



# **IP Office 7.0**

## **IP Office Softphone Installation**

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# **Chapter 1.**

# **IP Office Softphone Installation**

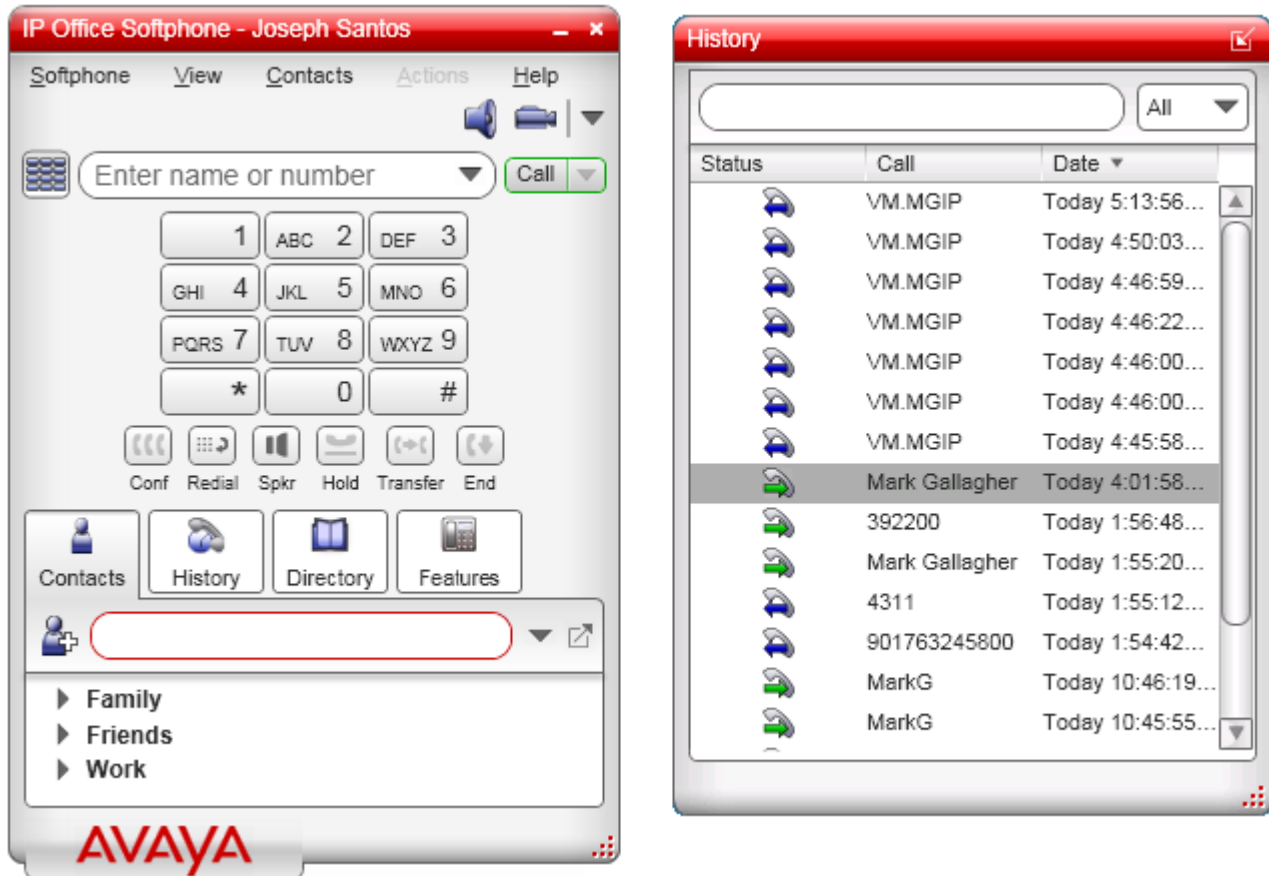




# 1. IP Office Softphone Installation

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.

The IP Office Softphone is supported with IP Office Release 6.0 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**.

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# 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 Manager.
  - 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.

## License Requirements

Use of IP Office Softphone requires the IP Office configuration to contain sufficient **Teleworker** and/or **Power User** licenses for the number of configured IP Office Softphone users. To be valid, the licenses must match the serial number of the IP Office system's feature key.

## Software

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

- **IP Office Manager**  
A PC with IP Office Manager 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.
- Microsoft .NET Framework 3.5 Service Pack 1.
- Microsoft Visual C++ 2008 SP1.
- Microsoft KB967634 Hotfix.

## User PC Requirements

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

Feature	Requirement
<b>Processor</b>	<ul style="list-style-type: none"> <li>• <b>Minimum:</b> Pentium 4 2.4 GHz or equivalent.</li> <li>• <b>Optimal:</b> Intel Core 2 Duo or equivalent, Video Card with DirectX 9.0c support.</li> </ul>
<b>Memory</b>	<ul style="list-style-type: none"> <li>• <b>Minimum:</b> 1 GB RAM.</li> <li>• <b>Optimal:</b> 2 GB RAM.</li> </ul>
<b>Hard Disk Space</b>	<ul style="list-style-type: none"> <li>• 50 MB.</li> </ul>
<b>Operating System</b>	<ul style="list-style-type: none"> <li>• <b>Microsoft Windows XP Service Pack 3.</b></li> <li>• <b>Microsoft Windows Vista (32-bit and 64-bit).</b> Vista support is only on Business, Enterprise and Ultimate versions.</li> <li>• <b>Microsoft Windows 7 (32-bit and 64-bit).</b> Windows 7 support is only on Professional, Enterprise and Ultimate versions.</li> </ul>
<b>Additional</b>	<p>The installer will install the following if not already installed:</p> <ul style="list-style-type: none"> <li>• Microsoft .NET Framework 3.5 Service Pack 1.</li> <li>• Microsoft Visual C++ 2008 SP1.</li> <li>• Microsoft KB967634 Hotfix.</li> </ul>
<b>Sound Card</b>	<ul style="list-style-type: none"> <li>• Full-duplex, 16-bit or use USB headset.</li> </ul>
<b>Browser</b>	<ul style="list-style-type: none"> <li>• Microsoft Internet Explorer 6.0 or later.</li> </ul>

## 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.

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## 1.2 Licenses

IP Office Softphone can only be used by user's who have their **Profile** setting set to either **Teleworker** or **Power User**. The number of users who can be configured as such is control by the number of **Teleworker** and or **Power User** licenses entered into the IP Office system's configuration.

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

2. Select **System**.

The screenshot shows the 'System' configuration page in IP Office Manager. The 'System' tab is active. The configuration includes fields for Name (00E007053B1D), Locale (United States (US English)), Time Offset (00:00), TFTP Server IP Address (0.0.0.0), 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 (unchecked), Enable SoftPhone HTTP Provisioning (checked), and Time Server IP Address (0.0.0.0). The 'Enable SoftPhone HTTP Provisioning' checkbox is highlighted with a red circle.

- 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 in IP Office Manager. The 'LAN1' tab is active. The 'VoIP' sub-tab is selected. The configuration includes checkboxes for H323 Gatekeeper Enable (checked), SIP Trunks Enable (checked), and SIP Registrar Enable (checked). The 'SIP Registrar Enable' checkbox is highlighted with a red circle.

- 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 in IP Office Manager. The configuration includes fields for Domain Name, Layer 4 Protocol (Both TCP & UDP), TCP Port (5060), UDP Port (5060), and Challenge Expiry Time (secs) (10). The 'Auto-create Extn/User' checkbox is checked and highlighted with a red circle.

- 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 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:

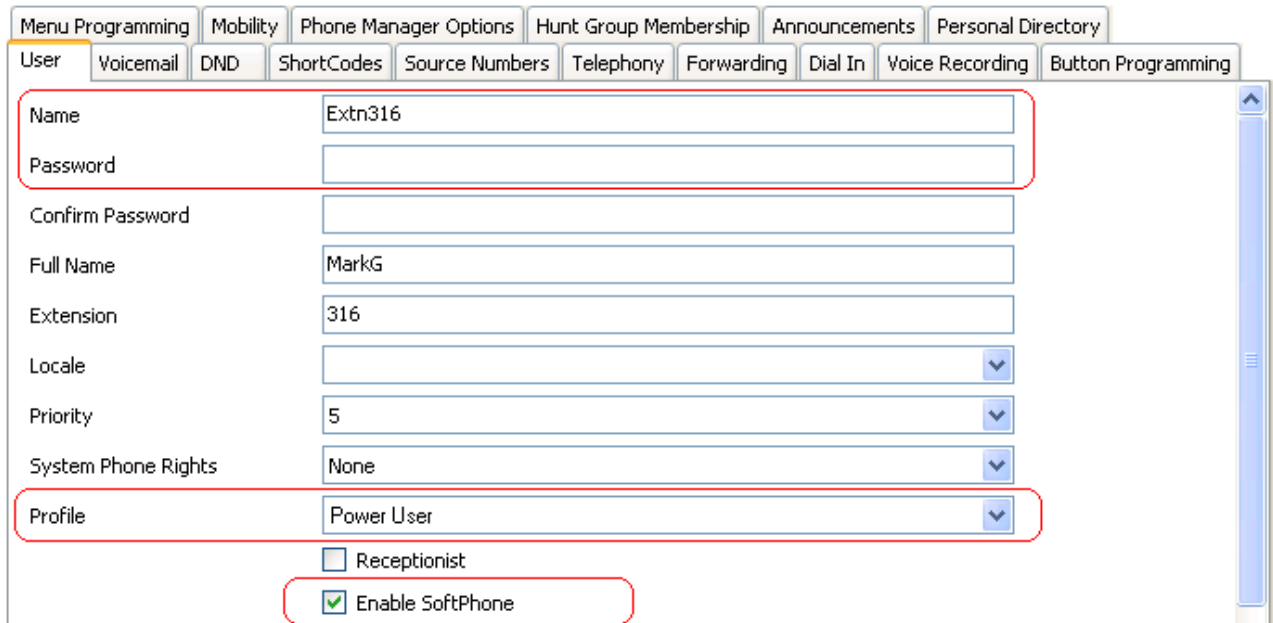
- If the user is new, create a new user record for the user. There is no requirement to create a matching extension record.
- If the user already exists, remove their extension number from which ever extension record it is currently assigned.

1. Using IP Office Manager 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.

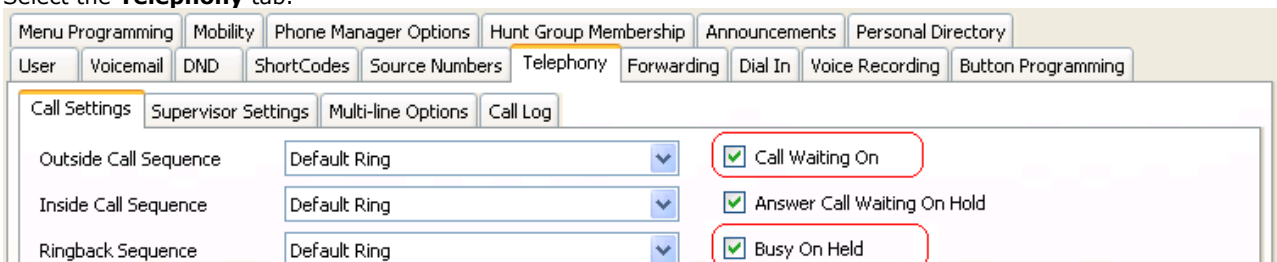


The screenshot shows the 'User' configuration page in IP Office Manager. The 'User' tab is selected. The form contains the following fields and options:

- 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 Manager. The 'Telephony' tab is selected. The form contains the following fields and options:

- Call Settings: Supervisor Settings, Multi-line Options, Call Log
- 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.
- Ensure that the **Busy on Held** 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 input fields: 'Login Code' and 'Login Idle Period (secs)'. The 'Login Code' field contains the text '\*\*\*\*' and is circled in red. To the right of these fields are two checkboxes: 'Force Login' and 'Force Account Code', both of which are currently unchecked.

- 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.

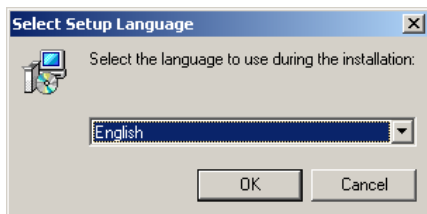
6. Click on **OK**.

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 Software Installation

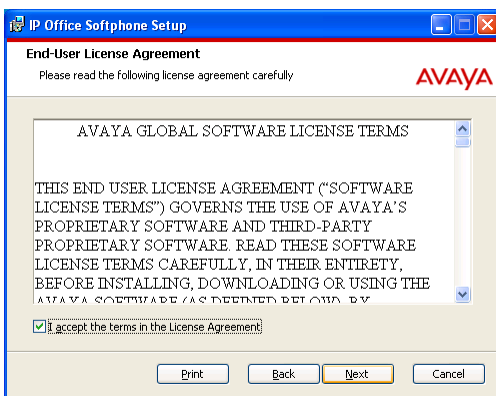
1. **Warning:** Only install the software after having completed the IP Office [license](#)<sup>[12]</sup>, [system](#)<sup>[13]</sup> and [user](#)<sup>[14]</sup> configuration processes.
2. Check the following on the user PC before installing the IP Office Softphone.
  - Check that the PC can connect 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](#)<sup>[10]</sup>. 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.



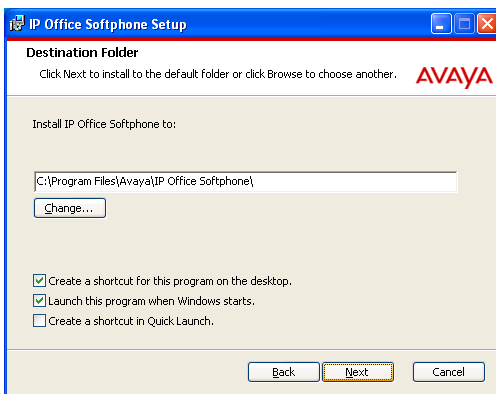
5. Select the language for the installation process. This does not affect the language used by IP Office Softphone when running. Click **OK**.



6. Click **Next**.

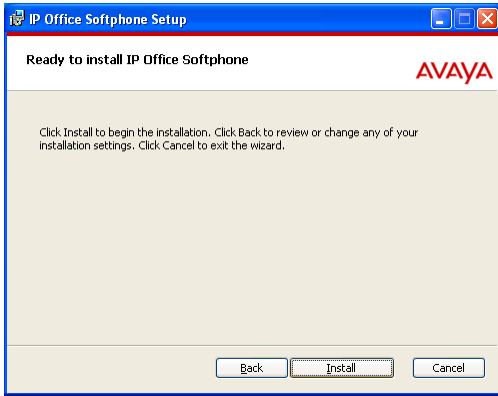


7. Select **I accept the terms in the License Agreement** and click **Next**.



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**.



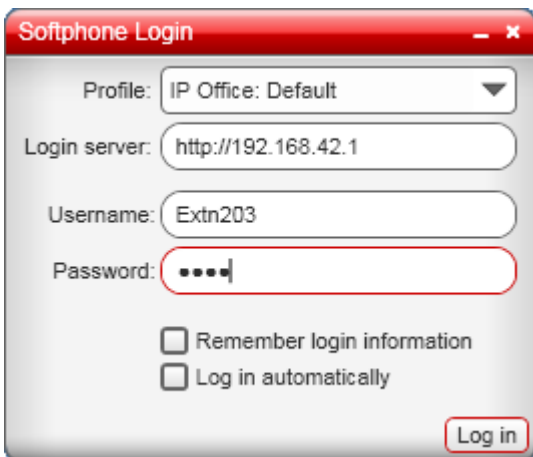


9. Click **Install**. The IP Office Softphone software installation is begun.



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.



# Chapter 2.

## Additional Processes


## 2. Additional Processes

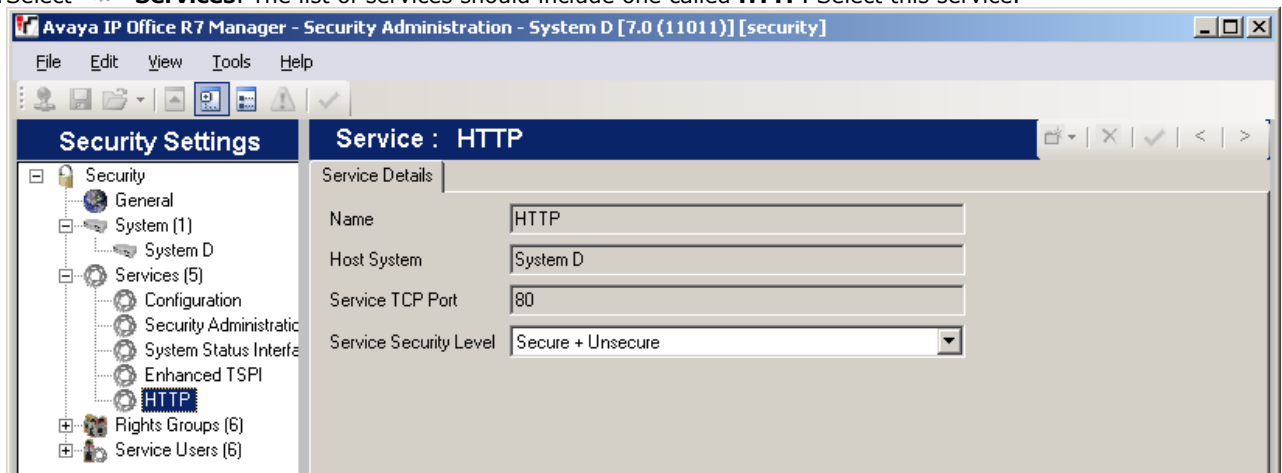
### 2.1 Using HTTPS

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 Manager and receive the configuration from the system.
2. Receiving the configuration will switch IP Office Manager 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 Manager). For further details of security certificates see the IP Office Security Mode section in the IP Office Manager manual.

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



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## 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

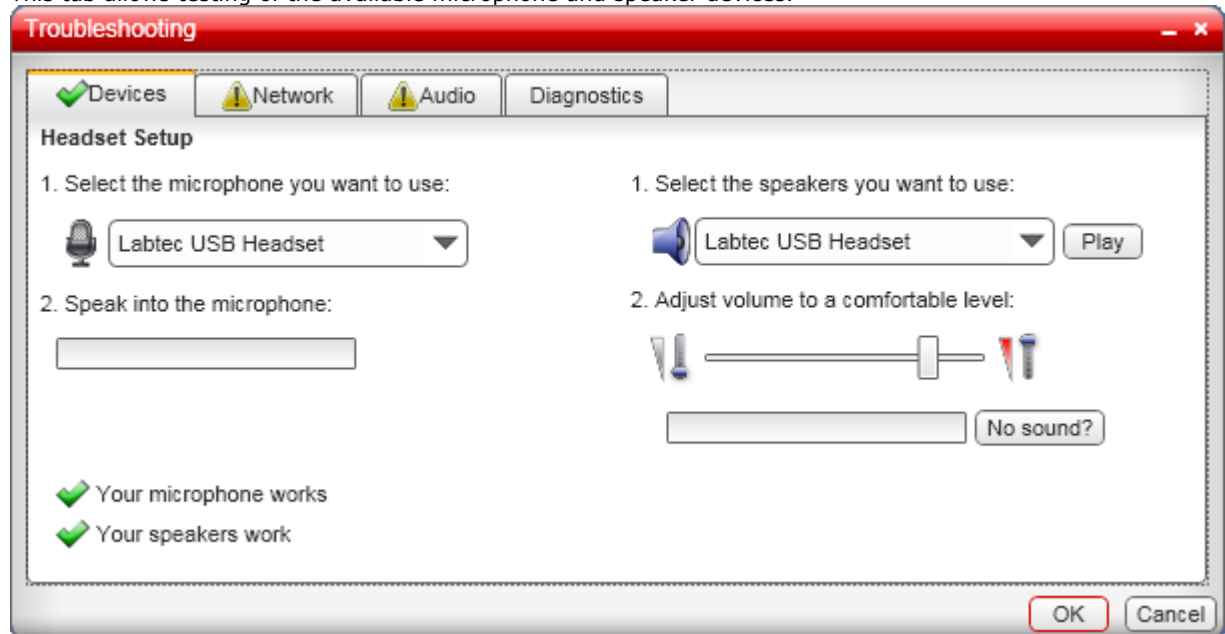
The IP Office Softphone application includes a number of internal menus to add with troubleshooting of user call issues. You can use these while at the user PC or you can guide the user through the use of these screens and have them provide you with the log file of results.

1. Select **Help | Troubleshooting**.

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

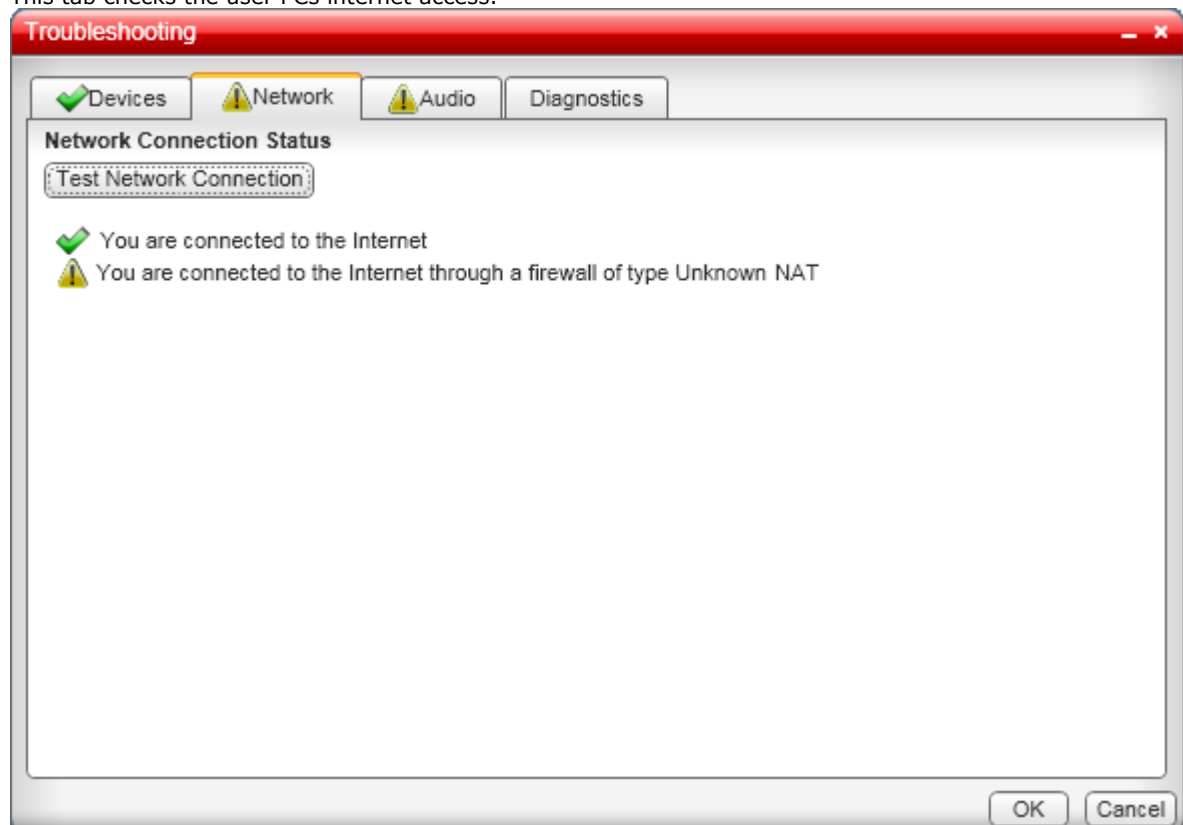
- **Devices**

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



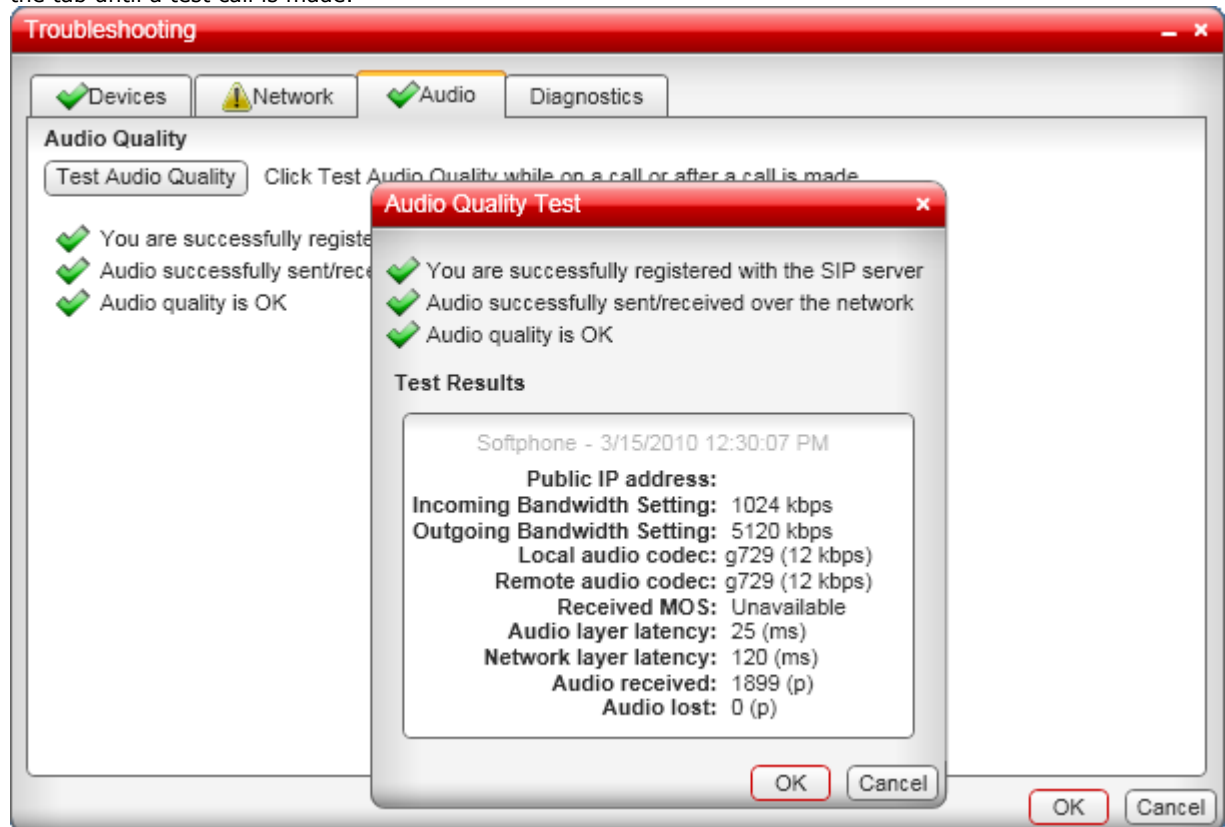
- **Network**

This tab checks the user PCs internet access.



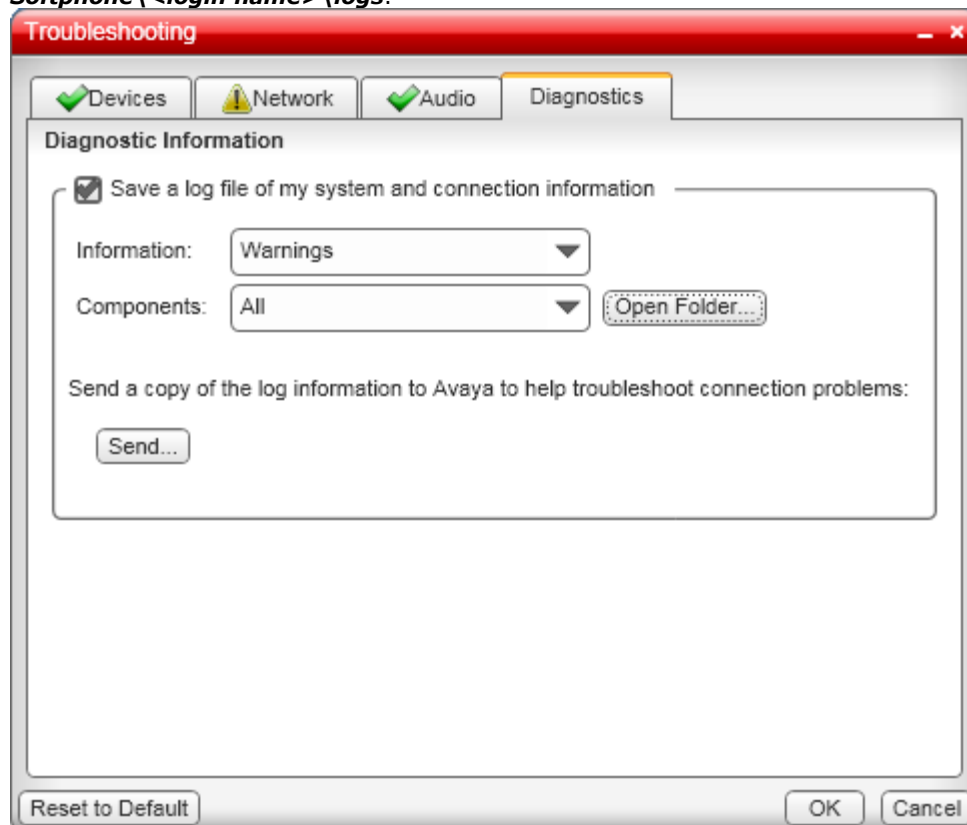
- **Audio**

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. 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. 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 Manager 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.

**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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