



Avaya IP Softphone Release 6.0 User Reference

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Introduction

About Avaya IP Softphone

▶ Introduction

Avaya IP Softphone is a collection of computer telephony integration (CTI) applications that enables you to control telephone calls (both incoming and outgoing) directly from your PC. Avaya IP Softphone enables you to log into your company's server remotely and make and receive telephone calls from the telephone extension.

Avaya IP Softphone increases your telecommunications capabilities by providing the following applications:

- **Avaya IP Softphone**

Avaya IP Softphone is an application that enables you to control your telephone calls (both incoming and outgoing) directly from your PC.

- **Avaya iClarity**

Avaya iClarity is a component that performs the following functions:

- Enables you to log into the server. You must be logged into the server before you can use Avaya IP Softphone to control your telephone calls and send and receive instant messages.
- Handles the voice communications when you use Avaya IP Softphone in the Road Warrior configuration (voice over IP). When you make or receive a call with Avaya IP Softphone, Avaya iClarity enables you to speak to and hear the other party via a headset connected to your PC or the PC's microphone and speakers.

▶ Avaya IP Softphone Configurations

Avaya IP Softphone supports the following configurations:

- **Road Warrior Configuration (Voice over IP)**

The Road Warrior configuration enables travelers to use the full feature set of your company's telephone system from temporary remote locations anywhere in the world (such as a hotel room). The Road Warrior configuration consists of two software applications running on a PC that is connected to the server over an IP network. The single network connection between the PC and server carries two channels, one for the signaling path and one for the voice path. Avaya IP Softphone software handles the call signaling, and Avaya iClarity (an H.323 V2-compliant audio application) handles the voice communications. The user places and receives calls via the Avaya IP Softphone interface on the PC and uses a headset connected to the PC (or the PC's microphone and speakers) to speak and listen.

Avaya iClarity runs in the background and starts automatically when you start Avaya IP Softphone.

- **Telecommuter Configuration**

The Telecommuter configuration of Avaya IP Softphone enables telecommuters to use the full feature set of your company's telephone system from a location other than your office. The Telecommuter configuration consists of a PC and a telephone with separate connections to the server. The PC is connected to the server over an IP network to provide the signaling path. The PC runs the Avaya IP Softphone software, providing you with an interface to control calls. A standard telephone is

connected to the server over the public-switched telephone network (PSTN) to provide a high-quality voice path. You place and receive calls via the Avaya IP Softphone interface on the PC and use the telephone handset to speak and listen.

If you receive an incoming call on your separate telephone line while you are active on a call with Avaya IP Softphone, that caller will hear either ringing (if you have call waiting on that line) or a busy signal. If you have call waiting, you can answer the incoming calls as you would answer any other call waiting call.

For the Telecommuter configuration, you must have a separate telephone line available at your remote location.

- **Control of Avaya IP Telephone (via the telephone) Configuration**

The Control of Avaya IP Telephone (via the telephone) configuration enables users to log into and control their Avaya IP telephone from Avaya IP Softphone. As with the Telecommuter configuration, you use the telephone to speak and listen. Unlike the Telecommuter configuration, you can make and handle calls from both the Avaya IP Softphone interface and your IP telephone.

For the Control of Avaya IP Telephone (via the telephone) configuration, you must have a supported Avaya IP telephone that has the software that supports the remote login (CTI) feature. Contact your System Administrator to get the latest software for your IP telephone.

- **Control of Avaya Telephone (via the server) Configuration**

The Control of Avaya Telephone (via the server) configuration enables users to log into the Avaya server and control their Avaya telephone (such as a 2420 telephone) from Avaya IP Softphone. As with the Telecommuter configuration, you use the telephone to speak and listen. Unlike the Telecommuter configuration, you can make and handle calls from both the Avaya IP Softphone interface and your Avaya telephone.

For the Control of Avaya Telephone (via the server) configuration, you must have a supported Avaya telephone.

- **Instant Messaging Only Configuration**

The Instant Messaging Only configuration enables you to log into your Instant Messaging account without logging into the call server. In this configuration, you have access to Instant Messaging capabilities and all other Avaya IP Softphone capabilities except call handling and call server features.

► **Avaya IP Softphone Features**

From the Avaya IP Softphone window, you can:

- Manage multiple call appearances.
- Make calls.
- Answer calls.
- View the calling/called party information for each call (referred to as *caller ID* for the calling party information), if available.
- Place calls on hold.
- Answer a held call.
- Hang up calls.
- Transfer calls.
- Set up and manage conference calls.
- Program speed dial buttons.

- Access all the features programmed for your telephone.
- Send and receive instant messages (if Instant Messaging is administered)
- Place calls from the Contact Directory, the Call History window, Microsoft Internet Explorer, Microsoft Outlook, Lotus Notes, and public directories.

► **Avaya IP Softphone Main Window**

The Avaya IP Softphone application has been designed with your convenience in mind. The Call Bar window, which is the main window, is a graphical user interface (GUI) that enables you to handle calls and access telephone system features via menus and buttons. Each call appearing on your extension is represented as a call appearance, which displays information about the call.

All window sizes and open dialog boxes are saved on exiting the window. When you open the main window the next time, it will look exactly the same as it did when you closed it, including the same location, size, and open dialog boxes.

Avaya IP Softphone provides two styles of the Call Bar window:

- Classic
- Generic Phone

You can change your Call Bar window by selecting **View>Call Bar Style**.

Classic Call Bar Window

The Classic Call Bar window contains the following components:

- **Title Bar:** The information displayed in the Title Bar depends on whether you are logged into the server and whether there are any call appearances present. If you are logged in and there are no call appearances, the Title Bar displays the extension you are logged in as. If you are logged into the Instant Messaging server, the Title Bar also displays your user name. If there are call appearances, the Title Bar displays the name and/or telephone number associated with the active call. If you are not logged in, the Title Bar displays "Not Logged In."
- **Menu Bar:** Contains a row of menu options, any of which you may select to display a menu.
- **Toolbars:** Contain a row of buttons used to activate various functions of the Avaya IP Softphone application.
- **Call Appearance:** Provides information about a single call, such as name, call duration, status icon, and a control button (for example, **Answer**, **Hangup** and **Unhold**). If you and the other party are logged into the Instant Messaging server and "online," and you are tracking that party, the  button also appears, enabling you to send a preset or custom IM message to that party.
- **Phone Display:** Receives information from the telephone system (such as directory information and the date and time).
- **Status Bar:** Displays Avaya IP Softphone application status and tooltips.

Generic Phone

The Generic Phone Call Bar window displays a graphic representation of a generic telephone complete with handset, dialpad, and feature buttons.

Toolbars

The following toolbars are associated with the Avaya IP Softphone main window:

- Phone Buttons
- Dial Number
- Audio Control
- Message Waiting
- Login Options
- Audio Settings
- Instant Messaging (if Instant Messaging is administered)
- Feature Buttons

These toolbars contain buttons that you can use for quick access to specific commands and tools. The toolbars are shown below. For more information on the toolbars, see [Displaying Toolbars and the Dial Pad](#).

Phone Buttons Toolbar



Dial Number Toolbar



Audio Control Toolbar



Message Waiting Toolbar



Login Options Toolbar



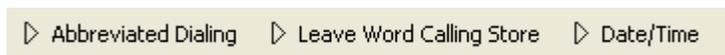
Audio Settings Toolbar



Instant Messaging Toolbar



Feature Buttons Toolbar



► **Supported Phones**

Avaya supports many phones for use with Avaya IP Softphone. Make sure your telephone is supported.

▶ **Dialing Emergency Numbers**

Avaya IP Softphone can dial emergency calls (for example, 911 calls in the U.S.). It will reach solely the local emergency service in the Public Safety Answering Point area where the server is located.

Please be advised that Avaya IP Softphone will not dial to and connect with local emergency service when dialing from remote locations. You should not use Avaya IP Softphone to dial emergency numbers for emergency services when dialing from remote locations.

Avaya Inc. will not be responsible or liable for any damages or injuries resulting from misplaced emergency calls made from Avaya IP Softphone. Your use of this product indicates that you have read this advisory and agree to use an alternative telephone to dial all emergency calls from remote locations.

What's New in this Release

Avaya IP Softphone Release 6.0 offers the following enhancements:

- Integration with Microsoft Office Communicator 2005
- Integration with IBM Lotus Sametime Connect 7.5
- Support for the Citrix environment
- Support for a 13-digit plan in Avaya Communication Manager Release 4.0
- Support for the following telephones:
 - 9610
 - 9620
 - 9630/9630C (supports only one expansion module)
 - 9640 (supports only one expansion module)
 - 9650 (supports only one expansion module)
- Advanced Bluetooth integration
- A new Call Bar window style (Generic Phone), which displays a representation of a generic telephone complete with handset, dialpad, and feature buttons. You can change your Call Bar window by selecting **View>Call Bar Style**. Your choices are **Classic** (the original Avaya IP Softphone Call Bar window) and **Generic Phone**.
- Advanced search and display capabilities for LDAP directories

Handling Calls with Avaya IP Softphone

► Introduction

When you receive or make a call after you start a Avaya IP Softphone session, a "service link" is established. This service link is the "audio path" that enables you to speak to the other party. If you are using the Road Warrior configuration, the service link is established between the server and Avaya IP Softphone. If you are using the Telecommuter configuration, the service link is established between the server and the telephone number you specified. If the service link is not established, you will be unable to make and receive calls. The action you must perform to establish the service link depends on the Avaya IP Softphone configuration you are using.

Depending on how your login on the server is administered, the service link will either:

- be disconnected when the current call ends, or
- remain connected for the duration of the current Login session.

► Using the Road Warrior Configuration

If you are using the Road Warrior configuration, the service link call is answered automatically.

To make a call using the Road Warrior configuration, you must perform the following step:

- Make a call from the Avaya IP Softphone window.

A service link call is made from the server. Even though you have made a call from Avaya IP Softphone, the call is not placed until the service link is established. Avaya IP Softphone answers the service link call automatically. The service link call is established, and the outgoing call is placed. You will hear the call ring at the destination telephone number.

When you receive an incoming call, the server tries to establish the service link to Avaya IP Softphone. The service link call is answered automatically. To answer a call using Avaya IP Softphone, just choose the **Answer** button for the call in the Avaya IP Softphone window. The incoming call is answered, and you can speak to the other party.

► Using the Telecommuter Configuration

If you are using the Telecommuter configuration, Avaya IP Softphone places the service link call to the telephone line you specified. You must answer the service link call by answering the telephone connected to the telephone number you specified.

To make a call in the Telecommuter configuration, you must perform the following steps:

1. Make a call from the Avaya IP Softphone window.

A service link call is made from the server to the telephone number you specified. Even though you have made a call from Avaya IP Softphone, the call is not placed until the service link is established.

2. Answer the call on your separate telephone line.

The service link call is established, and the outgoing call is placed. You will hear the call ring at the destination telephone number.

When you receive an incoming call, the server tries to establish the service link to the separate telephone line you specified. To answer a call in the Telecommuter configuration, you must answer the service link call on the separate telephone line you specified. The incoming call is answered, and you can speak to the other party.

▶ Using the Control of Avaya IP Telephone (via the telephone) Configuration

In the Control of Avaya IP Telephone (via the telephone) configuration, you can make calls and answer calls from both Avaya IP Softphone and your IP telephone. You are logged into the IP telephone instead of the server.

▶ Using the Control of Avaya Telephone (via the server) Configuration

In the Control of Avaya Telephone (via the server) configuration, you can make calls and answer calls from both Avaya IP Softphone and your telephone.

Dialing Emergency Numbers

▼ Introduction

Avaya IP Softphone can dial emergency calls (for example, 911 calls in the U.S.). It will reach solely the local emergency service in the Public Safety Answering Point area where the telephone system is located.

Please be advised that Avaya IP Softphone will not dial to and connect with local emergency service when dialing from remote locations. You should not use Avaya IP Softphone to dial emergency numbers for emergency services when dialing from remote locations.

Avaya Inc. will not be responsible or liable for any damages or injuries resulting from misplaced emergency calls made from Avaya IP Softphone. Your use of this product indicates that you have read this advisory and agree to use an alternative telephone to dial all emergency calls from remote locations.

Supported Telephones

▼ Introduction

Here is a list of phones that Avaya supports for use with Avaya IP Softphone. You may use other phones. However, phones other than those on the following list may not function correctly and are not supported by Avaya.

- 2402
- 2410
- 2420
- 2420 with an expansion module
- 4601
- 4602
- 4606
- 4610SW
- 4612
- 4620/4620SW
- 4620/4620SW with an expansion module
- 4624
- 4630/4630SW
- 6402D

- 6408D
- 6408D+
- 6416D+
- 6416D+ with an expansion module
- 6424D+
- 6424D+ with an expansion module
- 8405D
- 8405D+
- 8410D
- 8411D (For this phone, the System Administrator must disable the data port, which is true for all softphones.)
- 8434D
- 8434D with an expansion module
- 9610
- 9620
- 9630/9630C
- 9640
- 9650

Supported Telephones for the Control of Avaya IP Telephone (via the telephone) Configuration

▼ Introduction

Here is a list of phones that you can log into and control via the Control of Avaya IP Telephone (via the telephone) configuration:

- 4606
- 4610SW
- 4612
- 4620/4620SW
- 4620/4620SW with an expansion module
- 4624
- 4630/4630SW

Supported Telephones for the Control of Avaya Telephone (via the server) Configuration

▼ Introduction

Here is a list of phones that you can control via the Control of Avaya Telephone (via the server) configuration:

- 2402
- 2410
- 2420
- 2420 with an expansion module
- 4601
- 4602
- 4606
- 4610SW
- 4612
- 4620/4620SW
- 4620/4620SW with an expansion module
- 4624
- 4630/4630SW
- 6402D
- 6408D
- 6408D+
- 6416D+
- 6416D+ with an expansion module
- 6424D+
- 6424D+ with an expansion module
- 9610
- 9620
- 9630/9630C
- 9640
- 9650

Learning the Main Window

► **Introduction**

The Avaya IP Softphone main window provides full-function, multi-line telephony support on your PC.

Learning the Main Window defines all of the options available in the Avaya IP Softphone menus. Not all of the items will be available to you all of the time. If an item is not available in the current window, it is grayed out.

► **File Menu**

The following table lists the File menu commands and a description of each command.

| <i>Menu Command</i> | <i>Description</i> |
|--|--|
| Log in | Displays the Login dialog box. If you are already logged in, this item is disabled. |
| Log off | Logs you off the server. |
| Import Settings | Enables you to import previously saved files containing phone settings, program options, and configurations. |
| Export Settings | Enables you to export the phone settings, program options, and configurations from Avaya IP Softphone to a file for later use. |
| <p>The options imported and exported include all the options displayed on the Program Options dialog box except the Voice Messaging Access option. The configuration information includes all administered call events along with the Web Page triggers. It also includes Public Directory administration and the server name or IP address. Select Program Options from the Tools menu to review the Program Options choices.</p> | |
| Close | Closes the Call Bar window. |
| Exit/Exit (and log off) | Quits the application. If you are logged in, this option will also log you off the server. |

► **Edit Menu**

The following table lists the Edit menu commands and a description of each command.

| <i>Menu Command</i> | <i>Description</i> |
|---------------------|--|
| Cut (Ctrl+X) | Cuts any text selection, such as names or numbers, in the number text box. |
| Copy (Ctrl+C) | Copies any text selection, such as names or numbers, in the number text box. |
| Paste (Ctrl+V) | Pastes any text selection, such as names or numbers, in the number text box. |

► **Call Menu**

The following table lists the Call menu commands and a description of each command. Note that the Call menu is available only when there is a call appearing on your telephone.

| <i>Menu Command</i> | <i>Submenu Command</i> | <i>Description</i> |
|---------------------|------------------------|---|
| Drop | | Disconnects the active call. After the call is dropped, the telephone system provides dial tone. |
| Hold | | Places the active call on hold. When the call is on hold, a "check mark" is displayed. |
| Transfer | Supervised Transfer | Enables you to transfer the active call. This option allows you to speak to the destination party before that person receives the call. |
| | Unsupervised Transfer | Enables you to transfer the active call without speaking to the party that will receive the call. |
| Conference | | Enables you to add the call to a conference. |

► **View Menu**

The following table lists the View menu commands and a description of each command. For more information on toolbars, see *Displaying Toolbars and the Dial Pad*.

| <i>Menu Command</i> | <i>Submenu Command</i> | <i>Description</i> |
|---------------------|------------------------|--|
| Phone Display | | Displays the Phone Display panel, which displays information that would appear on the display of your telephone. |
| Dial Pad | | Displays the Dial Pad, which may be used to enter numbers for cut-through dialing. |
| Toolbars | Show Labels | Displays the text labels for the buttons on the Phone Button toolbar. |
| | Phone Buttons | Displays the Phone Button toolbar, which contains the Drop , Hold , Transfer , and Conference buttons. |
| | Dial Number | Displays the Dial Number toolbar, which enables you to enter numbers you want to dial and access various lists. This toolbar contains the Dial Number button. Enter telephone numbers you Dial Number want to dial. |
| | Audio Control | Displays the Audio Control toolbar, which provides buttons that enable you to adjust the volume and view the status of the Avaya iClarity application. |
| | Message Waiting | Displays the Message Waiting toolbar, which consists of one button that enables you to access your voice messaging system. |
| | Login Options | Displays the Login Options toolbar, which enables you to log into/log out of the server and modify the login settings. |
| | Audio Settings | Displays the Audio Settings toolbar, which enables you to modify the audio options for Avaya iClarity, adjust the volume setting of the speakers, microphone, and ringer, and specify whether ringing is played through the internal PC speaker. |

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|-------------------|--|
| Instant Messaging | Displays the Instant Messaging toolbar, which enables you to send an instant message, change your Instant Messaging preferences, change your Instant Messaging status, and run the IM Wizard. |
| Feature Buttons | Displays the Feature Buttons toolbar, which contains the feature buttons you added from the Phone Features window. |
| Status Bar | Shows or hides the Status bar, which displays the current activity or state of the Avaya IP Softphone and ToolTips. |
| Call Bar | Shows or hides the Call Bar window. If you hide the Call Bar window, you can view it by right-clicking the Avaya IP Softphone icon in the system tray, and selecting Call Bar . |
| Call Bar Style | Enables you to select the type of Call Bar window you want to use. Your choices are Classic and Generic Phone . Generic Phone displays a representation of a generic telephone complete with handset, dialpad, and feature buttons. |

► **Tools Menu**

The following table lists the Tools menu commands and a description of each command.

| <i>Menu Command</i> | <i>Submenu Command</i> | <i>Description</i> |
|-------------------------|------------------------|---|
| Phone Features | | Opens the Phone Features window, which lists all call appearances and feature buttons administered on the telephone system for this phone. |
| Personal Phone Features | | Opens the Personal Phone Features window. |
| Contacts | | Opens the Contact Directory window or the Avaya IP Softphone Contacts window, which stores names, addresses, phone numbers, and other information for your contacts. |
| Speed Dial Numbers | | Opens the Speed Dial Numbers window, which displays your existing Speed Dials. |
| Call History | | Opens the Call History log, which contains call history information including calling party name (for incoming calls), calling party number (for incoming calls), called party name (for outgoing calls), called party number (for outgoing calls), date, time, duration, and call notes. |
| Screen Pops | | Opens the Screen Pops window, which enables you to create and modify screen pops. |
| Search Public Directory | | Provides access to corporate or public directory services, enabling you to query and manage a database, such as a directory, over a TCP/IP connection. |
| Program Options | | Opens the Program Options dialog box, which enables you to administer various options, such as whether the Transfer button will perform a supervised transfer or an unsupervised transfer and whether to display Avaya IP Softphone on top of other windows. |

▶ **Audio Menu**

The following table lists the Audio menu commands and a description of each command.

| <i>Menu Command</i> | <i>Description</i> |
|----------------------------|--|
| Volume and Ringer Settings | Enables you to adjust the volume setting of the speakers, microphone, and ringer, set whether you want to hear your voice in your headset, and set whether to play ringing through the internal PC speaker. |
| Options | Enables you to set Avaya iClarity options such as whether you are using a headset/handset or PC speakers and a microphone and the type of connection between your PC and the server (for example, LAN or modem). |
| Tuning Wizard | Starts the Tuning Wizard, which enables you to configure the audio settings for Avaya iClarity. |
| Monitor | Displays information about the current service link connection between Avaya iClarity and the server. |

▶ **Instant Messaging Menu**

The following table lists the Instant Messaging menu commands and a description of each command.

| <i>Menu Command</i> | <i>Description</i> |
|---------------------|---|
| Preferences | Enables you to change the alerts, privacy settings, status, history settings, and preset/user-defined responses for your Instant Messaging address. |
| Send a message | Enables you to send an instant message. |
| Status | Enables you to change your Instant Messaging status. |
| IM Wizard | Starts the IM Wizard, which enables you to modify the login settings for Instant Messaging. |

▶ **Settings Menu**

The following table lists the Settings menu commands and a description of each command.

| <i>Menu Command</i> | <i>Description</i> |
|---------------------|---|
| Dialing Properties | Opens the Phone and Modem Options dialog box. When you dial a number from Avaya IP Softphone, the number will be formatted based on the information configured on the computer in the Phone and Modem Options dialog box. |
| Language | Enables you to select the language for Avaya IP Softphone. |
| Font | Enables you to select the font for Avaya IP Softphone. |
| Login Settings | Opens the Login Settings dialog box, which enables you to modify the Login settings, emergency call handling settings, VPN settings, and firewall settings. |
| Login Wizard | Starts the Login Wizard, which enables you to modify the Login settings. |

Opens the Login Status window, which indicates whether you are logged into the server, the current setting for the Emergency Call Handling feature, whether Avaya IP Softphone will attempt to log you into the server automatically every time you Avaya IP Softphone, and whether the Login Status window will open automatically when you log into the server. When you are logged into the server, the Login Status window also displays information about the current session.

▶ **Video Menu**

The following table lists the Video menu commands and a description of each command.

Menu

Command Description

Start Video Starts transmitting video to the other party.

Stop Video Stops transmitting video to the other party.

Mute Temporarily stops transmitting video to the other party. However, audio is still transmitted.

Video Options Opens the Video Options dialog box, which enables you to modify the video start settings, the video performance settings, the maximum bit rate for video transmission, and the maximum frame rate for video transmission.

Video Status Opens the Video Monitor dialog box, which enables you to view statistics for the current video call.

▶ **Help Menu**

The following table lists the Help menu commands and a description of each command.

Menu Command

Description

Contents Selecting Contents opens the Avaya IP Softphone on-line help table of contents.

About Avaya IP Softphone Displays information about this version of Avaya IP Softphone.

Viewing the Panels and Status Bar

Introduction

The Avaya IP Softphone Call Bar window contains a panel at the bottom of the window that serves as the call appearance. You can also display another panel, the Phone Display Panel, by selecting **Phone Display** from the **View** menu.

To display the status bar, select **Status Bar** from the **View** menu.

Call Appearance

The call appearance appears only during an incoming and outgoing call. It provides information about the call, such as call status, call display, call duration, and a control button (for example, **Answer**, **Hangup**, and **Unhold**). If the number associated with the call display is in the Contact Directory, the call display will contain the display name in the directory (instead of the display information from the telephone system). If you and the other party are logged into the Instant Messaging server and "online," and you are

tracking that party, the  button also appears, enabling you to send a preset or custom IM message to that party.

The call status—incoming, outgoing, or on hold—is displayed in the first section.

An example of a call appearance is shown below:



Phone Display Panel

The Phone Display panel is a 40-character display that is located under the call appearance. This display area is updated automatically with information from the telephone system so that you can see call and non-call related information (for example, the local time/date display from the telephone system).

Status Bar

The status bar is located at the bottom of the Avaya IP Softphone main window and displays Avaya IP Softphone application status. It also displays a brief description of each of the toolbar buttons when the mouse pointer is over the button. If you have activated "Send All Calls," the default string will be changed from "Ready" to "Ready - Send All Calls Activated."



Displaying Toolbars and the Dial Pad

Introduction

The following toolbars are associated with the Avaya IP Softphone Call Bar window—Phone Buttons, Dial Number, Audio Control, Message Waiting, Login Options, Audio Settings, Instant Messaging, and Video. These toolbars contain buttons that you can use for quick access to specific commands and tools.

Phone Buttons Toolbar

The Phone Buttons toolbar provides quick access to the following basic phone buttons: **Drop**, **Hold**, **Transfer**, and **Conference**.

The Phone Buttons toolbar is shown below:



Dial Number Toolbar

From the Dial Number toolbar, you can:

- dial numbers
- send digits during the call
- redial
- access the Dial Pad window
- access the Contact Directory
- access the Speed Dial list
- access the Speed Dial Numbers window
- access the Call History log
- access the recent calls list
- enter a name (full or partial) and search the contacts in the Avaya IP Softphone Contact Directory, Microsoft Outlook, Lotus Notes, and a public directory

The Dial Number toolbar is shown below:



Audio Control Toolbar

The Audio Control toolbar enables you to adjust the volume for Avaya iClarity. From this toolbar, you can:

- mute your microphone
- adjust the microphone volume
- determine the audio channel direction
- access the Audio Monitor dialog box, which displays the audio status
- force transmit
- mute your speaker
- adjust the speaker volume
- mute your ringer
- mute the ringer volume

The Audio Control toolbar is shown below:



The Audio Control toolbar is enabled when you are logged in. (This toolbar is disabled when you are not logged in.)

Message Waiting Toolbar

The Message Waiting toolbar consists of one button that enables you to access your voice messaging system.

The Message Waiting toolbar is shown below:



Login Options Toolbar

From the Login Options toolbar, you can:

- log into the server (if you are not logged in currently)
- log out of the server (if you logged in currently)
- access the Login Settings dialog box. (You can only access this dialog box when you are not logged into the server.) From this dialog box, you can modify the following information:
 - login settings
 - server address(es)
 - Instant Messaging login settings
 - audio configuration (for example, Road Warrior configuration or Telecommuter configuration)
 - emergency call handling settings
 - VPN configuration
 - firewall configuration
- run the Login Wizard

The Login Options toolbar is shown below:



Audio Settings Toolbar

From the Audio Settings toolbar, you can:

- modify the audio options
- mute the speakers
- adjust the volume setting for the speakers
- specify whether you want to hear your voice in your headset
- mute the microphone
- adjust the volume setting for the microphone
- adjust the volume setting of the ringer
- specify whether you want the ringer to play through the internal PC speaker
- run the Tuning Wizard

The Audio Settings toolbar is shown below:



Instant Messaging Toolbar

From the Instant Messaging toolbar, you can:

- start an Instant Messaging session
- change your Instant Messaging status

The Instant Messaging toolbar is shown below:



Video Toolbar

From the Video toolbar, you can:

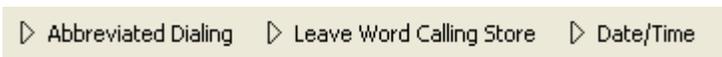
- start video
- stop video
- temporarily stop sending video to the other party
- access the Video Options dialog box, which enables you to modify the video start settings, the video performance settings, the maximum bit rate for video transmission, and the maximum frame rate for video transmission
- access the Video Monitor dialog box, which enables you to view statistics for the current video call

The Video toolbar is shown below:



Feature Buttons

The Feature Buttons toolbar can contain a maximum of seven buttons that you added from the Phone Features window. To use a feature, click on the corresponding feature button. A sample Feature Buttons toolbar is shown below:



Dial Pad

The Dial Pad displays the numbers that are on a telephone dial pad. It contains 12 buttons that you use to dial a number and access features. You can access the Dial Pad by selecting **Dial Pad** from the **View** menu.

The default Dial Pad is shown below:



You can set the Dial Pad to appear without letters by disabling the **Display letters on the Dial Pad** setting in the **User Interface Options** in the Program Options dialog box. (You access the Program Options dialog box by selecting the **Program Options** command from the **Tools** menu.)

NOTE:

The first time you open the Dial Pad during an Avaya IP Softphone session, the Dial Pad appears next to the Avaya IP Softphone window. If you move the location of the Dial Pad and then close it, the Dial Pad will reappear in its last location the next time you open the Dial Pad during the current session. However, the Dial Pad will always appear in its default position (that is, next to the Avaya IP Softphone window) when you open the Dial Pad for the first time during an Avaya IP Softphone session.

Using Keyboard Accelerators

Introduction

Avaya IP Softphone provides keyboard accelerators for Windows 2000 and Windows XP Professional.

To display the keyboard accelerators in Windows 2000 and Windows XP Professional, press the ALT key. (The ALT key toggles the display of the keyboard accelerators.)

Using a Headset with Avaya IP Softphone

Introduction

When using a headset with Avaya IP Softphone, be sure to place the microphone of the headset underneath your chin. This helps ensure that the other party on a call will hear you when you speak.

For a list of supported headsets, go to <http://avaya.com/support>.

NOTE:

If your extension is configured for auto answer with a headset, you can enable the **Use headset mode** option in Program Options. When auto answer is enabled, your headset remains in the offhook state, and you are connected to incoming calls automatically. This setting is commonly used in call centers.

Using Other Applications with Avaya IP Softphone

▶ **Introduction**

If your database is in a contact manager application that is TAPI compliant or supports TAPI-assisted dialing, you can place calls from that database through Avaya IP Softphone. If you want to use an application that is TAPI compliant or supports TAPI-assisted dialing, make sure you start Avaya IP Softphone and log into the server before making any calls.

▶ **Configure TAPI-Assisted Dialing**

To configure Avaya IP Softphone to perform TAPI-assisted dialing:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Make sure the **Handle voice call request from other applications** check box is selected (that is, "checked.")

2 _____

Click the **OK** button.

NOTE:

The new setting will not be used until you exit and restart Avaya IP Softphone.

3 _____

Glossary

▶ **Abbreviated Dial Feature**

Allows you to store selected telephone numbers for quicker and easier dialing. Each number can be a complete or partial telephone number, an extension number, or a trunk or feature code.

▶ **Active Call**

A call appearance state where the voice (talk) path between two parties has been connected.

▶ **Add/Remove Programs**

A *Windows* feature that allows you to remove programs that have been installed on your computer. The Add/Remove icon is found in the Control Panel dialog box.

▶ **Application Folder**

A folder on the network server that holds Avaya IP Softphone application software-executable files and components.

▶ **AutoPlay**

A *Windows* feature that causes an application on a CD-ROM to run without any user interaction as soon as the CD-ROM is inserted into the drive.

▶ **Avaya IP Softphone**

Avaya IP Softphone enables you to log into your company's server remotely and make and receive telephone calls from your telephone extension.

▶ **Call Appearance**

The call appearance is a single panel (40-character display) that provides information about a single call, such as name, call duration, status icon, and control button (for example, Answer, Hangup, or Unhold).

▶ **Call Information Panel**

The Call Information Panel (CIP) is a single panel (40-character display) that provides information about a single call, such as name, call duration, status icon, and control button (for example, Answer, Hangup, or Unhold).

▶ **Call Park**

To park a call for retrieval at any extension.

▶ **Call Pickup**

To answer a call to a member of your pickup group when your voice terminal is idle.

▶ **Call Prompting**

A telephone system feature that routes incoming calls based on information entered by the calling party, such as an account number. The caller is prompted to select an option from those listed in an announcement.

▶ **Conference**

Allows you to add parties to a call. You can add parties from your phone or the Call Bar window.

▶ **Cut-Through Dialing**

As a digit is entered, it is immediately dialed (as on a telephone). Cut-through dialing is provided using the Dial Pad or by entering digits from the keyboard when focus is not on the Number text box.

▶ **Delimited Text File**

A file containing values separated by commas, tabs, semicolons, or other characters.

▶ **Dial Area**

A frame located on the Avaya IP Softphone main window that provides dialing capabilities.

▶ **Dial Pad**

A window containing 12 buttons that are used to dial a number. Each character clicked is automatically sent. This is called *cut-through dialing*. Using the **Program Options** command from the **Tools** menu, you can set the Dial Pad to appear without letters on the buttons. (You must disable the **Display letters on the dial pad** option in the Program Options dialog box.)

▶ **Dial Number Button**

A button (telephone icon) on the Dial Number toolbar that is used to get a dial tone (for cut-through dialing) or to dial the digits entered in the Number text box (senderized dialing).

▶ **Dial Number Toolbar**

A toolbar that provides a number text box access to the Contact directory, call history, speed dial, and recent calls list. When you enter a string (for example, *rob*) followed by Enter, a popup menu displays with a list of the directory entries that start with that string. If the first character of the number is a letter, the title of the field will be changed from Number to Directory.

▶ **DNS**

See Domain Naming System.

▶ **Domain**

A subnetwork comprised of a group of clients and servers under the control of one security database.

▶ **Domain Naming System (DNS)**

Software that lets users locate computers on the Internet by host name. The DNS server maintains a database of host names and IP addresses.

▶ **Drop**

A button that allows you to disconnect from a call. The **Drop** button disconnects you from a call and gives you a dial tone. Use the **Drop** button when you want to disconnect from a call and place another call. You can also use the **Drop** button to disconnect the last person added to a conference call.

▶ **Eurofont**

A font set provided in DCP terminals that contains characters with diacritical marks common to other languages. Eurofont includes characters from the Russian, Greek, Baltic Rim, and central European languages, as well as the first 127 characters of the standard ANSI table. The True Type Font encoding used for Eurofont is non-standard relative to the encoding used in other *Windows* fonts. As a result, Avaya IP Softphone is able to support Eurofont characters in the displays received from the telephone system.

▶ **FAC**

See Feature Access Code.

▶ **Feature Access Code (FAC)**

A 1-to-4 digit number with an optional leading * or # that is assigned in the telephone system administration to invoke features. For example, *81 may invoke Service Observing Listen Only. FACs require an available call appearance with dial tone before the FAC can be sent to the telephone system. Assigned FACs may not be available to all users on the telephone system based on his/her class of restrictions and/or whether the feature has been enabled in the telephone system.

▶ **Feature Button**

A button placed on the main window that can be assigned to any one of a number of telephone system features that could be assigned to a physical extension's button during station administration.

▶ **Graphical User Interface (GUI)**

This is a picture based, rather than command-line based, interaction between the user and the computer.

▶ **Grayed Out**

When you do not have access to a menu or action list item, it will be grayed out (that is, dimmed or displayed in a different color from the rest of the menu or action list). The menu or action list item is disabled.

▶ **GUI**

See Graphical User Interface.

▶ **Hold**

Allows you to place the active call on hold temporarily, use the toolbar for other call purposes, and then return to the original call.

▶ **HTML**

See HyperText Markup Language.

▶ **Hypertext**

A linkage between related text. For example, if you select a word in a sentence, information about that word is retrieved if it exists, or the next occurrence of the word is found.

▶ **HyperText Markup Language**

HTML. A standard for defining documents with hypertext links. See also *Hypertext*.

▶ **Instant Messaging (IM)**

A feature that enables you to send instant messages to and receive instant messages from other users using Avaya IP Softphone. To use Instant Messaging, you must have an Instant Messaging account on your Avaya server, and the Instant Messaging feature must be administered in Avaya IP Softphone. Contact your System Administrator for more information.

▶ **IP Address**

Internet Protocol Address. Each computer has its own unique IP address, which is an identifier used for communicating across a network.

▶ **IT**

Information Technology.

▶ **Kanafont**

A font set provided in DCP terminals that contains Katakana characters (used in Japanese language) as well as the first 127 characters of the standard ANSI table. The True Type Font encoding is non-standard relative to the encoding used on other *Windows* fonts. As a result, Avaya IP Softphone is able to support Katakana characters in displays received from the telephone system.

▶ **LAN**

See Local Area Network.

▶ **Local Area Network (LAN)**

A private interactive communication network that allows computers to communicate over short distances at high data transfer rates.

▶ **Log**

A file that contains a record of computer activity as well as backup and recovery data.

▶ **Login**

Allows you to log into the server so that you can handle calls from Avaya IP Softphone.

▶ **Login ID**

A user name on your company's LAN.

▶ **Logout**

Allows you to log out of the server. When you log out of the server, you cannot handle calls with Avaya IP Softphone.

▶ **Network Server**

A computer in a network shared by multiple users.

▶ **Off-Hook**

Off-hook means that the voice path to your telephone is fully functional.

▶ **On-Hook**

On-hook means that the voice path to your telephone is turned off.

▶ **Phone Display**

A 40-character display that is located under the call appearance area of your Avaya IP Softphone callbar. This display area receives information from the telephone system so that you can see call and non-call related information, such as call prompting digits from the telephone system.

▶ **PSTN**

See Public Switched Telephone Network.

▶ **Public Switched Telephone Network (PSTN)**

The worldwide voice telephone network.

▶ **Readme File**

A file that provides the latest information on a newly released product; in this case, Avaya IP Softphone.

▶ **Read-only**

A folder or file that can be read, but not updated or erased.

▶ **Registry**

The system-wide depository of information supported by *Windows*. The registry contains information about the system and its applications, including clients and servers.

▶ **Screen Pop**

The ability to automatically display information from other sources, such as databases or Web pages, based on an Avaya IP Softphone triggering criteria.

▶ **Send All Calls**

To send all incoming calls (except priority, intercom, and personal central office calls) immediately to an assigned extension, AUDIX, or message center for coverage.

▶ **Senderized Dialing**

When a dial string is entered, the Dial Number button or Enter key must be selected to actually dial the digits. This type of dialing allows for editing of dial strings before sending the digits.

▶ **Softphone**

A software application that enables you to control telephone calls (both incoming and outgoing) directly from your computer.

▶ **Supervised Transfer**

A transfer option that lets you send the present call to another phone number or extension. You remain on the line until the call is answered and talk to the party that receives the transferred call (if desired). You set the Supervised Transfer feature using the Call Handling option from the **Program Options** command of the **Tools** menu. See Unsupervised Transfer.

▶ **Switch**

A private switching system providing voice-only or voice and data communications services (including access to public and private networks) for a group of terminals within a customer's premises (for example, a DEFINITY ECS).

▶ **TAPI Assisted Dialing**

Avaya IP Softphone supports telephony enabled applications such as *Microsoft Scheduler*. This support provides the ability for telephony enabled *Windows* applications to originate a call and have the call reflected in the Avaya IP Softphone application.

▶ **Toolbar**

A row of buttons used to activate various functions of the Avaya IP Softphone application. The Avaya IP Softphone main window can contain as many as six toolbars.

▶ **Tool Tips**

Brief descriptions that display when the mouse pointer is over a toolbar button.

▶ **Unsupervised Transfer**

A transfer option that lets you send the present call to another phone number or extension without talking to the party that will receive the transferred the call. You set the Unsupervised Transfer feature using the Call Handling option from the **Program Options** command of the **Tools** menu. See also Supervised Transfer.

▶ **Voice Terminal**

A telephone equipped with specifically designed features (for example, the Conference or Hold button or Message light) and functional capabilities that distinguish it from a conventional telephone.

▶ **VPN**

Virtual Private Network.

Using Avaya IP Softphone with Microsoft Office Communicator

If you installed Avaya IP Softphone with Microsoft Office Communicator Integration, you can make and handle calls from Microsoft Office Communicator 2005. Using the Avaya tab provided in the Microsoft Office Communicator 2005 window, you can also access and use the first 12 feature buttons administered on your telephone.

Things to Keep in Mind

When using Avaya IP Softphone with Microsoft Office Communicator Integration, keep in mind the following information:

- Before you can make calls from Microsoft Office Communicator, you must configure the dialing properties in Avaya IP Softphone.
- Whenever you make or answer a call from Microsoft Office Communicator, the Avaya IP Softphone window displays a call appearance for that call. If you do not want the Avaya IP Softphone window to appear, you can set Avaya IP Softphone to run with no window.
- For incoming calls, the caller name is not displayed in Microsoft Office Communicator.
- Incoming calls are not associated with a contact.
- Avaya IP Softphone supports the following Microsoft Office Communicator phone features:
 - Call
 - Hang up
 - Hold
 - Retrieve Call from Hold
 - Unannounced Transfer
 - Announced Transfer
 - Conference
 - Dialpad (for dialing DTMF on an existing call)

Make a call

To make a call:

1. Right-click the contact you want to call.
2. Select **Call** and the telephone number you want to dial.

A conversation window appears for the call.

Hang up a call

To hang up a call:

Click the **Hang Up** button in the conversation window.

Answer a call

To answer a call:
Click **Accept Call** in the incoming call window.
A conversation window appears for the call.

Place a call on hold

To put a call on hold:
Click the **Hold** button in the conversation window.

Answer a call on hold

To answer a call that is on hold, click the **Retrieve Call From Hold** button in the conversation window.

Transfer a call (Unannounced)

To transfer a call:

1. Click the **Unannounced Transfer** button in the conversation window.
The Transfer Voice Call dialog box appears.
2. Select the contact to which you want to transfer the call.
3. Click the **OK** button.

Transfer a call (Announced)

To transfer a call:

1. Click the **Announced Transfer** button in the conversation window.
The Announced Transfer dialog box appears.
2. Select the contact to which you want to transfer the call.
3. Click the **OK** button.
The Transfer Call dialog box appears.
4. Click the **Call** button.
The call is placed to the contact.
5. To complete the transfer, click the **Transfer Now** button.

Start a conference

To start a conference:

1. Click the **Add a person to the call** button in the conversation window.
The Invite Someone to Join This Conference dialog box appears.
2. Select the contact you want to add to the call.
3. Click the **OK** button.
The Add a Person to the Call dialog box appears.
4. Click the **Call** button.
The call is placed to the contact.
5. To add the call to the conference, click the **Add** button.

Use feature buttons

To use a feature button:

1. Click the Avaya tab in the Microsoft Office Communicator window.
2. Click on the appropriate feature button.
3. Use the dialpad to enter the feature access code or digits (if necessary).

Using Avaya IP Softphone with IBM Lotus Sametime Connect 7.5

If you installed Avaya IP Softphone with IBM Sametime Integration, you can make calls from IBM Lotus Sametime Connect 7.5 using Avaya IP Softphone.

To make a call from IBM Lotus Sametime Connect 7.5, right-click on the contact you want to call, and then select **Avaya IP Softphone Start Call**.

Things to Keep in Mind

When using Avaya IP Softphone with IBM Sametime Integration, keep in mind the following information:

- You must be logged into Avaya IP Softphone to make calls.
- Avaya IP Softphone will dial the telephone number that is administered in the Office Phone field in IBM Domino for the selected user.
- Avaya IP Softphone does not provide a call appearance for the calls you make.
- You cannot handle incoming calls.
- If you restart Avaya IP Softphone, you must restart IBM Lotus Sametime Connect 7.5.
- If you receive the message "Unable to place call. Avaya IP Softphone is not logged in," Avaya IP Softphone is not logged into the server. Log into the server with Avaya IP Softphone.
- If you receive the message "Unable to connect to Avaya IP Softphone," Avaya IP Softphone is not running. Start Avaya IP Softphone and log into the server.

Using Avaya IP Softphone in the Citrix Environment

If you are using Avaya IP Softphone in the Citrix environment, please keep in mind the following information:

- You can set your dialing rules in Avaya IP Softphone. (Select **Tools>Program Options>Dialing Rules.**)
- All Avaya IP Softphone files reside on the Citrix server.
- The Picture of Phone window is not supported.
- If you are running Avaya IP Softphone in published application mode, the Call Bar view must remain enabled. Do **not** disable Call Bar from the View menu.
- You cannot use video with Avaya IP Softphone.
- Instant Messaging and presence tracking are not supported.
- The Road Warrior configuration is not supported.
- You cannot change the location and name of the IP Softphone database file (softphone.mdb).
- You cannot import or export files with Avaya IP Softphone.
- The Click-to-Dial feature works only if the following conditions exist:
 - Microsoft Internet Explorer is a published application on the Citrix server.
 - You are using the installation of Microsoft Internet Explorer on the Citrix server. (The Click-to-Dial feature will not work with the local installation of Microsoft Internet Explorer on your PC.)

Running and Exiting Avaya IP Softphone

▼ **Purpose**

Before you can use Avaya IP Softphone to handle calls, you must:

1. Connect to your company's LAN (Local Area Network) where the server resides.
2. Start Avaya IP Softphone.
3. Log into the server via the Login dialog box.

After you are logged into the server, you can use Avaya IP Softphone to handle calls.

This section describes how to:

- Start Avaya IP Softphone
- Log into the server
- Exit Avaya IP Softphone

Configuring Your Login Settings

▶ **Introduction**

Using the Login Wizard, you can modify your login settings for the following configurations:

- Road Warrior configuration
- Telecommuter configuration
- Control of Avaya IP Telephone (via the telephone) configuration
- Control of Avaya Telephone (via the server) configuration

NOTE:

You will be unable to configure the login settings while you are logged into the server.

▶ **Procedure**

To configure your login settings:

- 1 Make sure you are not logged into the server.

- 2 Click the **Login Wizard** button.

Perform one of the following steps:

- If Instant Messaging is enabled, go to Step 4.
- If Instant Messaging is not enabled, go to Step 5.

3

Click the **Next** button.

The next Login Wizard dialog box appears.

4

Perform one of the following steps:

- If you want to use the Road Warrior configuration or the Telecommuter configuration, click the **Log into Avaya call server** option button.
- If you want to use the Control of Avaya Telephone (via the server) configuration, click the **Log into Avaya call server** option button and click the **Control an Avaya telephone** check box.
- If you want to use the Control of Avaya IP Telephone (via the telephone) configuration, click the **Log into Avaya IP telephone** option button.

5

Click the **Next** button.

The next Login Wizard dialog box appears.

6

In the Extension box, enter your extension on the server.

7

In the Password box, enter your password.

8

If you want Avaya iClarity to save your password for the next time you log into the server, make sure the **Remember password for next login session** check box is enabled.

9

Perform one of the following steps:

- If you are using the Road Warrior configuration, the Telecommuter configuration, or the Control of Avaya Telephone (via the server) configuration:
 1. Click the **Next** button.

The Server Address dialog box appears.
 2. In the Primary Server Address box, enter the address of the server.
 3. Click the **Next** button.

The Dialing Properties dialog box appears.
 4. Go to Step 11.
- If you are using the Control of Avaya IP Telephone (via the telephone) configuration:
 1. Click the **Discover** button to determine the IP address of the Avaya IP telephone, or enter the IP address of the Avaya IP telephone.
 2. Click the **Next** button.

The Dialing Properties dialog box appears.
 3. Go to Step 11.

10

From the Dialing Location box, select the dialing location for the server you are logging into. (To change the dialing properties (such as the country and area code), click the **Properties** button.)

11

Click the **Next** button.

If you are using the Road Warrior configuration, Telecommuter configuration, or Control of Avaya Telephone (via the server) configuration, the Emergency Call Handling disclaimer dialog box appears. This dialog box enables you to configure Avaya iClarity to use the Emergency Call Handling feature on your company's telephone system (if this feature is enabled for your extension). The Emergency Call Handling feature routes emergency calls (for example, 911 calls in the U.S.) to the appropriate emergency services destination. Go to Step 13.

If you are using the Control of Avaya IP Telephone (via the telephone) configuration, you are finished configuring the login settings. Go to Step 18.

12

If you agree with the information stated in the Emergency Call Handling disclaimer dialog box, click the **I Agree** button.

The next Login Wizard dialog box appears. This dialog box enables you to configure Avaya iClarity to use the Emergency Call Handling feature on your company's telephone system (if this feature is enabled for your extension). The Emergency Call Handling feature routes emergency calls (for example, 911 calls in the U.S.) to the appropriate emergency services destination.

13

Perform one of the following steps:

- If you want to use the Emergency Call Handling feature, make sure the **Enable Emergency Call Handling feature** check box is enabled, and perform one of the following steps:
 - If you are using Avaya iClarity in your office (that is, you are located by your extension on your company's telephone system), select the **Your extension number** option button.
 - If you are using Avaya iClarity away from your office (that is, you are working from a remote site, such as your home or a hotel), click the **Telephone number** option button, and enter the telephone number at your current location.
- If you do not want to use the Emergency Call Handling feature, make sure the **Enable emergency call handling feature** check box is disabled.

14

Click the **Next** button.

If you are using the Road Warrior configuration or Telecommuter configuration, the Avaya iClarity configuration dialog box appears. This dialog box enables you to specify whether you will use the Road Warrior configuration (Voice over IP) or the Telecommuter configuration. Go to Step 16.

If you are using the Control of Avaya Telephone (via the server) configuration, go to Step 18.

15

Perform one of the following steps:

- If you want to use your application in the Road Warrior configuration, click the **Road Warrior (Voice over IP)** option button, and select how your PC connects to the server from the Bandwidth Setting box. (This is the network bandwidth setting.)
- If you want to use your application in the Telecommuter configuration, click the **Telecommuter** option button, and enter the telephone number of the telephone you want to use. You will use the handset (or speakerphone) on this telephone to hear and speak to the other party on a call. Be sure to enter this telephone number the way you would dial it from your extension.

For example, if the telephone number is an outside call in the same area code as your extension and you must dial a "9" when making outside calls, you would enter **9** at the beginning of the telephone number in this box.

16

When finished, click the **Next** button.

17

Perform one of the following steps:

- If Instant Messaging is enabled, the Login Wizard allows you to configure the settings for your instant messaging account. Perform the following steps:
 1. Click the **Next** button.
 2. Select the appropriate option button, and click the **Next** button.
 3. Follow the screen prompts.
- If Instant Messaging is not enabled, click the **Finish** button.

18

Configuring the Startup Settings

► **Introduction**

You can set whether the Avaya IP Softphone window appears when Avaya IP Softphone is started. Your choices are:

- Call Bar window
- no Avaya IP Softphone window. See Running Avaya IP Softphone with no Window.

► **Procedure**

To set which Avaya IP Softphone window will appear on startup:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1

Click on **User Interface Options**.

The User Interface Options appear.

2

In the User interface(s) displayed area, select the appropriate check box(es).

3

Click the **OK** button.

NOTE:

The new setting will not be used until you exit and restart Avaya IP Softphone.

4

Starting Avaya IP Softphone

▼ Procedure

To start Avaya IP Softphone:

- 1 _____
Log into your company's LAN.
- 2 _____
Select **Start** from the taskbar.
- 3 _____
Select **Programs** from the Start menu.
- 4 _____
Select **Avaya IP Softphone**.
- 5 _____
Select **Avaya IP Softphone**.
The Avaya IP Softphone and the Login dialog box appear. Although Avaya IP Softphone is now running, you are not yet logged into the server.
- 6 _____
Go to Logging into the Server.

Logging into the Server Initially

▶ Introduction

The procedure describes how to log into the server for the first time.

▶ Procedure

To log into the server for the first time:

- 1 _____
Make sure you are logged into your company's LAN.
- 2 _____
Run the Login Wizard to configure your login settings.

After configuring your login settings, click the **Log into the server** button.

The Login dialog box appears.

3

In the Extension box, verify your extension on the server.

4

In the Password box, enter your password.

5

In the Configuration box, specify whether you want to use the Road Warrior configuration (Voice over IP), the Telecommuter configuration, the Control of Avaya Telephone (via the server) configuration, the Control of Avaya IP Telephone (via the telephone) configuration, or the Instant Messaging Only configuration.

6

Perform one of the following steps:

- If you are using the Road Warrior configuration, make sure the address of the server is displayed in the Call Server Address box and the appropriate bandwidth setting is displayed in the Bandwidth Setting box.
- If you are using the Telecommuter configuration, make sure the address of the server is displayed in the Call Server Address box and the telephone number of the telephone you want to use is displayed in the Telephone At box.
- If you are using the Control of Avaya Telephone (via the server) configuration, make sure the address of the server is displayed in the Call Server Address box.
- If you are using the Control of Avaya IP Telephone (via the telephone) configuration, make sure the IP address of the Avaya IP telephone is displayed in the IP Telephone Address box.
- If you are using the Instant Messaging Only configuration, enter your Instant Messaging user ID in the Username box, and then enter the password for your Instant Messaging account in the Password box.

7

From the Dialing Location box, select the dialing location for the server you are logging into. (To change the dialing properties (such as the country and area code), click the **Properties** button.)

8

If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login session** check box.

9

If you want the software to try to log into the server automatically the next time you start Avaya iClarity, enable the **Automatically login if possible when application restarts** check box.

10

For Instant Messaging

If you want the software to try to log into the Avaya Instant Messaging server automatically, enable the **Log into Avaya instant messaging server** check box.

11

Click the **Log in** button.

NOTE:

If you are using the Control of Avaya IP Telephone (via the telephone) configuration, perform the following steps:

1. Look at the display of your IP telephone.
The system prompts you to allow the remote login (CTI).
2. Press the **#** button on the dialpad of the IP telephone to allow Avaya IP Softphone to log into the IP telephone.

The Login Status dialog box appears when you log into the server successfully.

The Login icon appears in the system tray. When you place the mouse over this icon, the extension you are logged in as and the status of the link to the server are displayed.

Important!

If you are using the Telecommuter configuration, the Verify Telephone Number dialog box appears. It is very important that you make some test calls after you log in to verify that you have set up your connection properly. Click the **OK** button.

12

Logging into the Server

► Introduction

Before you can use Avaya IP Softphone, you must log into the server. When you start Avaya IP Softphone, the Login dialog box appears.

► Procedure

To log into the server:

Make sure you are logged into your company's LAN.

1

In the Extension box of the Login dialog box, enter your extension on the server.

2

In the Password box, enter your password.

3

In the Configuration box, select the configuration you want to use.

4

Perform one of the following steps:

- If you are using the Road Warrior configuration, make sure the address of the server is displayed in the Call Server Address box and the appropriate bandwidth setting is displayed in the Bandwidth Setting box.
- If you are using the Telecommuter configuration, make sure the address of the server is displayed in the Call Server Address box and the telephone number of the telephone you want to use is displayed in the Telephone At box.
- If you are using the Control of Avaya Telephone (via the server) configuration, make sure the address of the server is displayed in the Call Server Address box.
- If you are using the Control of Avaya IP Telephone (via the telephone) configuration, make sure the address of the IP telephone is displayed in the IP Telephone Address box.
- If you are using the Instant Messaging Only configuration, enter your Instant Messaging user ID in the Username box, and then enter the password for your Instant Messaging account in the Password box.

5

If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login session** check box.

6

If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

7

For Instant Messaging

If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

8

Click the **Log in** button.

NOTE:

If you are using the Control of Avaya IP Telephone (via the telephone) configuration, perform the following steps:

1. Look at the display of your IP telephone.
The system prompts you to allow the remote login (CTI).
2. Press the **#** button on the dialpad of the IP telephone to allow Avaya IP Softphone to log into the IP telephone.

The Login Status dialog box appears when you log into the server successfully, and Avaya IP Softphone starts.

The Login icon appears in the system tray. When you place the mouse over this icon, the extension you are logged in as and the status of the link to the server are displayed.

Important!

If you are using the Telecommuter configuration, the Verify Telephone Number dialog box appears. It is very important that you make some test calls after you log in to verify that you have set up your connection properly. Click the **OK** button.

9

Login Issues

► Introduction

Follow the information provided in this topic if you have been unable to log into your company's server or your Avaya IP telephone.

► Things to Keep in Mind

If you are unable to log into the server or IP telephone, do the following:

- If you are using the Avaya IP Telephone configuration, verify that the IP telephone you want to log into is an Avaya IP telephone that has the software that supports the remote login (CTI) feature. Contact your System Administrator to get the latest software for your IP telephone.
- Disable or configure Internet Connection Sharing (ICS), Internet Connection Firewall (ICF), and all firewall applications on your PC.
- If your company's LAN uses a firewall, configure Avaya iClarity for use with a firewall.
- If you are using a VPN, configure Avaya iClarity for use with a VPN.

If you are still unable to login, go to the Troubleshooting page for Avaya IP Softphone at <http://avaya.com/support> for more information.

Using the Road Warrior Configuration

Introduction

The Road Warrior configuration enables travelers to use the full feature set of your company's telephone system from temporary remote locations anywhere in the world (such as a hotel room). The Road Warrior configuration consists of two software applications running on a PC that is connected to the server over an IP network. The single network connection between the PC and server carries two channels, one for the signaling path and one for the voice path. Avaya IP Softphone software handles the call signaling, and Avaya iClarity (an H.323 V2-compliant audio application) handles the voice communications. The user places and receives calls via the Avaya IP Softphone interface on the PC and uses a headset connected to the PC (or the PC's microphone and speakers) to speak and listen.

Avaya iClarity runs in the background and starts automatically when you start Avaya IP Softphone.

Requirements

To use Avaya IP Softphone in the Road Warrior configuration, you will need:

- access to your company's LAN (via dialup networking or a cable modem), which provides the signaling path between your PC running Avaya IP Softphone and your telephone.
- either a headset connected to the PC or a microphone and speakers connected to the PC so you can speak and listen during calls.

Logging In

To log in using the Road Warrior configuration:

Make sure you are logged into your company's LAN.

1 _____

In the Extension box of the Login dialog box, enter your extension on the server.

2 _____

In the Password box, enter your password.

3 _____

From the Configuration box, select **Road Warrior**.

4 _____

Make sure the address of the server is displayed in the Call Server Address box.

5 _____

Make sure the appropriate bandwidth setting is displayed in the Bandwidth Setting box.

6 _____

7

 If you want the software to save your password for the next time you log in, enable the **Remember password for next login** check box.

8

 If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

9

 If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

10

 Click the **Log in** button.

Using the Telecommuter Configuration

► **Introduction**

The Telecommuter configuration of Avaya IP Softphone enables telecommuters to use the full telephone system feature set from home. The Telecommuter configuration consists of a PC and a telephone with separate connections to the telephone system. The PC is connected to the telephone system over an IP network to provide the signaling path. The PC runs the Avaya IP Softphone software, providing you with an interface to control calls. A standard telephone is connected to the telephone system over the public-switched telephone network (PSTN) to provide a high-quality voice path. You place and receive calls via the IP Softphone interface on the PC and use the telephone handset to speak and listen.

For the Telecommuter configuration, you must have a separate telephone line available at your location. When you receive or make a call after you start a Avaya IP Softphone session, a "service link" is established. This service link is the "audio path" that enables you to speak to the other party. In the Telecommuter configuration, the service link is established between the server and the telephone number you specified. If the service link is not established, you will be unable to make and receive calls.

NOTE:

Avaya IP Softphone does not support video calls in the Telecommuter configuration.

► **Requirements**

To use Avaya IP Softphone in the Telecommuter configuration, you will need:

- access to your company's LAN (via dialup networking or a cable modem), which provides the signaling path between your PC running Avaya IP Softphone and your company's telephone system.
- a separate telephone line, which you will use to speak to and hear the other party on a call.

► **Logging In**

To log into the server using the Telecommuter configuration:

1 _____
Make sure you are logged into your company's LAN.

2 _____
In the Extension box of the Login dialog box, enter your extension on the server.

3 _____
In the Password box, enter your password.

4 _____
From the Configuration box, select **Telecommuter**.

5 _____
In the Call Server Address box, enter the address of the server.

In the Telephone At box, enter the telephone number of the telephone you want to use. (This is the telephone number that the server calls to reach you for the voice connection.)

You will use the handset (or speakerphone) on this telephone to hear and speak to the other party on a call.

Important!

6 _____
Be sure to enter this telephone number the way you would dial it from your extension. For example, if the telephone number is an outside call in the same area code as your server and you must dial a 9 when making outside calls, you would enter **9** at the beginning of the telephone number in the Telephone at box.

7 _____
If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login** check box.

8 _____
If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

For Instant Messaging

9 _____
If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

Click the **Log in** button.

The Verify Telephone Number dialog box appears. It is very important that you make some test calls after you log in to verify that you have set up your connection properly. Click the **OK** button.

The Login Status window appears when you log into the server successfully, and Avaya IP Softphone starts.

The Avaya IP Softphone icon appears in the system tray. When you place the mouse over this icon, the extension you are logged in as is displayed.

10

► **Things to Keep in Mind**

When using the Telecommuter configuration, keep in mind the following information:

- If you receive an incoming call on your separate telephone line while you are active on a call with Avaya IP Softphone, that caller will hear either ringing (if you have call waiting on that line) or a busy signal. If you have call waiting, you can answer the incoming calls as you would answer any other call waiting call.
- As long as the connection exists between the server and the telephone on your separate telephone line, you will be unable to make calls from this telephone. Calls can only be made from Avaya IP Softphone; the telephone is used only for voice transmission. (The telephone line is dedicated to transmitting the conversation between you and the other caller on the Avaya IP Softphone call.) Once the connection to the Avaya server ends, you can make calls from this telephone.
- If you want to use telephone system features that require you to enter feature activation information (such as the Call Forwarding feature), you must enter this information from either your PC keyboard or the Dial Pad window. **Do not enter this information from the telephone on your separate line.**

Using the Control of Avaya IP Telephone (via the telephone) Configuration

► **Introduction**

The Control of Avaya IP Telephone (via the telephone) configuration of Avaya IP Softphone enables Avaya IP Telephone users to control their IP telephones from Avaya IP Softphone. In this configuration, you log into your Avaya IP Telephone instead of the server. Once you are logged into your IP telephone, you can make and handle calls from both Avaya IP Softphone and your IP telephone, and you use your IP telephone to speak and listen. For example, when a call arrives at your extension, you can either answer it from the Avaya IP Softphone window or your IP telephone. In this configuration, both Avaya IP Softphone and your IP telephone are "linked" during the session, enabling you to switch back and forth between the Avaya IP Softphone window and your IP telephone at any time as you make and handle calls.

NOTE:

When you use the Control of Avaya IP Telephone (via the telephone) configuration, you will be unable to mute your speaker and control the volume of your IP telephone from the Avaya IP Softphone window.

For the Control of Avaya IP Telephone (via the telephone) configuration, you must have an Avaya IP telephone that has the software that supports the remote login (CTI) feature. Contact your System Administrator to get the latest software for your IP telephone.

► **Requirements**

To use Avaya IP Softphone in the Control of Avaya IP Telephone (via the telephone) configuration, you will need:

- access to your company's LAN (via dialup networking or a cable modem), which provides the signaling path between your PC running Avaya IP Softphone and your IP telephone.
- a supported Avaya IP telephone that has the software that supports the remote login (CTI) feature.
- CTI control enabled on your Avaya IP telephone. To enable CTI control:
 1. Press the **Mute** button on your Avaya IP telephone.
 2. Press the **2** button.
 3. Press the **8** button.
 4. Press the **4** button.
 5. Press the **#** button.

The display of the telephone indicates whether CTI control is enabled. The message "CTI=manual" indicates that CTI control has been enabled. The message "CTI=off" indicates that CTI control is disabled.

6. Perform one of the following steps:
 - If "CTI=manual" is displayed, save your changes by following the prompts on the telephone display.
 - If "CTI=off" is displayed, press the **1** button and the **#** button to enable CTI control, and then save your changes by following the prompts on the telephone display.

► **Logging In**

To log in using the Control of Avaya IP Telephone (via the telephone) configuration:

Make sure you are logged into your company's LAN.

1

In the Extension box of the Login dialog box, enter the extension of your IP telephone.

2

In the Password box, enter the password for your IP telephone.

3

From the Configuration box, select **Control of Avaya IP Telephone (via the telephone)**.

4

Perform one of the following steps:

- Click the **Discover** button to determine the IP address of the Avaya IP telephone.
- Enter the IP address of the Avaya IP telephone.

5

If you want the software to save your password for the next time you log in, enable the **Remember password for next login** check box.

6

If you want the software to try to log into the IP telephone automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

7

For Instant Messaging

If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

8

Click the **Log in** button.

9

Look at the display of your IP telephone.

The system prompts you to allow the remote login (CTI).

10

Press the **#** button on the dialpad of your IP telephone to allow Avaya IP Softphone to log into the IP telephone.

11

► Things to Keep in Mind

When using the Control of Avaya IP Telephone (via the telephone) configuration, keep in mind the following information:

- You can start a procedure (such as dialing a number or adding participants to a conference) from Avaya IP Softphone and complete it from the IP telephone. (Conversely, you can start a procedure from the IP telephone and complete it from Avaya IP Softphone.)
- You cannot mute your speaker and control the volume from the Avaya IP Softphone window. You must perform these actions from the IP telephone.

Using the Control of Avaya Telephone (via the server) Configuration

► Introduction

The Control of Avaya Telephone (via the server) configuration of Avaya IP Softphone enables you to control your Avaya telephone from Avaya IP Softphone. In this configuration, you can make and handle calls from both Avaya IP Softphone and your Avaya telephone, and you use your Avaya telephone to speak and listen. For example, when a call arrives at your extension, you can either answer it from the Avaya IP Softphone window or your telephone. In this configuration, both Avaya IP Softphone and your telephone are "linked" during the session, enabling you to switch back and forth between the Avaya IP Softphone window and your telephone at any time as you make and handle calls.

NOTE:

When you use the Control of Avaya Telephone (via the server) configuration, you will be unable to mute your speaker and control the volume of your telephone from the Avaya IP Softphone window.

For the Control of Avaya Telephone (via the server) configuration, you must have a supported Avaya telephone.

► Requirements

To use Avaya IP Softphone in the Control of Avaya Telephone (via the server) configuration, you will need:

- access to your company's LAN (via dialup networking or a cable modem), which provides the signaling path between your PC running Avaya IP Softphone and your telephone.
- a supported Avaya telephone.

► Logging In

To log in using the Control of Avaya Telephone (via the server) configuration:

Make sure you are logged into your company's LAN.

1 _____

In the Extension box of the Login dialog box, enter your extension on the server.

2 _____

In the Password box, enter your password.

3 _____

From the Configuration box, select **Control of Avaya Telephone (via the server)**.

4 _____

Make sure the address of the server is displayed in the Call Server Address box.

5

If you want the software to save your password for the next time you log in, enable the **Remember password for next login** check box.

6

If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

7

For Instant Messaging

If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

8

Click the **Log in** button.

9

► Things to Keep in Mind

When using the Control of Avaya Telephone (via the server) configuration, keep in mind the following information:

- You can start a procedure (such as dialing a number or adding participants to a conference) from Avaya IP Softphone and complete it from your telephone. (Conversely, you can start a procedure from your telephone and complete it from Avaya IP Softphone.)
- You cannot mute your speaker and control the volume from the Avaya IP Softphone window. You must perform these actions from the telephone.

Using the Instant Messaging Only Configuration

► Introduction

The Instant Messaging Only configuration enables you to log into your Instant Messaging account without logging into the call server. In this configuration, you have access to Instant Messaging capabilities and all other Avaya IP Softphone capabilities except call handling and call server features.

► Requirements

To use Avaya IP Softphone in the Instant Messaging Only configuration, you will need:

- access to your company's LAN (via dialup networking or a cable modem), which provides the signaling path between your PC running Avaya IP Softphone and your company's Instant Messaging server.
- an account on the Instant Messaging server.

► **Logging In**

To log in using the Instant Messaging Only configuration:

Make sure you are logged into your company's LAN.

1 _____

From the Configuration box of the Login dialog box, select **Instant Messaging Only**.

2 _____

In the User Name box, enter your Instant Messaging user ID.

3 _____

In the Password box, enter password for your Instant Messaging account.

4 _____

Make sure the address of the Instant Messaging server is displayed in the IM Server Address box.

5 _____

If you want the software to save your password for the next time you log in, enable the **Remember password for next login** check box.

6 _____

If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

7 _____

Click the **Log in** button.

8 _____

Using Avaya IP Softphone with a Virtual Private Network (VPN)

► **Introduction**

This topic describes the requirements and procedure to log into a server using a VPN. You must follow the information provided in this topic if:

- You are using a VPN tunnel and you have a "shim" VPN client running on your PC. (A "shim" VPN client is a software application that resides below the native TCP/IP stack of your PC and intercepts all network traffic that your PC transmits and receives.)
- You are unable to log into your company's server using the Logging into the Server procedure.

NOTE:

Before you can log into Avaya IP Softphone, you must disable or configure Internet Connection Sharing (ICS), Internet Connection Firewall (ICF), and all firewall applications running on the PC (for example, McAfee Personal Firewall Plus, Norton Personal Firewall, and Zone Labs ZoneAlarm). You must also disable the built-in firewall of your VPN client application (such as Lucent or Cisco).

► **Requirements**

To use Avaya IP Softphone to log into a VPN, you will need:

- access to your company's LAN
- a VPN client application that provides the IP address (that is, the IPsec IP address) that is assigned to you by the VPN gateway. Contact your VPN provider or IT department for instructions on how to determine the IP address of your VPN client.

NOTE:

Avaya IP Softphone will **NOT** work with VPN gateways that implement port address translation.

You must disable the built-in firewall of your VPN client application (such as Lucent or Cisco).

► **Logging In**

To log in using a VPN:

- 1

Make sure you are logged into your company's LAN.
- 2

Open your VPN client application and determine the IP address assigned by the VPN gateway. If you cannot find this information, contact your Network Administrator.
- 3

Disable the built-in firewall of your VPN client application.

4 _____
Disable the firewall application (if running) on your PC.

5 _____
In the Extension box of the Login dialog box, enter your extension on the server.

6 _____
In the Password box, enter your password.

7 _____
In the Configuration box, specify the option button for the configuration you want to use.

Perform one of the following steps:

- If you are using the Road Warrior configuration, make sure the address of the server is displayed in the Call Server Address box and the appropriate bandwidth setting is displayed in the Bandwidth Setting box.
- If you are using the Telecommuter configuration, make sure the telephone number of the telephone you want to use is displayed in the Telephone At box.
- If you are using the Control of Avaya Telephone (via the server) configuration, make sure the address of the server is displayed in the Call Server Address box.
- If you are using the Control of Avaya IP Telephone (via the telephone) configuration, make sure the address of the IP telephone is displayed in the IP Telephone Address box.
- If you are using the Instant Messaging Only configuration, enter your Instant Messaging user ID in the Username box, and then enter the password for your Instant Messaging account in the Password box.

8 _____
If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login session** check box.

9 _____
If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

10 _____
For Instant Messaging

If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

11 _____

Click the **Settings** button.

The Login Settings dialog box appears. The Login tab is selected.

12

Click the **Advanced** tab.

The Advanced tab appears.

13

Click the **Use the following IP address** check box in the Local IP Address Information area, and enter the IP address of your VPN client in the corresponding box. (The VPN gateway assigns the IP address to your VPN client.)

14

Perform one of the following steps:

- If your company's VPN does not have a firewall, go to Step 16.
- If your company's VPN has a firewall using TCP and/or UDP port restrictions, perform the following steps:
 1. Contact your Telecommunications department or IT department to determine the port range allowed by the firewall.
 2. Click the **Choose from the following port range to communicate with the server** check box in the Local Port Range Information area.
 3. In the Lowest port number box, enter the number of the lowest port you want Avaya IP Softphone to use. This number must be greater than 1024 and less than 65436.
 4. In the Highest port number box, enter the number of the highest port you want Avaya IP Softphone to use. This number must be less than 65536.

NOTE:

The minimum range between the lowest port number and the highest port number is 100 ports (that is, the range you enter must consist of 100 or more port numbers).

15

Click the **OK** button.

16

Click the **Log in** button.

The VPN Configuration in Effect dialog box appears.

17

Click the **Continue with the current settings** option button.

18

Click the **OK** button.

NOTE:

If you are using the Control of Avaya IP Telephone (via the telephone) configuration, perform the following steps:

1. Look at the display of your IP telephone.
The system prompts you to allow the remote login (CTI).
2. Press the **#** button on the dialpad of the IP telephone to allow Avaya IP Softphone to log into the IP telephone.

The Login Status dialog box appears when you log into the server successfully, and Avaya IP Softphone starts.

The Login icon appears in the system tray. When you place the mouse over this icon, the extension you are logged in as and the status of the link to the server are displayed.

Important!

If you are using the Telecommuter configuration, the Verify Telephone Number dialog box appears. It is very important that you make some test calls after you log in to verify that you have set up your connection properly. Click the **OK** button.

19

Using Avaya IP Softphone with a Firewall

► **Introduction**

This topic describes the requirements and procedure to log into a server that uses a firewall with TCP and/or UDP port restrictions. Follow the information provided in this topic only if you have been unable to log into your company's server using the Logging into the Server procedure.

► **Requirements**

To use Avaya IP Softphone with a firewall, you will need:

- access to your company's LAN
- the port range allowed by the firewall. (Contact your Telecommunications department or IT department for this information.)

NOTE:

Before you can log into Avaya IP Softphone, you must disable or configure Internet Connection Sharing (ICS), Internet Connection Firewall (ICF), and all firewall applications running on the PC (for example, McAfee Personal Firewall Plus, Norton Personal Firewall, and Zone Labs ZoneAlarm). If you are using a VPN client (such as Lucent or Cisco), you must also disable its built-in firewall.

► **Logging In**

To log in with a firewall:

- 1** _____
Make sure you are logged into your company's LAN.
 - 2** _____
Disable the firewall application (if running) on your PC.
 - 3** _____
In the Extension box of the Login dialog box, enter your extension on the server.
 - 4** _____
In the Password box, enter your password.
 - 5** _____
In the Configuration box, specify the option button for the configuration you want to use.
- Perform one of the following steps:
- If you are using the Road Warrior configuration, make sure the address of the server is displayed in the Call Server Address box and the appropriate bandwidth setting is displayed in the Bandwidth Setting box.
 - If you are using the Telecommuter configuration, make sure the telephone number of the telephone you want to use is displayed in the Telephone At box.
 - If you are using the Control of Avaya Telephone (via the server) configuration, make sure the address of the server is displayed in the Call Server Address box.
 - If you are using the Control of Avaya IP Telephone (via the telephone) configuration, make sure the address of the IP telephone is displayed in the IP Telephone Address box.
 - If you are using the Instant Messaging Only configuration, enter your Instant Messaging user ID in the Username box, and then enter the password for your Instant Messaging account in the Password box.
- 6** _____
 - 7** _____
If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login session** check box.

If you want the software to try to log into the server automatically the next time you start Avaya IP Softphone, enable the **Automatically login if possible when application restarts** check box.

8

For Instant Messaging

If you want to log into the Instant Messaging server, enable the **Log into Avaya instant messaging server** check box.

9

Click the **Settings** button.

The Login Settings dialog box appears. The Login tab is selected.

10

Click the **Advanced** tab.

The Advanced tab appears.

11

Click the **Choose from the following port range to communicate with the server** check box in the Local Port Range Information area.

12

In the Lowest port number box, enter the number of the lowest port you want Avaya IP Softphone to use. This number must be greater than 1024 and less than 65436.

13

In the Highest port number box, enter the number of the highest port you want Avaya IP Softphone to use. This number must be less than 65536.

NOTE:

The minimum range between the lowest port number and the highest port number is 100 ports (that is, the range you enter must consist of 100 or more port numbers).

14

Click the **OK** button.

15

Click the **Log in** button.

The VPN Configuration in Effect dialog box appears.

16

Click the **Continue with the current settings** option button.

17

Click the **OK** button.

NOTE:

If you are using the Control of Avaya IP Telephone (via the telephone) configuration, perform the following steps:

1. Look at the display of your IP telephone.
The system prompts you to allow the remote login (CTI).
2. Press the **#** button on the dialpad of the IP telephone to allow Avaya IP Softphone to log into the IP telephone.

The Login Status dialog box appears when you log into the server successfully, and Avaya IP Softphone starts.

The Login icon appears in the system tray. When you place the mouse over this icon, the extension you are logged in as and the status of the link to the server are displayed.

Important!

If you are using the Telecommuter configuration, the Verify Telephone Number dialog box appears. It is very important that you make some test calls after you log in to verify that you have set up your connection properly. Click the **OK** button.

18



Running Avaya IP Softphone with no Window

▶ **Introduction**

You can configure Avaya IP Softphone to run without displaying the application window. In this configuration, you use Avaya IP Softphone to log into the call server. Once you are logged into the server, you make calls from another application (such as Microsoft Outlook) and handle calls directly from your telephone.

To access Avaya IP Softphone, you must right-click on the Avaya IP Softphone icon in the System Tray

▶ **Procedure**

To configure Avaya IP Softphone to run with no window:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1

Click on **User Interface Options**.

The User Interface Options appear.

2

Click the **Display user interface(s) on start up** check box to disable it.

NOTE:

Make sure this check box is not enabled (that is, "checked").

3

Click the **OK** button.

NOTE:

The new setting will not be used until you exit and restart Avaya IP Softphone.

4

Exiting Avaya IP Softphone

Procedure

This procedure describes how to exit Avaya IP Softphone and log off (if you are logged in).

Perform one of the following steps:

- From the File menu, select **Exit (and log off)**.
- Right-click the Avaya IP Softphone icon in the system tray, and select **Exit (and log off)**.
- Click the close button for the Avaya IP Softphone window.

If you were logged in, you are now logged off.

Handling and Making Calls

Handling Calls with Avaya IP Softphone

► Introduction

When you receive or make a call after you start a Avaya IP Softphone session, a "service link" is established. This service link is the "audio path" that enables you to speak to the other party. If you are using the Road Warrior configuration, the service link is established between the server and Avaya IP Softphone. If you are using the Telecommuter configuration, the service link is established between the server and the telephone number you specified. If the service link is not established, you will be unable to make and receive calls. The action you must perform to establish the service link depends on the Avaya IP Softphone configuration you are using.

Depending on how your login on the server is administered, the service link will either:

- be disconnected when the current call ends, or
- remain connected for the duration of the current Login session.

► Using the Road Warrior Configuration

If you are using the Road Warrior configuration, the service link call is answered automatically.

To make a call using the Road Warrior configuration, you must perform the following step:

- Make a call from the Avaya IP Softphone window.

A service link call is made from the server. Even though you have made a call from Avaya IP Softphone, the call is not placed until the service link is established. Avaya IP Softphone answers the service link call automatically. The service link call is established, and the outgoing call is placed. You will hear the call ring at the destination telephone number.

When you receive an incoming call, the server tries to establish the service link to Avaya IP Softphone. The service link call is answered automatically. To answer a call using Avaya IP Softphone, just choose the **Answer** button for the call in the Avaya IP Softphone window. The incoming call is answered, and you can speak to the other party.

► Using the Telecommuter Configuration

If you are using the Telecommuter configuration, Avaya IP Softphone places the service link call to the telephone line you specified. You must answer the service link call by answering the telephone connected to the telephone number you specified.

To make a call in the Telecommuter configuration, you must perform the following steps:

1. Make a call from the Avaya IP Softphone window.

A service link call is made from the server to the telephone number you specified. Even though you have made a call from Avaya IP Softphone, the call is not placed until the service link is established.

2. Answer the call on your separate telephone line.

The service link call is established, and the outgoing call is placed. You will hear the call ring at the destination telephone number.

When you receive an incoming call, the server tries to establish the service link to the separate telephone line you specified. To answer a call in the Telecommuter configuration,

you must answer the service link call on the separate telephone line you specified. The incoming call is answered, and you can speak to the other party.

▶ **Using the Control of Avaya IP Telephone (via the telephone) Configuration**

In the Control of Avaya IP Telephone (via the telephone) configuration, you can make calls and answer calls from both Avaya IP Softphone and your IP telephone. You are logged into the IP telephone instead of the server.

▶ **Using the Control of Avaya Telephone (via the server) Configuration**

In the Control of Avaya Telephone (via the server) configuration, you can make calls and answer calls from both Avaya IP Softphone and your telephone.

Handling Calls

Answer a call

▶ **Introduction**

An incoming call is displayed in the Call Appearance area of the Avaya IP Softphone window with a call label and the calling number. The **Answer** button appears next to the call appearance.

When you answer a call, the **Answer** button for the call appearance becomes the **Hangup** button, and the Active Timer starts. The Active Timer keeps track of the duration of the call.

If you are active on a call and answer another call, the active call is placed on hold automatically, and the ringing call becomes active.

If you have a bridged appearance that is active on the other extension, the **Bridge** button appears next to the call appearance. If you click this button, you will start a conference.

▶ **Procedure**

To answer a call from the Call Bar:

Choose the **Answer** button for the associated call appearance.

If you are using a separate telephone line, answer the call from the phone.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click  to receive video from the caller.

If both you and the caller are logged into the Instant Messaging server, and you are tracking the caller's Instant Messaging presence, you can send a preset Instant Messaging response to the caller.



Hang up a call

► Introduction

Clicking the **Hangup** button for a call appearance disconnects the call. This action is similar to hanging up the handset or turning off the Speakerphone on your telephone.

You can only hang up active calls.

If you want to disconnect a call and start a new call, use the **Drop** button.

► Procedure

To hang up a call:

Choose the **Hangup** button for the associated call appearance.

The call is disconnected, and the information for the call is removed from the call appearance.

If you are using the speakerphone, the speakerphone turns off.

1 _____

If you are using the handset, hang it up.

2 _____

Drop a call

► Introduction

Clicking the **Drop** button disconnects the active call. After the call is dropped, a new call is started.

You can only drop active calls.

NOTE:

If you are having a conference call, clicking the **Drop** button disconnects the last party you added to the conference.

► Procedure

To drop the active call:

Choose the **Drop** button from the Phone Buttons toolbar.

The active call is disconnected, and the associated call appearance is removed. A new call is started.

Answer a call on hold

► Introduction

When you answer a call that is on hold, the **Unhold** button for that call appearance becomes the **Hangup** button, and the Active Timer resumes. The Active Timer keeps track of the duration of the call.

If you are active on a call and answer a call that is on hold, the active call is placed on hold automatically, and the held call becomes active.

► Procedure

To answer a call that is on hold:

Choose the **Unhold** button for the associated call appearance or double-click on the call appearance.

The call becomes active, and the **Hangup** button appears on the associated call appearance.

If the call is video enabled, the far end window appears.

Place a call on hold

► Introduction

When you place a call on hold, the **Hangup** button for that call appearance becomes the **Unhold** button, and the Hold Timer starts. The Hold Timer keeps track of how long the call is on hold. The Hold Timer restarts every time the call is placed on hold.

You can only place the active call on hold.

► Procedure

To place the active call on hold:

Choose the **Hold** button.

The active call is placed on hold, and the **Unhold** button appears for the call appearance.

If the call is video enabled, the far end window closes.

Enter digits during a call

► Introduction

Using Avaya IP Softphone, you can send digits during an active call.

You can enter digits from

- your keyboard
- the Dial Pad window
- another application

► Enter digits from your keyboard

To send digits from your keyboard during a call:

Make sure the Avaya IP Softphone window is active (that is, the window is selected).

1 _____

Click  next to  and select **Send Digits**.

2 _____

Type the characters you want to send.

Avaya IP Softphone sends these characters as you type them. You cannot edit these digits.

3 _____

► Enter digits from the Dial Pad window

To send digits from the Dial Pad window during a call:

From the **View** menu, select **Dial Pad**.

The Dial Pad window appears

1 _____

Click on the appropriate buttons in the Dial Pad window.

Avaya IP Softphone sends these characters as you click on them.

2 _____

▶ Enter digits from another application

To send digits from another application during a call:

Select the digits you want to send.

The selected digits are highlighted.

1

Right-click the mouse on the **Avaya IP Softphone** icon in the system tray, and select **Dial on current call**.

Avaya IP Softphone sends these characters.

2

Transfer a call

▶ Introduction

There are four methods of transferring calls:

- **Unsupervised Transfer from the Call Bar window** (that is, the Avaya IP Softphone main window)
You click the **Transfer** button on the Phone Buttons toolbar, type the number to be called into a text box, and click the **OK** button to transfer the call. You do not announce the call.
- **Supervised Transfer from the Call Bar window**
You click the **Transfer** button on the Phones Buttons toolbar, type the number to be called into a text box, and click the **OK** button. After announcing the call, you can either click the **OK** button to transfer or the **Cancel** button to not transfer the call.
- **Drag and Drop Transfer from the Call Bar window**
You transfer a call by placing the call on hold and then dragging and dropping the call appearance for that call onto the active call appearance of the destination to which you want to transfer the call.
- **Drag and Drop Transfer from the Contact Directory**
You transfer a call by dragging and dropping the Contact Directory entry to which you want to transfer the call onto the active call appearance.

You specify which type of transfer (that is, Unsupervised Transfer or Supervised Transfer) you want the **Transfer** button in the Phone Buttons toolbar to perform using the Call Handling option from the **Program Options** command of the **Tools** menu. See Configuring Avaya IP Softphone Options.

► Unsupervised Transfer

To transfer a call using Unsupervised Transfer:

While you are active on a call, click the **Transfer** button.

The Transfer dialog box appears.

1

Perform one of the following steps:

- If you want to transfer the call to a new call, click the **New Number** option button, and enter the number to which you want to transfer the call. You can type in the number via your keyboard or paste it in from the Windows Clipboard.
- If you want to transfer the call to an existing call, click the **Existing Call** option button, and select the call to which you want to transfer the call.

2

Click the **OK** button to transfer the call.

The call appearance disappears from the IP Softphone window, indicating that the transfer was successful.

3

► Supervised Transfer

You can perform a Supervised Transfer using either the **Transfer** button on the toolbar or the mouse.

To transfer a call using Supervised Transfer:

While you are active on a call, click the **Transfer** button.

The Transfer dialog box appears.

1

Perform one of the following steps:

- If you want to transfer the call to a new call, click the **New Number** option button, and enter the number to which you want to transfer the call. You can type in the number via your keyboard or paste it in from the Windows Clipboard.
- If you want to transfer the call to an existing call, click the **Existing Call** option button, and select the call to which you want to transfer the call.

2

Click the **OK** button.

The call you want to transfer is placed on hold automatically, a new call appearance appears, you hear dial tone, and the Transfer dialog box appears.

3 _____

Click the **OK** button in the Transfer dialog box to transfer to the call.

4 _____

► **Drag and Drop Transfer**

Performing a transfer using the mouse is helpful when you are currently speaking to the person to whom you want to transfer the call.

To transfer a call using the mouse:

Make sure there is an existing call appearance for the destination to which you want to transfer the call.

1 _____

Place on hold the call you want to transfer.

2 _____

Answer the call appearance for the transfer destination.

The call becomes active.

3 _____

Press and hold down the mouse button on the name/number field of the call you placed on hold.

4 _____

Drag the call appearance onto the active call appearance of the transfer destination, and then release the mouse button.

A menu appears.

5 _____

Select **Transfer**.

The Transfer dialog box appears.

6 _____

Click the **OK** button.

The call is transferred.

7 _____

► **Drag and Drop Transfer to a Contact Directory Entry**

To transfer a call to a Contact Directory entry:

Open the Contact Directory window.

1

While you are active on a call, press and hold down the mouse button on the Contact Directory entry to which you want to transfer the call.

2

Drag the Contact Directory entry onto the active call appearance, and then release the mouse button.

A menu appears.

3

Select the type of transfer you want to perform.

4

Making Calls

Make a call from a Speed Dial

► Introduction

Avaya IP Softphone lets you create speed dial numbers in the Contact Directory Properties dialog box. A speed dial number can be any number in the Contact Directory, up to a maximum of 25 numbers.

► Using the Dial Number Toolbar

To make a call from a Speed Dial using the Dial Number toolbar:

In the Avaya IP Softphone Call Bar window, click the down arrow next to the **Contact Directory** button on the Dial Number toolbar.

The speed dial list appears.

1

Click the number you want to dial.

If you are using a separate telephone line, answer the call from the Contact.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

► Using the Speed Dial Numbers window

To make a call from the Speed Dial Numbers window:

Open the Speed Dial Numbers window. You can open the Speed Dial Numbers window by:

- Clicking the **Speed Dials** button on the Dial Number toolbar in the Avaya IP Softphone Call Bar window.
- Right-clicking on the Avaya IP Softphone icon in the system tray and selecting **Speed Dial Numbers**.

The Speed Dial Numbers window appears.

1

Click the Speed Dial you want to dial, and click the **Dial Number** button.

If you are using a separate telephone line, answer the call from the Contact.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Make a call from the Speed Dial Numbers window

Introduction

The Speed Dial Numbers window displays all of the Speed Dials that you have created in the Contact Directory. From this window, you can make calls from your Speed Dials.

When you make a call from a Speed Dial, a call appearance is displayed in the Call Appearance area of the Avaya IP Softphone window. If you are active on a call and make another call, the active call is placed on hold automatically, and the new call becomes active.

► Procedure

To make a call from the Speed Dial Numbers window:

Open the Speed Dial Numbers window. You can open the Speed Dial Numbers window by:

- Clicking the **Speed Dials** button on the Dial Number toolbar in the Avaya IP Softphone Call Bar window.
- Right-clicking on the Avaya IP Softphone icon in the system tray and selecting **Speed Dial Numbers**.

The Speed Dial Numbers window appears.

1

Click the Speed Dial you want to dial, and click the **Dial Number** button.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Make a call from a Contact entry

► Introduction

You can store names, addresses, email addresses, notes, and phone numbers in the Contact Directory. The directory will support multiple numbers for each entry.

The directory entries can be displayed in the Contact Directory window with the following views: large icons, small icons, list, and detailed. In the detailed view, the entry's name, number, email, category, and notes are listed. The number displayed in this view is the first number found for the entry if multiple numbers are entered. The directory entries can be sorted by name, number, or category.

► Make a call from the Contact Directory window

To make a call from a Contact entry in the Contact Directory window:

In the Avaya IP Softphone Call Bar window, click the **Contact Directory** button on the Dial Number toolbar.

The Contact Directory window appears.

1 _____

Double-click the name in the directory list for the person you want to call.

If the name in the directory entry has more than one number, a popup menu with a list of numbers appears. Select the appropriate telephone number from the popup menu.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2 _____

► Make a call from the Avaya IP Softphone Contacts window

To make a call from a Contact entry in the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contact Directory** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray, and select **Contact Directory**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1 _____

Perform one of the following steps:

- Right-click on the contact you want to call, and then select **Dial Number**.
- Select the contact you want to call, and then select **Contacts>Dial Number**

or click .

If the name in the directory entry has only one telephone number, that telephone number is dialed.

If the name in the directory entry has more than one telephone number, a popup menu with a list of numbers appears. Select the appropriate number from the popup menu. The telephone number is dialed.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Make a call from the Number box

► Introduction

When you make a call from the Number box in the Dial Number toolbar, a call appearance is displayed in the Call Appearance area of the Avaya IP Softphone window. This call appearance displays the telephone number you entered in the Number box. The information displayed in the call appearance is overwritten by any name information provided by your company's telephone system.

If you are active on a call and make another call, the active call is placed on hold automatically, and the new call becomes active.

If you enter an alpha character in the Number box, the label of the box will change to "**Directory**," Avaya IP Softphone will allow you to perform a name lookup.

NOTE:

When you dial make a call from the Number box, the telephone number you enter will be processed according to how you configured Windows dialing.

► Procedure

To make a call from the Number box:

In the Number box, enter the telephone number you want to dial.

1

Click the **Dial Number** button or press the ENTER key on your keyboard.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Dial a number from Microsoft Internet Explorer

► Introduction

While you are logged into your call server or telephone with Avaya IP Softphone, you can dial telephone numbers that are displayed on pages in Microsoft Internet Explorer with a click of the mouse. All numbers that match the North American dial plan format (that is, a 10-digit number or an 11-digit number that starts with "1") or the international number format ("+" followed by a one to three digit country code number, a one to five digit area code, and four groups of digits) are highlighted automatically in Microsoft Internet Explorer. When you place your mouse over one of these telephone numbers, a telephone icon appears. If you click the mouse on that telephone number, a call appearance is displayed in the Call Appearance area of the Avaya IP Softphone window. This call appearance displays the telephone number you dialed from the web page. The information displayed in the call appearance is overwritten by any name information provided by your company's telephone system.

NOTE:

A maximum of 15 digits can be highlighted automatically in a telephone number in Microsoft Internet Explorer.

You can also dial numbers that are not highlighted automatically. For these numbers, you must select the number you want to dial, and then click **Dial using Avaya IP Softphone** in the **Favorites>Links** folder in Microsoft Internet Explorer.

NOTE:

When you dial a telephone number from a web page, the telephone number will be processed according to how you configured Windows dialing. If you try to dial an entry that starts with an alphabetic character, Avaya IP Softphone will perform a name lookup.

If you want to dial numbers from other applications, see Dial a number from another application.

► Requirements

To dial a number from Microsoft Internet Explorer, you must have:

- Microsoft Internet Explorer 6.0 or later
- The Enable third-party browser extensions feature enabled in the Windows Control Panel. You can configure this feature by performing the following steps:
 1. Access Internet Options from the Windows Control Panel.
The Internet Properties dialog box appears.
 2. Click the **Advanced** tab.
 3. Make sure the **Enable third-party browser extensions** check box is "checked."
 4. Click the **OK** button.
 5. If you changed the setting for this feature, you must restart Microsoft Internet Explorer for the change to take effect.

► Enable Dialing from Microsoft Internet Explorer

You must perform this procedure if you want dialable numbers to be highlighted in Microsoft Internet Explorer.

To enable dialing from Microsoft Internet Explorer:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Click on **Desktop Integration**.

The Desktop Integration information appears.

2 _____

In the Click-to-Dial area, select the **Highlight dialable numbers in Microsoft Internet Explorer windows** check box.

3 _____

Click the **OK** button.

4 _____

► Dial a Number

To dial a number that was highlighted automatically in Microsoft Internet Explorer:

In the Microsoft Internet Explorer window, place the mouse over the telephone number you want to dial.

A telephone icon appears.

NOTE:

If you are on a secure site, a different icon appears.

1 _____

Click the mouse or press the ENTER key on your keyboard.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2 _____

To dial a non-highlighted number from Microsoft Internet Explorer:

In the Microsoft Internet Explorer window, select the telephone number you want to dial.

The selected telephone number is highlighted.

1 _____

Perform one of the following steps:

- From the Favorites menu in Microsoft Internet Explorer, select **Links>Dial using Avaya IP Softphone**.
- If Favorites is displayed in the Microsoft Internet Explorer window:
 1. Click the **Links** folder in Favorites.
 2. Click **Dial using Avaya IP Softphone**.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Dial a number from another application

► Introduction

With Avaya IP Softphone, you can dial numbers that are stored in other applications. To dial these numbers, you can use either the Avaya IP Softphone icon located in the system tray or the Windows Clipboard.

To dial numbers from Microsoft Internet Explorer, see Dial a number from Microsoft Internet Explorer.

► Using the Avaya IP Softphone Icon

To dial a number from another application using the Avaya IP Softphone icon:

Select the telephone number you want to dial.

The selected number is highlighted.

1

Double-click the mouse on the **Avaya IP Softphone** icon in the system tray.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

► Using Windows Clipboard

To dial a number from another application using the Windows clipboard:

Select the telephone number you want to dial, right-click the mouse on the selected number, and select **Copy**.

The selected number is highlighted.

1

Right-click the mouse on the **Avaya IP Softphone** icon in the system tray, and select **Call**.

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Redial the last number dialed

► Introduction

The Redial button dials the last telephone number that you dialed from Avaya IP Softphone during the current session. When you make a call using the Redial button, a call appearance is displayed in the Call Appearance area of the Avaya IP Softphone window. This call appearance displays the telephone number. The information displayed in the call appearance is overwritten by any name information provided by your company's telephone system.

► Procedure

To redial the last number dialed:

Click the **Redial** button.

1

If you are using a separate telephone line, answer the call from the phone.

Avaya IP Softphone places the call. A call appearance is displayed for the call.

If the call is video enabled:

- If you set Video Start to **Automatic**, the far end window appears and displays video from the caller.
- If you set Video Start to **Manual > Prompt Dialog**, the Video prompt dialog box appears. Click the **Yes** button to receive video from the caller.
- If you set Video Start to **Manual > Toolbar Button**, click to receive video from the caller.

2

Enter digits during a call

► Introduction

Using Avaya IP Softphone, you can send digits during an active call.

You can enter digits from

- your keyboard
- the Dial Pad window
- another application

▶ Enter digits from your keyboard

To send digits from your keyboard during a call:

Make sure the Avaya IP Softphone window is active (that is, the window is selected).

1 _____

Click  next to  and select **Send Digits**.

2 _____

Type the characters you want to send.

Avaya IP Softphone sends these characters as you type them. You cannot edit these digits.

3 _____

▶ Enter digits from the Dial Pad window

To send digits from the Dial Pad window during a call:

From the **View** menu, select **Dial Pad**.

The Dial Pad window appears

1 _____

Click on the appropriate buttons in the Dial Pad window.

Avaya IP Softphone sends these characters as you click on them.

2 _____

▶ Enter digits from another application

To send digits from another application during a call:

Select the digits you want to send.

The selected digits are highlighted.

1 _____

Right-click the mouse on the **Avaya IP Softphone** icon in the system tray, and select **Dial on current call**.

Avaya IP Softphone sends these characters.

2 _____

Dialing Emergency Numbers

▼ Introduction

Avaya IP Softphone can dial emergency calls (for example, 911 calls in the U.S.). It will reach solely the local emergency service in the Public Safety Answering Point area where the telephone system is located.

Please be advised that Avaya IP Softphone will not dial to and connect with local emergency service when dialing from remote locations. You should not use Avaya IP Softphone to dial emergency numbers for emergency services when dialing from remote locations.

Avaya Inc. will not be responsible or liable for any damages or injuries resulting from misplaced emergency calls made from Avaya IP Softphone. Your use of this product indicates that you have read this advisory and agree to use an alternative telephone to dial all emergency calls from remote locations.

Conferencing Calls

► Introduction

Depending on your telephone system, you may have up to six participants (including yourself) in a conference.

Avaya IP Softphone supports the following methods of handling conference calls:

- **Conference from the Call Bar window** (that is, the Avaya IP Softphone main window)
You click the **Conference** button on the Phone Buttons toolbar, type the number of the party to be added into a text box, and click the **OK** button. After talking to the party, you can either click the **OK** button to add or the **Cancel** button to not add the party to the call.
- **Drag and Drop Conference from the Call Bar window**
You add another party to a call by placing the call you want to add on hold and dragging and dropping the call appearance for that call onto the active call appearance.
- **Drag and Drop Conference with a Contact Directory entry**
You add a Contact Directory entry to a call by dragging and dropping the Contact Directory entry onto the active call appearance.

► Conference from the Call Bar window

To add another person to a call or conference a call:

While you are active on a call, click the **Conference** button.

The Conference dialog box appears.

1 _____

In the New Number box, enter the telephone number of the party you want to add to the call.

Important!

The number must be typed in, or it can be copied and pasted in.

2 _____

Click the **OK** button.

The caller is automatically put on hold and a new call is placed to the telephone number you entered. A call appearance appears for the new call, and the Conference dialog box appears.

3 _____

Perform one of the following steps:

- If the call is answered, you can talk privately to the party. To add the party to the call, click the **OK** button in the Conference dialog box.
One call appearance appears displaying "CONFERENCE 2" (indicating an active conference).
- If the call is not answered or is busy, click the **Cancel** button in the Conference dialog box, and then click the **Unhold** button to return to the original party

4 _____

Repeat steps 1 through 4 until you have conferenced all parties.

The single call appearance will display that you are on a conference. Any person on the conference call can hang up at any time.

To disconnect the last person added to the conference call, click the **Drop** button.

5 _____

When the conference call is over, click the **Hangup** button.

6 _____

► **Drag and Drop Conference**

You can conference two individual calls or add a call to a conference by dragging the held call appearance onto the active call appearance and releasing the mouse button. You can only perform this procedure from the Call Bar window.

To add another person to a call or conference a call using the mouse:

Place on hold the call you want to add to the conference.

1 _____

Answer the call appearance for the conference call.

The call becomes active.

2 _____

Press and hold down the mouse button on the name/number field of the call you placed on hold.

3 _____

Drag the call appearance onto the active call appearance of the conference, and then release the mouse button.

A menu appears.

4 _____

Click the **Conference** button.
The Conference dialog box appears.

5 _____

Click the **OK** button.
The call is conferenced.

6 _____

► **Drag and Drop Conference with a Contact Directory Entry**

To add a Contact Directory entry to a conference:

Open the Contact Directory window.

1 _____

While you are active on a call, press and hold down the mouse button on the Contact Directory entry that you want to add to the conference.

2 _____

Drag the Contact Directory entry onto the active call appearance of the conference, and then release the mouse button.

A menu appears.

3 _____

Select **Conference**.
The Conference dialog box appears.

4 _____

Click the **OK** button.
The call is conferenced.

5 _____

Using Conferencing

► Introduction

Depending on your telephone system, you may have up to six participants (including yourself) in a conference.

Avaya IP Softphone supports the following methods of handling conference calls:

- **Conference from the Call Bar window** (that is, the Avaya IP Softphone main window)
You click the **Conference** button on the Phone Buttons toolbar, type the number of the party to be added into a text box, and click the **OK** button. After talking to the party, you can either click the **OK** button to add or the **Cancel** button to not add the party to the call.
- **Drag and Drop Conference from the Call Bar window**
You add another party to a call by placing the call you want to add on hold and dragging and dropping the call appearance for that call onto the active call appearance.
- **Drag and Drop Conference with a Contact Directory entry**
You add a Contact Directory entry to a call by dragging and dropping the Contact Directory entry onto the active call appearance.

► Conference from the Call Bar window

To add another person to a call or conference a call:

While you are active on a call, click the **Conference** button.

The Conference dialog box appears.

1 _____

In the New Number box, enter the telephone number of the party you want to add to the call.

Important!

The number must be typed in, or it can be copied and pasted in.

2 _____

Click the **OK** button.

The caller is automatically put on hold and a new call is placed to the telephone number you entered. A call appearance appears for the new call, and the Conference dialog box appears.

3 _____

Perform one of the following steps:

- If the call is answered, you can talk privately to the party. To add the party to the call, click the **OK** button in the Conference dialog box.
One call appearance appears displaying "CONFERENCE 2" (indicating an active conference).
- If the call is not answered or is busy, click the **Cancel** button in the Conference dialog box, and then click the **Unhold** button to return to the original party

4 _____

Repeat steps 1 through 4 until you have conferenced all parties.

The single call appearance will display that you are on a conference. Any person on the conference call can hang up at any time.

To disconnect the last person added to the conference call, click the **Drop** button.

5 _____

When the conference call is over, click the **Hangup** button.

6 _____

► **Drag and Drop Conference**

You can conference two individual calls or add a call to a conference by dragging the held call appearance onto the active call appearance and releasing the mouse button. You can only perform this procedure from the Call Bar window.

To add another person to a call or conference a call using the mouse:

Place on hold the call you want to add to the conference.

1 _____

Answer the call appearance for the conference call.

The call becomes active.

2 _____

Press and hold down the mouse button on the name/number field of the call you placed on hold.

3 _____

Drag the call appearance onto the active call appearance of the conference, and then release the mouse button.

A menu appears.

4 _____

Click the **Conference** button.
The Conference dialog box appears.

5 _____

Click the **OK** button.
The call is conferenced.

6 _____

► **Drag and Drop Conference with a Contact Directory Entry**

To add a Contact Directory entry to a conference:

Open the Contact Directory window.

1 _____

While you are active on a call, press and hold down the mouse button on the Contact Directory entry that you want to add to the conference.

2 _____

Drag the Contact Directory entry onto the active call appearance of the conference, and then release the mouse button.

A menu appears.

3 _____

Select **Conference**.
The Conference dialog box appears.

4 _____

Click the **OK** button.
The call is conferenced.

5 _____

Place a conference on hold

▶ **Introduction**

When you place a conference on hold:

- The other participants can continue talking.
- You may make and answer calls.

The conference call is placed on hold automatically when you answer a call or make a call.

▶ **Procedure**

To place a conference on hold:

Choose the **Hold** button.

The conference is placed on hold, and the **Unhold** button appears for the associated call appearance.

Answer a conference on hold

▶ **Introduction**

When you answer a conference that is on hold, the **Unhold** button becomes the **Hangup** button for the call appearance of the conference, and the Active Timer resumes. The Active Timer keeps track of the duration of the call.

If you are active on a call and answer a call that is on hold, the active call is placed on hold automatically, and the held call becomes active.

▶ **Procedure**

To answer a conference that is on hold:

Choose the **Unhold** button for the associated call appearance of the conference or double-click on the call appearance.

The conference becomes active, and the **Hangup** button appears for the associated call appearance.

Drop the last call from a conference

▶ Introduction

This procedure enables you to drop the last call that was added to the conference.

The conference must be active when you want to drop the last call.

▶ Procedure

To drop the last call from a conference:

While the conference is active, choose the **Drop** button from the Phone Buttons toolbar.

Avaya IP Softphone disconnects the last call that was added to the conference.

Hang up a conference

▶ Introduction

This procedure describes how to hang up a conference.

▶ Procedure

To hang up a conference:

Choose the **Hangup** button for the associated call appearance.

The conference is disconnected.

Configuring Audio Settings

Configure your audio settings

▶ Introduction

Using the Audio Tuning Wizard, you can:

- select the playback device you want to use with Avaya iClarity
- select the recording device you want to use with Avaya iClarity (Road Warrior configuration only)
- select a secondary playback device
- set ringing to be played on a secondary ring device
- specify whether you are using a headset/handset or PC speakers and a microphone
- verify that your speakers or headset are operating properly
- adjust the volume of your speakers or headset
- verify that your microphone is operating properly
- adjust the volume of your microphone
- determine the level of the background noise at your location

Keep in mind the following:

- You will be unable to configure the audio settings while you are active on a call.
- You must close all PC applications that record or play sound before configuring the audio settings.

▶ Procedure

To configure your audio settings:

Close all applications that record or play sound.

1

Click the **Tuning Wizard** button.

The Audio Tuning Wizard dialog box appears. This dialog box enables you to select the devices you want to use to record (Road Warrior configuration only) and play back sound during your calls.

If you are using Avaya IP Softphone in the Telecommuter configuration, the Control of Avaya Telephone (via the server) configuration, or the Control of Avaya IP Telephone (via the telephone) configuration, go to Step 4.

2

From the **Select a recording device** box, select the device you want to use to record sound on your PC during calls.

3

From the **Select a playback device** box, select the device you want to use to play sound on your PC during calls.

If your PC has multiple playback devices, you must select a primary playback device.

If you want to use a secondary ring device, select the **Enable a secondary ring device** check box, and then select the device from the **Select a secondary playback device** box. The **Enable a secondary ring device** check box and the **Select a secondary playback device** box are available only if your PC has multiple playback devices.

4

Click the **Next** button.

If you are using Avaya IP Softphone in the Telecommuter configuration or the Avaya IP Telephone configuration, go to Step 7.

The second Audio Tuning Wizard dialog box appears. This dialog box enables you to specify whether you are using a headset/handset or PC speakers and a microphone to speak to and hear the other party on a call. The following options are available:

- **Headset or Handset**

Select this option button if you are using a headset or a handset to speak to and hear the other party on a call. This option button is disabled if the Audio Tuning Wizard identified a half-duplex sound card in your PC.

- **PC Microphone and PC Speakers**

Select this option button if you are using a microphone and PC speakers to speak to and hear the other party on a call.

- **Half-Duplex Sound Device**

This option button is selected automatically if you have a half-duplex sound card in your PC. Avaya IP Softphone does not support half-duplex sound cards. If you have a half-duplex sound card, you must upgrade your sound card and/or sound card drivers.

5

Select the appropriate button, and then click the **Next** button.

The third Audio Tuning Wizard dialog box appears. This dialog box enables you to verify that your PC speakers or headset are operating properly and to adjust the volume of the speakers or headset.

6

Click the **Test** button.

If your speakers or headset are operating properly, you will hear a sample sound file. Go to Step 8.

If you do not hear the sample sound file, verify the connections between your PC and the speakers/headset and verify that your speakers are turned on. For more information, see the Sound Troubleshooter topic in Windows Help.

7

Move the slider to set the volume for the speakers/headset. Moving the slider to the right increases the volume.

8

When finished setting the volume, click the **Stop** button to stop the file from being played.

9

Click the **Next** button.

If you are using Avaya IP Softphone in the Telecommuter configuration or Avaya IP Telephone configuration, you are finished configuring the audio settings. Go to Step 16.

The fourth Audio Tuning Wizard dialog box appears. You will use this dialog box to verify that your microphone is operating properly and to adjust the recording level (that is, volume) of the microphone.

If your microphone is operating properly, you will see the status indicators fluctuate in the Audio meter when you speak. Go to Step 11.

If you do not see the status indicators fluctuate in the Audio meter when you speak, verify the connection between your PC and microphone. For more information, see Windows Help.

10

Perform one of the following steps:

- If you want Avaya iClarity to adjust the recording level for the microphone, click the **Automatically adjust microphone recording level** option button and then speak into the microphone for at least 30 seconds.

The status indicators in the Audio meter, which indicate the microphone signal input level, should remain between the ^ symbols on the Audio meter. If the status indicators exceed or do not appear between the ^ symbols on the Audio meter, move the slider to set the sensitivity of the microphone. Moving the slider to the right increases the sensitivity.

- If you want to adjust the recording level for the microphone manually, click the **Use the following microphone recording level** option button, and move the slider to set the recording level for the microphone. Moving the slider to the right increases the recording level.

11

When finished setting the recording level, click the **Next** button.

The fifth Audio Tuning Wizard dialog box appears. This dialog box enables the Audio Tuning Wizard to determine the level of background noise at your current location. This prevents Avaya iClarity from transmitting the background noise at your location when you are not speaking during a call.

12 _____

Make sure there is no excessive noise.

13 _____

Click the **Test** button and then do not speak.

The **Test** button becomes disabled, you are prompted to remain quiet, and the Audio Tuning Wizard determines the background noise level at your current location. This test lasts for approximately 10 seconds. When the test is completed, the **Test** button becomes enabled.

If there was excessive noise during the test, repeat Steps 13 and 14.

14 _____

When finished, click the **Next** button.

A dialog box appears, informing you that you are finished configuring the audio settings.

15 _____

Click the **Finish** button.

16 _____

Mute your microphone

▶ **Introduction**

You can mute the volume of the microphone from the Avaya IP Softphone window.

▶ **Procedure**

To mute the microphone:

- 1 _____

Make sure the microphone is on.

Click the **Microphone control** button on the Audio Control toolbar.
The microphone is muted.
To turn off the Mute feature, click the **Microphone control** button again.
- 2 _____

Adjust the microphone volume

▶ **Introduction**

You can adjust the volume of the microphone (that is, headset or internal/external microphone) from the Avaya IP Softphone window. You can adjust the volume of the microphone only when it is enabled.

▶ **Procedure**

To adjust the volume:

- 1 _____

Make sure the microphone is on.

Click the **Microphone Control** arrow button on the Audio Control toolbar.
The Volume control appears.
- 2 _____
- 3 _____

Move the slider to adjust the volume.

Mute the speakers

► Introduction

You can mute the speakers (that is, headset or internal/external speakers) from the Avaya IP Softphone window. You can mute the speakers when they are enabled.

NOTE:

When you mute the speakers, the ringer is muted automatically.

► Procedure

To mute the speakers:

- 1 _____
Make sure the speakers are on.

- 2 _____
Click the **Speaker Control** button on the Audio Control toolbar.
The speakers are muted.
To turn off the Mute feature, click the **Speaker control** button again.

Adjust the speaker volume

► Introduction

You can adjust the volume of the speakers (that is, headset or external speakers) from the Avaya IP Softphone window when they are active.

► Procedure

To adjust the volume:

- 1 _____
Make sure the speakers are on.

- 2 _____
Click the **Speaker Control** arrow button on the Audio Control toolbar.
The Volume control appears.

- 3 _____
Move the slider to adjust the volume.

Mute the ringer

► **Introduction**

You can mute the ringer for incoming calls if it is enabled.

NOTE:

The ringer is muted automatically when you mute the speakers.

► **Procedure**

To mute the ringer:

Click the **Ringer Control** button  on the Audio Control toolbar.

The ringer is muted.

To turn off the Mute feature, click the **Ringer Control** button  again.

Adjust the ringer volume

► **Introduction**

You can adjust the ringer volume for incoming calls if it is enabled.

NOTE:

The ringer is muted automatically when you mute the speakers.

► **Procedure**

To adjust the ringer volume:

Click the **Ringer Control** arrow button on the Audio Control toolbar.

The Volume control appears.

1 _____

Move the slider to adjust the volume.

2 _____

Using the Contact Directory

Introduction

Avaya IP Softphone provides the Contact Directory, which enables you to store names, addresses, email addresses, instant messaging addresses (if Instant Messaging is enabled), notes, and phone numbers. You can make calls, send Instant Messages, and send email to the Contact Directory entries.

Avaya IP Softphone provides two "views" of the Contact Directory entries:

- The Avaya IP Softphone Contacts window
- The Contact Directory window

Using the Avaya IP Softphone Contacts window

▶ Introduction

The Avaya IP Softphone Contacts window provides you with an "IM-centric" view of your Contact Directory entries.

From this window, you can

- add an entry or group to the Contact Directory
- edit an entry in the Contact Directory
- rename an entry or group in the Contact Directory
- delete an entry or group from the Contact Directory
- sort the contacts displayed in the Avaya IP Softphone Contacts window
- track Instant Messaging contacts
- block Instant Messaging contacts from tracking your status
- change your Instant Messaging status
- change your Instant Messaging preferences
- place a call to a contact
- send an Instant Message to a contact
- send an email message to a contact

► **Adding an entry to the Contact Directory**

To add an entry to the Contact Directory from the Avaya IP Softphone Contacts window.

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Click on the group to which you want to add this new contact.

2

From the **Contacts** menu, select **Add Contact**.

The Add Contact form appears to the left of the Avaya IP Softphone Contacts window.

3

In the **Name** box, enter the person's name.

4

If Instant Messaging is enabled, enter the person's instant messaging ID in the **IM Address** box.

5

In the **Email** box, enter the person's email address.

6

In the **Address** box, enter the person's address.

7

In the telephone number boxes (that is, Business, Home, Mobile, Company, Car, Assistant, Pager, Business Fax, and Home Fax), enter the person's phone numbers.

8

In the **Notes** box, enter any information you want.

9

When finished, click  to save your changes.

The new contact appears in the selected group.

10

▶ **Adding a group to the Contact Directory**

To add a group to the Contact Directory from the Avaya IP Softphone Contacts window.

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

From the **Contacts** menu, select **Add Group**.

The Add Group dialog box appears.

2

Enter the name of the group, and then select the **OK** button.

The new group appears.

3

▶ **Editing an entry in the Contact Directory**

To modify the information for a contact from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact you want to modify, and then select **Properties**.
- Select the contact you want to modify, and then select **Contacts>Properties**.

The Contact form appears to the left of the Avaya IP Softphone Contacts window, displaying the information for the selected contact.

2

Make your changes.

3

- 4 When finished, click .
-

► **Renaming an entry or group in the Contact Directory**

To change the name for a contact or group from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact or group you want to rename, and then select **Rename**.
- Select the contact or group you want to rename, and then select **Contacts>Rename**.

The name of the selected contact or group is highlighted.

2

Make your changes.

3

When finished, click the mouse on another contact or group.

4

▶ **Deleting an entry or group from the Contact Directory**

To delete a contact or group from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1 _____

Perform one of the following steps:

- Right-click on the contact or group you want to delete, and then select **Delete**.
- Select the contact or group you want to delete, and then select **Contacts>Delete**.

A dialog box appears, prompting you to confirm the action.

2 _____

Click the **OK** button to delete the selected contact or group.

3 _____

▶ **Sorting contacts in the Avaya IP Softphone Contacts window**

You can set the order in which contacts are sorted (displayed) within each group in the Avaya IP Softphone Contacts window. Your choices are:

- all contacts from A to Z
- all online contacts from A to Z and then all offline contacts from A to Z
- only the online contacts from A to Z
- all contacts from Z to A
- all online contacts from Z to A and then all offline contacts from Z to A
- only the online contacts from Z to A

To sort contacts in the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Click the **Sort** button.

The list of sorting options appears.

2

Select the sorting option you want to use.

3

► **Tracking a contact**

To track a user from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact you want to track, and then select **Track**.
- Select the contact you want to track, and then select **Contacts>Track**.

A "check mark" indicates that the contact is being tracked.

2

► **Blocking a contact**

To block a user from tracking your Instant Messaging status:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact you want to block, and then select **Block**.
- Select the contact you want to block, and then select **Contacts>Block**.

A "check mark" indicates that the contact is being blocked.

2

► **Changing your Instant Messaging status from the Avaya IP Softphone Contacts window**

To select the status that you want to be displayed to other Instant Messaging user:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Click .
- Select **File>My Presence**.

A menu appears displaying the Instant Messaging status options.

2

Select the status you want to be displayed to other Instant Messaging users.

3

► **Making a call from the Avaya IP Softphone Contacts window**

To make a call from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact you want to call, and then select **Dial Number**.
- Select the contact you want to call, and then select **Contacts>Dial Number**

or click .

If the name in the directory entry has only one telephone number, that telephone number is dialed.

If the name in the directory entry has more than one telephone number, a popup menu with a list of numbers appears. Select the appropriate number from the popup menu. The telephone number is dialed.

2

► **Sending an Instant Message from the Avaya IP Softphone Contacts window**

To send an instant message from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1

Perform one of the following steps:

- Right-click on the contact to which you want to send an instant message, and then select **Send Instant Message**.
- Select the contact to which you want to send an instant message, and then select **Contacts>Send Instant Message**.
- Select the contact to which you want to send an instant message, and then click .

The Instant Message Session window appears. The Instant Messaging address of the user you want to contact is displayed in the title bar of the window.

2 _____

In the bottom text box, enter your message. Use the **Font** button to change the font. Use the **Emoticon** button to insert emotion icons.

3 _____

When you are ready to send your message, click the **Send** button.

4 _____

When you want to close the Instant Messaging window, perform one of the following steps:

- From the **File** menu, select **Close**.
- Click the **Close** button at the top of the window.

5 _____

► **Sending email from the Avaya IP Softphone Contacts window**

To send an email message from the Avaya IP Softphone Contacts window:

Open the Avaya IP Softphone Contacts window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Avaya IP Softphone Contacts window appears. If the Contact Directory window appears, select **View>IM View** to view the Avaya IP Softphone Contacts window.

1 _____

Perform one of the following steps:

- Right-click on the contact to which you want to send an email message, and then select **Send Email**.
- Select the contact to which you want to send an email message, and then select **Contacts>Send Email**.

The new message window appears for your email application. The email address of the selected contact appears in the "To" field.

2

Enter your message and send it.

3

Using the Contact Directory window

► Introduction

You can store names, addresses, email addresses, instant messaging addresses (if Instant Messaging is enabled), notes, and phone numbers in the Contact Directory. The directory will support multiple numbers for each entry.

The directory entries can be displayed with the following views: large icons, small icons, list, and detailed. In the detailed view, the entry's name, number, email, category, and notes are listed. The number displayed in this view is the first number found for the entry if multiple numbers are entered. The directory entries can be sorted by name, number, or category.

► Adding an entry to the Contact Directory

The Contact Directory Properties dialog box enables you to add a new entry to the Contact directory. You can add or edit directory entries using the Properties dialog box. To display the Properties dialog box, follow the steps below.

Open the Contact Directory window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Contact Directory window appears. If the Avaya IP Softphone Contacts window appears, select **File>Contact Directory** to view the Contact Directory window.

1

Click the **New entry** button.

The Properties dialog box appears.

2

In the **Name** box, enter the person's name.

3

In the **Address** box, enter the person's address.

4

In the **Email** box, enter the person's email address.

5

If Instant Messaging is enabled, perform the following steps:

1. In the Instant Message box, enter the person's instant messaging ID.
2. If you want to track when the user is available for instant messaging, select the **Track availability** check box.

6

In the **Notes** box, enter any information you want.

7

From the **Category** box, select the category to which you want to assign this entry. You can add, rename, or remove a category by clicking the "..." button on the Category box.

To add a category:

1. Click the "..." button next to the Category box.
The Categories dialog box appears.
2. In the text box, enter the category you want to add, and then click the **Add** button.
3. Repeat Step 2 to create additional categories.
4. When finished adding categories, click the **Close** button.

8

In the telephone number boxes (that is, Business, Home, and Pager), enter the person's phone numbers.

The default labels of the telephone number boxes are **Business**, **Home**, and **Pager**. However, you can change these labels by clicking the "..." button next to telephone number box. Your choices are **Business Fax**, **Home Fax**, **Mobile**, **Assistant**, **Car**, and **Company**.

If you want to assign a telephone number to a Speed Dial, perform the following steps:

1. Click the **Add Speed Dial** check box for the telephone number you want to assign to a Speed Dial.
The Speed Dial Function Keys dialog box appears.
2. Perform one of the following steps:
 - If you want to assign this Speed Dial to a function key on your keyboard:
 1. Check the **Assign this speed dial to a function key** check box.
The new Speed Dial is displayed in the Function Keys list. By default, this Speed Dial is assigned to the next available function key. If you want to change the function key to which the Speed Dial is assigned, use the **Arrow** buttons.
 2. Click the **OK** button.
 - If you do not want to assign this Speed Dial to a function key, click the **OK** button.
3. Repeat Steps 1 and 2 if you want to create additional Speed Dials for this entry.

9

If you want the telephone numbers for this entry to be dialed as touch-tones during all calls, click the **Dial number on current call** check box.

NOTE:

If you select the **Dial number on current call** check box, all telephone numbers for this contact will be dialed as touch-tones during an existing call. These numbers will not be dialed as a new call (that is, Avaya IP Softphone will not start a new call and dial these numbers). You should only select this check box if the associated telephone numbers are digits that you must enter during a call (such as the password for a voice mail account or a PIN for a bank account).

10

When finished, click the **OK** button.

The Contact Directory window displays the new entry.

11

► **Editing an entry in the Contact Directory**

The Contact Directory Properties dialog box enables you to edit directory entries.

Open the Contact Directory window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Contact Directory window appears. If the Avaya IP Softphone Contacts window appears, select **File>Contact Directory** to view the Contact Directory window.

1 _____

Select the entry you want to modify, and then click the **Properties** button.

The Properties dialog box appears, displaying the information for the selected entry.

2 _____

Make your changes.

3 _____

When finished, click the **OK** button.

4 _____

► **Setting the Fields Displayed in the Contact Directory Window**

You can specify which fields you want displayed in the Contact Directory window and the order in which those fields are displayed.

To set the fields displayed in the Contact Directory window:

Open the Contact Directory window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Contact Directory window appears. If the Avaya IP Softphone Contacts window appears, select **File>Contact Directory** to view the Contact Directory window.

1 _____

From the Edit menu, select **Field Organizer**.

The Field Organizer dialog box appears. The Show fields in this order box shows the fields that are currently displayed in the Contact Directory window. The order in which these fields are displayed in the Show fields in this order box indicates the order in which these fields will be displayed in the Contact Directory window.

The Available Fields box shows the fields that are not displayed currently in the Contact Directory window.

2

Perform any of the following steps:

- If you want additional fields to be displayed in the Contact Directory window, select the appropriate fields in the Available Fields box, and then click . If you want all of the fields to be displayed, click . The selected fields appear in the Show fields in this order box.
- If you want one or more fields to no longer be displayed in the Contact Directory window, select the appropriate fields in the Show fields in this order box, and then click . If you want all of fields (except Name) to no longer be displayed, click .
- To change the order in which the fields are displayed in the Contact Directory window, select the appropriate field in the Show fields in this order box, and then click  or . The top position in the Show fields in this order box corresponds to the left-most column in the Contact Directory window.

3

When you are finished, click the **OK** button.

4

► **Making a call from the Contact Directory**

To make a call from the Contact Directory:

Open the Contact Directory window by performing one of the following steps:

- Click the **Contacts** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contacts**.

The Contact Directory window appears. If the Avaya IP Softphone Contacts window appears, select **File>Contact Directory** to view the Contact Directory window.

1

Double-click on the name in the directory list.

If the name in the directory entry has only one telephone number, that telephone number is dialed.

If the name in the directory entry has more than one telephone number, a popup menu with a list of numbers appears. Select the appropriate number from the popup menu. The telephone number is dialed.

2

Import files into the Contact Directory

► **Introduction**

You can import the following files into a Contact Directory:

- files saved in the comma-separated values format (".csv")
- Phonebook files from DEFINITY IP Softphone R1

If you want to import a .csv file, that file must be in the following format and order:

1. Name
2. Address
3. Email
4. Business Number
5. Business Fax Number
6. Home Number
7. Home Fax Number
8. Mobile Number
9. Assistant Number
10. Car Number
11. Company Number
12. Pager Number
13. Instant Messaging Address

14. Track Presence (**0** - track the Instant Messaging presence status; **1** - do not track Instant Messaging presence status)

15. Category

NOTE:

Any field that contains a comma (,) must be surrounded by quotes.

Each record in the .csv file can contain a maximum of 15 fields. An error will occur if your imported .csv file has a record that contains more than 15 fields. Your .csv file may have records that contain less than 15 fields.

Refer to the online help of the application from which you want to export data for information on how to save data in the .csv format.

► **Import a .csv File**

To import a .csv file into the Contact Directory:

Open the Contact Directory window. If are using the Avaya IP Softphone Contacts window, select **File>Contact Directory** to view the Contact Directory window.

The Contact Directory window appears.

1 _____

From the **File** menu in the Contact Directory window, select **Import**.

A submenu appears.

2 _____

Select **Text file**.

The File open for import dialog box appears.

3 _____

Select the file you want to import.

4 _____

Click the **OK** button.

The new data is imported into the Contact Directory.

5 _____

► **Import a Phonebook file from IP Softphone R1**

When you import a Phonebook file from IP Softphone R1, the information from the Phonebook fields is placed into the following Contact Directory fields:

- Last Name field = Name field
- First Name/Initial field = Name field
- Business Phone # field = Business field
- Business Fax # field = Business Fax field
- Home Phone # field = Home field
- Alternate Phone # field = Mobile field
- E-mail Address field = Email field
- Mailing Address field = Address field

NOTE:

The information in the Notes field of Phonebook is not imported to the Contact Directory.

To import a Phonebook file into the Contact Directory:

Open the Contact Directory window.

The Contact Directory window appears.

1

From the **File** menu in the Contact Directory window, select **Import**.

A submenu appears.

2

Select **IP Softphone R1 Phonebook**.

The Open Phonebook file for Import dialog box appears.

3

Select the Phonebook file you want to import. The default location is **c:\Program Files\Lucent\DEFINITY IP Softphone\Pbook.mdb**.

4

Click the **OK** button.

The Phonebook entries are imported into the Contact Directory.

5

Export entries from the Contact Directory

► **Introduction**

You can export all of the entries from the Contact Directory to a file in the comma-separated values format (".csv"), which can be used in other applications. During the export procedure, Contact Directory takes the fields (including the Notes field) for each directory entry and writes them out in a horizontal line in a .csv file. This line of information from a directory entry is referred to as a "record." For example, if you export a Contact Directory that has 300 entries, the .csv file will have 300 records.

When you export a Contact Directory, the data is exported to the .csv file in the following format:

- Name
- Address
- Email
- Business Number
- Business Fax Number
- Home Number
- Home Fax Number
- Mobile Number
- Assistant Number
- Car Number
- Company Number
- Pager Number
- Instant Messaging Address
- Track Presence (**0** - track the Instant Messaging presence status; **1** - do not track the Instant Messaging presence status)
- Category

► **Procedure**

To export the entries from the Contact Directory:

Open the Contact Directory window. If are using the Avaya IP Softphone Contacts window, select **File>Contact Directory** to view the Contact Directory window.

The Contact Directory window appears.

1 _____

From the **File** menu in the Contact Directory window, select **Export**.

The Save Exported Database As dialog box appears.

2 _____

3 Enter the path and name of the file to which the directory entries will be exported.

Click the **Save** button.
The Contact Directory entries are exported to the file you specified.
4 _____

Using the Call History Log

Using the Call History Log

▶ Introduction

The Call History log stores information on incoming calls, outgoing calls, incoming Instant Messages, and outgoing Instant Messages by automatically generating a call record or one-line summary of each call/instant message. You can add or modify notes in the record, delete the call record, dial the selected number from the record, or send an Instant Message to the associated Instant Messaging address.

▶ Procedures

To use the Call History log:

On the Avaya IP Softphone menu bar, click the **Call History** button.

The Call History log appears.

1

Perform any of the following steps:

- To call a number from the Call History log, click the record containing the phone number you want to dial, and then click the **Dial Number** button. You may also call a number by simply double-clicking the icon preceding the call record.
- To send an Instant Message from the Call History log, right-click on the record containing the Instant Messaging address you want to contact, and then select **Send IM**.
- To edit a record in the Call History log, highlight the record and select **Edit** from the menu bar. You can edit the Name, Number, and Notes fields.
- To add a record from the Call History log to the Contact Directory, highlight the record and then click the **Add to Directory** button.
- To delete a record from the Call History log, highlight the record and click the **Delete** button.
- To sort call records by a specific category (for example, "Name"), click on the appropriate category heading. You can sort call records according to the following categories: Name, Number, Time, Date, and Duration. You cannot sort call records by the Notes category.

2

View the Call History Log

Introduction

The Call History log displays information about incoming calls, outgoing calls, incoming instant messages, and outgoing instant messages. The information stored includes the name of the person, the number dialed or the number received, date, time, and duration of the call. The log contains a menu bar, toolbar, status bar, and a call history record.

For more information about the Call History log, including adding Call History numbers to the Contact Directory, see Using the Call History Log.

The symbols on the Call History dialog box are as follows:



Incoming call



Incoming call with video



Missed incoming call



Outgoing call



Outgoing call with video



Incoming Instant Message



Outgoing Instant Message

The Call History log contains the following fields:

- Name field: Contains the name of the calling party/IM address of the sender, followed by the number type (for example, business, home, or fax).
- Number field: Contains the phone number dialed for outgoing calls. For incoming calls, the number displayed depends on the features provided by the telephone system. If the telephone system provides caller identification information, that number will be displayed.
- Date and Time fields: Contain the date and time the call originated.
- Duration field: Displays the length of the call.
- Notes field: Contains optional information entered by the user. This field supports 255 characters.



Accessing a Voice Messaging System

▼ Introduction

Avaya IP Softphone notifies you when you receive a voice mail message and enables you to access your voice messaging system from Avaya IP Softphone. When you receive a voice mail message, the Message Waiting Indicator on your telephone is turned "on." When this occurs, Avaya IP Softphone displays the Voice Messages icon in the system tray, indicating that you have voice mail. You can access your voice messaging system from Avaya IP Softphone by clicking on the Voice Messages icon. However, you must first configure Avaya IP Softphone to access your voice messaging system. If you click on the Voice Messages icon before configuring Avaya IP Softphone to access your voice messaging system, no action occurs (that is, Avaya IP Softphone does not access your voice messaging system).

You can set Avaya IP Softphone to access your voice messaging system in one of the following ways:

- dial the access number of the voice messaging system
- open an application (such as Intuity Message Manager) that accesses the voice messaging system
- open a web browser and go to the web page for the voice messaging system (such as Avaya's web access based visual interface application, www.messenger, which is part of Avaya's Visual Desktop Messaging Suite)

Voice Messaging Access includes the following topics:

- Configure IP Softphone to access a Voice Messaging System
- Access the Voice Messaging System

Configure Avaya IP Softphone to access a Voice Messaging System

► Introduction

When you receive a voice mail message, the Message Waiting Indicator on your telephone is turned "on." When this occurs, Avaya IP Softphone displays the Voice Messages icon in the system tray and turns on the Voice Messages Status button in the main window, indicating that you have voice mail. You can access your voice messaging system from Avaya IP Softphone by clicking on the Voice Messages icon or the Voice Messages Status button. However, you must first configure Avaya IP Softphone to access your voice messaging system. If you click on the Voice Messages icon or Voice Messages Status button before configuring Avaya IP Softphone to access your voice messaging system, no action occurs (that is, Avaya IP Softphone does not access your voice messaging system).

You can set Avaya IP Softphone to access your voice messaging system in one of the following ways:

- dial the access number of the voice messaging system
- open an application (such as Intuity Message Manager) that accesses the voice messaging system
- open a web browser and go to the web page for the voice messaging system (such as Avaya's web access based visual interface application, www.messenger, which is part of Avaya's Visual Desktop Messaging Suite)

► Procedure

To configure Avaya IP Softphone to access your voice messaging system:

From the **Tools** menu, select **Program Options**.

The Program Options dialog box appears.

1

Click **Voice Messaging Access** in the list box.

The Voice Messaging Access information appears.

2

Click the **Enable Voice Messaging Access** check box.

A check mark appears in the **Enable Voice Messaging Access** check box, indicating that this feature is enabled.

NOTE:

If you do not want Avaya IP Softphone to access the voice messaging system, make sure the **Enable Voice Messaging Access** check box is not selected, and then go to Step 5.

3

Perform one of the following steps:

- If you want Avaya IP Softphone to dial a telephone number:
 1. Click the **Dial this number** option button.
 2. In the text box, enter the telephone number you want to dial to access the voice messaging system.
 3. Go to Step 5.
- If you want Avaya IP Softphone to open another application (such as Intuity Message Manager) to access the voice messaging system:
 1. Click the **Open this application** option button.
 2. Using the **Browse** button, select the application you want to run.

The path and file name for the selected application appears.

3. Click the **Test** button to verify that the application you selected opens properly.
 4. Go to Step 5.
- If you want Avaya IP Softphone to open a web browser to access the web page for the voice messaging system (such as Avaya's www.messenger):
 1. Click the **Go to the web page** option button.
 2. In the text box, enter the web page for the voice messaging system.
 3. Click the **Test** button to verify that the web browser opens properly and displays the web page you specified.
 4. Go to Step 5.

4

Click the **OK** button.

5

Access the Voice Messaging System

► **Introduction**

When you receive a voice mail message, the Message Waiting Indicator on your telephone is turned "on." When this occurs, Avaya IP Softphone displays the Voice Messages icon in the system tray and turns on the Voice Messages Status button in the main window, indicating that you have voice mail. You can access your voice messaging system from Avaya IP Softphone by clicking on the Voice Messages icon or the Voice Messages Status button. However, you must first configure Avaya IP Softphone to access your voice messaging system. If you click on the Voice Messages icon or Voice Messages Status button before configuring Avaya IP Softphone to access your voice messaging system, no action occurs (that is, Avaya IP Softphone does not access your voice messaging system).

► **Procedure**

To access your voice messaging system:

Perform one of the following steps:

- Click the **Voice Messages** icon in the system tray.
- Click the **Voice Messages Status** button in the Avaya IP Softphone Call Bar window.

Depending on how you configured the Voice Messaging Access feature, Avaya IP Softphone attempts to contact your voice messaging system.

Using Instant Messaging

The Instant Messaging feature enables you to send instant messages to and receive instant messages from other users using Avaya IP Softphone. With Instant Messaging you can:

- Send an Instant Message
- Answer an Instant Message
- Send a preset Instant Message
- Configure Avaya IP Softphone to change your Instant Messaging status automatically
- Change your Instant Messaging status
- Change your Instant Messaging login settings
- Change your Instant Messaging alerts
- Change your Instant Messaging privacy settings
- Change your Instant Messaging history settings
- Change your preset Instant Messaging responses

To use Instant Messaging, you must have an Instant Messaging account on your Avaya Converged Communications Server, and the Instant Messaging feature must be administered in Avaya IP Softphone. Contact your System Administrator for more information.

Send an Instant Message

► **Introduction**

You can only establish an instant messaging session with a user who is online.

► **Procedure**

To send an Instant Message:

Perform one of the following steps:

- From the Call Bar window:

1. Click  or select **Send a message** from the Instant Messaging menu.
The Contact Address dialog box appears.
2. Enter the Instant Messaging address of the user you want to contact, and then click the **OK** button.

- From the Contact Directory window:

1. Right-click on the entry of the user you want to contact.
A submenu appears.
2. Select **Send Instant Message**.

- From the Avaya IP Softphone Contacts window:

Perform one of the following steps:

- Right-click on the contact, and then select **Send Instant Message**.
- Select the contact, and then select **Contacts>Send Instant Message**.
- Select the contact, and then click .

The Instant Message Session window appears. The Instant Messaging address of the user you want to contact is displayed in the title bar of the window.

1

In the bottom text box, enter your message. Use the **Font** button to change the font.

Use the **Emoticon** button to insert emotion icons. Use  to send a preset message.

2

When you are ready to send your message, click the **Send** button.

3

When you want to close the Instant Messaging window, perform one of the following steps:

- From the **File** menu, select **Close**.
- Click the **Close** button at the top of the window.

4

Answer an Instant Message

► **Introduction**

When you receive an instant message, an Instant Messaging window appears. You can set Avaya IP Softphone to provide audio alerts and/or visual alerts when an Instant Messaging event occurs.

► **Procedure**

When you receive an instant message, a pop up appears displaying the incoming message.

To answer an instant message:

Click on the link in the pop up.

The Instant Message Session window appears. The Instant Messaging address of the other user is displayed in the title bar of the window.

1

In the bottom text box, enter your message. Use the **Font** button to change the font. Use the **Emoticon** button to insert emotion icons.

2

When you are ready to send your message, click the **Send** button.

3

When you want to end the Instant Messaging session, click the **End** button.

To close the Instant Messaging window, perform one of the following steps:

- From the **File** menu, select **Close**.
- Click the **Close** button at the top of the window.

4

Send a preset Instant Messaging response

► **Introduction**

This procedure enables you to send a preset/user-defined Instant Messaging response to a caller. For example, suppose you are active on a call with a client, and you receive a call

from your supervisor. Instead of answering the ringing call, you can click  on the ringing call appearance and select the preset message "With a client."

Before using this feature, keep in mind the following information:

- The IM responses feature must be enabled.
- You can only select the preset responses that you have specified previously.
- You can only send preset Instant Messaging responses to users who are logged into the Instant Messaging server.
- You can only send preset Instant Messaging responses from the Avaya IP Softphone Call Bar window (that is, the main window).

To configure the IM responses feature, see [Change your Instant Messaging responses](#).

► **Procedure**

To send a preset Instant Messaging response:



Click  on the call appearance of the person to which you want to send the preset Instant Messaging response.

The list of available preset/user defined responses appears.

1

Select the response you want to send.

The response is sent, and the Instant Message Session window appears.

2

Configure Avaya IP Softphone to change your Instant Messaging status automatically

► **Introduction**

Use this procedure to configure Avaya IP Softphone to:

- Change your Instant Messaging status to "On the Phone" automatically when you are handling a call using Avaya IP Softphone.
- Change your Instant Messaging status to "Away" automatically when you are idle for more than a specified number of minutes.

► **Procedure**

To configure Avaya IP Softphone to change your Instant Messaging status automatically:

From the Instant Messaging menu, select **Preferences**.

The Instant Messaging Preferences dialog box appears.

1

Click the **Status** tab.

The Status tab appears.

2

If you want Avaya IP Softphone to change your Instant Messaging status to "On the Phone" automatically when you are on a call, select the **Allow Avaya IP Softphone to automatically change your status to "On the Phone" when you are on the phone** check box.

3

If you want Avaya IP Softphone to change your Instant Messaging status to "Away" when you are idle for a specified number of minutes:

1. Select the **Allow Avaya IP Softphone to automatically change your status to "Away" when you are idle for more than** check box.
2. In the minutes box, select the number of minutes you must be idle before the status is changed.

4

When you are finished, click the **OK** button.

5

Change your Instant Messaging status

► **Introduction**

Use this procedure to select the status that you want to be displayed to other Instant Messaging users. Your choices are:

- Online 
- Busy 
- Away 
- On The Phone 
- Appear Offline 

► **Procedure**

To change your Instant Messaging status:

Perform one of the following steps:

- From the Instant Messaging menu, select **Status**.
- Click .

A menu appears displaying the Instant Messaging status options.

1 _____

Select the status you want to be displayed to other Instant Messaging users.

2 _____



Change your Instant Messaging login settings

► **Introduction**

Use this procedure to change the following Instant Messaging login settings:

- the IP address of the Instant Messaging server
- your Instant Messaging address (for example, yourname@yourcompany.com)
- your password
- whether you want Avaya IP Softphone to remember your password the next time you log in

NOTE:

You cannot change the login settings while you are logged into the server.

► **Using the IM Wizard**

To change your Instant Messaging login settings via the IM Wizard:

From the Instant Messaging menu, select **IM Wizard**.

The Instant Messaging Setup Wizard dialog box appears.

1 _____

Make sure the **Yes, continue with configuration** option button is selected, and then click the **Next** button.

The next Instant Messaging Setup Wizard dialog box appears.

2 _____

In the IM Address box, enter your user name on the Instant Messaging server.

3 _____

In the Password box, enter your password.

4 _____

If you want the software to save your password for the next time you log into the server, enable the **Remember password for next login session** check box.

5 _____

Click the **Next** button.

The next Instant Messaging Setup Wizard dialog box appears.

6 _____

In the Server Address box, enter the IP address or domain name of the Instant Messaging server, and then click the **Next** button.

The next Instant Messaging Setup Wizard dialog box appears.

7 _____

Click the **Finish** button.

8 _____

► **Using the Login dialog box**

To change your Instant Messaging login settings from the Login dialog box:

In the Login dialog box, click the **Settings** button.

The Login Settings dialog box appears.

1 _____

Click the **IM** tab.

The IM tab appears.

2 _____

Make your changes.

3 _____

When you are finished, click the **OK** button.

4 _____

Change your Instant Messaging alerts

► **Introduction**

Use this procedure to specify whether Avaya IP Softphone will provide audio alerts and/or visual alerts when an Instant Messaging event occurs.

► **Procedure**

To change your Instant Messaging alerts:

From the Instant Messaging menu, select **Preferences**.

The Instant Messaging Preferences dialog box appears.

1 _____

Click the **Alerts** tab.

The Alerts tab appears.

2 _____

In the **Alert when** box, select the Instant Messaging event you want to administer.

3 _____

If you want Avaya IP Softphone to display a visual alert when this event occurs, select the **Showing a message by the system task bar** check box.

4 _____

If you want Avaya IP Softphone to play a sound file when this event occurs, select the **Playing a sound file** check box.

5 _____

If you want the Instant Messaging window to appear when you receive the first incoming message during your Avaya IP Softphone session, select the **Displaying the IM session window with the first incoming message** check box.

NOTE:

The **Displaying the IM session window with the first incoming message** check box is displayed only when the **When an instant message is received** option is selected in the Alert when box.

6 _____

Repeat Steps 3 through 6 for each event you want to administer.

7 _____

When you are finished, click the **OK** button.

8 _____

Change your Instant Messaging privacy settings

► Introduction

Use this procedure to specify which users will be allowed to send you instant messages and to view your online status.

► Procedure

To change your Instant Messaging privacy settings:

From the Instant Messaging menu, select **Preferences**.

The Instant Messaging Preferences dialog box appears.

1 _____

Click the **Privacy** tab.

The Privacy tab appears.

2 _____

Perform one of the following steps:

- If you want all users to be able to send you instant messages and view your online status, select the **Allow all users to send me instant messages and view my online status** option button.
- If you want to block specific users from sending you instant messages and viewing your online status:
 1. Select the **Block the following users from sending me instant messages and viewing my online status** option button.
 2. Click the **Add** button.
 3. In the list box, enter the IM address of the user you want to block.
 4. Repeat Steps 2 and 3 for any other users you want to block.

3 _____

When you are finished, click the **OK** button.

4 _____

Change your Instant Messaging history settings

► **Introduction**

Use this procedure to specify

- whether you want to save the content of your Instant Messaging sessions
- the location and file that contains the content of your Instant Messaging sessions

► **Procedure**

To change your Instant Messaging history settings:

From the Instant Messaging menu, select **Preferences**.

The Instant Messaging Preferences dialog box appears.

1 _____

Click the **History** tab.

The History tab appears.

2 _____

If you want Avaya IP Softphone to save the content of your Instant Messaging sessions, click the **Enable Instant Messaging History** check box.

3 _____

- In the Path box, enter the location of the file that will contain the content of your Instant Messaging sessions.
- 4 _____
- When you are finished, click the **OK** button.
- 5 _____

Change your Instant Messaging responses

► **Introduction**

Use this procedure to

- enable the IM response feature
- select the preset Instant Messaging responses you want to use
- create custom Instant Messaging responses

► **Procedure**

To change your Instant Messaging responses:

- From the Instant Messaging menu, select **Preferences**.
The Instant Messaging Preferences dialog box appears.
- 1 _____
- Click the **Responses** tab.
The Responses tab appears.
- 2 _____
- If you want to enable IM responses, click the **Enable IM responses on incoming calls** check box.
- 3 _____
- Select the check box for each preset response you want to be able to send to the other party. If you want to change the preset response, enter the modified IM response in the corresponding text box.
- 4 _____

If you want to specify a custom response, click the mouse in one of the text boxes in the User defined responses area, and enter the response. Select the associated check box if you want to be able to send this message to the other party. Repeat this step to specify another custom response.

5

When you are finished, click the **OK** button.

6

Using Video with Avaya IP Softphone

▶ Introduction

The Avaya Video Integrator enables you to send and receive video during calls you handle with Avaya IP Softphone.

If your company's media server supports video, Avaya IP Softphone attempts to "register" with the video feature on the media server. If the video registration is successful,  appears at the bottom of the Avaya IP Softphone window. If the video registration is unsuccessful,  appears at the bottom of the Avaya IP Softphone window.

When video is available during a call, you can:

- send video to the other party
- receive video from the other party
- temporarily stop sending video to the other party
- stop sending video to the other party for the remainder of the call
- view statistics for the call

NOTE:

Avaya IP Softphone does not support video calls in the Telecommuter configuration.

▶ Requirements

The following hardware and software are required if you want to use video:

- Your company's Avaya media server must be running Communication Manager Release 3.0.1 or later.
- A video camera is connected and configured properly on your PC.
- Microsoft DirectX Release 9.0b or later is installed on your PC.

Change your video options

▶ Introduction

Use this procedure to change the following video options:

- whether you want video calls to start automatically
- performance
- whether you want Avaya IP Softphone to display the near-end video and the far-end video in the same window or in individual windows

NOTE:

"Picture in Picture" is not supported for the Polycom ViaVideo II camera.

- whether you want the video window(s) to always appear on top of other windows
- whether you want the video window to appear in the optimal size supported by the graphics card in your PC. Optimizing the video window may decrease CPU usage on your PC and increase performance.
- the camera you want to use

- the maximum call rate for an outgoing call you make with Avaya IP Softphone
- the maximum call rate for an incoming call you answer with Avaya IP Softphone
- flicker rate

NOTE:

Flicker reduction is supported only for the Polycom ViaVideo II camera.

► **Procedure**

To change your video options:

Perform one of the following steps:

- Click  on the Video toolbar.
- From the Video menu, select **Video Options**.

The Video Options dialog box appears.

1

To set how video starts when you make or receive a video enabled call, perform one of the following steps:

- If you want the video to start automatically, click the **Automatic** option button.
- If you want Avaya IP Softphone to prompt you to start video, click the **Manual** option button and the **Prompt Dialog** option button.
- If you want to start video by clicking  on the Video Toolbar, click the **Manual** option button and the **Toolbar Button** option button.

2

To set the performance, perform one of the following steps:

- If you want to balance performance between application performance and video performance, select the **Balanced** option button.
- If you are more concerned with application performance, select the **Favor Applications** option button.
- If you are more concerned with video performance, select the **Favor Video** option button.

3

To set how Avaya IP Softphone displays the near-end video and far-end video, perform one of the following steps:

- If you want the near-end video and the far-end video to appear in the same window:
 1. Select the **Picture In Picture** option button.
 2. In the Near End Window Position area, select the appropriate option button to specify the location of the near-end video in the video window.

NOTE:

"Picture in Picture" is not supported for the Polycom ViaVideo II camera.

- If you want the near-end video and the far-end video to appear in individual windows, select the **Individual Windows** option button.

4

If you want the video window(s) to always appear on top of other windows, click the **Video Window Always on Top** check box.

5

If you want the video window to appear in the optimal size supported by the graphics card in your PC, click the **Optimize** button. Optimizing the video window may decrease CPU usage on your PC and increase performance.

6

To select the camera you want to use, select the appropriate camera from the Camera box.

7

To change the maximum call rate for an outgoing call you make with Avaya IP Softphone, select the appropriate setting from the Maximum Rate for Outgoing Call box. This setting is important for video conferencing. For a video conference, you must change this setting depending on the call rate of the video conference.

8

To change the maximum call rate for an incoming call you answer with Avaya IP Softphone, select the appropriate setting from the Maximum Rate for Incoming Call box. You should change this setting only when the bandwidth is limited.

9

To set the flicker rate, click the **Flicker Reduction Enabled** check box, and select the appropriate setting from the corresponding box.

NOTE:

Flicker reduction is supported only for the Polycom ViaVideo II camera.

10

Click the **OK** button.

11

Mute the video

► **Introduction**

Use this procedure to temporarily stop sending video to the other party during a call.

NOTE:

When you mute the video, Avaya IP Softphone continues to send audio to the other party.

► **Procedure**

To temporarily stop sending video to the other party:

Click  on the Video toolbar.  appears on the Video toolbar to indicate that Avaya IP Softphone is not sending video. You continue to receive video from the other party. The other party sees the following message: "Please wait for far end to start video."

To start sending video to the other party again:

Click  on the Video toolbar.  appears on the Video toolbar to indicate that Avaya IP Softphone is sending video.

Stop the video

► **Introduction**

Use this procedure to stop sending video to the other party during a call. Stopping the video during a call does not disconnect the call.

NOTE:

When you stop the video during a call, you cannot restart the video during that call.

► **Procedure**

To stop sending video to the other party:

Click  on the Video toolbar.

The Stop Video dialog box appears.

1

Click the **Yes** button.

2

Hide/Show the video windows

▶ Introduction

Use this procedure to hide or show your video windows.

If you are using Picture in Picture mode, you can hide or show the near-end video window. If you hide the near-end window in Picture in Picture mode, the video window shows only the far-end video.

▶ Hide the Video Windows

To hide your video windows:

Right-click the mouse on the **Avaya IP Softphone** icon in the system tray.

A menu appears.

1 _____

Select **Hide Video Windows**.

The video windows are hidden.

2 _____

If you are using Picture in Picture mode, double-click the mouse anywhere in the video window to hide the near-end video window. The video window shows only the far-end video.

▶ Show the Video Windows

To view your video windows:

Right-click the mouse on the **Avaya IP Softphone** icon in the system tray.

A menu appears.

1 _____

Select **Show Video Windows**.

The video windows appear.

2 _____

If you are using Picture in Picture mode, double-click the mouse anywhere in the video window to view the near-end video window.

Move the video windows

▶ **Introduction**

Use this procedure to move your video windows.

If you are using Picture in Picture mode, you can move the near-end video window to a different corner of the video window.

▶ **Move the Video Windows**

To move your video windows:

Press and hold down the mouse on the title bar of the video window you want to move.

1 _____

Drag the window to the appropriate location, and release the mouse.

2 _____

If you are using Picture in Picture mode and you want to move the near-end video window:

Press and hold down the mouse anywhere in the near-end video window.

1 _____

Drag the near end video window to the appropriate corner of the video window, and release the mouse.

2 _____

View statistics for the current video call

▶ **Introduction**

Use this procedure to view statistics for the current video call.

▶ **Procedure**

To view the statistics for the current video call:

Perform one of the following steps:

- Click  on the Video toolbar.
- From the Video menu, select **Video Properties**.

The Video Properties dialog box appears.

1 _____

To view incoming and outgoing video information for the current video call, click the **Video Status** tab.

To view the transmit and receive capabilities for your PC for video calls, click the **Capabilities** tab.

To view the transmit and receive settings for your PC and the transmit and receive capabilities of the other party for the current video call, click the **Signaling** tab.

2 _____

When finished, click the **Close** button.

3 _____

Troubleshooting

▼ Introduction

For the latest troubleshooting information, go to <http://avaya.com/support>.

Login Issues

▶ Introduction

Follow the information provided in this topic if you have been unable to log into your company's server or your Avaya IP telephone.

▶ Things to Keep in Mind

If you are unable to log into the server or IP telephone, do the following:

- If you are using the Avaya IP Telephone configuration, verify that the IP telephone you want to log into is an Avaya IP telephone that has the software that supports the remote login (CTI) feature. Contact your System Administrator to get the latest software for your IP telephone.
- Disable or configure Internet Connection Sharing (ICS), Internet Connection Firewall (ICF), and all firewall applications on your PC.
- If your company's LAN uses a firewall, configure Avaya iClarity for use with a firewall.
- If you are using a VPN, configure Avaya iClarity for use with a VPN.

If you are still unable to login, go to the Troubleshooting page for Avaya IP Softphone at <http://avaya.com/support> for more information.

Creating Speed Dials

Introduction

Speed Dials are a list of telephone numbers that you can dial from the Speed Dial Numbers window. You create a Speed Dial from the Speed Dial Numbers window or a Contact Directory entry.

Using the Contact Directory

To create a Speed Dial from the Contact Directory:

Open the Contact Directory window by performing one of the following steps:

- Click the **Contact Directory** button in the Avaya IP Softphone Call Bar window.
- Right-click on the **Avaya IP Softphone** icon in the system tray and select **Contact Directory**.

The Contact Directory window appears.

1

Select the entry that contains the telephone number(s) you want to assign to a Speed Dial, and then click the **Properties** button.

The Properties dialog box appears, displaying the information for the selected entry.

2

Click the **Add Speed Dial** check box for the telephone number you want to assign to a Speed Dial.

The Speed Dial Function Keys dialog box appears.

3

Perform one of the following steps:

- If you want to assign this Speed Dial to a function key:
 1. Check the **Assign this speed dial to a function key** check box.

The new Speed Dial is displayed in the Function Keys list. By default, this Speed Dial is assigned to the next available function key. If you want to change the function key to which the Speed Dial is assigned, use the **Arrow** buttons.
 2. Click the **OK** button.
- If you do not want to assign this Speed Dial to a function key, click the **OK** button.

The Speed Dial Function Keys dialog box closes.

4

Repeat Steps 3 and 4 if you want to create additional Speed Dials for this entry.

5

When finished, click the **OK** button.

6

Using the Speed Dial Numbers window

To create a Speed Dial from the Speed Dial Numbers window:

Click the **New entry** button.

The New Speed Dial dialog box appears.

1

In the Name box, enter the name of the person associated with this new Speed Dial. (This name will be added to the Contact Directory.)

2

In the Telephone Number box, enter the telephone number you want to assign to this Speed Dial. Click the **...** button to select the label for this telephone number (for example, **Business** or **Home**).

3

If you want to assign this Speed Dial to a function key, check the **Assign this speed dial to a function key** check box.

The new Speed Dial is displayed in the Function Keys list. By default, this Speed Dial is assigned to the next available function key. If you want to change the function key to which the Speed Dial is assigned, use the **Arrow** buttons.

4

When finished, click **OK** button.

An entry for this person is added to the Contact Directory.

5

Searching Public Directories

Introduction

The Search Public Directory feature enables you to access corporate or public directory services. Using this feature, you can query and manage an LDAP (Lightweight Directory Access Protocol) database (such as a directory) over a TCP/IP connection. You can configure Avaya IP Softphone to access public directories. (See the section "Set up Access to a Public Directory" in this help topic.)

From the Search Public Directory window, you can

- place calls to entries in the public directory
- copy entries to your Contact Directory
- send email to entries in the public directory

Search a Public Directory

To search a public directory:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the Tools menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory window appears.

1 _____

Click the **Directory Menu** button , and select the directory you want to search.

2 _____

Click the **Search by** button, and select the type of information for which you want to search.

The type of data you selected appears as the label for the text box at the top of the window. For example, if you selected **Number**, the text box label changes from **Name** to **Number**.

3 _____

In the search text box, enter the information you want to find.

4 _____

Click the **Search** button.

The information is displayed for each entry that matches your search criteria.

5

At this point, you can:

- Dial the associated telephone number for the selected entry by clicking the **Dial Number** button.
- Copy the information for the selected entry and save it as an entry in the Avaya IP Softphone Contact Directory by clicking the **Add to Directory** button.

When an entry is added to the Avaya IP Softphone Contact Directory, the information in the name, phone, and email fields are entered automatically.

- Create an email message that you can send to the email address (if available) for the selected entry by clicking the **Send Email** button. (This action launches your email application and inserts the email address of the selected entry into the **To:** field of a new message.)

6

Search a Public Directory Using the Advanced Search and Display Feature

The Advanced Search and Display feature enables you to search multiple fields in the public directory. Before you can perform this procedure, you must enable the Advanced Search and Display feature in the Program Options dialog box. (See the section "Configure the Advanced Search and Display feature" in this help topic.)

To search a public directory using the Advanced Search and Display feature:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the Tools menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory window appears.

1

Click the **Directory Menu** button , and select the directory you want to search.

2

From the Edit menu, select **Advanced Search and Display**.

The Advanced Search and Display dialog box appears.

3

In the Search Public Directory area, click in the field(s) you want to search, and enter the information you want to find. When performing an advanced search, keep in mind the following information:

- You can use wildcard characters (*).
- Each row represents different search criteria.
- You can specify multiple attributes in each row.
- You can specify up to four rows of search criteria.

For example, suppose you want to find all people named "Smith" in the public directory and all people named "Jones" in your Boston location. For this search, you would enter **Smith** in the Name box. In the next row, you would enter **Jones** in the Name box and **Boston** in the City box.

4

Click the **Search** button.

The information is displayed for each entry that matches your search criteria.

5

At this point, you can:

- Dial the associated telephone number for the selected entry by clicking the **Dial Number** button.
- Copy the information for the selected entry and save it as an entry in the Avaya IP Softphone Contact Directory by clicking the **Add to Directory** button.

When an entry is added to the Avaya IP Softphone Contact Directory, the information in the name, phone, and email fields are entered automatically.

- Create an email message that you can send to the email address (if available) for the selected entry by clicking the **Send Email** button. (This action launches your email application and inserts the email address of the selected entry into the **To:** field of a new message.)

6

Set the Fields Displayed in the Search Public Directory Window

You can specify which fields you want displayed in the Search Public Directory window and the order in which those fields are displayed.

To set the fields displayed in the Search Public Directory window:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the Tools menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory window appears.

1

From the Edit menu, select **Field Organizer**.

The Field Organizer dialog box appears. The Show fields in this order box shows the fields that are currently displayed in the Search Public Directory window. The order in which these fields are displayed in the Show fields in this order box indicates the order in which these fields will be displayed in the Search Public Directory window.

The Available Fields box shows the fields that are not displayed currently in the Search Public Directory window.

2

Perform any of the following steps:

- If you want additional fields to be displayed in the Search Public Directory window, select the appropriate fields in the Available Fields box, and then click . If you want all of the fields to be displayed, click . The selected fields appear in the Show fields in this order box.
- If you want one or more fields to no longer be displayed in the Search Public Directory window, select the appropriate fields in the Show fields in this order box, and then click . If you want all of fields to no longer be displayed, click .
- To change the order in which the fields are displayed in the Search Public Directory window, select the appropriate field in the Show fields in this order box, and then click  or . The top position in the Show fields in this order box corresponds to the left-most column in the Search Public Directory window.

3

When you are finished, click the **OK** button.

4

Set up Access to a Public Directory

You can configure Avaya IP Softphone to access public directories. Before you can access a public directory, you must create an account for the public directory in the Search Public Directory window. To access a public directory, *you must know the server address for the LDAP client*. However, depending on the directory you want to access, you may also need to know the following information:

- search root for the LDAP client
- login
- password

To set up access to a public directory:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the **Tools** menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory window appears.

1

Click the **Directory Menu** button , and select **Add**.

The Directory Properties dialog box appears.

2

In the General tab, enter the following information about the specified directory:

- Description
- Server address
- Login
- Password
- Search Root

Important!

Login and password requirements depend on the database you are accessing.

3

Click the **Advanced** tab.

The Advanced tab appears.

4

In the Advanced tab, enter or edit the following:

- Port
- Search Timeout
- Max. Entries Returned

Important!

These settings are determined by the administrators of the database you are accessing.

5

When you are finished, click the **OK** button.

The directory has now been added. To make this new directory the "active" public directory (that is, the directory you want to search), you must select it. (See "Search a Public Directory.")

6

Modify Access to a Public Directory

To modify access to a public directory:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the **Tools** menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory windows appears.

1

Click the **Directory Menu** button , and select the directory you want to modify.

The name of the selected directory appears next to the **Directory Menu** button.

2

Click the **Directory Menu** button , and select **Properties**.

The Directory Properties dialog box appears, displaying the settings for the selected directory.

3 _____

Make your changes.

4 _____

When you are finished, click the **OK** button.

5 _____

Remove Access to a Public Directory

To remove access to a public directory:

Perform one of the following steps:

- Click the **Search Public Directory** button  in the Avaya IP Softphone Call Bar window.
- Select **Search Public Directory** from the **Tools** menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon in the system tray, and select **Search Public Directory**.

The Search Public Directory windows appears.

1 _____

Click the **Directory Menu** button , and select the directory for which you want to remove access.

The name of the selected directory appears next to the **Directory Menu** button.

2 _____

Click the **Directory Menu** button , and select **Remove**.

Access to the selected directory is removed.

3 _____

Configure the Advanced Search and Display feature

To configure Avaya IP Softphone to use the Advanced Search and Display feature when you search public LDAP directories:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Click on **Desktop Integration**.

The Desktop Integration information appears.

2 _____

Select the **Enable Advanced Search and Display** check box.

3 _____

Click the **OK** button.

4 _____

Searching for Names in All Directories

Introduction

The Name Look-Up feature enables you to search for names in the Contact Directory, Microsoft Outlook, Lotus Notes, and/or corporate or public LDAP directory services databases in one step from the Name box in the Avaya IP Softphone Call Bar window.

If you configure Avaya IP Softphone to search all directories, Avaya IP Softphone will search the directories in the following order:

- Avaya IP Softphone Contact Directory
- Microsoft Outlook
- Lotus Notes
- public LDAP directories

Before you can search Microsoft Outlook, Lotus Notes, and/or public LDAP directories from the Avaya IP Softphone window, you must configure the Name Look-Up feature.

NOTE:

The Avaya IP Softphone Contact Directory is always searched during a name look-up search.

Using Name Lookup with Microsoft Outlook

When Avaya IP Softphone searches for a name in Microsoft Outlook, it searches the information stored in the Last Name field in each contact in Microsoft Outlook. If a match is found, Avaya IP Softphone will only display each matching record that contains information in a telephone number field.

For example, suppose you have two contacts with the last name of **Jones** (Ann Jones and Mark Jones). In this example, the record for Ann Jones has information in the Business Telephone Number field. The record for Mark Jones has no information in any of the telephone number fields. If you type **Jones** in the Number box and click the **Dial Number** button, Avaya IP Softphone will display the record for Ann Jones only. The record for Mark Jones will not be displayed because it does not contain a telephone number.

Keep in mind the following information when using Name Lookup with Microsoft Outlook:

- Microsoft Outlook must be running.
- Microsoft Outlook Express is **not** supported.
- A maximum of 50 telephone numbers will be displayed for a search.
- The contact must contain at least one telephone number. Contacts without telephone numbers will be ignored.
- You can use partial matches.

Using Name Lookup with Lotus Notes

When Avaya IP Softphone searches for a name in Lotus Notes, it searches the information stored in the Last Name field in each contact. If a match is found, Avaya IP Softphone will only display each matching record that contains information in a telephone number field.

For example, suppose you have two contacts with the last name of **Jones** (Ann Jones and Mark Jones). In this example, the record for Ann Jones has information in the Business Telephone Number field. The record for Mark Jones has no information in any of the telephone number fields. If you type **Jones** in the Number box and click the **Dial Number** button, Avaya IP Softphone will display the record for Ann Jones only. The record for Mark Jones will not be displayed because it does not contain a telephone number.

Keep in mind the following information when using Name Lookup with Lotus Notes:

- Lotus Notes Release 5.0 or later must be running.
- By default, Lotus Notes will provide a password dialog box every time Avaya IP Softphone tries to search the Lotus Notes address book. You can prevent this dialog box from appearing every time by performing the following steps:
 1. From the Lotus Notes window, select **File menu>Tools>User ID**.
 2. At the bottom of the dialog box, select the **Don't prompt for a password from other Notes-based programs**.
 3. Click the **OK** button.
- A maximum of 50 telephone numbers will be displayed for a search.
- The contact must contain at least one telephone number. Contacts without telephone numbers will be ignored.
- You can use partial matches.

Configure the Name Look-up feature

To configure Avaya IP Softphone to search Microsoft Outlook, Lotus Notes, and/or public LDAP directories when you search for a name:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Click on **Desktop Integration**.

The Desktop Integration information appears.

2 _____

In the Name Look-Up area, select the check box for each type of directory you want Avaya IP Softphone to search.

3 _____

Click the **OK** button.

4 _____

Search for a Name

Keep in mind the following information:

- If you configured Avaya IP Softphone to search Microsoft Outlook, make sure Microsoft Outlook is running.
- If you configured Avaya IP Softphone to search public LDAP directories, make sure you have set up access to those directories.

To search for a name using the Name Look-Up feature:

In the Number box in the Avaya IP Softphone Call Bar window, enter the name you want to find. You can search for partial names.

1 _____

Click the **Dial Number** button.

The matching records are displayed. An icon appears in front of each matching entry, indicating the database where the entry is located (for example, Microsoft Outlook, Lotus Notes, or an LDAP directory).

2 _____

To make a call, click the record that contains the telephone number you want to dial.

3 _____

Configuring Screen Pops

Introduction

Screen pops are used to trigger application actions. You can create a screen pop that uses a web page (URL), a Windows application, or a file.

Create a Screen Pop

To create a screen pop that uses a web page, an application, or a file:

1. From the **Tools** menu, select **Screen Pops**.
The Screen Pops window appears.
2. From the File menu, select **New**.
The Screen Pops dialog box appears.
3. In the text box, enter a name for the screen pop you want to create.
4. Click the **Next** button.
The Trigger dialog box appears.
5. Perform one of the following steps:
 - If you want this screen pop to run when you receive a call, select the appropriate option button in the Incoming Call area.
 - If you want this screen pop to run when you make a call, select the appropriate option button in the Outgoing Call area.
6. Click the **Next** button.
The Action dialog box appears.
7. Perform one of the following steps:
 - If you want this screen pop to access a URL, click the **Enter a web page address (URL)** option button, and enter the address of the URL you want to access.
 - If you want this screen pop to run an application or a file, click the **Enter an application or file path** option button, and use the **Browse** button to select the application or file you want to use.
8. Click the arrow button next to the text box, and select the call information you want the screen pop to use.
9. Click the **Next** button.

NOTE:

Be sure to insert quotes around the full path of the application and spaces between the parameters (for example, "**C:\My Documents\application.exe**" "%n" "%m").

If the screen pop will use Start Time, Date, or no call information, the Testing dialog box appears. Go to Step 11.

If the screen pop will use call information other than Start Time or Date, the Format Call Information dialog box appears. Go to Step 10.

10. Perform one of the following steps:

- If you want the screen pop to send part of the call information you specified:
 1. Click the **Send Part** check box.
 2. From the Number of characters to include box, select the number of characters you want send.
 3. From the Location box, select the location of the characters you want to send.
 4. Click the **Next** button.
- If you do not want the screen pop to send part of the call information you specified, click the **Next** button.

The Testing dialog box appears. Using this dialog box, you can verify whether your screen pop will properly access the URL you specified or run the application you specified.

11. Click the **Test** button.

If the screen pop will use Start Time, Date, or no call information, Avaya IP Softphone performs the screen pop. Go to Step 14.

If the screen pop will use call information other than Start Time or Date, the Enter the following data dialog box appears. Go to Step 12.

12. Enter the appropriate call information to test the screen pop. (For example, if the screen pop will use Caller Name, enter a caller name that exists in the application, file, or web page the screen pop is using.)

13. Click the **Continue** button.

The screen pop uses the information you entered.

14. Perform one of the following steps:

- If the screen pop worked properly, click the **Next** button in the Testing dialog box, and go to the next step.
- If the screen pop did not work properly, click the **Back** button in the Testing dialog box, and verify the information you entered.

15. Click the **Finish** button.

The screen pop you created appears in the Screen Pops window. Avaya IP Softphone will not use this screen pop until you activate it. You activate a screen pop by clicking on its check box. (A check mark indicates that the screen pop is active.)

Modify a Screen Pop

To modify a screen pop:

1. From the **Tools** menu, select **Screen Pops**.

The Screen Pops window appears, displaying the screen pops you have created.

2. Select the screen pop you want to modify.

3. From the **Edit** menu, select **Properties**.

The Screen Pops dialog box appears.

4. Make your changes to the screen pop.

5. When finished, click the **Finish** button.

6. Close the Screen Pops window.

Activate a Screen Pop

Once you create a screen pop, you must activate it when you want to use it. To activate a screen pop:

1. From the **Tools** menu, select **Screen Pops**.
The Screen Pops window appears, displaying the screen pops you have created.
2. Click the check box for the screen pop you want to activate.
A check mark indicates that the screen pop is activated.

Delete a Screen Pop

To delete a screen pop:

1. From the Tools menu, select **Screen Pops**.
The Screen Pops window appears, displaying the screen pops you have created.
2. Select the screen pop you want to delete.
3. From the **Edit** menu, select **Delete**.
The selected screen pop is deleted.

Sample Screen Pop that uses a Web Page

The following procedure describes how to create a screen pop that uses the caller number of the incoming call and searches for the matching number in your company's directory web page. Before performing this procedure, make sure you can access your company's directory web page.

To create a screen pop for a web page:

1. From the **Tools** menu, select **Screen Pops**.
The Screen Pops window appears.
2. From the File menu, select **New**.
The Screen Pops dialog box appears.
3. In the text box, enter Incoming Web Page.
4. Click the **Next** button.
The Trigger dialog box appears.
5. Select the **Ringling** option button in the Incoming Call area.
6. Click the **Next** button.
The Action dialog box appears.
7. Click the **Enter a web page address (URL)** option button, and enter the full address that appears in your web browser when you access the web page for searching your company's directory (for example, **http://post.avaya.com/cgi-bin/htpq?tel=**).
8. Click the arrow button next to the text box.
A menu appears.

9. Select **Caller Number (%m)**, and click the **Next** button.
The Format Call Information dialog box appears.
10. Click the **Next** button.
The Testing dialog box appears.
11. Click the **Test** button.
The Enter the following data dialog box appears.
12. In the Caller Number (%m) box, enter a telephone number that appears in your company's directory (for example, your telephone number).
13. Click the **Continue** button.
Your web browser starts and displays the directory record that matches the telephone number you entered.
14. Click the **Next** button.
The Setup Completed dialog box appears.
15. Click the **Finish** button to save this screen pop.
The new screen pop appears in the Screen Pops windows.
16. Click the check box for this screen pop to activate it.



Administering Dialing Properties

Introduction

The Phone and Modem Options dialog box determines when and how numbers are formatted and dialed.

When you dial a number from Avaya IP Softphone, the number will be formatted based on the information configured on the computer in the Phone and Modem Options dialog box.

For example, if your configuration is as follows:

- Area Code: 303.
- To access an outside line for local calls, dial 9.
- To access an outside line for long-distance call, dial 9.

The following table shows how numbers are formatted and dialed:

| <i>User Enters</i> | <i>Formatted Number</i> | <i>Number Dialed</i> |
|--------------------|-------------------------|----------------------|
| 5551212 | +1 (303) 555-1212 | 9 555-1212 |
| 85571 | 85571 | 85571 |
| 8005551212 | +1 (800) 555-1212 | 9 1 800 555-1212 |
| 61295551212 | +6 (129) 555-1212 | 9 011 6 129 555-1212 |
| 800flowers | +1 (800) FLOWERS | 9 1 800 356-9377 |
| 95551212 | 95551212 | 95551212 |
| 918005551212 | 918005551212 | 918005551212 |

To administer dialing properties:

1. From the **Settings** menu, select **Dialing Properties**. The Phone and Modem Options dialog box appears.
2. In the Phone and Modem Options dialog box, perform one of the following steps:
 - o To create a new dialing location:
 1. Click the **New** button.
 2. Enter the information for the location. Refer to *Microsoft Windows Help* for information on what to enter in the Phone and Modem Options dialog box.

NOTE:

Remember that these are the dialing properties for the voice system to which you are connected, not your home telephone. You must specify the following information:

- Country/region
 - Area code (For some countries, you will need to set area code rules.)
 - Dialing rules for local and long-distance calls
3. When finished, click the **OK** button.

- To modify an existing dialing location:
 1. Select the location you want to modify, and then click the Edit button.
 2. Make your changes. Refer to *Microsoft Windows Help* for information on what to enter in the Phone and Modem Options dialog box.

NOTE:
Remember that these are the dialing properties for the voice system to which you are connected, not your home telephone. You must specify the following information:

 - Country/region
 - Area code (For some countries, you will need to set area code rules.)
 - Dialing rules for local and long-distance calls
 3. When finished, click the **OK** button.
- 3. Repeat Step 2 for any other dialing locations you want to create or modify.
- 4. When finished, click the **OK** button.



Configuring Avaya IP Softphone Options

Introduction

You can configure the following settings in Avaya IP Softphone:

- General Settings (for example, whether you want Avaya IP Softphone to handle voice requests from other programs)
- Call Handling (whether you want the Transfer button on the Phone Buttons toolbar to perform a supervised transfer or an unsupervised transfer)
- Call History (for example, which calls you want to log)
- Call Information Display (for example, whether you want the call information to be replaced with the associated Contact Directory entry)
- Database Location (the location of the database for the Contact Directory window/Avaya IP Softphone Contacts window and the Call History Log)
- User Interface Options
- External Number Format (the format of external telephone numbers)
- Internal Dial Plan (the dial plan(s) your system uses for internal calls)
- Event Logging (maintaining and viewing event logs)
- Voice Messaging Access (whether you want Avaya IP Softphone to access your voice messaging system. If you enable voice messaging access, you must configure Avaya IP Softphone to access your voice messaging system.)
- Feature Access (set user restrictions on the Program Options feature, the Contact Directory, the Call History Log, the Search Public Directory feature, phone features, and screen pops)
- Desktop Integration (search for names in Microsoft Outlook, Lotus Notes, and/or an LDAP public directory from the Call bar window, configure the Advanced Search and Display feature, and dial numbers from the Microsoft Internet Explorer window and other applications)

NOTE:

Do not use the High Contrast Black color scheme for your active windows.

Setting Options

To set the Avaya IP Softphone options:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1

In the list box, click on the setting you want to administer.

The associated options are displayed.

2

Make your changes.

3

Repeat Steps 2 and 3.

4

When finished, click the **OK** button to activate the options.

5

Exporting the Settings

To export these settings to a disk or shared network directory:

From the Avaya IP Softphone Call Bar window, select **Export Settings** from the **File** menu.

The Save As dialog box appears.

1

In the Save As dialog box, enter the following fields (or accept the defaults):

- Save in—navigate to the drive and folder where you want to save the file.
- File name—enter the name of the file.
- Save as type—select the type of file.

2

Select the **Save** button to save the file to the destination folder you specified.

3

Importing the Settings

You can now import the configuration information from a disk or shared network directory to your computer. You must be logged off the server to import configuration information. To import the settings:

From the Avaya IP Softphone Call Bar window, select **Import Settings** from the **File** menu.

The Open dialog box appears.

1

In the Open dialog box, select the file you want to import, and then click the **Open** button.

A dialog box appears, prompting you to confirm your action.

2

Click the **Yes** button.

Avaya IP Softphone informs you that the configuration information has been successfully entered into the registry. The options your supervisor has set up for your station have been successfully imported.

3

Click the **OK** button.

A message box appears.

4

Click the **OK** button.

5

Selecting the Language for Avaya IP Softphone

This setting does not affect information displayed from the call server (such as Caller ID information).

To select the language:

From the Avaya IP Softphone Call Bar window, select **Language** from the **Settings** menu.

The Select a Language dialog box appears.

1 _____

Select the language you want Avaya IP Softphone to use, and then click the **OK** button.

NOTE:

The language you select will not be used until you exit and restart Avaya IP Softphone.

2 _____

Selecting the Font for Avaya IP Softphone

This setting applies to information displayed in call appearances, the Contact Directory, and the Call History.

To select the font:

From the Avaya IP Softphone Call Bar window, select **Font** from the **Settings** menu.

The Font dialog box appears.

1 _____

Select the font, style, and size you want Avaya IP Softphone to use, and then click the **OK** button.

NOTE:

The font you select will not be used until you exit and restart Avaya IP Softphone.

2 _____

Setting Avaya IP Softphone to Dial Internal Telephone Numbers

To configure Avaya IP Softphone to dial internal telephone numbers:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1

Click on **Internal Dial Plan**.

The Internal Dial Plan information appears.

2

Select the check box for each dial plan your system uses for internal calls.

3

Click the **OK** button.

NOTE:

The new setting will not be used until you exit and restart Avaya IP Softphone.

4

Setting a Password for the Feature Access Settings

To configure a password for the Feature Access settings:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1

Click on **Feature Access**.

The Feature Access information appears.

2

Click the **Set Password** button.

The Change Password dialog box appears.

3

In the New password box, enter your new password.

4

In the Confirm new password box, reenter your new password.

5 _____

Click the **OK** button.

6 _____

Click the **OK** button to close the Program Options dialog box.

The next time you want to access the Feature Access settings, you must click the **Enter Password** button and enter your password.

7 _____

To change or remove the password for the Feature Access settings:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Click on **Feature Access**.

The Feature Access information appears, but it is disabled.

2 _____

Click the **Enter Password** button.

The Enter Password dialog box appears.

3 _____

Enter your password, and click the **OK** button.

4 _____

Click the **Change Password** button.

The Change Password dialog box appears.

5 _____

Perform one of the following steps:

- If you want to change your password:
 1. Enter your new password in the New password box.
 2. Reenter your new password in the Confirm new password box.
 3. Click the **OK** button.
- If you want to remove the password from the Feature Access settings:
 1. Leave both boxes empty, and click the **OK** button.
A dialog box appears, prompting you to confirm your action.
 2. Click the **Yes** button.

6 _____

Click the **OK** button to close the Program Options dialog box.

7 _____

Setting Avaya IP Softphone to Run with No Window

Perform this procedure if you want to make and handle calls from another application (such as Microsoft Office Communicator 2005) and you do not want to see the Avaya IP Softphone window.

NOTE:

If you set Avaya IP Softphone to run with no window, the Avaya IP Softphone icon still appears in the system tray every time you run Avaya IP Softphone. Right-click on this icon and select **Call Bar** if you want to access the Avaya IP Softphone window.

To configure Avaya IP Softphone to run with no window:

From the Avaya IP Softphone Call Bar window, select **Program Options** from the **Tools** menu.

The Program Options dialog box appears.

1 _____

Click on **User Interface Options**.

The User Interface Options information appears.

2 _____

Deselect the **Display user interface(s) on startup** check box.

3 _____

Click the **OK** button.

NOTE:

The new setting will not be used until you exit and restart Avaya IP Softphone.

4

Using the Phone Feature Options

Introduction

Avaya IP Softphone enables you to access the following windows to use and manage telephone feature buttons:

- **Phone Features window**

The Phone Features window displays in a "tree" view all of the feature buttons administered on the server for the physical station terminal of the extension you are logged into. You can add up to seven of these features to the Feature Buttons toolbar in the Avaya IP Softphone Call Bar window.

- **Personal Phone Features window**

The Personal Phone Features window enables you to create a personal list of the phone features you use most often by copying those features from the Phone Features window. You can select any feature button to add to your Personal Phone Features window.

Using the Phone Features window

To access the Phone Features window:

Perform one of the following steps:

- Select **Phone Features** from the **Tools** menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon, and select **Phone Features**.

The Phone Features window appears.

1

Perform one of the following steps:

- To activate a feature button, double-click on that feature. When a phone feature button is activated in Avaya IP Softphone, the icon next to the button is green.
- To copy a feature to the Personal Phone Features window, right-click on the feature you want to copy, and select **Add to Personal Features**.
- To modify the feature labels in the Phone Features window, right-click on the feature label you want to modify, select **Rename**, and then type the changes. To restore the feature label to its original label, right-click on the feature label, and select **Restore**.

Important!

If the feature you are renaming is also in your Personal Features window, the name will be changed there also.

- To delete a feature button, right-click on the feature you want to delete, and select **Delete**. Whether you can delete a feature button depends on your user privileges.

2

Adding Features to the Feature Buttons Toolbar

You can add features from Phone Features window to the Feature Buttons toolbar in the Avaya IP Softphone Call Bar window. (You can display the Feature Buttons toolbar by selecting **View>Toolbars>Feature Buttons** in the Avaya IP Softphone Call Bar window.)

To add a feature to the Feature Buttons toolbar:

Perform one of the following steps:

- Select **Phone Features** from the **Tools** menu in the Avaya IP Softphone Call Bar window.
- Right-click on the Avaya IP Softphone icon, and select **Phone Features**.

The Phone Features window appears.

1

Perform one of the following steps:

- Select the feature you want to add to the Feature Buttons toolbar, and then select **Display on Feature Buttons Toolbar** from the **Edit** menu.
- Right-click on the feature you want to add to the Feature Buttons toolbar, and select **Display on Feature Buttons Toolbar**.

2

Repeat step 2 to add more features to the Feature Buttons toolbar. The Feature Buttons toolbar can contain a maximum of seven buttons.

3

Using the Personal Phone Features window

To access the Personal Phone Features window:

Select **Personal Phone Features** from the **Tools** menu in the Avaya IP Softphone Call Bar window.

The Personal Phone Features window appears.

1

Perform any of the following steps:

- To activate a feature button, double-click on that feature. When a phone feature button is activated in Avaya IP Softphone, the icon next to the button is green.
- To modify the feature labels in the Personal Phone Features window, right-click on the feature label you want to modify, select **Rename**, and then type the changes. To restore the feature label to its original label, right-click on the feature label, and select **Restore**.
- To delete a feature button, right-click on the feature you want to delete, and select **Delete**.

2
