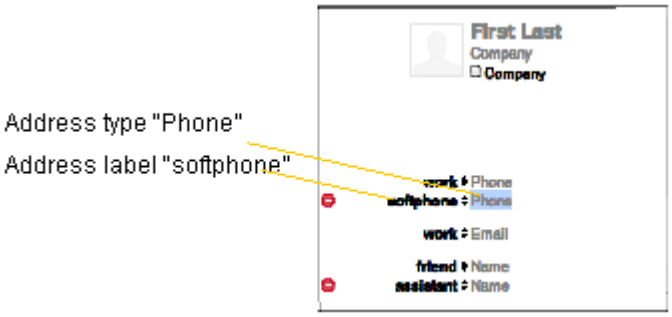
Enabling the Mac Address Book

Enable the Mac Address book account that is automatically set up in the softphone.

Setting up for Availability

If your Mac Address book contains phone numbers that you know you can use to obtain online availability information about the person via your SIP account, you can perform this optional setup:

1. In the Mac Address book, modify the contact's entry so that the type is "Phone" and the label is"softphone" (all lower case):



   When you enable the Mac Address Book account in the softphone, the contact will be pulled in with the specified phone number already set up as a softphone address.

2. Open the contact and choose the specified phone number in the Presence field.
3. Click **OK**. The softphone will obtain availability information for this contact.

4.1.3 Populating by Importing Contacts

You can populate the contact list by importing from an external file or files. Your system administrator may have placed a file on a server for you to import. You can also import your own file or files, as many as required. The new contacts will be added to the existing contacts.

Importing

You can import a contact list from:

- CSV 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.
- vCard. A vCard file (*.vcf file). A vCard is an electronic business card that is often attached to an e-mail.

1. From the menu bar, choose **Contacts > Import Contacts**. The Import Contacts wizard starts.
2. Select the file type and file location, and specify whether you want to replace or append to the existing contact list.

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 softphone will use to interpret the meaning of each column. The columns can be in any order. For a complete list of headings, see Contact List Headings 44. Key headings are:
   - sip-address
     The IP Office softphone recognizes a value in this column as a softphone address and considers the address as one that can be phoned and as an address that can be used for IM/presence (if SIP is being used for IM/presence).
   - xmpp-address
     The IP Office softphone recognizes a value in this field as a Jabber (XMPP) address and will map this field to the Instant Message contact method for the contact. The softphone considers a Jabber address as one that can be used for IM/presence (if XMPP is being used for IM/presence).
   - display-name, given_name, surname
   - business number
   - presence_subscription
     Complete this column in one of these ways:
     - If you only want to share presence information with some of your contacts, fill in this column in the file. Enter "true" for contacts whose online presence you want to see, leave blank or enter "false" for others. During the import, you will be able to choose to share presence with only these contacts. The IP Office softphone will subscribe to the presence of these "true" contacts, assuming that the user has a SIP (if using SIP for presence).
     - If you want to share presence with all your contacts (or with none), ignore this heading. During the import you will be able to choose to share with all (or none) of your contacts.
3. Save the file as *.csv.

Exporting Contacts

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

1. From the menu bar, choose **Contacts > Export Contacts**. The **Export Contacts** wizard starts.
2. Select the file type and file location for the created file. A file of the specified type is created.

4.2 Managing Contacts and Groups

4.2.1 Adding a Contact

1. On the softphone, select the Contacts tab.
2. Click , or control-click a group and choose **Add Contact to Group**. The Contact Editor dialog appears.
3. Enter a phone number, select the type, enter the number, and click the **Add** button . The new number appears in the list.

Field	Description
Contact Summary	
Group	Click to show the list of groups. Check each group this contact should belong to.
Primary Call	If the contact has more than one number, select the primary number. This number will be used with single-click calling.
Primary Presence	This field appears only when the contact has more than one Softphone number or Instant Message address. The primary presence is used as follows: • The presence icon on the contact list shows the online status for this address. • The single-click action for instant messaging uses this address. You can still send IMs to this person at their other addresses, but you must Control-click and choose the desire address from the context menu.
Other Sections	
Display Name *(required)*	The display name for this source of information. For example, the display name from the XMPP contact list.
First Name, Last Name	Optional.
Presence	This field is automatically populated when you enter an address in the Softphone or Instant Message field. It indicates that you are sharing online presence information using this address. The address is also shown in the list in the Primary presence field, above.

4.2.2 Adding a Contact Using an Existing Address

You can add a contact by capturing existing information:

1. If you are on a phone call with a person who is not a contact, click the **Add to Contacts** icon in the call panel. Alternatively, from the **History** tab, Ctrl-click the desired contact and select **Add Contact**.
2. The **Contact Profile** dialog appears. Complete the dialog as desired and press **OK**.

4.2.3 Updating Contacts from the Directory

The system performs contact updates automatically during each startup, so there is no need to update your contacts manually. If you would like to update your contact list, restart the software and allow the system to update your contacts for you.

4.2.4 Modifying the Contacts List

Changing Contact Information

To change the information for a contact, control-click the contact and choose **Edit Profile**. The Contact dialog appears. For more information, see Adding a Contact 28.

Moving or Deleting a Contact

- To move one or more contacts to a different group, select and drag the contact(s) to the title bar of the new group
- To delete one or more contacts, select the contact(s), control-click, and choose **Delete** or **Delete Selected Items** . If a contact belongs to several groups, it is removed from all groups.
- Each time you log in, the softphone repopulates the "system" group, so any contacts moved or deleted from this group are replaced when you restart the software. If the contact you wish to move exists in the system group, you must copy the contact to another group. Control-click the contact and choose **Edit Profile**, then select an additional group from the **Group** drop down menu.
    - **Note:** Only users with valid XMPP accounts appear in the "system" group.

Adding, Deleting or Renaming Groups

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

4.3 Using Contacts

4.3.1 Sharing Online Status

Softphone shares your online status with contacts that have a softphone address, and you can set up the softphone to view the online status of other contacts. Typical online statuses are **Available**, **On the phone**, **Busy**, etc.

To change your online status, select a status from the drop-down options next to your name on the softphone. See Setting up Online Status Indicators 30.

4.3.2 Watching Others' Status

To watch a contact's status, the presence feature must be enabled for that contact:

- If you create a contact via the Contact Profile, the softphone will automatically obtain status information if the contact has a valid XMPP address
- If you created contacts by importing a contact list, you can specify during the import whether you want to share presence information. See Populating by Importing Contacts 27.

4.3.3 Publishing Your Status

When you choose to share your presence information with an external contact (someone whose address is outside of your corporate network), the softphone sends a notification to that contact. The notification requests the contact to share his or her presence information with you. If the contact accepts this request, the icon beside the contact's name indicates his or her status.

4.3.4 Receiving an Online Status Request

Someone who is not one of your contacts can add you as a contact on their end. To respond to the request:

Option	Button	Comment	Result
Create a new contact	Allow	This option is selected for you if you do not currently have a contact with this SIP or XMPP address.	Allow the request and create a new contact using this address. Because you allow the request, you will no longer be bothered by requests from this person. In addition, this same request will automatically be sent from your softphone to the other person, so that you can see their online status.
Update an existing contact	Allow	This option is selected for you if you already have a contact with this SIP or XMPP address but you were not previously sharing your online status with this person.	Allow the request and add this address to an existing contact (if the softphone has found an appropriate match). Because you allow the request, you will no longer be bothered by requests from this person. In addition, this same request will automatically be sent from your softphone to the other person, so that you can see their online status.
Either option	Ignore		Ignore the request. The other person will not be able to see your online status. The other person will not be added to your privacy settings. The Online Status Request can appear again in this session or a future session.

4.3.5 Setting Your Online Status

Changing your Status

Click the down arrow beside the online status indicator on the softphone, and select the desired value.

Setting up Online Status Indicators

Indicator	Your Status	Others' Status
Available	Either: • You have set your status to this value. • The softphone has determined that you are logged on but not on the phone or idle. When you have this status, the softphone will automatically detect when you are idle or on the phone, and change the status to match. By default, your status is set to Idle when the Idle period expires. To set the Idle period, see Preferences – Application 36.	You can contact this person.
Busy	You have set your status to this value. The softphone will never automatically switch you out of this status; you must switch yourself.	You can contact this person.
Away	You have set this status manually. The softphone does not automatically switch you out of this status; you must switch yourself.	You can contact this person.
On the phone	Either: • 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. • 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 are on a call and do not want to receive a call.	The contact does not want to receive calls or messages, but you can contact them.
Do not disturb	You have set this status to indicate that you do not want to receive incoming call alerts or messages. Any missed calls are indicated in the toolbar and the History tab.	The contact can not receive messages.
Offline	You have set your status to this value. The other person sees you as offline, even though you are not actually offline. 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.
Set custom status	Enter your own status for your contacts to see.	

4.3.6 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.

1. In the contact list, control-click the selected contact or contacts and choose **Add Contact to Alert List**. The Alert List icon appears beside the contact.
2. Select the **Keep Contact on Alert List** if you want to see the next time the contact's status changes. When the contact's status changes, a notification appears.

4.3.7 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' (Control-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).

Chapter 5.
Using Other Resources

5. Using Other Resources

5.1 The History Tab

The History tab allows you to see your call history. Depending on your selection in the History tab drop-down menu, you will see

- All incoming and outgoing calls
- Only dialed calls
- Only received calls
- Only missed calls

From the menu bar, choose **View > Show History**.

5.1.1 Managing the List of Calls

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

- Delete the call
- Delete all entries in this list
- Edit the profile if the entry is a contact
- Add as contact. The Contact dialog appears. See Adding a Contact Using an Existing Address 28.

5.1.2 Phoning from History

You can control-click on an entry to place a call to this person, using the contact method that was used for this call. You can:

- Control-click on an entry and select **Call** or **Video Call** to place a call to this person, using the contact method that was used for this call.
- Place a call to this person and add them to a conference call that is in progress. For more information see Conference Calls 17.

5.2 The Directory Tab

The Directory tab is available only if your system administrator has set up the softphone to access a corporate directory.

To view the Directory tab go to the menu bar and choose **View > Show Directory**.

The name of your contact, their title and a phone number appears. Only one number appears for each entry. Other numbers might show if you try to call this person.

5.2.1 Phone a Person

Control-click an entry and choose **Call** or **Video Call**. The call is placed immediately.

5.2.2 Create a Contact

Control-click an entry and choose **Add to Contacts**. The Contact Editor window appears, populated with all the information from the directory (not only the information displayed in the tab).

Complete the window with any missing information that you want to record and press **OK**.

If the information for a person in the directory ever changes, you can control-click the entry and choose **Update Contact**.

Chapter 6.

Configuring the IP Office Softphone

6. Configuring the IP Office Softphone

From the menu bar, choose **Softphone > Preferences**. The Preferences window appears.

6.1 Preferences - Application

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

You can also enable or disable the Idle period, which is the period of time that passes before your presence is switched from Available to Idle. The default Idle period is 10 minutes.

6.2 Preferences - Alerts & Sounds

This panel lets you control the alert box and lets you assign sounds.

6.2.1 Enable Alert Displays

You can control whether the Call Alert box is displayed in different situations. You can also control how you are alerted to an incoming IM: either with a small IM Alert box or with the IM window itself.

6.2.2 Assigning Sounds

You can assign specific sounds to a variety of actions or "events."

1. Select the **Enable sounds** check box and select the check boxes for each desired event, or clear the **Enable sounds** check box to disable all sounds.
2. If enabling sounds, you can change the sound for each event: select the individual event. The value in Sound preference will change. Select the desired sound.

You can import sounds; these will be added to the list of sounds you can choose from when assigning a sound to an event.

6.3 Preferences - 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 select the device to use.

Field	Description
Headset Mode	
Microphone, Speaker	Change these fields only if you want to override the devices that the softphone automatically selected. In both these fields, select the headset you are using. The headset is the device that is usually used for the speaker (the sound you hear) and microphone (recording your voice). The only situation in which the headset is not used is when the Speaker Phone button on the dialpad is pressed. Therefore, unless you will always be using the softphone in speakerphone mode, you must make a selection here. Select the headset in both the Speaker device field and Microphone device field.
Zero-touch device configuration	Typically, leave on. When device configuration is on, you can change your audio or video device and the softphone will automatically detect the new device and start using it. 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.
Test Devices	For information on the Test Devices button, see Troubleshooting 40.
Speakerphone Mode	
Microphone Speaker	Same as headset mode, but for the device to use when speakerphone is one (on the toolbar). You can set different devices for the speaker and microphone: for example, you can set the speaker to the speakerphone and set the microphone to your headset. **Note:** The Speaker Phone button on the dialpad will be disabled if you do not have a speaker phone.
Other Devices	
Ring on	The device where you want to hear the phone ringing. Change this field only if you want to override the devices that the softphone automatically selected.
Camera	This field appears only on versions of the softphone that include video functionality. Change this field only if you want to override the devices that the softphone automatically selected.

Resolution	Leave at standard, or change the size as follows:
	
	• Set it to high if you have a good camera and a computer with a fast CPU. You will know that you have set the size too large if:
	  • Your computer slows down (the video is using too much CPU)
	  • The video shows black areas or is slow or jerky.
	• Typically set it to low only in special situations, for example, when using wi-fi in a hotel. You will know that you have set the size too small if the video is fuzzy. This field is identical to the Resolution field in **Media Quality > Video Quality**.

6.4 Preferences - Codecs

Change the settings on this tab only if advised to do so by your system administrator. Note that it is not possible to set a 'preferred' codec. IP office determines the order of audio codecs. However, it does not determine the order of video codecs.

6.5 Preferences - Media Quality

Field	Description
Audio Quality	
Reduce echo	Turning this feature on improves sound quality. This feature is typically on.
Reduce background noise	Automatically attempts to remove background noise. Typically on for the speakerphone.
Automatic gain control	This feature is typically on.
Preserve bandwidth	When this feature is on, the softphone stops sending audio when you are not talking. When this feature is off, the softphone always sends audio, which uses more bandwidth but can result in better call quality. Typically, this feature is off. However, if you are using a slow (dial-up or ISDN) connection, you can turn it on to improve performance.
Video Quality	

Resolution	Leave at standard, or change the size as follows:
	• Set it to high if you have a good camera and a computer with a fast CPU. You will know that you have set the size too large if:
	  • Your computer slows down (the video is using too much CPU)
	  • The video shows black areas or is slow or jerky.
	• Typically set it to low only in special situations, for example, when using wi-fi in a hotel. You will know that you have set the size too small if the video is fuzzy. This field is identical to the Resolution field in **Devices > Other Devices**.

6.6 Preferences - Call Automation

These settings let you configure how you want Auto Answer to handle incoming calls (when Auto Answer is enabled). See Handling Incoming Calls 14 for information on how to enable Auto Answer.

The Third-party Call Automation feature controls how the softphone handles external auto-answer requests. Ensure that this option is set to **Always answer with audio only**. You can select the option to **Answer with video if incoming call is a video call** if that is your preference.

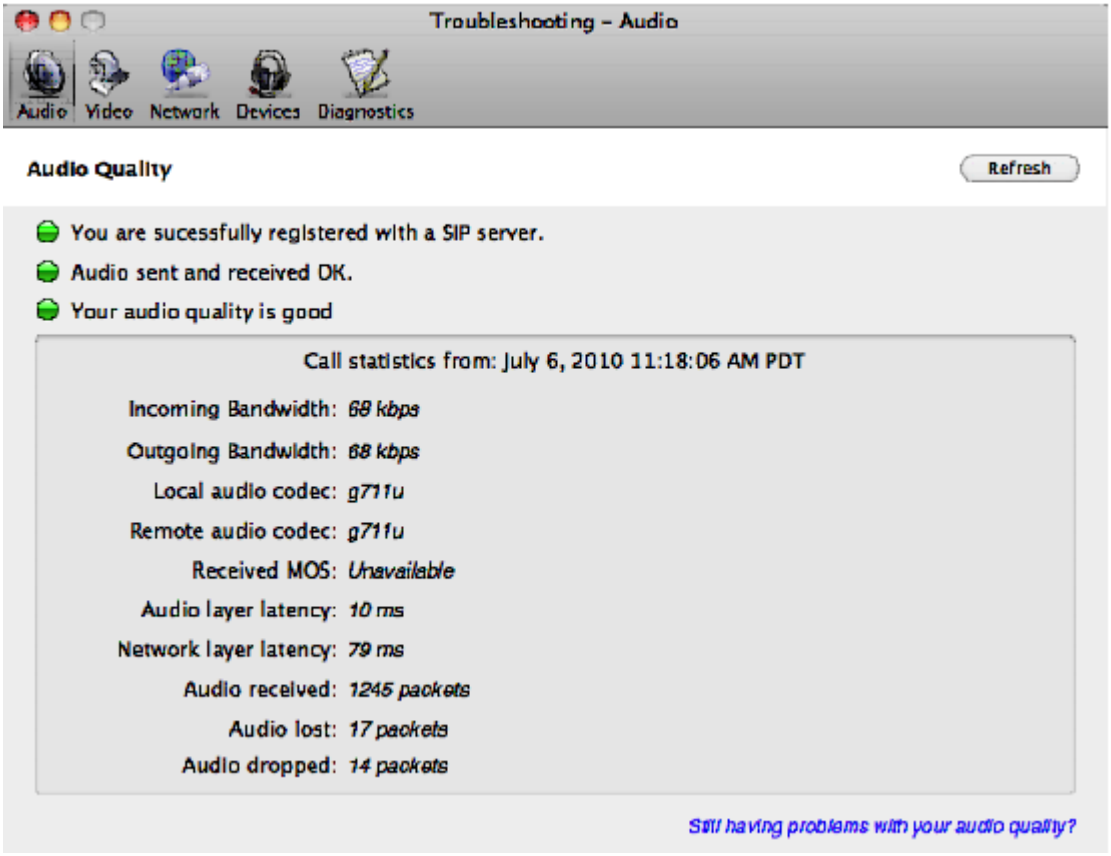
Chapter 7. Troubleshooting

7. Troubleshooting

From the menu bar, choose **Help > Troubleshooting**. The Troubleshooting window appears.

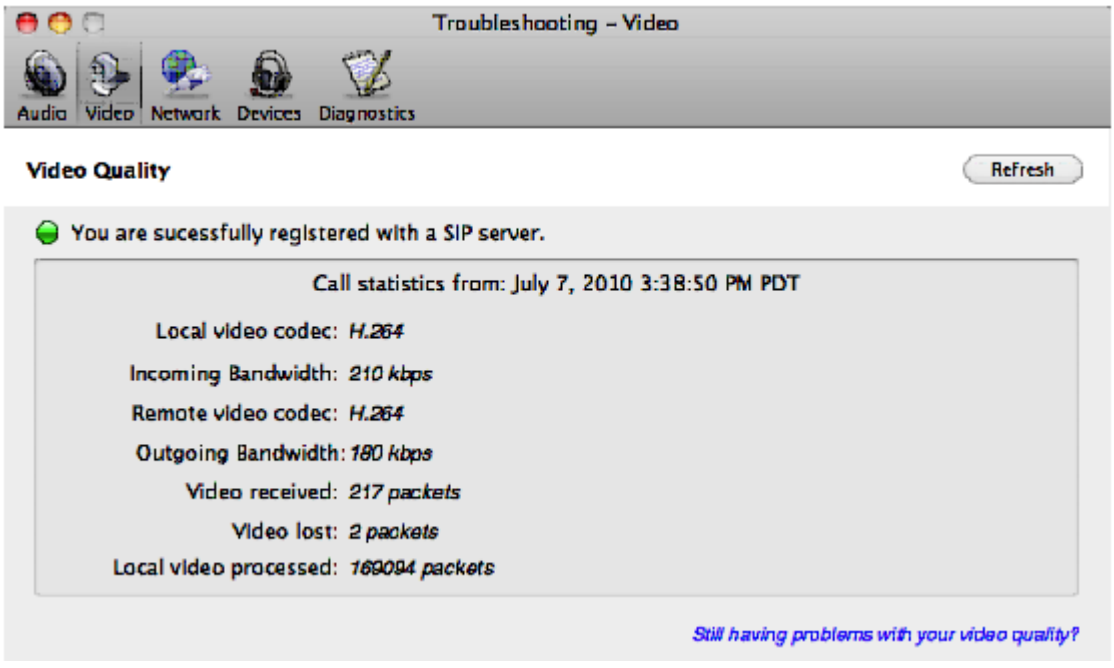
7.1 Testing Audio Quality

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).



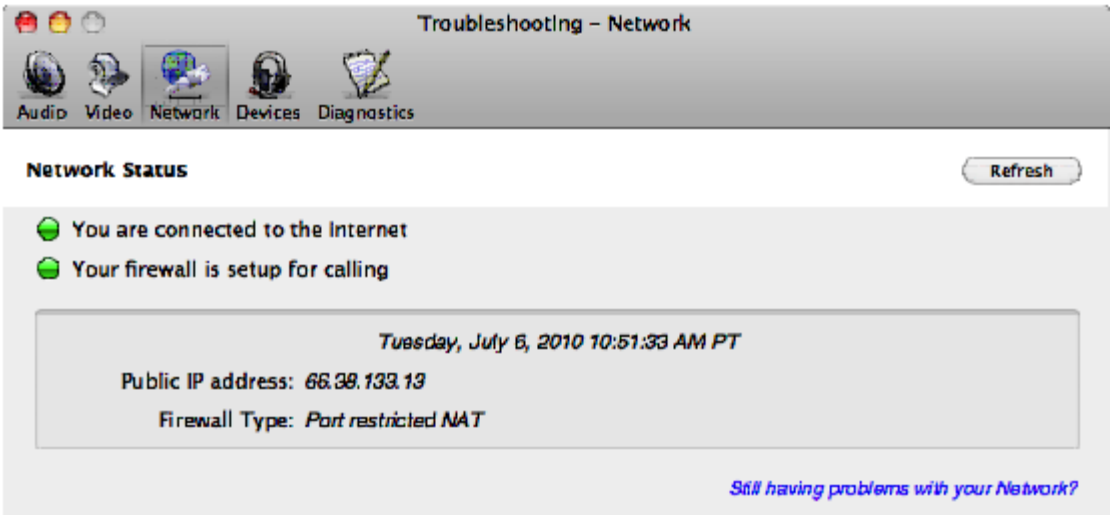
7.2 Testing Video Quality

While you are on a phone call, you can test the quality of the video. Note that to perform a valid test, you should be on an established call (not a call attempt).



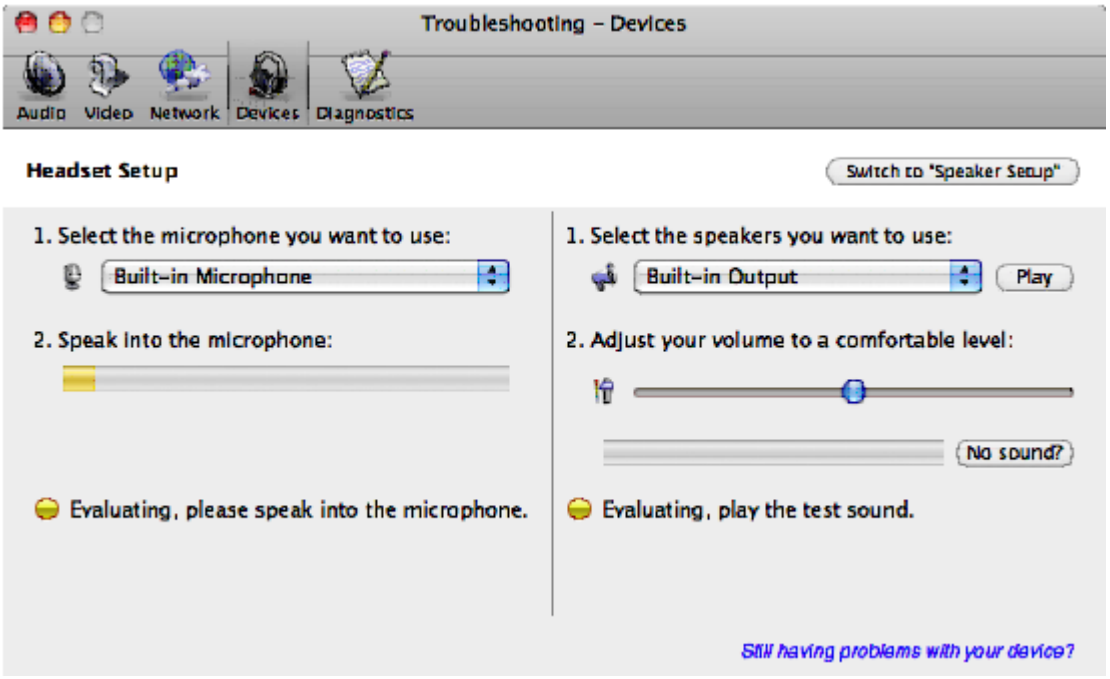
7.3 Testing the Network Connection

You can verify that you are successfully connected to the network.



7.4 Testing Audio Devices

You can verify that your microphone and speakers are working and can set the volume to a comfortable level without having to actually place a phone call.



7.5 Diagnostics

Only use this panel if instructed to do so by your system administrator.

To start logging IP Office Softphone activity:

1. Click **Start Logging**. The first Diagnostics Logging window appears.
2. Select the problem you are experiencing and click **Start Logging**.
3. On the second Diagnostics Logging screen, click **Finish**. Logging will start.
4. Perform the actions you want to capture; for example, attempt to make a phone call.
5. When done, display the first Diagnostics Logging window again and click **Send Report**. A window opens; select the report and click **Open Reports Folder**. When the report is successfully sent, a confirmation message appears on the first Diagnostics window.
6. Click **Stop Logging**.
7. Close the **Troubleshooting** window.

Chapter 8.
Contact List Headings

8. Contact List Headings

Following is a list of all the headings that are used in the softphone contact list. This list can be useful when formatting a contact list in order to import it into the softphone. For details, see Populating by Importing Contacts 27.

Heading	Description
business_number	
business_numbern, where n is 2 to 6	
categories	Maps to softphone groups.
default_address	Maps to the Presence field.
default_address_comm	Always specifies IM, if default_address is specified. This heading does not map to a Contact Profile field.
default_address_type	Specifies SIP or XMPP.
display-name	
email_address	
email_addressn, where n is 2 to 6	
fax_number	
fax_numbern, where n is 2 to 6	
given_name	
home_number	
home_numbern, where n is 2 to 6	
mobile_number	
mobile_numbern, where n is 2 to 6	
other_address	
other_addressn, where n is 2 to 6	
postal_address	
presence_subscription	TRUE or FALSE.
sip_address	Maps to the Softphone field.
sip_addressn, where n is 2 to 6	
surname	
web_page	
web_pagen, where n is 2 to 6	
xmpp_address	Maps to the Instant Message field. This field must always specify an XMPP address.
xmpp_addressn, where n is 2 to 6	

Chapter 9.
Glossary

9. Glossary

Term	Definition
Broadband	Broad or wide bandwidth. In data transmission, the wider the band, the more data it is possible to transmit in a given time span. A cable, DSL and ADSL connection to the network provide broadband for data transmission. A dialup or ISDN connection typically provide a narrow bandwidth for data transmission.
Codec	The format by which audio or video streams are compressed for transmission over networks.
Dial plan	The rules that the IP Office softphone follows in order to interpret the softphone address or phone number that the user has entered and to modify the number or address, as required, to ensure that the call will be placed successfully.
DTMF	Dual-tone multi frequency. DTMF is the system that is used in interactive voice-response menu systems such as the menu system for accessing voicemail messages. The DTMF system allows the user to interact with the menu by pressing keys on a dialpad or keyboard.
Firewall	A technology that prevents unauthorized people connecting to your computer and to the applications running on the computer.
IM	Instant Messaging. A technology that lets users send text message and files for near instantaneous delivery and display on each others' computers.
MWI	Message Waiting Indicator. An indicator that there is a voicemail message for the owner of an account.
Narrowband	In data transmission, the wider the band, the more data it is possible to transmit in a given time span. A cable, DSL and ADSL connection to the network provide broadband for data transmission. A dialup or ISDN connection typically provide a narrow bandwidth for data transmission.
Presence	An instant messaging feature that allows users to share information about their online status.
PSTN	Public Switch Telephone Network. The traditional land-line phone network.
SIP account	An account that provides the user the ability to make VoIP phone calls. The account encapsulates the rules and functions the user can access.
Softphone address	The address used to connect to a SIP endpoint. In other words, the "phone number" used in a VoIP phone call. For example, sip:joseph@domainA.com.
VoIP	Voice over Internet Protocol. A variation of IP used for sending voice data over the internet, in other words, used for making phone calls over the internet.
vCard	An electronic business card that is often attached to an e-mail. It often appears as a "signature block" that identifies the person, their title, and their business.
VoIP service provider	A business that provides a VoIP service, allowing a user to connect to the internet in order to make VoIP phone calls using the softphone. The VoIP service provider sets up a SIP account for the user.

Chapter 10.
Document History

10. Document History

Date	Issue	Changes
25th February 2014	**02c**	• General layout tidy.

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