



Telephony Toolbar End-User Guide

October 2006

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Welcome

The Telephony Toolbar is a carrier class lightweight desktop communications management product for everyday users of Microsoft® Outlook®, Internet Explorer and TelPacks telephony soft switch platform. Telephony Toolbar employs the latest technology platforms and communications facilities. In this regard Telephony Toolbar fully interoperates with IP Telephony platforms.

Getting Started

After you have installed the Telephony Toolbar, you should read the following topics to get you using its many features quickly and easily:

First Use


When starting Telephony Toolbar for the first time some elements need to be configured. Once configured, users can proceed to use Telephony Toolbar without needing to reconfigure, as indicated in the section entitled Subsequent Use. Tool-tips appear when hovering over individual toolbar components, giving a title to the function each component performs.

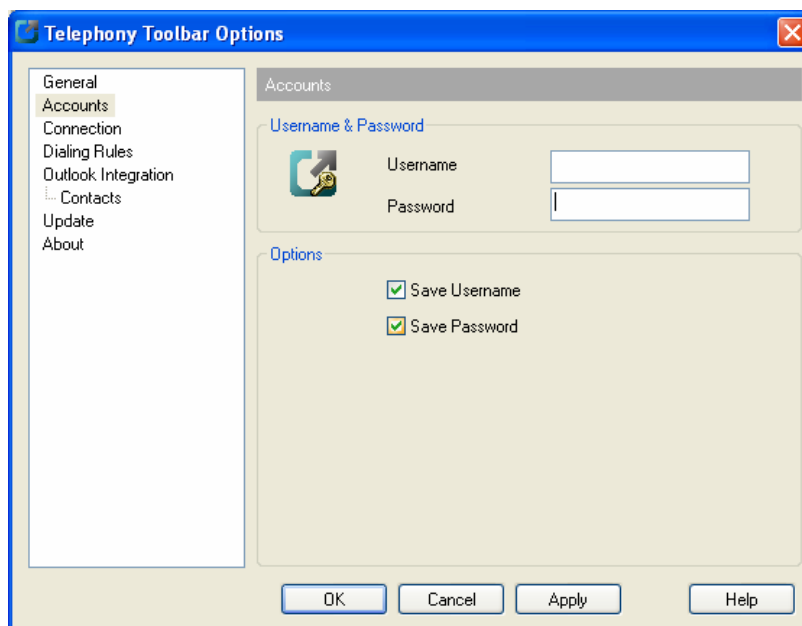
Before configuration, the Telephony Toolbar for Microsoft Internet Explorer looks like:



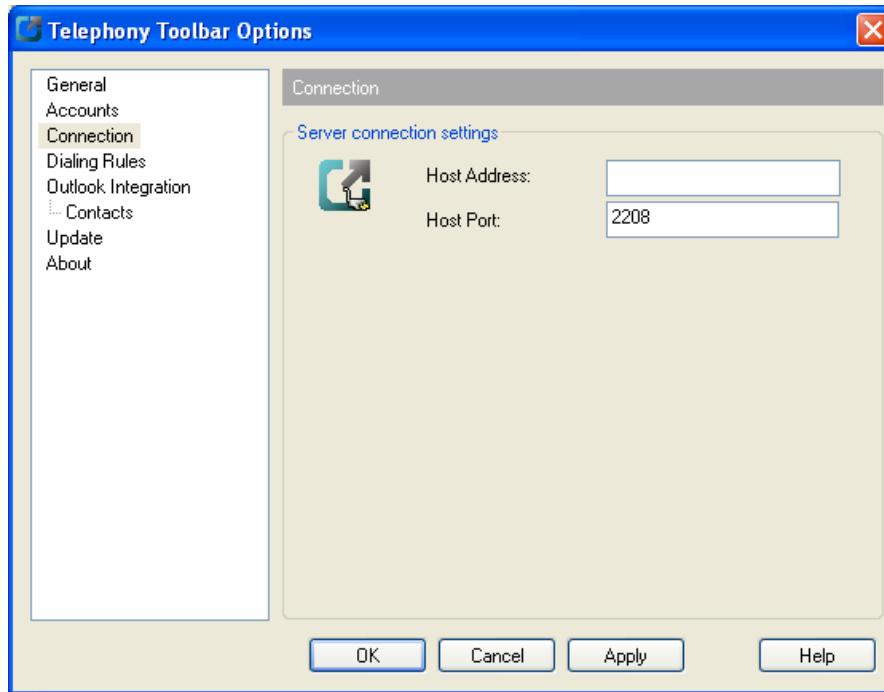
When all services have been assigned the Telephony Toolbar in Microsoft Outlook should look like the following before configuration:



1. Click on the settings button  in the toolbar
2. Telephony Toolbar will prompt for your IP Telephony platform account credentials.
3. Check the **SAVE USERNAME** and **SAVE PASSWORD** options if you want to save your settings (your password will be encrypted).

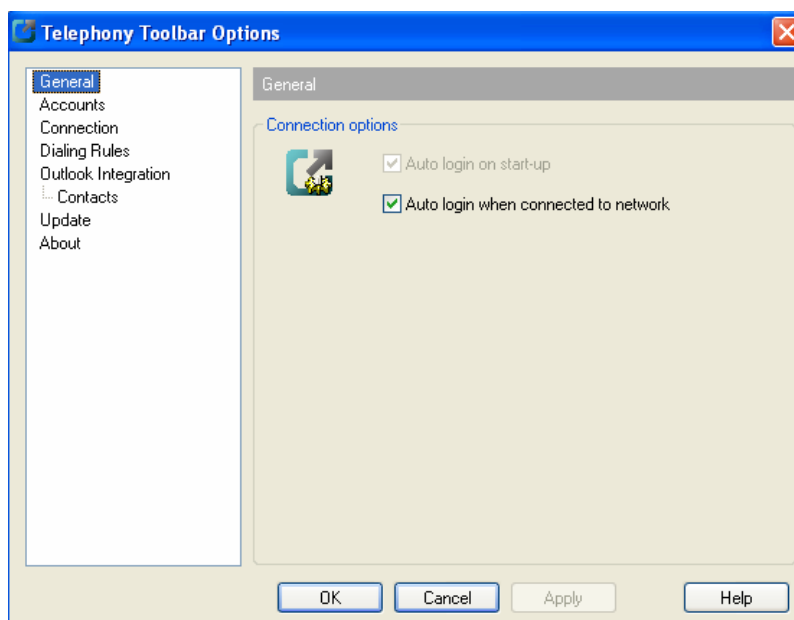



- Click on the **CONNECTION** tab and enter the server URL and port number for the server. This information is available from your system administrator or service provider.

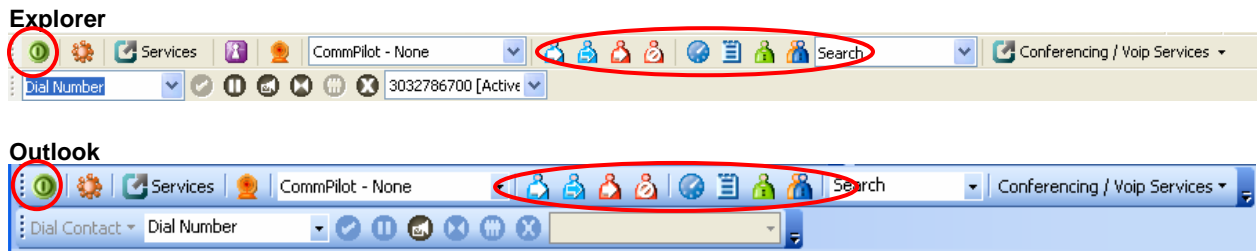


NOTE: If your web traffic is proxied, enter the details in the "Proxy Connection Settings" region of the 'CONNECTION' tab. The particulars are available from your network administrator. The proxy is **only** used for silent upgrade checking, and is in no way related to the server connection.

- Click on the **GENERAL** tab
- Check **AUTO LOGIN ON START-UP** if you would like to connect to the server when you start Internet Explorer and/or Outlook
- Check **AUTO LOGIN WHEN CONNECTED TO NETWORK** to enable Telephony Toolbar to connect to the server when a network connection is available




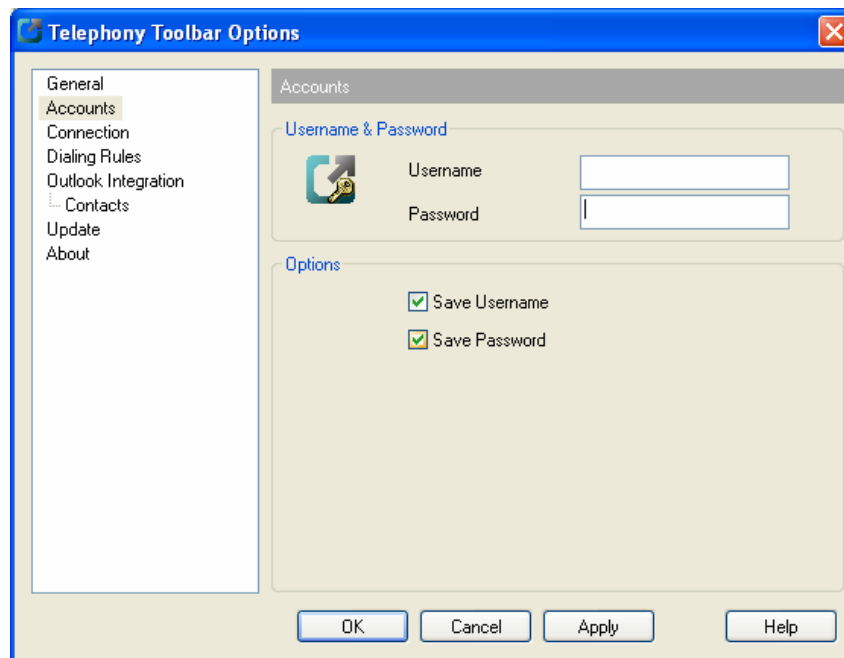
8. Click **OK** to save your settings and exit the dialog
9. Click the login button  and if your configuration and credentials are correct the toolbar will be displayed as follows (note the green login button and the colored icons).




Subsequent Use

If you have chosen to check the boxes in steps 6 and 7 above, then the Telephony Toolbar will automatically be active when you launch either Internet Explorer or Outlook. If you have not chosen to check the boxes, follow the directions below for subsequent use.

1. To connect to the server, click the login button  on the Telephony Toolbar.
2. If you did not check the **SAVE USERNAME** and **SAVE PASSWORD** options, you will be prompted for those parameters again.



3. Enter your Username and Password, then Click **OK** to exit the dialog
4. Click the login button  to connect to the service

The Telephony Toolbar

Successful login to Telephony Toolbar will enable the various functions. The toolbar is actually divided into 2 separately movable toolbars. Each toolbar functions as described below. The Explorer toolbar is unique from the Outlook Toolbar, but they share most functionality.

- Shared Functionality
- Explorer Functionality
- Outlook Functionality

Toolbar 1 (Explorer)



Toolbar 2 (Explorer)



Toolbar 1 (Outlook)

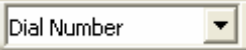













Toolbar 2 (Outlook)



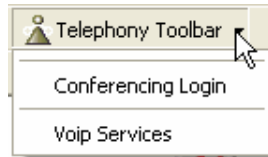
Shared Functionality

The Explorer and the Outlook toolbars share the functionality described below.

- Dial Other 
- Answer 
- Hold 
- Voice Mail Transfer 
- Transfer 
- 3-Way Conference 
- End 
- Active Call Management 
 - NGT Lab [Held]
 - 7204972808 [Held]
 - 3032786700 [Active]
- Options 
- Services 
- Remote Office 
- Shortcuts 
 - CommPilot - Unavailable

- Search

- Links



Dial Other

The Dial Other drop-down list enables you to dial a previously-dialed number directly, or specify the number you want to call. To place a call:

1. Enter the number into the designated box, or select a previously entered number by clicking on the arrow and choosing from the list
2. Press the **ENTER** key on your keyboard to place the call.

NOTE: The Dial Other drop down remembers only the last 10 numbers entered.

Answer



With the Telephony Toolbar you can answer calls by clicking the toggle button. The answer button is only enabled when you have a call coming in, or on hold. The button can be used for answering an incoming call, or taking a call off hold.

Hold



With the Telephony Toolbar you can initiate hold a call by clicking the toggle button.

Dial Voicemail/Voicemail transfer



With the Telephony Toolbar you can dial voicemail, or transfer an active call to voicemail by clicking the toggle button.

Transfer



With the Telephony Toolbar you can transfer a call by clicking entering a new number in the 'Dial Number' field and clicking the toggle button.

3-Way Conference



With the Telephony Toolbar you can initiate a 3-way conference by clicking the toggle button. The 3-Way Conference toggle button is only enabled when the currently logged in user has exactly 2 calls in either active or held states.

End



With the Telephony Toolbar you can end a call by clicking the toggle button.

Active Call Management



With the Telephony Toolbar you can manage active calls by picking them from the drop down list.

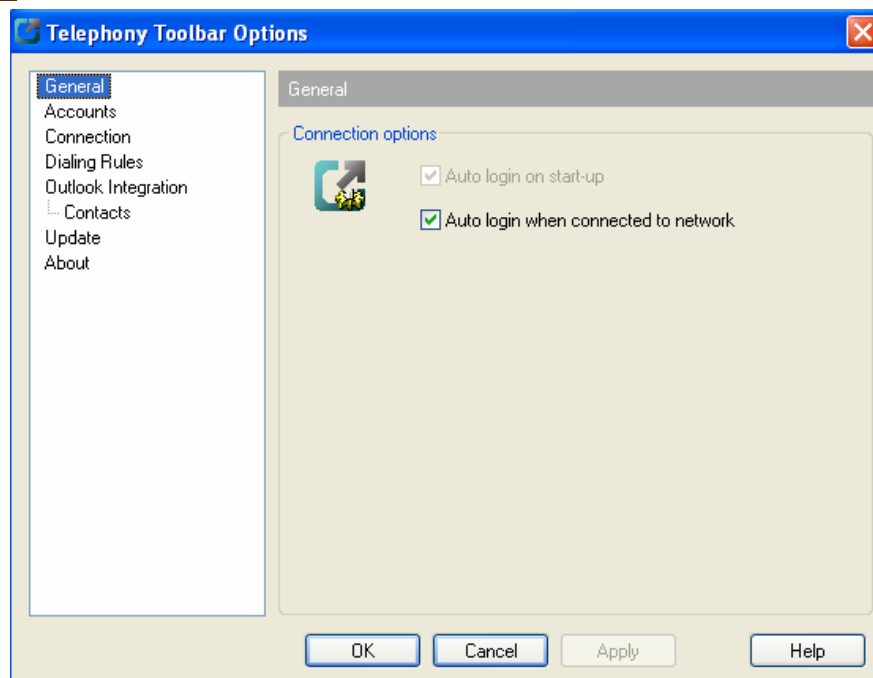
Options



The Options window allows you to add/modify the user and server settings for connecting Telephony Toolbar to your service provider. This window is divided into six tabs.

- General
- Accounts
- Connection
- Outlook Integration
- Dialing Rules
- About

General



- ✓ Check the **AUTO LOGIN ON START-UP** to automatically log into the Telephony Toolbar upon the startup of Internet Explorer and/or Outlook.
- ✓ Check the **AUTO LOGIN WHEN CONNECTED TO NETWORK** to automatically connect to the Telephony Toolbar server when it detects a network connection.

Accounts

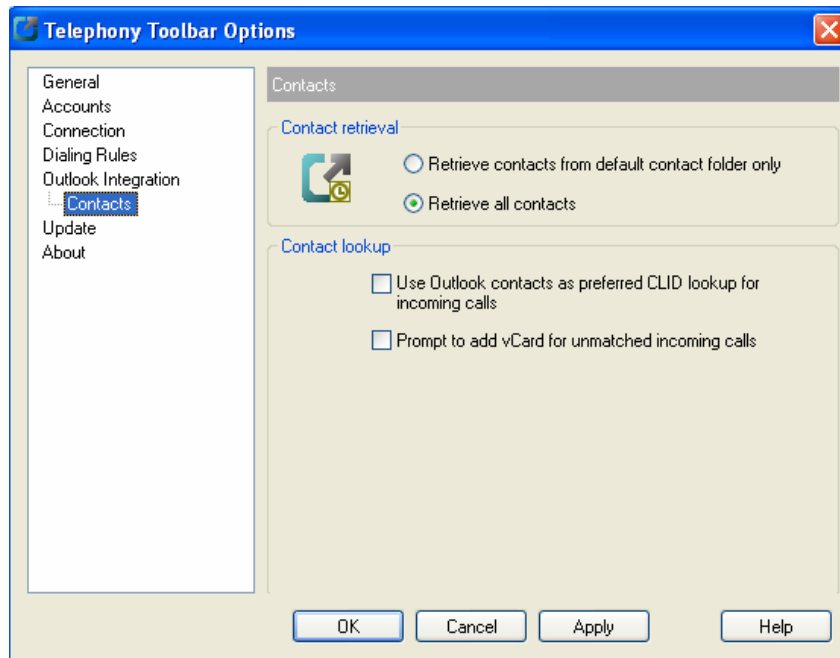
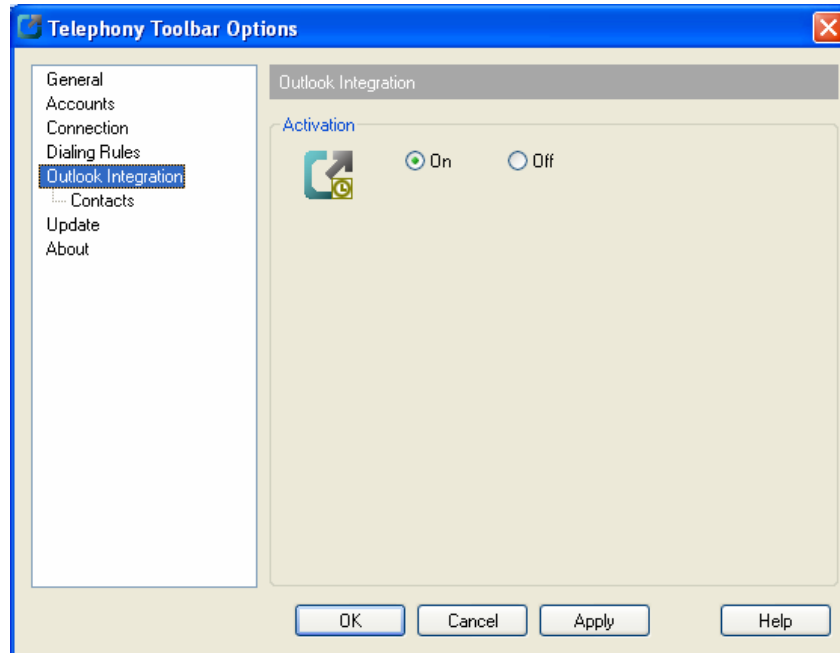
The Accounts tab shows/captures the information needed to connect to your service provider. Using this tab is explained above in the 'First Use' and 'Subsequent Use' section.

Connection

The Connection tab displays the information required to connect to your service provider. Using this tab is explained above in the 'First Use' section.

Outlook Integration

Outlook Integration through Telephony Toolbar provides contact management for end-users.

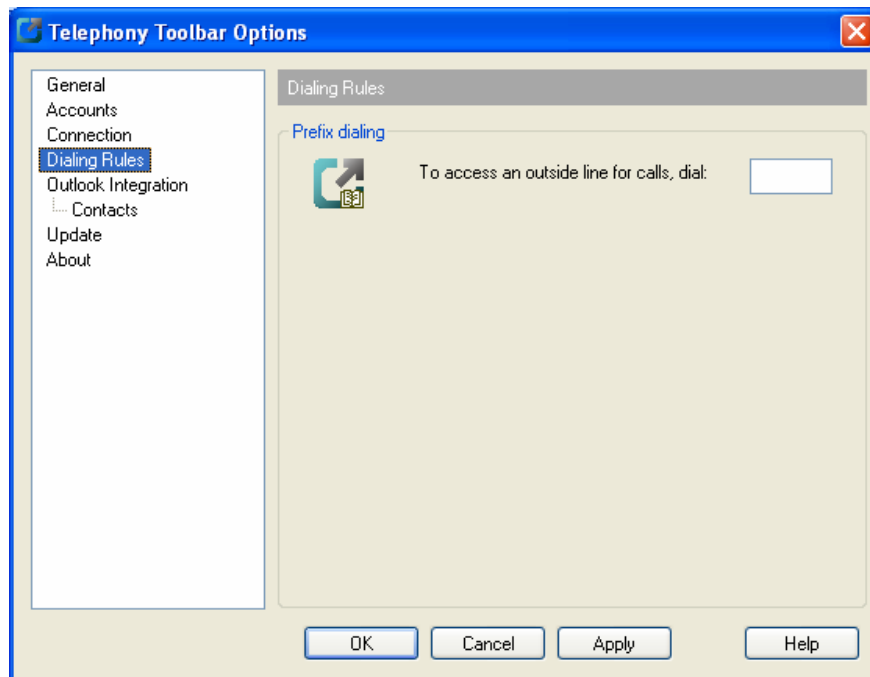


- ✓ Check the **RETRIEVE CONTACTS FROM DEFAULT CONTACT FOLDER ONLY** option if you would like Telephony Toolbar to attempt to resolve an unknown number through *your* Outlook contact repository.

- ✓ Check the **RETRIEVE ALL CONTACTS** option if you would like Telephony Toolbar to attempt to resolve an unknown number through *ALL* Outlook contact repositories (including company public contact folders) NOTE: This can slow down the lookup process.
- ✓ Check the **USE OUTLOOK AS PREFERRED CLID LOOKUP FOR INCOMING CALLS** option if you would like Telephony Toolbar to attempt to resolve an unknown number through your Outlook contact repository.
- ✓ Check the **PROMPT TO ADD VCARD FOR UNMATCHED INCOMING CALLS** option if you would like Telephony Toolbar to display a prompt to add the incoming number to the contact repository for incoming calls whose number cannot be resolved through Outlook and the Service Provider.

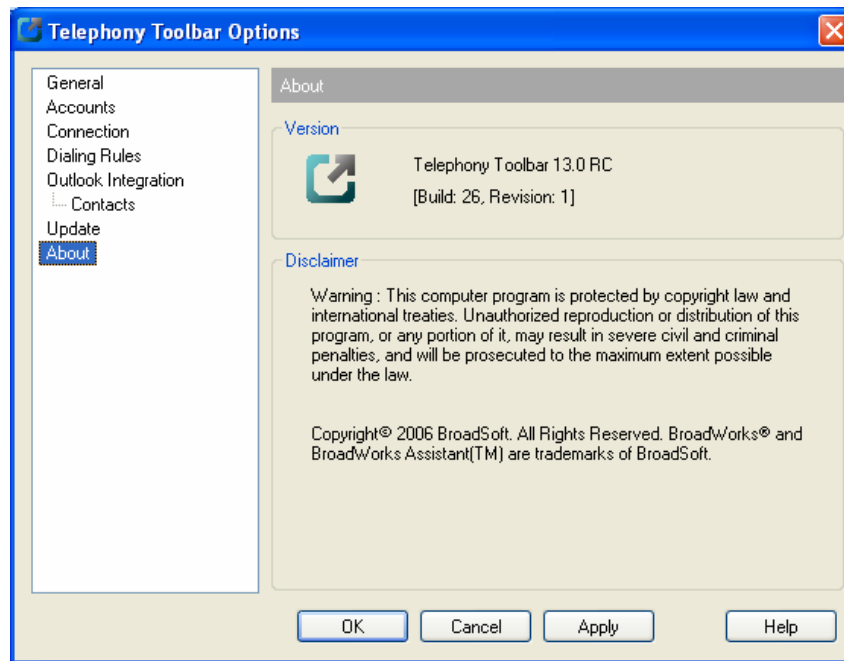
Dialing Rules

Dialing Rules allows you to specify the prefix number used to dial external numbers. If entered, this number is pre-pended to dialed numbers that span more than 6 digits. Up to 5 digits can be entered as a prefix for outgoing calls. The valid characters are numbers 0 to 9, and '+'. However, the '+' can only be the first character.



About

The About tab displays the version, copyright notices and product disclaimers associated with the Toolbars. It is useful in assisting support representatives from your service provider.



Services



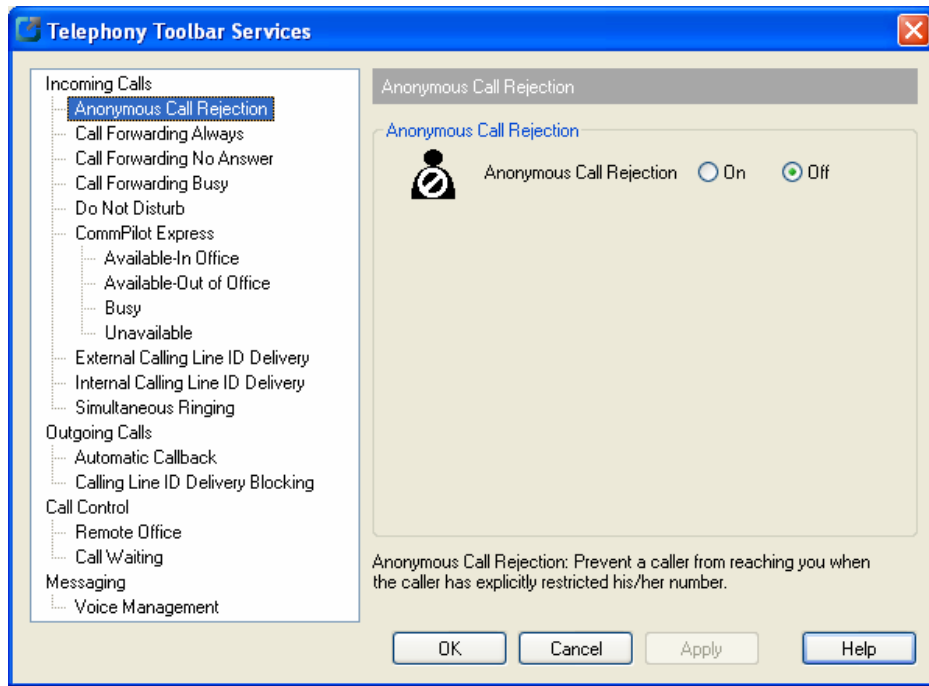
The Services window allows users to enable/disable Telephony Toolbar's advanced features.

- Anonymous Call Rejection
- Call Forwarding Always
- Call Forwarding No Answer
- Call Forwarding Busy
- Do Not Disturb
- CommPilot Express
- External Calling Line ID Delivery
- Internal Calling Line ID Delivery
- Simultaneous Ringing
- Automatic Callback
- Calling Line ID Delivery Blocking
- Remote Office
- Call Waiting
- Voice Management

Anonymous Call Rejection

This option enables Telephony Toolbar to reject anonymous calls.

The settings can be changed via the  button in the Telephony Toolbar.

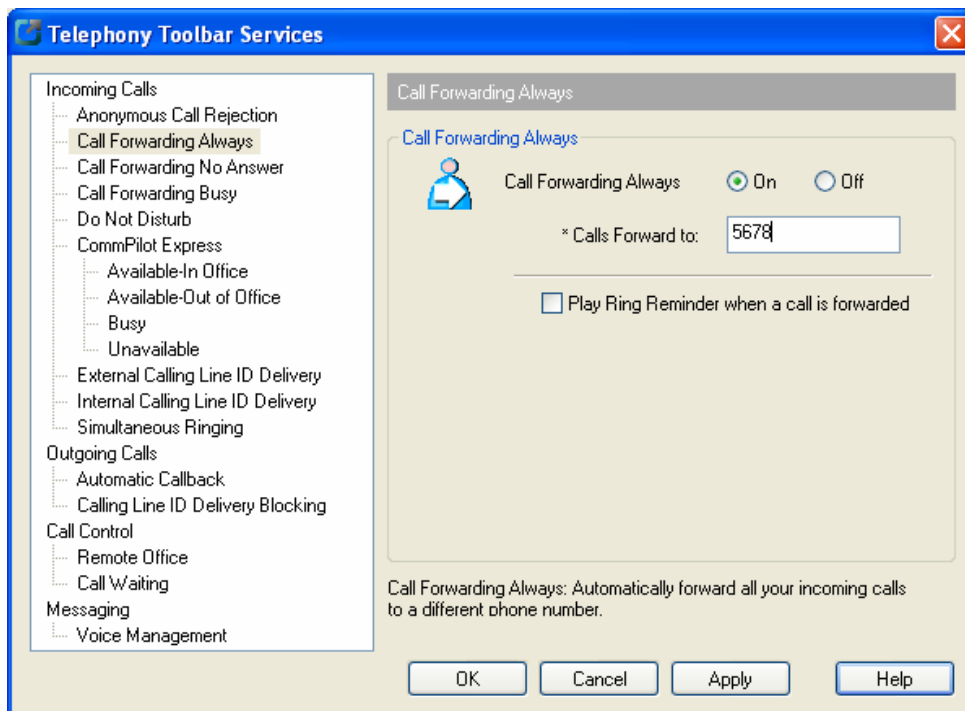


Call Forwarding Always


This option enables Telephony Toolbar to forward all incoming calls to a specified phone number. A reminder ring can also be played to alert the user to the call-forwarding option being selected.

The settings can be changed via the  button in the Telephony Toolbar.

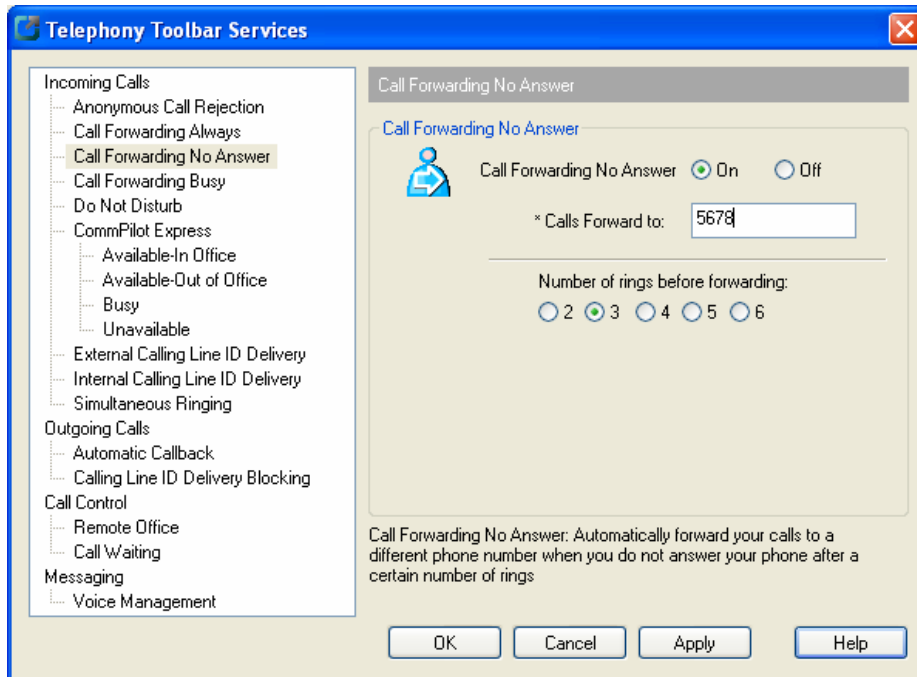
When this service is activated, the  icon in the toolbar changes to .




Call Forwarding No Answer

This option enables Telephony Toolbar to forward all incoming calls to a specified phone number when your phone is not answered after the selected number of rings occur. The settings can be changed via the  Services button in the Telephony Toolbar.

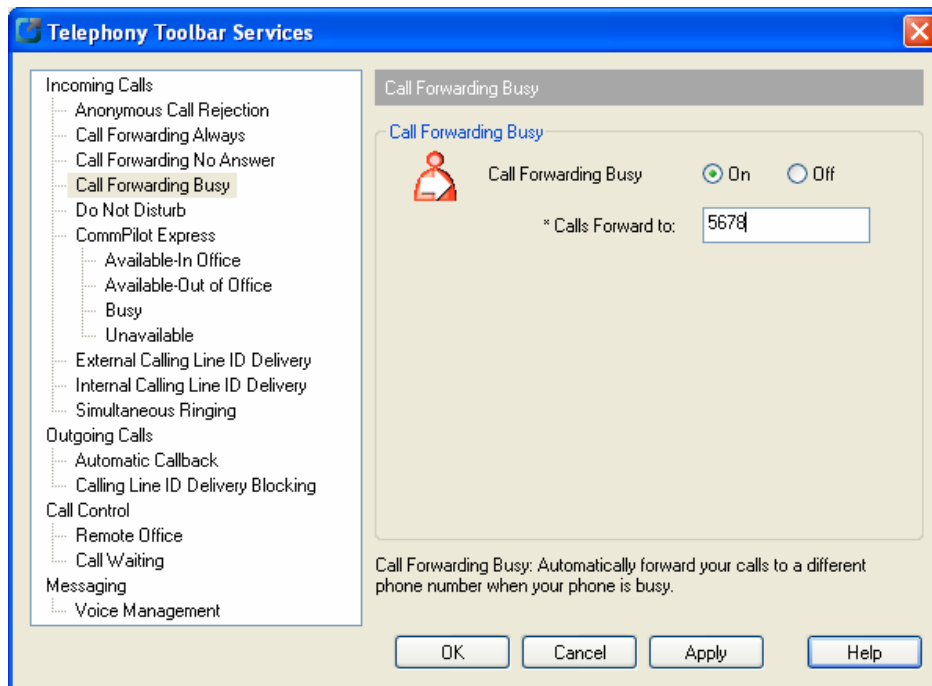
When this service is activated, the  icon in the toolbar changes to .



Call Forwarding Busy

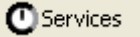
This option enables Telephony Toolbar to forward all incoming calls to a specified phone number when all the lines on the phone are in use. The settings can be changed via the  Services button in the Telephony Toolbar.

When this service is activated, the  icon in the toolbar changes to .

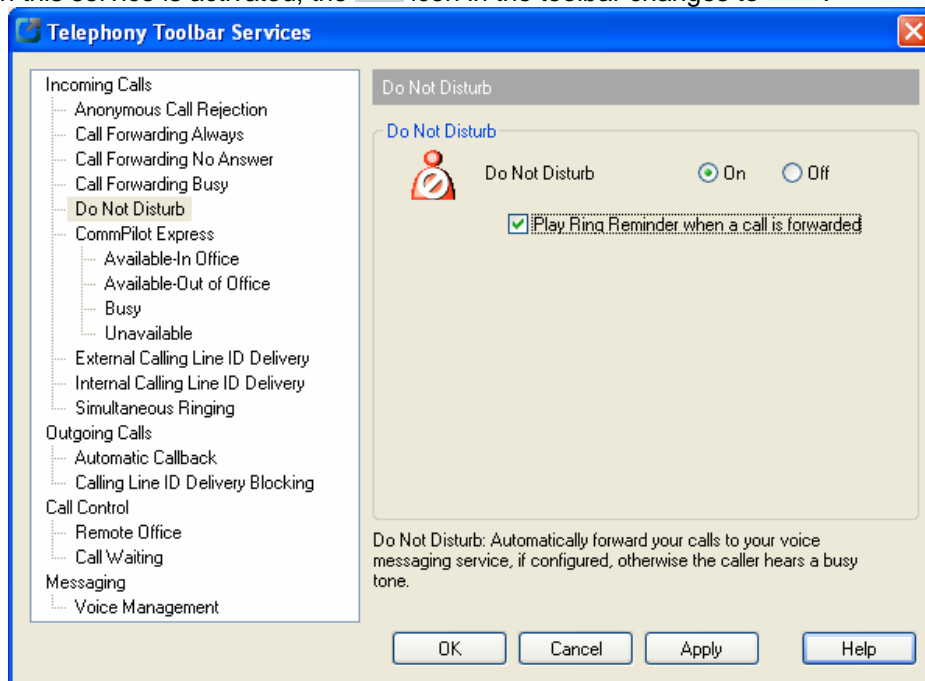


Do Not Disturb

This feature allows all incoming calls to be forwarded to a voice messaging service, and notification of the user when this occurs, if desired. The settings can be changed via the

 **Services** button in the Telephony Toolbar.

When this service is activated, the  icon in the toolbar changes to .



Web Express

Web Express provides the ability to configure and manage inbound call flows. Web Express allows you to configure up to four profiles to control inbound calls. These profiles are analogous

to cellular phone profiles. Even when you're off-site you can still manage your profiles on the web or on the phone.

With Web Express, you can work efficiently without unnecessary interruption and manage calls based on your schedule.

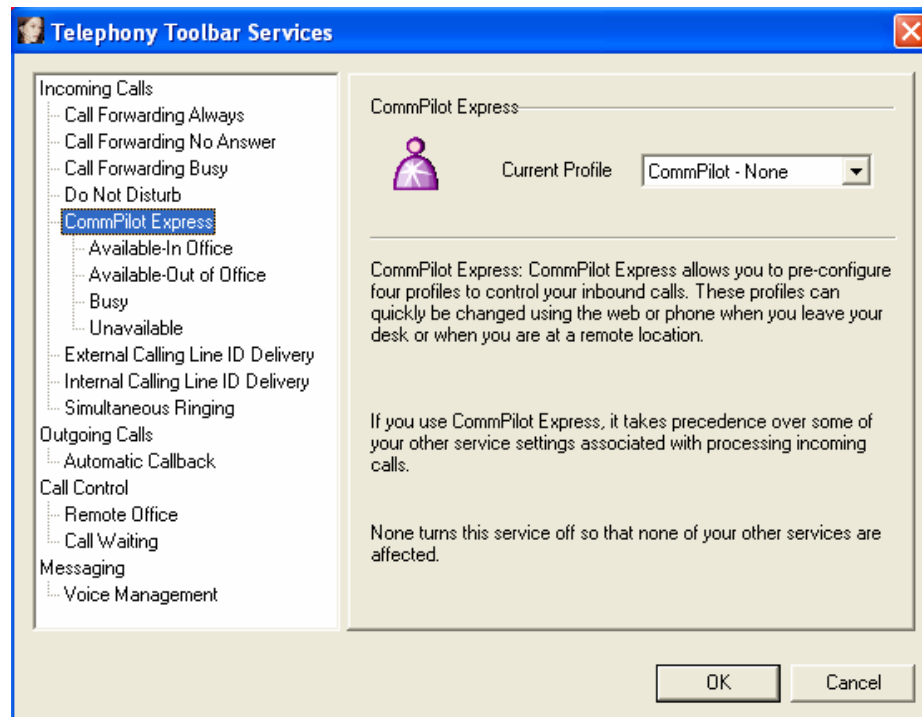
IMPORTANT NOTE: You should not configure other services, such as Call Notify, Call Forwarding, or Simultaneous Ring if you use Web Express.

The profiles available are:

- None
- Available – In Office
- Available – Out of Office
- Busy
- Unavailable

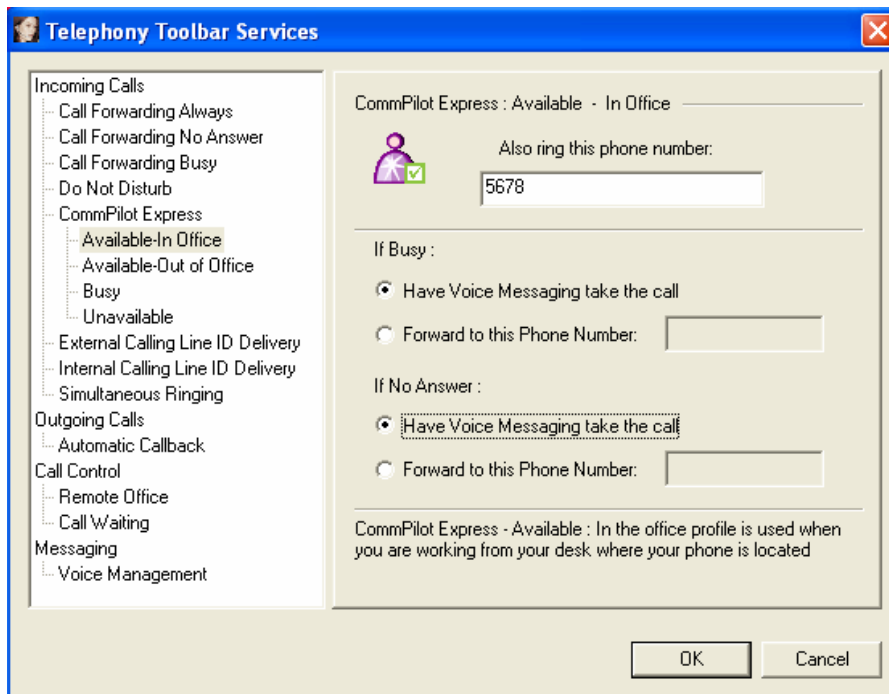
Web Express (CommPilot Express): None

Selecting this option will not use any of Web Call Manager's profiles. Any other services that may be activated will be used to handle incoming calls.



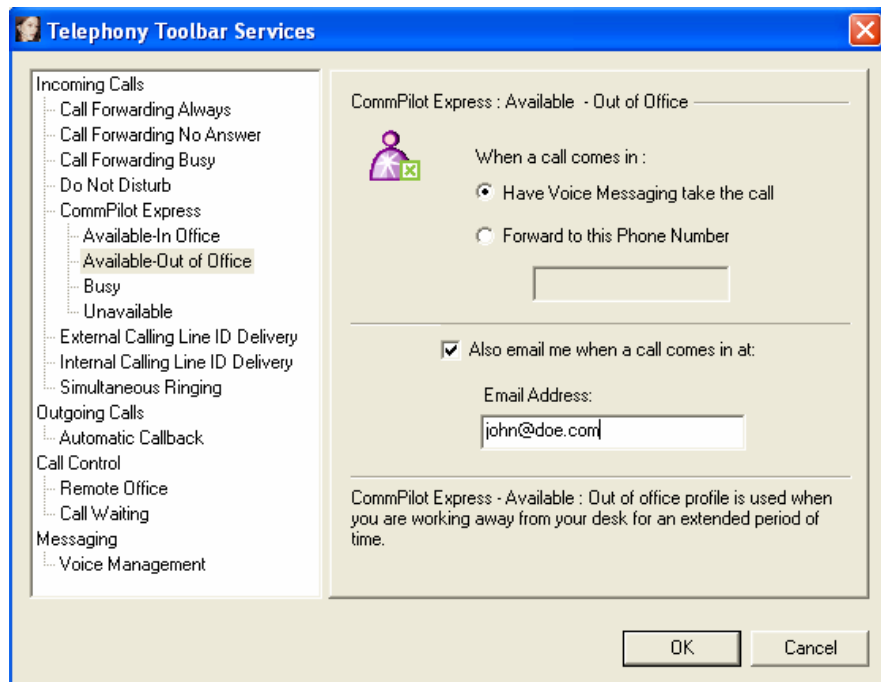
Web Express (CommPilot Express): Available in Office

This profile provides the facility to indicate how calls are handled when the user is located in the office. The user can enable incoming calls to ring at additional phones, and setup voice messaging to take calls.



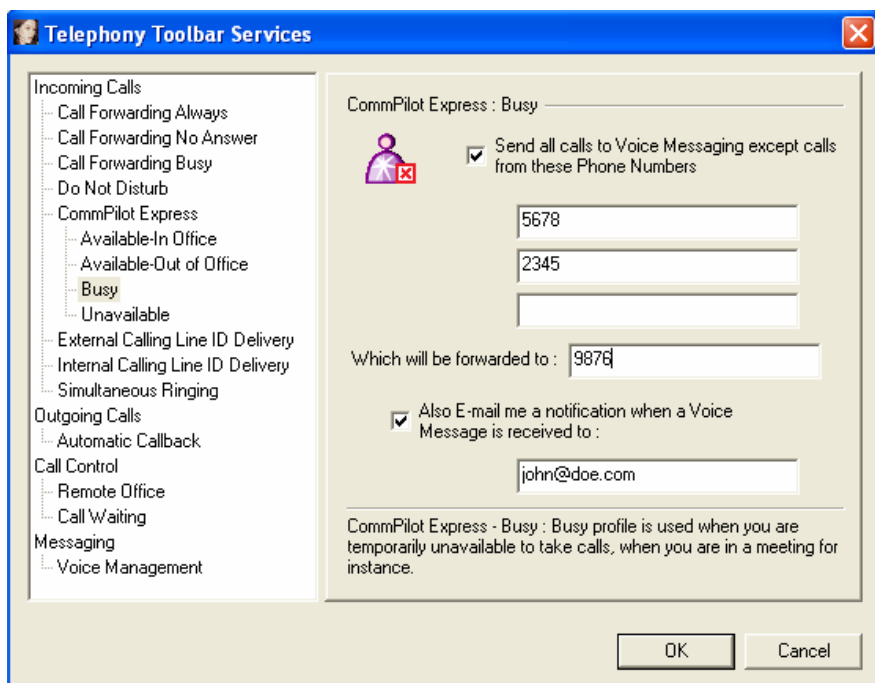
Web Express (CommPilot Express): Out of Office

This profile enables the user to dictate how calls are handled when he/she is out of the office, but available to receive calls. Calls can be forwarded to different phones, and notification e-mails can be sent.



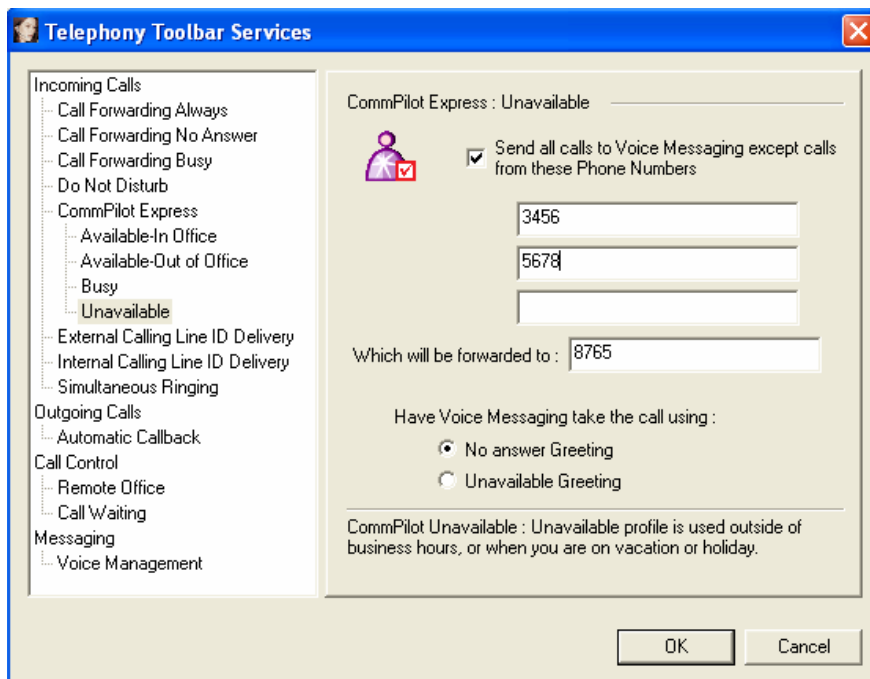
Web Express (CommPilot Express): Busy

With this profile users can indicate how calls are to be handled when they are busy. Calls from selected numbers can be forwarded, calls can be sent to Voice Messaging, and an e-mail notification can be sent when a call is received.



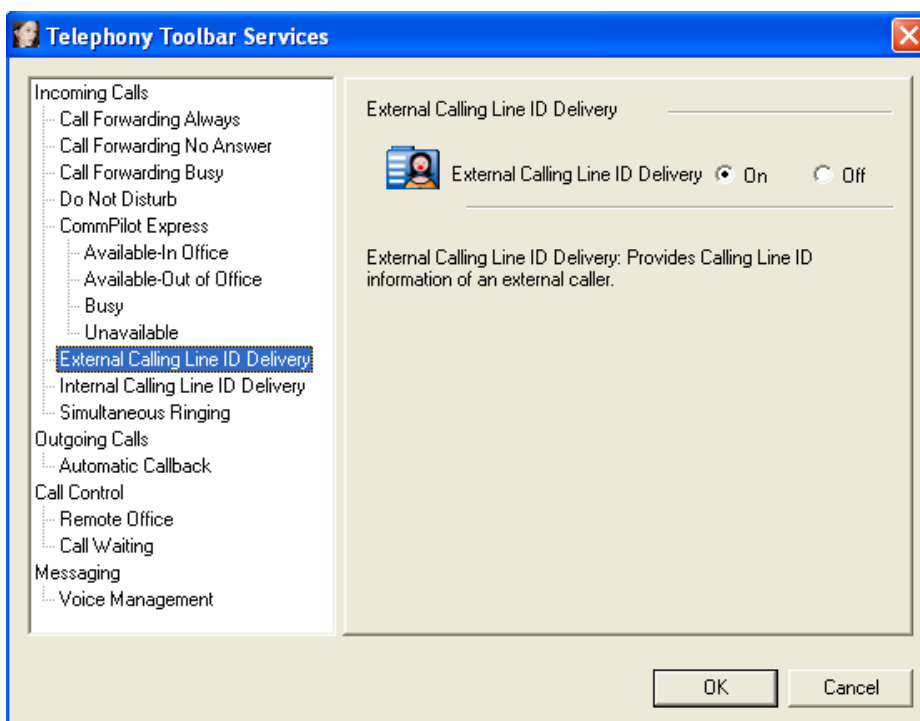
Web Express (CommPilot Express): Unavailable

This profile enables users to specify how calls are handled when they are not available. For example when you are on vacation calls from selected numbers can be forwarded, and users can specify a Voice Messaging greeting to be heard by all callers.



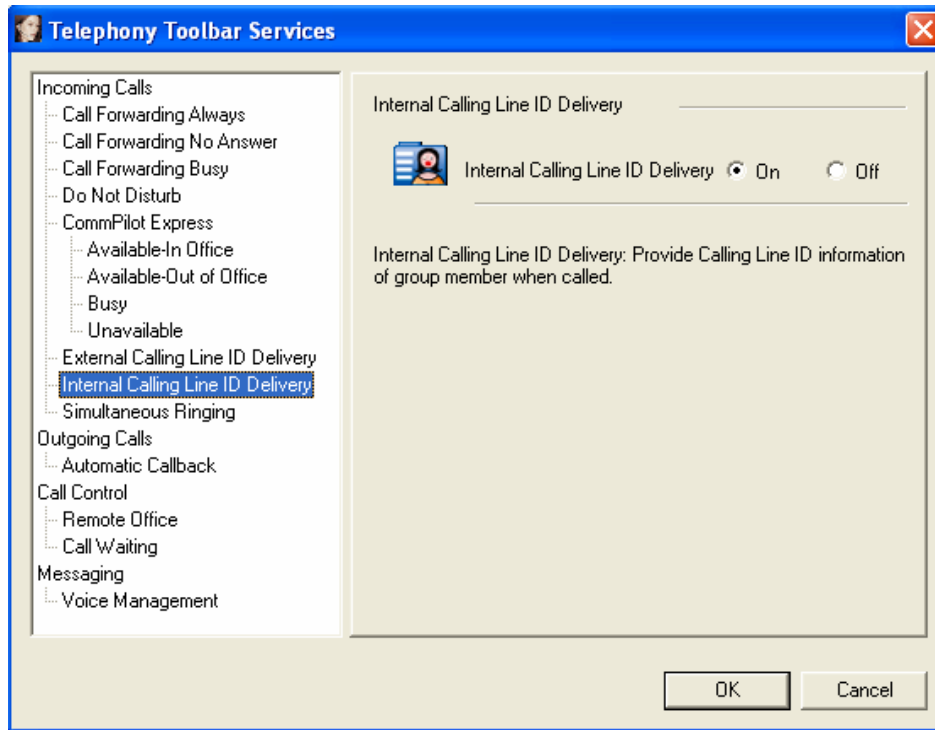
External Calling Line ID Delivery

This feature allows the user to view incoming call line ID information for external numbers.



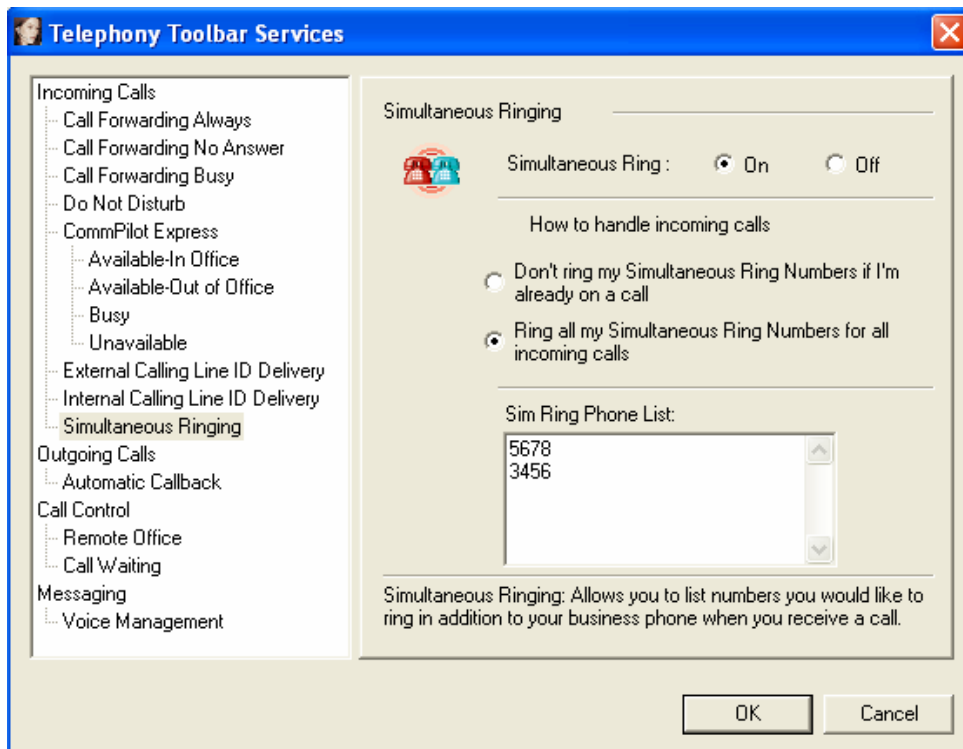
Internal Calling Line ID Delivery

This feature allows the user to view incoming call line ID information for group member numbers.



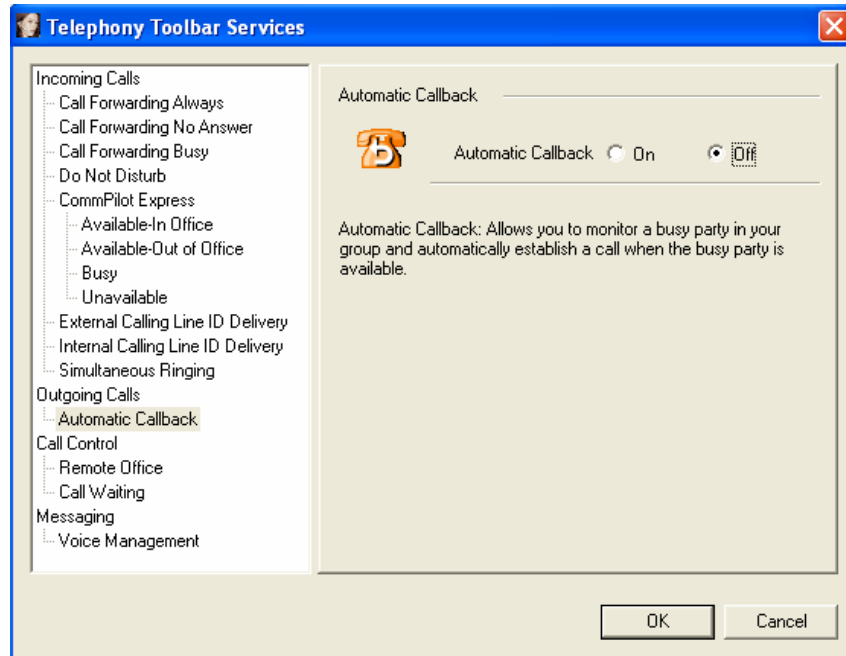
Simultaneous Ringing

This feature enables Telephony Toolbar to alert other phones when incoming calls are received. The user has the option of disabling this service during calls.



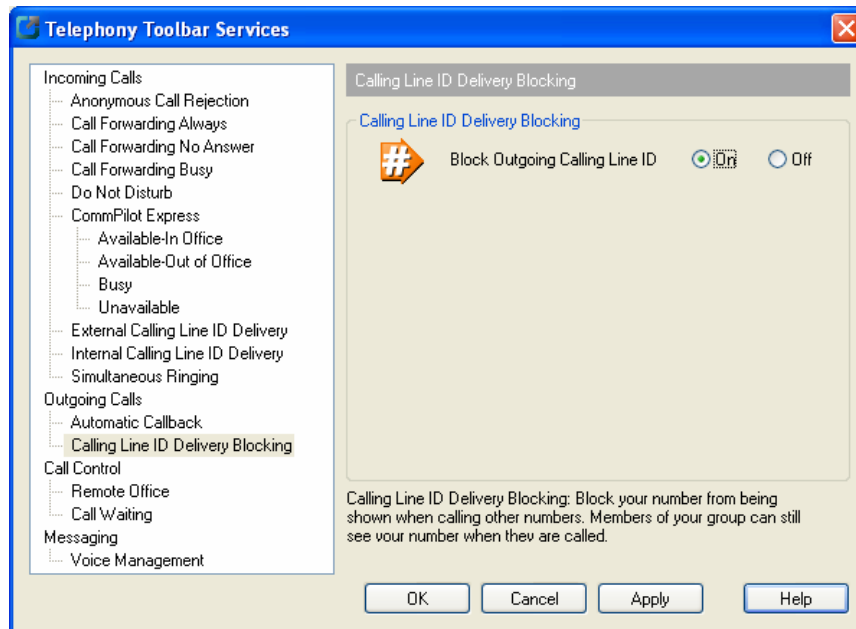
Automatic Callback

This feature allows a toolbar user to monitor a busy party in your group and automatically establish a call when the busy party is available.



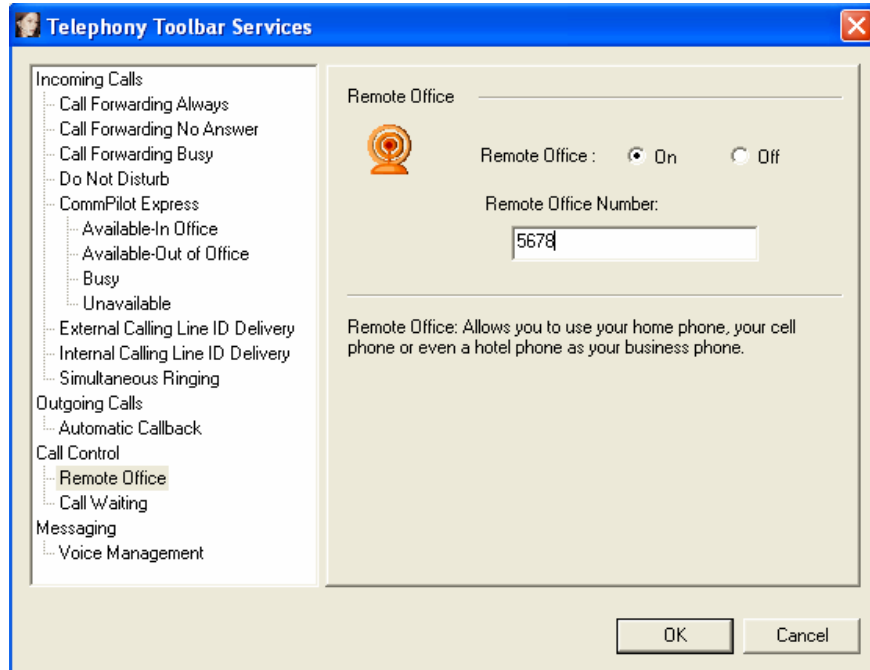
Calling Line ID Delivery Blocking

This feature allows a toolbar user block the delivery of their calling line id on outbound calls.



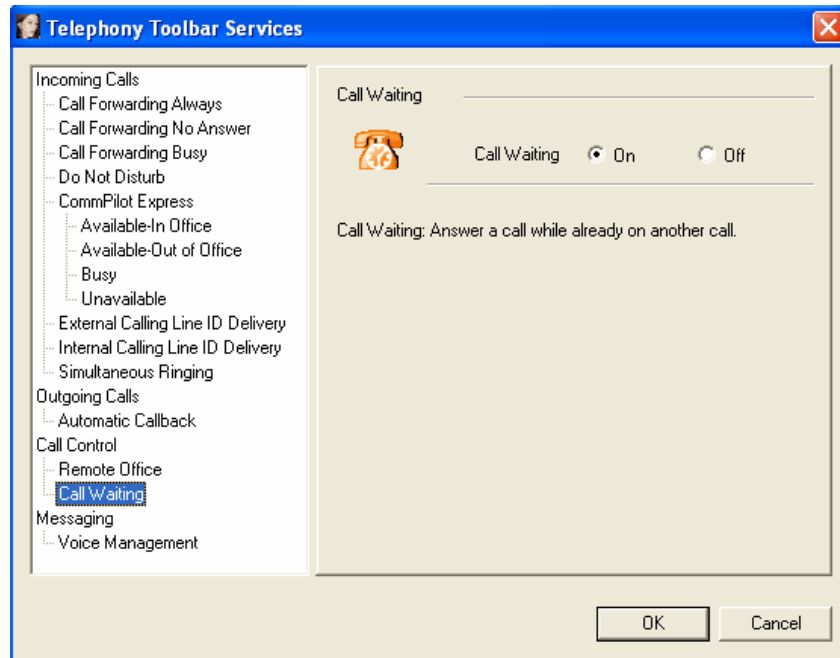
Remote Office

This feature allows the use of another phone instead of the normal business phone.



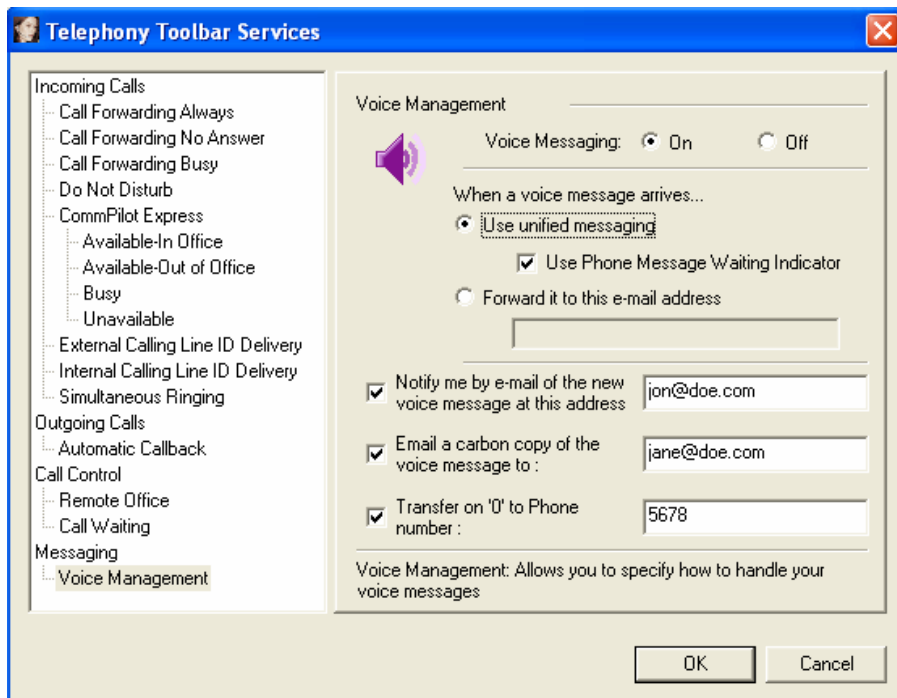
Call Waiting

This feature allows a toolbar user to answer a call while they are on a currently call.



Voice Management

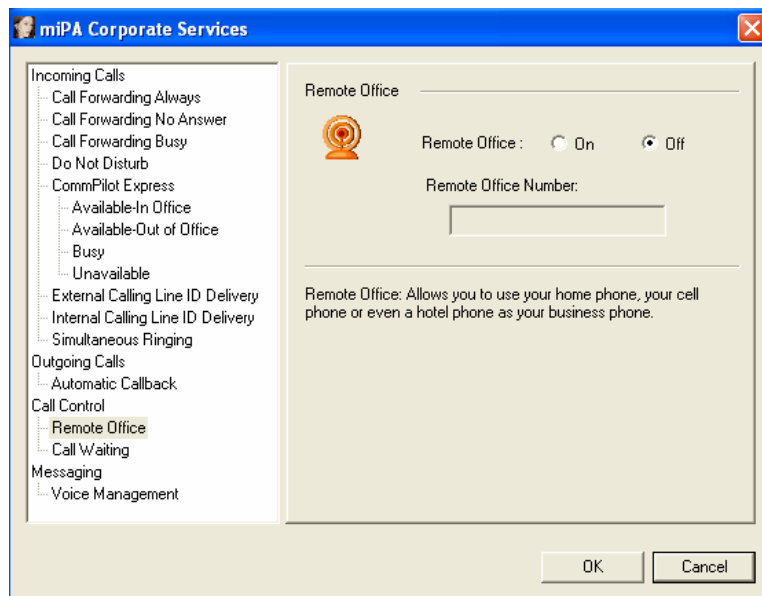
Telephony Toolbar Voice Management allows users to specify how voice messages are handled. Unified messaging allows voice messages to be captured and forwarded to a particular address. The Phone Message Waiting Indicator is a visual reminder on the phone that a message has been recorded. Furthermore, e-mail notifications can be made of the recorded voice message.



Remote Office



This feature allows the use of another phone instead of the normal business phone.



Shortcuts

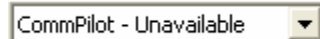


The shortcuts available in the toolbar provide quick access to parameters which would otherwise have to be accessed through the Telephony Toolbar Service Settings. Shortcuts include:

- Web Express

- Call Forward Always
- Call Forward No Answer
- Call Forward Busy
- Do Not Disturb
- Speed Dial
- Call History
- Directories

Web Express (CommPilot Express)



By using the Web Express dropdown list, you can quickly select any of the Web Express profiles described in the 'Services' section above. Profiles include:

- None
- Available – In Office
- Available – Out of Office
- Busy
- Unavailable

Call Forward Always



This activates the Call Forward Always feature as described above in the 'Services' section.

Call Forward No Answer



This activates the Call Forward No Answer feature as described above in the 'Services' section.

Call Forward Busy



This activates the Call Forward Busy feature as described above in the 'Services' section.

Do Not Disturb



This activates the Do Not Disturb feature as described above in the 'Services' section.

Speed Dial



When you click on the Speed Dial icon, you should see a screen load in the main pane. The screen should look similar to the one below.

Speed Dial Directory		
Key	Number	Description
2	1008	Ron K

Click on any of the numbers in your Speed Dial list to place a call.

Call History



The Call History feature of Telephony Toolbar allows users to view their call history in reverse chronological order. Calls included are:

- Missed Calls
- Dialed Calls
- Received Calls

When you click the Call History button in the toolbar, you should see a screen load in the main pane. The screen should look similar to the one below.

Missed Calls		Received Calls		Dialed Calls	
Ron Kribb	1008	Bob Tester	1012	Unavailable	01
9/5/2005	17:09	6/5/2005	16:56	9/5/2005	17:10
Jill Tester	1001	Sophie Allan	1005	Bob Tester	1012
6/5/2005	18:30	5/5/2005	15:03	9/5/2005	17:10



Click on any of the numbers in your Call History list to place a call.

Directories



Telephony Toolbar supports two types of server-based phone directories:

- Personal Directory
- Group Directory

Click on the  button in the toolbar to access your Personal Directory, and on the  button to access your Group Directory. When you click on a Directory button in the toolbar, you should see a screen load in the main pane. The screen will look similar to the one below.

Personal Directory	
Name / Email	Number
Acme Support	80001
Doctors	2341291200
Mom	2316505920
Tim West	437519921

Click on any of the numbers in your Directory list to place a call.

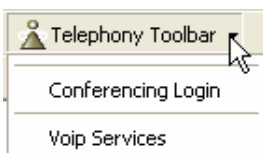
Search



The Search drop-down list enables you to search for a previously-searched user or contact directly, or specify an ad-hoc user/contact query. The Search queries both Group and Personal Directories, and your Outlook Contacts list.

NOTE: The Search drop down remembers the last 10 dialed numbers for quick selection.

Links



The drop list allows Telephony Toolbar users to access links to other Services. Services currently include:

- Conferencing

- Voip Services

Receiving a Call

Telephony Toolbar displays a call notification window on top of the system tray when you receive a call. If more than one call is received, the call notification windows stack on top of one-another. These windows automatically close 5 seconds after they emerge. This window gives you 3 options:

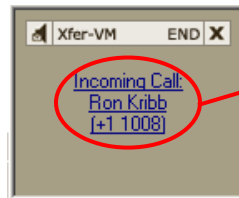
- Answer
- Transfer to Voice-mail
- End



Answer

You can answer an incoming call by:

1. Picking up your handset
2. Clicking on the popup notification **if** you have an Advanced Call Control (ACC) compliant phone.

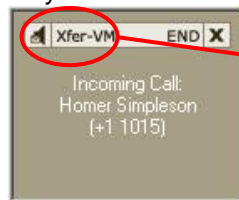


Click Here
to Answer

NOTE: *If more than one call is received, the call notification windows stack on top of one-another. You can answer these calls by first making a selection between these 2 calls and then picking up your handset / clicking on the notification.*

Transfer to Voice-mail

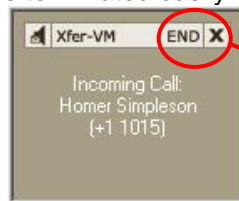
An incoming call can be redirected to your voice mailbox with a single click.



Click Here
to Transfer
to Voicemail

Terminating a Call

Incoming and outgoing calls can be terminated easily with a single click.



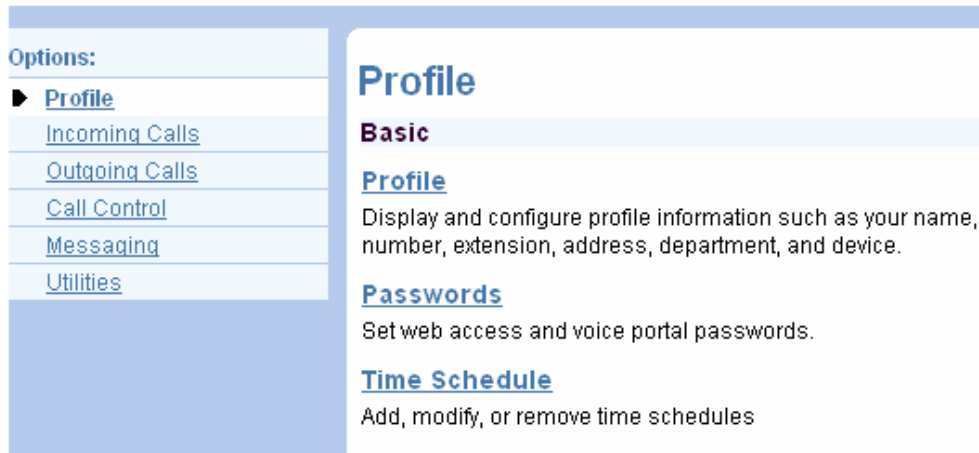
Click Here
to End Call

Explorer Functionality

Web Portal Login



By pressing the Portal Login button on the Telephony Toolbar you can automatically log into the TelPack Web Portal. When you use the Portal Login button, you will see the following Portal Home Page:



Dialing from a Web Page

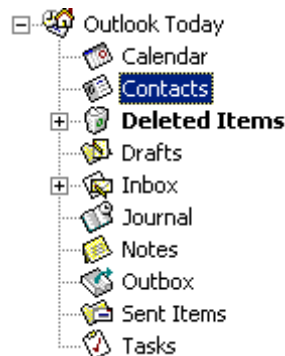
To dial a phone number from a web page, perform the following steps:

1. Select the phone number displayed on a webpage.
2. Right-click over the selected phone number and select **DIAL**.

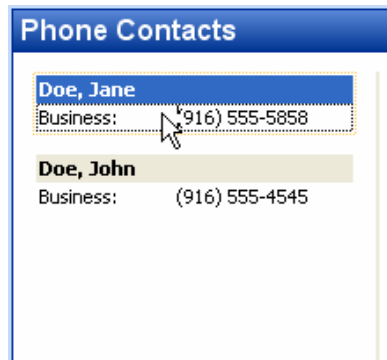
Outlook Functionality

Dialing from Outlook Contacts

1. Open Outlook and click on the "Contacts" item in the Folder list.



2. Select the contact you wish to call from the contact list.

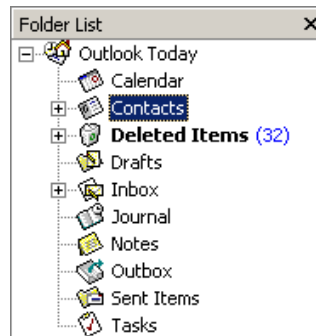


3. Use the **DIAL CONTACT** pull down list from the Telephony Toolbar to select the contact phone number you wish to dial.

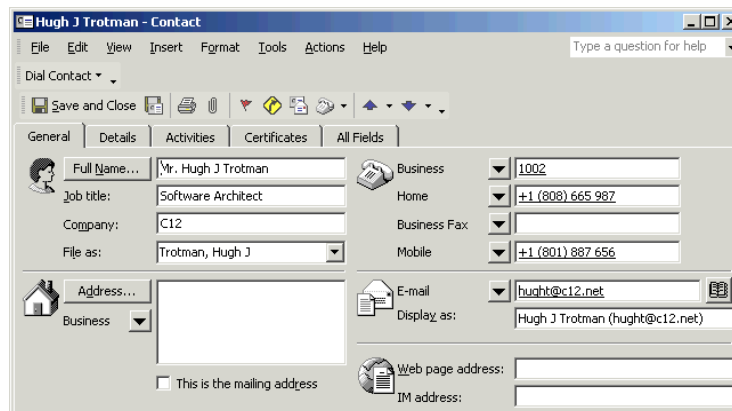


Dialing from a vCard

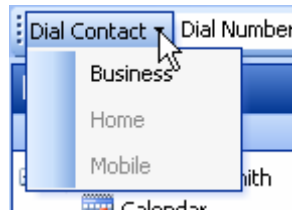
1. Click on the 'Contacts' entry in the folder list.



2. Double-click the entry for the desired contact. The vCard / Contact dialog should appear.



4. Use the **DIAL CONTACT** pull down list from the Contact item to select the contact phone number you wish to dial.



Troubleshooting Telephony Toolbar

This section presents three common scenarios to further ease the use of Telephony Toolbar.

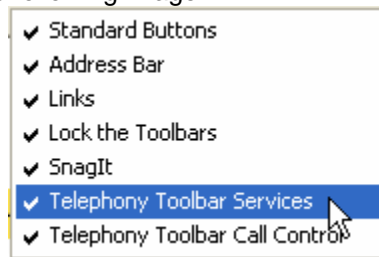
1. When starting Outlook or Internet Explorer, Telephony Toolbar is not visible
2. Telephony Toolbar is visible in Internet Explorer but not in Outlook
3. When logging in, Telephony Toolbar displays a dialog box indicating that I have not been licensed to use it.

If your problem persists please contact your Service Provider.

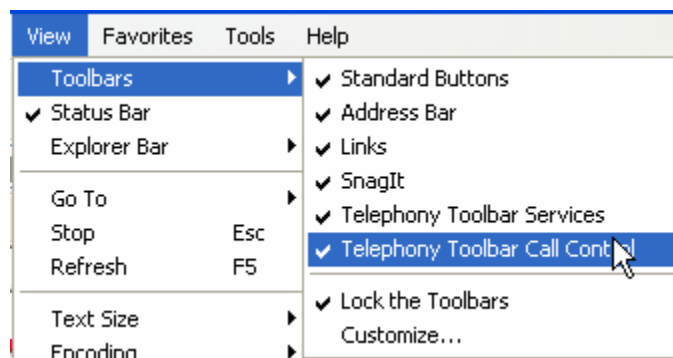
Scenario 1:

When starting Outlook or Internet Explorer, Telephony Toolbar is not visible.

1. Right click on the toolbars region in Outlook and/or Internet Explorer. Upon doing so a menu should appear, similar to the following image.



2. Select **TELEPHONY TOOLBAR SERVICES** and the Services toolbar should appear immediately.
3. Select **TELEPHONY TOOLBAR CALL CONTROL** and the Call Control toolbar should appear immediately.
4. Another method is to select the View > Toolbars menu in Outlook or Internet Explorer.

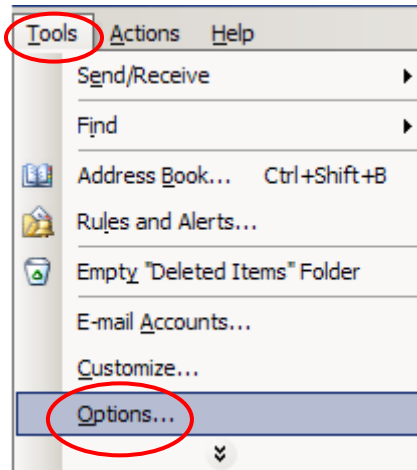


Scenario 2:

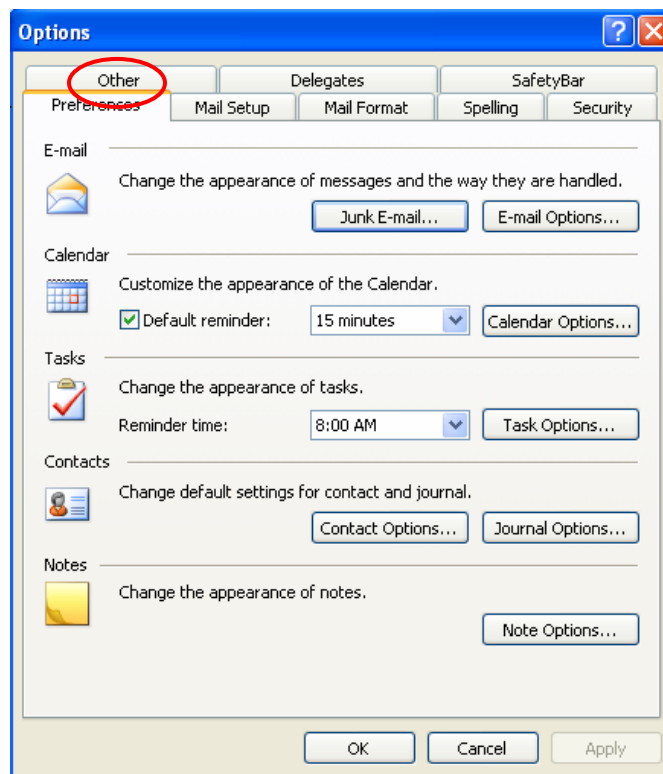
Telephony Toolbar is visible in Internet Explorer but not in Outlook

This occurs when Telephony Toolbar is successfully installed for both Internet Explorer and Outlook, but right-clicking to view the toolbar in Outlook yields no Telephony Toolbar option.

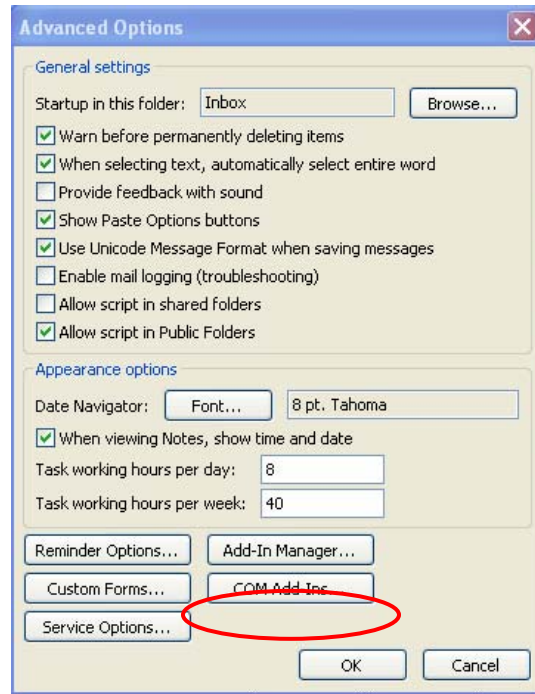
1. Select **TOOLS > OPTIONS** from the Outlook menu.



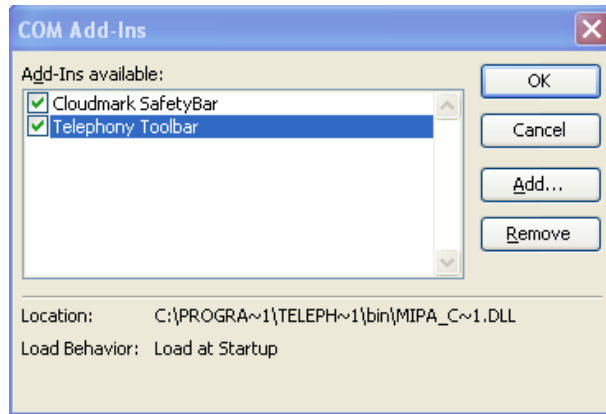
2. Click on the **OTHER** tab and then press the **ADVANCED OPTIONS** button.



3. Press the **COM ADD-INS...** button

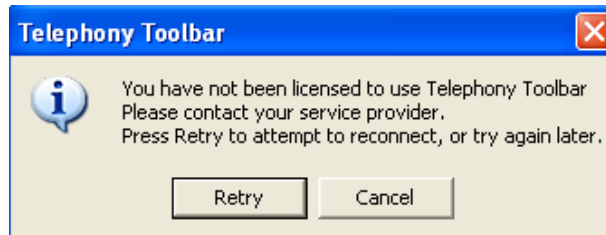


4. Click **Add...** then select 'TELEPH~1\bin\MIPA_C~1.DLL' from the bin directory in the Telephony Toolbar install directory. After doing so the following dialog should be visible.



Scenario 3:

When logging in, Telephony Toolbar displays a dialog box indicating that I have not been licensed to use it.



NOTE: This error indicates that your Service Provider has not added the Telephony Toolbar Client License to your list of services. Contact your Service Provider to activate the Telephony Toolbar for your account.