



# ***Cisco Unified CallConnector for Microsoft Office Installation and User's Guide***

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# Preface

This chapter introduces Cisco Unified CallConnector for Microsoft Office (formerly known as Cisco Unified CallConnector), describes the purpose of this document, and outlines the required software. The chapter includes the following topics:

- Purpose
- Audience
- Organization
- Related Documentation
- Required Software
- Supported Windows Platforms
- Conventions
- Obtaining Documentation
- Documentation Feedback
- Cisco Product Security Overview
- Obtaining Technical Assistance
- Obtaining Additional Publications and Information

## ***Purpose***

This manual is intended for end customers who will be using the Cisco Unified CallConnector to handle their business calls.

Cisco Unified CallConnector has an extensive set of features and customization options to allow you to adapt its functionality to your needs. This purpose of this guide is to acquaint you with these CallConnector features and help you get the most out of the system by providing step-by-step instructions. The document also provides links to additional product information and the methods and options for accessing support. The last chapter provides some troubleshooting information to allow you to isolate problems that you might be experiencing.

## ***Audience***

This manual is intended for end-users who will be using the Cisco Unified CallConnector to manage their calls, communication and collaboration needs.

The guide will also be useful to those administering and providing support to the Cisco Unified CallConnector users.

The user guide assumes that you know the basics of using your computer and are familiar with Windows, using a mouse and selecting items from a dialog box.

## Organization

This guide contains thirteen chapters:

<b>Preface -</b>	This chapter provides an overview of the User Guide and describes how to use the manual.
<b>Overview -</b>	This chapter provides an overview of the Cisco Unified CallConnector and describes the user interface and screens.
<b>Installation-</b>	This chapter describes how to install and setup the Cisco Unified CallConnector.
<b>Getting Started -</b>	This chapter describes how to install, start, and operate the Cisco Unified CallConnector and its user interface components.
<b>Popup Window -</b>	This chapter provides instructions for setting up and using shortcut icons.
<b>QuickSearch -</b>	This chapter provides instructions for setting up and using shortcut icons.
<b>QuickDial -</b>	This chapter describes the how to use the QuickDial features to auto-dial from any Windows application or from web pages..
<b>Using Toolbar -</b>	This chapter provides step-by-step instruction for the basic call handling methods.
<b>Accessing Shortcuts -</b>	This chapter provides instructions for setting up and using shortcut icons.
<b>Using the Directory -</b>	This chapter explains how to use the directory to find entries, make calls and updating entries.
<b>Viewing Call Logs –</b>	This chapter describes how to view information the call details for all the calls received and made from this position.
<b>Monitoring Status -</b>	This chapter describes how to access and view the availability status of the users in the system.
<b>Troubleshooting -</b>	This chapter describes the tools and procedures for troubleshooting problems with your the Cisco Unified CallConnector.

## ***Related Documents***

For more information about the Cisco Unified CallConnector please visit the Cisco Systems web site:

<http://www.cisco.com/go/unifiedcallconnector>

## ***Required Telephone Systems***

The Cisco Unified CallConnector supports the following Cisco Systems IP PBXs and telephones. Please visit the Cisco Systems site for the Cisco Unified CallConnector for the latest product compatibility list.

Cisco Unified Communications Manager Express version 4.0 (formerly known as Cisco Unified CallManager Express)

## ***Supported Windows Platforms***

The following Windows operating systems and application versions are supported by the Cisco Unified CallConnector:

Windows 2000, Windows XP  
Microsoft Outlook 2000, 2003 and 2007  
Microsoft Internet Explorer version 6.0 and 7.0

## Conventions

The following conventions are used in this guide:

Convention	Description
<b>boldface</b>	font Commands and keywords are in <b>boldface</b> .
<i>italic font</i>	Arguments for which you supply values are in <i>italics</i> .
[ ]	Elements in square brackets are optional.
{ x   y   z }	Alternative keywords are grouped in braces and separated by vertical bars.
[ x   y   z ]	Optional alternative keywords are grouped in brackets and separated by vertical bars.
string	An unquoted set of characters. Do not use quotation marks around the string or the string will include the quotation marks.
<small>screen font</small>	Terminal sessions and information that the system displays are in <small>screen font</small> .
<b>boldface screen font</b>	Information you must enter is in <b>boldface screen font</b> .
<i>italic screen font</i>	Arguments for which you supply values are in <i>italic screen font</i> .
→	This pointer highlights an important line of text in an example.
^	The symbol ^ represents the key labeled Control—for example, the key combination ^D in a screen display means hold down the Control key while you press the D key.
< >	Nonprinting characters, such as passwords are in angle brackets.

## Conventions Used

The following conventions are used in this guide:

Most of the operations of the Cisco Unified CallConnector can be initiated by using either the mouse or keyboard. The user guide provides the instructions for both these methods. The body of the text describes the operation in more detail.

The names of keys appear in bold capital letters: **ENTER**

Information that you type appears in small, light typeface: Cisco Unified CallConnector

Menu commands appear in bold and are abbreviated in the text. For example the **Print** command on the **File** menu is indicated by **File-Print**. The names of buttons in dialog boxes also appear in bold.

Actions you take or procedures for you to follow are indicated by indented and bulleted steps.

## Terminology

The following terms are used frequently in the manual to identify different kinds of individuals and objects.

Term	Meaning
Administrator	The person responsible for the administration of the Cisco Unified CallController system.
UCC	Cisco Unified CallConnector.
Group	A collection of users. A group is also displayed as the department in the corporate directory.
Manager	The person responsible for a group of agents.
Database	A database is a file that contains information in a tabular format.
Record or Entry	Each row of the database table is called an entry or a record.
Field	Each column of the database table is called a field.
Directory	A directory is a database that usually contains names and related information.
Presence	Real-time availability status of a user. Presence status can include availability, location , telephone status and away messages.
Server	Named directory containing control and data files.
Users	Individuals who are authorized to use the system.
Dialog	Popup window from which options are selected.
Window	An area of the screen where the application displays information.
Toolbar	A row of icons on a computer screen that activate commands or functions when clicked.
Sidebar	A secondary window that can display application information. A Sidebar can be open and closed without effecting the contents of the main window.
SIP	Session Initiation Protocol – a standardized set of messages and methods for setting up communication sessions.

## Using the Mouse

The following terms are used in the manual when describing mouse-based operations:

Term	Meaning
Point	Move the mouse pointer on screen to the desired item or location.
Select	Click on the item of choice.
Click	Quickly press and release the left mouse button.
Right-Click	Quickly press and release the right mouse button.
Double-Click	Quickly press and release the left mouse button twice in succession.
Drag&Drop	Click down on item, holding down the button, move the mouse pointer to desired location, and then release the button.

## Obtaining Documents

Cisco documentation and additional literature are available on Cisco.com. Cisco also provides several ways to obtain technical assistance and other technical resources. These sections explain how to obtain technical information from Cisco Systems.

### Cisco.com

You can access the most current Cisco documentation at this URL:

<http://www.cisco.com/univercd/home/home.htm>

You can access the Cisco website at this URL:

<http://www.cisco.com>

You can access international Cisco websites at this URL:

[http://www.cisco.com/public/countries\\_languages.shtml](http://www.cisco.com/public/countries_languages.shtml)

### Documentation DVD

Cisco documentation and additional literature are available in a Documentation DVD package, which may have shipped with your product. The Documentation DVD is updated regularly and may be more current than printed documentation. The Documentation DVD package is available as a single unit.

Registered Cisco.com users (Cisco direct customers) can order a Cisco Documentation DVD (product number DOC-DOCDVD=) from the Ordering tool or Cisco Marketplace.

Cisco Ordering tool:

<http://www.cisco.com/en/US/partner/ordering/>

Cisco Marketplace:

<http://www.cisco.com/go/marketplace/>

## Ordering Documentation

You can find instructions for ordering documentation at this URL:

[http://www.cisco.com/univercd/cc/td/doc/es\\_inpk/pdi.htm](http://www.cisco.com/univercd/cc/td/doc/es_inpk/pdi.htm)

You can order Cisco documentation in these ways:

Registered Cisco.com users (Cisco direct customers) can order Cisco product documentation from the Ordering tool:

<http://www.cisco.com/en/US/partner/ordering/>

Nonregistered Cisco.com users can order documentation through a local account representative by calling Cisco Systems Corporate Headquarters (California, USA) at 408 526-7208 or, elsewhere in North America, by calling 1 800 553-NETS (6387).

## Documentation Feedback

You can send comments about technical documentation to:

[bug-doc@cisco.com](mailto:bug-doc@cisco.com)

You can submit comments by using the response card (if present) behind the front cover of your document or by writing to the following address:

Cisco Systems  
Attn: Customer Document Ordering  
170 West Tasman Drive  
San Jose, CA 95134-9883

We appreciate your comments.

## Cisco Product Security Overview

Cisco provides a free online Security Vulnerability Policy portal at this URL:

[http://www.cisco.com/en/US/products/products\\_security\\_vulnerability\\_policy.html](http://www.cisco.com/en/US/products/products_security_vulnerability_policy.html)

From this site, you can perform these tasks:

- Report security vulnerabilities in Cisco products.
- Obtain assistance with security incidents that involve Cisco products.
- Register to receive security information from Cisco.

A current list of security advisories and notices for Cisco products is available at this URL:

<http://www.cisco.com/go/psirt>

If you prefer to see advisories and notices as they are updated in real time, you can access a Product Security Incident Response Team Really Simple Syndication (PSIRT RSS) feed from this URL:

[http://www.cisco.com/en/US/products/products\\_psirt\\_rss\\_feed.html](http://www.cisco.com/en/US/products/products_psirt_rss_feed.html)

## Reporting Security Problems in Cisco Products

Cisco is committed to delivering secure products. We test our products internally before we release them, and we strive to correct all vulnerabilities quickly. If you think that you might have identified a vulnerability in a Cisco product, contact PSIRT:

Emergencies—[security-alert@cisco.com](mailto:security-alert@cisco.com)

Nonemergencies—[psirt@cisco.com](mailto:psirt@cisco.com)

**Tip** We encourage you to use Pretty Good Privacy (PGP) or a compatible product to encrypt any sensitive information that you send to Cisco. PSIRT can work from encrypted information that is compatible with PGP versions 2.x through 8.x. Never use a revoked or an expired encryption key. The correct public key to use in your correspondence with PSIRT is the one that has the most recent creation date in this public key server list:

<http://pgp.mit.edu:11371/pks/lookup?search=psirt%40cisco.com&op=index&export=on>

In an emergency, you can also reach PSIRT by telephone:

- 1 877 228-7302
- 1 408 525-6532

## **Obtaining Technical Assistance**

For all customers, partners, resellers, and distributors who hold valid Cisco service contracts, Cisco Technical Support provides 24-hour-a-day, award-winning technical assistance. The Cisco Technical Support Website on Cisco.com features extensive online support resources. In addition, Cisco Technical Assistance Center (TAC) engineers provide telephone support. If you do not hold a valid Cisco service contract, contact your reseller.

## **Cisco Technical Support Website**

The Cisco Technical Support Website provides online documents and tools for troubleshooting and resolving technical issues with Cisco products and technologies. The website is available 24 hours a day, 365 days a year, at this URL:

<http://www.cisco.com/techsupport>

Access to all tools on the Cisco Technical Support Website requires a Cisco.com user ID and password. If you have a valid service contract but do not have a user ID or password, you can register at this URL:

<http://tools.cisco.com/RPF/register/register.do>

**Note** Use the Cisco Product Identification (CPI) tool to locate your product serial number before submitting a web or phone request for service. You can access the CPI tool from the Cisco Technical Support Website by clicking the **Tools & Resources** link under Documentation & Tools. Choose **Cisco Product Identification Tool** from the Alphabetical Index drop-down list, or click the **Cisco Product Identification Tool** link under Alerts & RMAs. The CPI tool offers three search options: by product ID or model name; by tree view; or for certain products, by copying and pasting **show** command output. Search results show an illustration of your product with the serial number label location highlighted. Locate the serial number label on your product and record the information before placing a service call.

## ***Submitting a Service Request***

Using the online TAC Service Request Tool is the fastest way to open S3 and S4 service requests. (S3 and S4 service requests are those in which your network is minimally impaired or for which you require product information.) After you describe your situation, the TAC Service Request Tool provides recommended solutions. If your issue is not resolved using the recommended resources, your service request is assigned to a Cisco TAC engineer. The TAC Service Request Tool is located at this URL:

<http://www.cisco.com/techsupport/servicerequest>

For S1 or S2 service requests or if you do not have Internet access, contact the Cisco TAC by telephone. (S1 or S2 service requests are those in which your production network is down or severely degraded.) Cisco TAC engineers are assigned immediately to S1 and S2 service requests to help keep your business operations running smoothly. To open a service request by telephone, use one of the following numbers:

Asia-Pacific: +61 2 8446 7411 (Australia: 1 800 805 227)  
EMEA: +32 2 704 55 55  
USA: 1 800 553-2447

For a complete list of Cisco TAC contacts, go to this URL:

<http://www.cisco.com/techsupport/contacts>

## ***Definition of Service Request Severity***

To ensure that all service requests are reported in a standard format, Cisco has established severity definitions.

Severity 1 (S1)—Your network is “down,” or there is a critical impact to your business operations. You and Cisco will commit all necessary resources around the clock to resolve the situation.

Severity 2 (S2)—Operation of an existing network is severely degraded, or significant aspects of your business operation are negatively affected by inadequate performance of Cisco products. You and Cisco will commit full-time resources during normal business hours to resolve the situation.

Severity 3 (S3)—Operational performance of your network is impaired, but most business operations remain functional. You and Cisco will commit resources during normal business hours to restore service to satisfactory levels.

Severity 4 (S4)—You require information or assistance with Cisco product capabilities, installation, or configuration. There is little or no effect on your business operations.

## ***Obtaining Additional Publications Information***

Information about Cisco products, technologies, and network solutions is available from various online and printed sources.

Cisco Marketplace provides a variety of Cisco books, reference guides, and logo merchandise. Visit Cisco Marketplace, the company store, at this URL:

<http://www.cisco.com/go/marketplace/>

*Cisco Press* publishes a wide range of general networking, training and certification titles. Both new and experienced users will benefit from these publications. For current Cisco Press titles and other information, go to Cisco Press at this URL:

<http://www.ciscopress.com>

*Packet* magazine is the Cisco Systems technical user magazine for maximizing Internet and networking investments. Each quarter, *Packet* delivers coverage of the latest industry trends, technology breakthroughs, and Cisco products and solutions, as well as network deployment and troubleshooting tips, configuration examples, customer case studies, certification and training information, and links to scores of in-depth online resources. You can access *Packet* magazine at this URL:

<http://www.cisco.com/packet>

*iQ Magazine* is the quarterly publication from Cisco Systems designed to help growing companies learn how they can use technology to increase revenue, streamline their business, and expand services. The publication identifies the challenges facing these companies and the technologies to help solve them, using real-world case studies and business strategies to help readers make sound technology investment decisions. You can access *iQ Magazine* at this URL:

<http://www.cisco.com/go/iqmagazine>

*Internet Protocol Journal* is a quarterly journal published by Cisco Systems for engineering professionals involved in designing, developing, and operating public and private internets and intranets. You can access the *Internet Protocol Journal* at this URL:

<http://www.cisco.com/ipj>

World-class networking training is available from Cisco. You can view current offerings at this URL:

<http://www.cisco.com/en/US/learning/index.html>

# Overview

This chapter provides an overview of Cisco Unified CallConnector for Microsoft Office (formerly known as Cisco Unified CallConnector). It describes the key features, the different modes of operations. It also describes each of the graphical user interface components of Cisco Unified CallConnector for Microsoft Office.

This chapter describes the following in more detail:

<b>Key Features -</b>	Describes the key features of Cisco Unified CallConnector.
<b>CallConnector Models -</b>	Cisco Unified CallConnector supports a standalone, server and mobility components. This section describes these UCC models.
<b>CallConnector Personal -</b>	Provides an overview of the features of the Cisco Unified CallConnector Personal model.
<b>CallConnector Server -</b>	Provides an overview of the additional features available from the Cisco Unified CallConnector Server model.
<b>CallConnector Mobility -</b>	Provides an overview of the features available from the Cisco Unified CallConnector Mobility.
<b>CallConnector Toolbars -</b>	Describes the components of the Cisco Unified CallConnector Toolbars in Microsoft Explorer and Outlook.
<b>CallConnector Sidebar/View -</b>	Describes the components of the Cisco Unified CallConnector Sidebars in Microsoft Explorer and View windows in Outlook.
<b>Popup -</b>	Describes the Popup applications and its menu.
<b>QuickSearch -</b>	Describes the QuickSearch user interface.
<b>Monitoring Presence Status-</b>	Briefly describes the Presence capabilities of Cisco Unified CallConnector.
<b>Getting Help -</b>	Describes how to get Cisco Unified CallConnector help information.

## Cisco Unified CallConnector Overview

Cisco Unified CallConnector delivers a new way to handle the everyday task of communicating with others within the business or with customers and vendors. As a fully integrated communication management solution with presence (your current availability), you will find greater productivity and business efficiency leveraging your PC-based data to initiate voice, messaging or collaboration sessions. Cisco Unified CallConnector is not just another application for the Windows, but is embedded within your line of business application such as Microsoft Outlook and Internet Explorer.

The Cisco Unified CallConnector offers these features:

- Simple to use toolbar within Microsoft Outlook and Internet Explorer for dialing numbers, controlling the call, and setting your availability and location status.
- Brings together all your contacts (personal, corporate, and Outlook) for QuickDialing or for starting a new email or Instant Message to the contact.
- Quick Search feature to find a contact quickly with display of all contact numbers and messaging methods plus location and availability for fellow employees without leaving your current application.
- Quick Message, an Instant Messaging Client included for short communications with fellow employees.
- Screen pop for placed and received calls with Outlook contact name allowing clickable options to take the call, send the call to voice mail or send a quick message.
- Quick Dialing from any application, including web pages, by highlighting a number, and selecting dial.
- Quick Presence conveniently displays availability, location and notes for contacts in directories and search results.
- Optional MobilityConnector add-on providing Single Number Reach call routing services to allow your business calls to reach you at any number based on the rules you have set.

## Cisco Unified CallConnector Models

Cisco Unified CallConnector is available in three configurations:

<b>Personal</b>	Delivering call control features for the individual user using Cisco Unified Communications Manager Express (formerly known as Cisco Unified CallManager Express) TAPI TSP .
<b>Server</b>	Server based application installed at each site giving users call control plus Presence/Instant Messaging and Rules-based Automation Services based on a SIP Client Server architecture.
<b>Mobility</b>	Add-on to the server application, the Cisco Unified CallConnector Mobility provides single number reach to a number.

### **Cisco Unified CallConnector Personal**

Cisco Unified CallConnector Personal is a separate install on each Windows workstation with a Cisco Unified IP Phone connected to Cisco Unified CallManager Express. Each user of Cisco Unified CallConnector Personal delivers the call control features listed in the table below and is supported with any PC running Microsoft Windows..

Features with Cisco Unified CallConnector Personal

<b>Cisco Unified CallConnector Personal Feature</b>	<b>Description</b>	<b>Benefit</b>
Call Control toolbars within Microsoft Outlook and Internet Explorer	Toolbars for easy access to features without the need for any additional desktop applications. Can be used within Outlook or Internet Explorer	Provides easy to use features such as finding contacts, executing phone features, and streamlining communications for the user
CallConnector Contacts	Within Outlook & Internet Explorer brings together all personal, corporate and Outlook contacts, history of calls and speed dial lists.	Makes it easy to find contacts, view missed calls from your everyday applications
QuickConnect from any Contact	Easy click-to-dial or click-to-send on any contact with option to show all numbers (Work, Cell, Home) and send addresses (email, IM, SMS) associated with the Contact	Saves time where call is placed in a few seconds without manual dialing a number or starting other communication sessions.
Quick Transfer /Hold /Conference	Easily transfer, hold or setup conferences using context menus within Outlook or Explorer.	Ease of transferring or setting up conference calls using PC Mouse. Callback from email or conference to a number in the web page.
QuickSearch though Contacts	Use pause/break key on PC to quickly find contact and then quick dial number, or send email.	Easy way to search though all contacts without opening new applications or switching pages.
Speed dial	Option to create Icon based speed dials for frequently called numbers.	Common numbers are easy to find and dial quickly.
Call Popup with Outlook Caller ID Lookup	Incoming calls will show a screen pop with callers name lookup from Outlook contacts. Clickable Option to answer or send call to voice mail.	Always know who is calling with option to answer call or ignore and send to voice mail.
QuickDial from any application	Highlight a phone number in any application like Microsoft Word, PowerPoint, Email or web page, then double-click phone icon to place call.	Quick and easy way to place a call without reading number and manually dialing. Saves time, and improves productivity
CallConnector Call Logs	Missed, Received, and Dialed calls stored on PC in addition to the IP Phone. Use Quick Dial to return calls missed while out of the office	Save time returning calls missed while away from the office. History log of calls received and placed can be used for billing.

### ***Cisco Unified CallConnector Server***

The Cisco Unified CallConnector Server application delivers the features as described above with the added benefit of Presence and Instant Messaging. The Cisco Unified CallConnector Server gives your employee's information about colleagues location, availability, and phone status using the same CallConnector toolbars from within Outlook and Internet Explorer. Using simple icons and colors to show location and availability, users are able to reach colleagues quickly the first time and reduce phone tag – helping them to be more productive.

The table below lists the additional features available with Cisco Unified CallConnector Server.

Cisco Unified CallConnector brings together easy to use call control, presence, instant messaging, directories and call routing rules to simplify the communication experience, helping work teams and colleagues share information faster and communicate in real time.

Cisco Unified CallConnector provides status of co-workers if available or busy before trying to contact them. Similar to popular instant messaging status, the user can set his or her status from the Cisco Unified CallConnector toolbar. This status information is updated automatically to all users from the Cisco Unified CallConnector Server and can be accessed from the toolbars in Internet Explorer, Outlook or Quick search results window. By seeing who is online, offline, available, or busy or with custom message like "on vacation" or "in a meeting" can also be shared to let users know why someone is unavailable or busy. Knowing whether contacts are available helps to reduce communication delays between workers, thereby enabling faster decision making and enhanced productivity.

## Features with Cisco Unified CallConnector Server

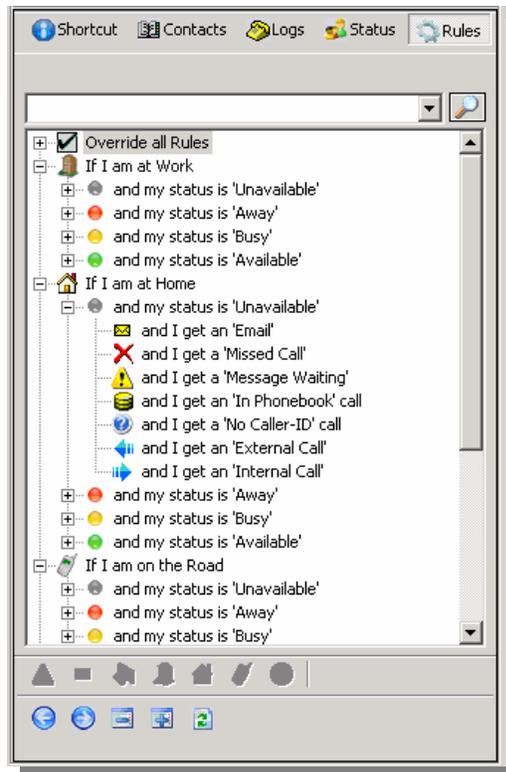
<b>Cisco Unified CallConnector Server Feature</b>	<b>Description</b>	<b>Benefit</b>
Dynamic Presence Information	Real Time display of users Location, Availability, IP Phone Status, plus optional custom message.	Reduces phone tag, and gives employee's information of who is in the office or on the road.
User Selectable Location	User can set their location shown by Icon (Work, Home, Travel, Vacation) or custom message displayed to other users.	Allows others (including operator) to see who is in office, out to lunch or away on travel.
User Selectable Availability	User can set their status shown by color, Available, Busy, Away, other.	Lets fellow employee's know who is available to receive calls or Instant Messages
Dynamic IP Phone Status	All phones Connected to the Cisco Unified CallManager Express have status auto updated for others to see.	Reduces phone tag providing more efficient communications
QuickMessaging	Simple Instant Messaging for the Small Office launched though CallConnector Contacts Quick Dial. Option to launch other IM clients installed on PC though Contacts Quick Dial.	Easy to use Instant Messaging Client for productivity gains between employees. Alternative to use of external public IM Clients due to security concerns
Synchronization with Calendar	Updates your availability status automatically based on your Outlook calendar.	Automatically tracks your schedule and reduces the need to manually update availability.
QuickSearch with Presence information	Quick Search results bar shows Location, Availability and Phone Status for colleagues in addition to contact numbers.	Quickly find phone numbers for colleagues plus presence info to know if available before calling.
User Customizable Automation Rules	Set rules for basic call handling and notification though email or SMS when calls are received	Gives users option to send notification to pager, cellular or smartphones about important calls missed while away from the office.
Operator or Admin can change Location or Availability of others	Gives key personal option to change presence information shown to others	Provides up to date information to users to improve communications.
Easy Install without configuring TAPI TSP at each Workstation	Users receive email invite with clickable link for easy install from Server	Users are able to self-install for reduced installation costs

### **Cisco Unified CallConnector Mobility**

Cisco Unified CallConnector Mobility brings the business calls to the workers at their current location and to a phone of their choice. An optional part of the Cisco Unified CallConnector family of products, the CallConnector Mobility is an add-on server application that integrates with

Cisco Unified CallManager Express to monitor incoming business calls and then route or bridge them based on user-specified call handling rules. Whether at home or from remote locations, the workers can place or receive calls through the Cisco Unified CallManager Express and leverage the business's Unified Communications infrastructure.

Cisco Unified CallConnector Rules Interface allows the workers to setup automation rules to bring the business calls to them based on their availability and location.



The Cisco Unified CallConnector Mobility is an add-on application to the Cisco Unified CallConnector for Microsoft Office Server. The solution monitors user's presence status (availability and location) and calls placed to their Cisco Unified IP phone. Users can associate rules with their presence status and location to route selected callers to a specified number, like a cell phone. As an option, calls can be bridged to both the IP Phone and the remote phone. When a call is bridged, it appears both at the user's IP Phone and the other phone allowing the call to be taken at either device. Calls routed to a remote phone are announced to the user who is given a choice to accept the call or send the caller to voice mail.

The Cisco Unified CallConnector Mobility offers the following features:

#### Single Number Reach

Cisco Unified CallManager Express users can now provide a single phone number to their business contacts and be immediately connected to their business calls at the most convenient and available telephone. Callers can be routed to a home phone if teleworking or the mobile phone when in transit or any other accessible phone. With the Cisco Unified CallConnector Mobility, workers can provide more responsive service to customers without having to distribute multiple and private mobile phone numbers. .

#### Single Voicemail/ Box

If the user is unreachable at their specified single business number, the Cisco Unified CallConnector Mobility will forward the call to voice mail, using Cisco Unity Express or Cisco Unity. When calls are routed, an SMS (text message) or email can automatically send notification of the missed call to the user. The single voice mailbox allows the user to easily manage all business voice messages saving time and money.

#### User Customizable Rules for Routing

The Cisco Unified CallConnector Mobility is fully integrated with the Cisco Unified CallConnector toolbars to allow users to setup rules based on availability and location to specify the reach numbers and routing for business calls. Rules can be easily changed from everyday used business applications like Internet Explorer and Microsoft Outlook. The Cisco Unified CallConnector Mobility combines the power of Single Number Reach with user settable routing rules to provide a flexible and user controlled solution for the mobile workers.

#### Integration with Presence

Call handling automation rules can be based on the presence status of the user, where as the status changes, call routing rules are triggered automatically. The Cisco Unified CallConnector for Microsoft Office allows users to change both availability (available, busy, away, unavailable) and location (work, home, on-the-road, etc), which can also set call routing rules. Using location information, the Cisco Unified CallConnector Mobility will know if the user is at home and available, can route business calls to their home number, but when busy the call is sent to voice mail with notification to the user.

#### Reach At Any Phone

The user can specify any telephone number as their single number reach telephone. This can be the home phone, the mobile phone or the telephone at their current location. The different reach numbers can be specified for their different presence locations settings.

#### Validated Delivery

The Cisco Unified CallConnector Mobility verifies the user at the reach number using a password to ensure that the business calls are delivered only to the user. The users can set their own access passwords.

#### Device Switching without Interrupting Calls

With Cisco Unified CallConnector Mobility, single number reach calls can be bridged on the IP Phone to allow mobile workers to continue the call after they arrive at the office and take advantage of speakerphone or other IP phone services. The call can be continued at either device without interruption, and users can use the best available IP Phone or mobile device.

**Benefits of Cisco Unified CallConnector Mobility**

<b>Cisco Unified CallConnector Mobility Feature</b>	<b>Description</b>	<b>Benefit</b>
Simultaneous Ringing	The incoming call rings on the Cisco Unified IP Phone and the user specified number.	Call rings at both the Cisco Unified IP Phone and mobile phone. The call can be picked up at either device.
Bridged Calls	In bridged single number calls, the incoming call is available on both the Cisco Unified IP Phone and the remote telephone.	This allows users to walk into the office and switch the call from the mobile phone to the Cisco Unified IP Phone.
Routed Calls	In routed single number calls, the incoming call is transferred to the remote telephone.	User never misses important calls and customers are connected instead of going to voice mail.
Validated User	Users need to enter a password before the call is delivered to the remote telephone.	The business calls are always delivered to the user. If someone else answers, then the call is sent to voice mail.
Single Voice Mailbox	If the user is not available then the call is routed to the business voice mail box.	User needs to manage only one voice mail box for their business calls. Less time is needed for users to check multiple voicemail systems
User-customizable automation rules	Users can set rules for single number reach call handling.	User's setup their own rules for filtering and routing calls to their reach number. Different reach numbers can be set based on availability.
Integration with Presence and Location	Allows the automation rules to be triggered based on the current user availability and location.	As the user's availability and location changes, the calls can follow them to the most appropriate telephone device.
Switching between telephone devices	Allows the call to be switched from mobile to the Cisco Unified IP Phone and visa versa.	Based on the needs of the moment, users can take advantage of the reliability of the wired office phone or the convenience of the mobile phone.
Privacy for bridged calls	When the call is bridged, it cannot be picked up from the associated desktop phone.	Access to the call from the desktop is allowed as soon as the remote connection becomes active. This prevents the possibility of an unauthorized person listening in on that call.

## Toolbar Overview

The toolbar runs within Microsoft Internet Explorer and Outlook and provides a unified one-click access to call handling, ability to quickly locate your contacts, initiate messaging and collaboration sessions. The Contacts button allows you to open information windows for viewing contacts, call logs or the presence status of your colleagues.



1 2 3 4 5 6 7 8 9

### Toolbar in Outlook

1. Cisco Icon/About Menu provides access to Help and links to more information on the Cisco Unified CallConnector and access to support and problem reporting resources.
2. Availability: Allows you to set your current availability status and publish it to your colleagues.
3. Location: Lets you change your current location and indicate whether you are at work or away on business.
4. Search Bar: Enter number to make a call or enter text to search for a contact. The pull down list lets you view the last numbers dialed or contacts located.
5. CallControl Buttons: You can control the call on your phone from these buttons. The buttons are context sensitive and change with the different call states.

Idle State: The Idle toolbar allows you to dial a new call, pickup a ringing or held call and forward your line to another number.

Ringing State: For an incoming call, you can only answer the call.

Connected State: The CallControl buttons change to provide Transfer, Conference, Hold, Hang-up and Park options.

Held State: When a call is on hold, you can resume the conversation.

6. Line Display Menu: The line display is a pull down list showing you the state of the 'lines' or extensions configured on your phone. For each line, it displays the extension number, the call state and the calling party information.
7. Telephony Features Menu: This provides a list of all the supported telephony features.
8. Action Menu: The Action menu is a contextual menu providing access to the additional contact numbers, collaboration and communication methods for the currently active caller. The menu is populated with the caller's contact details.
9. Contacts Button: The Contacts button opens a side window in Outlook and Explorer. These provide access to directories, logs, presence and availability status of the users,

Note: The Internet Explorer has two additional buttons:

Speed Dial Menu: Pull-down arrow to the right of the dial button displays the speed dial names.

Highlighter: Before the Contacts button allows you to convert telephone numbers in the Web pages to clickable numbers.

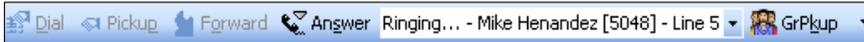
### Handling Calls Using the Toolbar

The CallConnector Toolbar allows you to control the calls on you IP Phone from your PC using the mouse and keyboard. You have access to most of the telephone features available on you phone, but now they are integrated with your PC based data and accessed from a graphical interface.

IDLE STATE:



INCOMING STATE:



CONNECTED STATE:



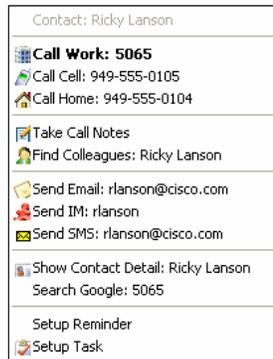
HELD STATE:



### Locating Contacts from the Toolbar

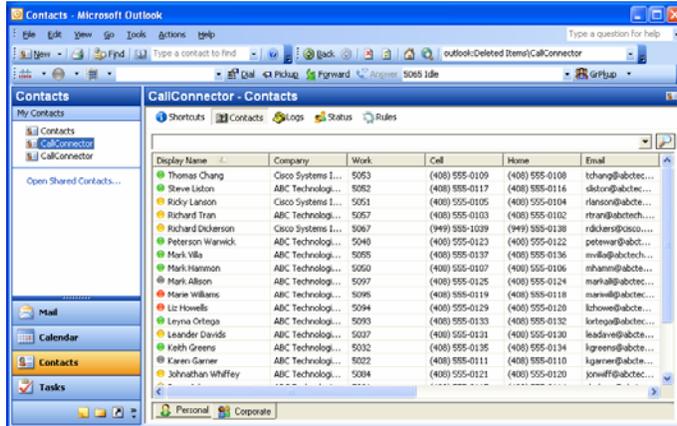
You can quickly locate and setup communication sessions with your contacts using the Toolbar QuickSearch. Communication options include making calls to work or mobile numbers, launching Email, SMS or Instant Message or opening up collaboration sessions.

QUICKSEARCH BAR



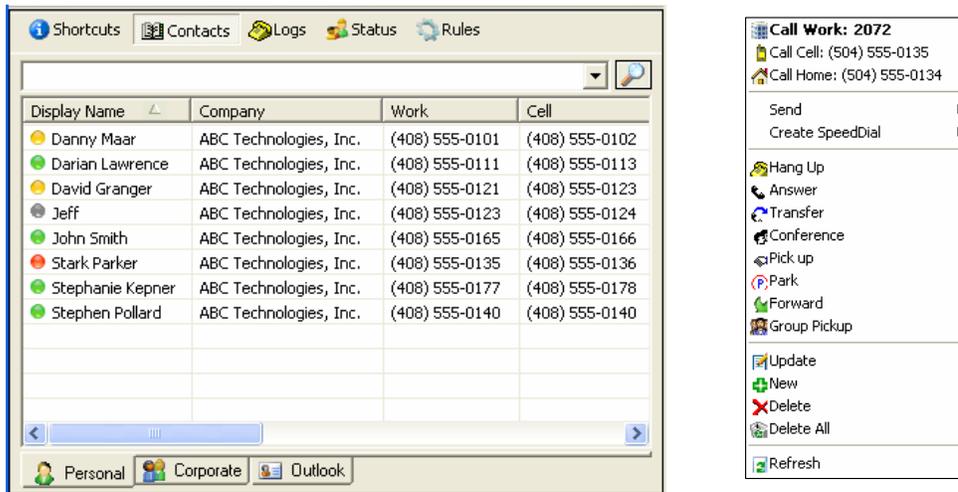
## Accessing Applications

The Cisco Unified CallConnector provides a suite of contact and presence management applications that are available from within Internet Explorer and Outlook. The figure below shows the applications in Outlook.



## Managing Contacts

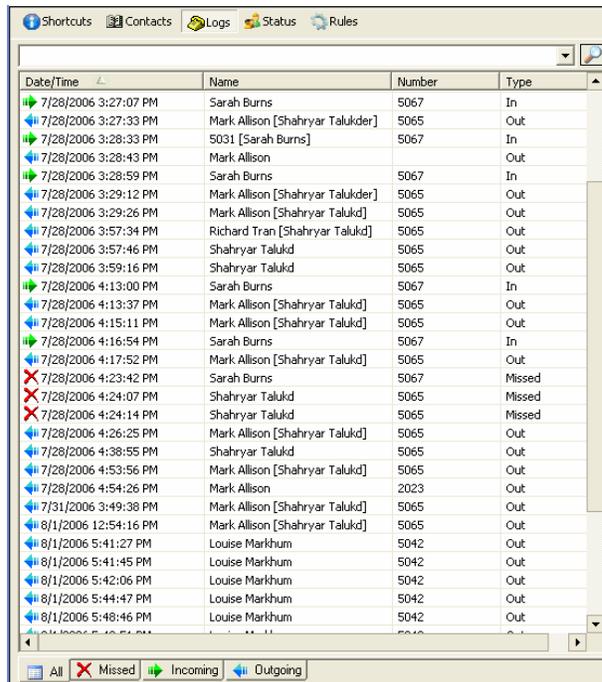
The CallConnector supports three contact databases – Corporate for shared organization contact information, Personal available for each individual user and the Outlook contacts. The Contacts window allows you to search, view and manage this information.



## Viewing Call Log

The Cisco Unified CallConnector Call Logs displays all a list of all calls made and received from your UCC program. It allows you to view important information about phone calls and lets you quickly search calls with specific attributes. It also allows you to perform telephony actions from the right-click action menu. The Call Logs also allows you to sort your call logs by date/time, name, number, and call type. You may also view each type of call individually.

The Call Log window displays the history of the calls that have been made to or from your phone.



Date/Time	Name	Number	Type
7/28/2006 3:27:07 PM	Sarah Burns	5067	In
7/28/2006 3:27:33 PM	Mark Allison [Shahryar Talukder]	5065	Out
7/28/2006 3:28:33 PM	5031 [Sarah Burns]	5067	In
7/28/2006 3:28:43 PM	Mark Allison		Out
7/28/2006 3:28:59 PM	Sarah Burns	5067	In
7/28/2006 3:29:12 PM	Mark Allison [Shahryar Talukder]	5065	Out
7/28/2006 3:29:26 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 3:57:34 PM	Richard Tran [Shahryar Talukd]	5065	Out
7/28/2006 3:57:46 PM	Shahryar Talukd	5065	Out
7/28/2006 3:59:16 PM	Shahryar Talukd	5065	Out
7/28/2006 4:13:00 PM	Sarah Burns	5067	In
7/28/2006 4:13:37 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:15:11 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:16:54 PM	Sarah Burns	5067	In
7/28/2006 4:17:52 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:23:42 PM	Sarah Burns	5067	Missed
7/28/2006 4:24:07 PM	Shahryar Talukd	5065	Missed
7/28/2006 4:24:14 PM	Shahryar Talukd	5065	Missed
7/28/2006 4:26:25 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:38:55 PM	Shahryar Talukd	5065	Out
7/28/2006 4:53:56 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:54:26 PM	Mark Allison	2023	Out
7/31/2006 3:49:38 PM	Mark Allison [Shahryar Talukd]	5065	Out
8/1/2006 12:54:16 PM	Mark Allison [Shahryar Talukd]	5065	Out
8/1/2006 5:41:27 PM	Louise Markhum	5042	Out
8/1/2006 5:41:45 PM	Louise Markhum	5042	Out
8/1/2006 5:42:06 PM	Louise Markhum	5042	Out
8/1/2006 5:44:47 PM	Louise Markhum	5042	Out
8/1/2006 5:48:46 PM	Louise Markhum	5042	Out

Call Log Window showing history of all user's calls

## Call Popup Window

The Popup Window displays information on the calls at your phone. Each call is represented by one window. The Popup looks up the phone number in your contact database or Outlook and displays the name and organization information. The Popup window provides two call control buttons and the blue arrow for the Action menu.

**Call work**      **5065**

Call cell      949-555-0105

Call home      949-555-0104

---

Take Call Notes

Find Colleagues:      Ricky Lanson

Send Email to      rlanson@abctech.com

Send IM to      rlanson

Send SMS:      rlanson@abctech.com

---

Show Contact Detail: Ricky Lanson

Search Google:      5065

---

Setup Reminder

Setup Task

**Action Menu**

**Ricky Lanson**      ✕

5065

ABC Technologies Inc.

---

Hang Up | Hold

**Call Control Buttons:**

Button	Description
Answer	Answers a ringing call
Busy	Activates the Do-Not-Disturb phone settings
Hang Up	Disconnects the call
Hold	Places the call on hold
Resume	Re-connects the held call

## Using QuickSearch

From within any application, you can quickly locate and setup communication sessions with your contacts using QuickSearch. Communication options include making calls to work or mobile numbers, launching Email, SMS or Instant Message windows or opening up collaboration sessions. To use enter the first few letters of the first name.

**Enter Name or Number**      ✕

OK
Cancel

↓

**Enter Name or Number**      ✕

- Randolph Smith      Cisco Systems, Inc.
- Richard Parker      Cisco Systems, Inc.
- Rick Doogle      Cisco Systems, Inc.
- Richard Dickerson      Cisco Systems Inc.
- Ricky Lanson      Cisco Systems Inc.
- Richard Martin      Cisco Systems, Inc.
- Robert McFadden      Cisco Systems, Inc.

→

**Call Work Phone**      **5067**

Call Cell Phone      949-555-1039

Call Home Phone      949-555-0138

Call VoIP

Send Email to rdickers@cisco.com

Send SMS to rdickers@cisco.com

Send Instant Message to Richard Dickerson

Show Contact Detail

Setup Task

Setup Reminder/Appointment

Take Note

Search Google

---

**Richard Dickerson**

Status      Busy

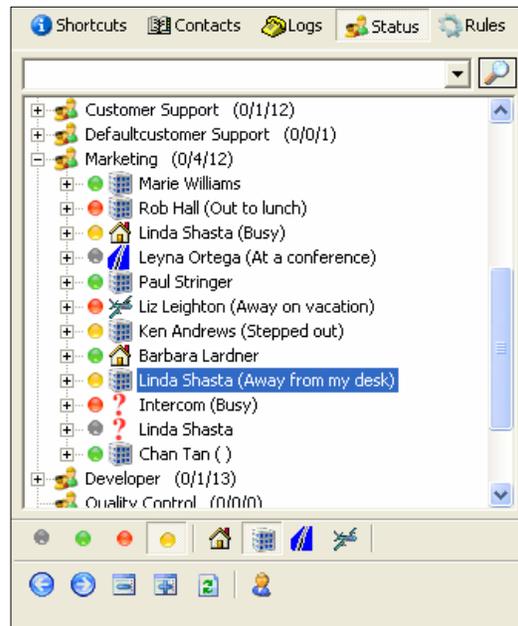
Location      At Work

Message      At My Desk

## Monitoring Presence Status

The Presence Service collects information about a user's availability and location, including whether or not they are using their telephone at a particular time. This information is made available to the Cisco Unified CallConnector users from within their every day business applications such as Internet Explorer or Outlook. The presence information is also displayed when you use QuickSearch to locate contacts. Using this real-time presence information, users can connect with colleagues more efficiently through determining the most effective method for communicating with them at that time thus avoiding phone or message tag.

The Status window provides a real-time view of the entire organization with information on the availability of users and groups, location of people and whether they are on call. User's can manage their own presence status, make calls and send instant messages from this window.



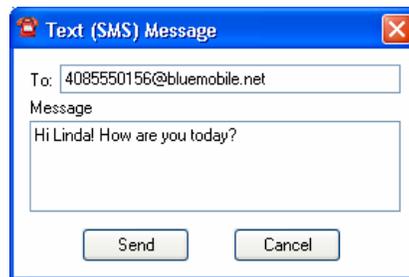
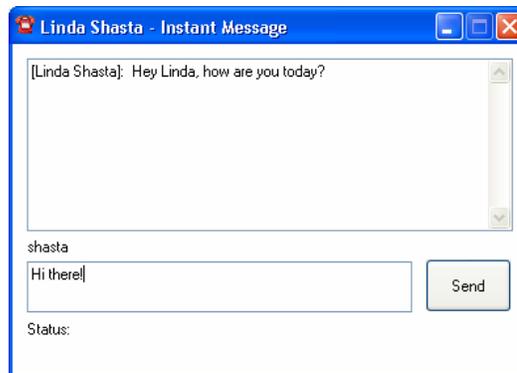
### Updating Availability

Cisco Unified CallConnector maintains three components of a user's presence information: Availability – this is the user's current Busy, Available, Away and Unavailable status; Location – the place where the user is situated and the Away Message – providing additional notes on their availability. In the server configuration, this information is broadcast to your subscribers.

Availability Icon	Description	Location Icon	Description
	Available		At Work
	Busy		Currently at Home
	Away		On the Road
	Unavailable		Away on Vacation
	Don't show my status		Location undefined

### ***Sending Instant Messages***

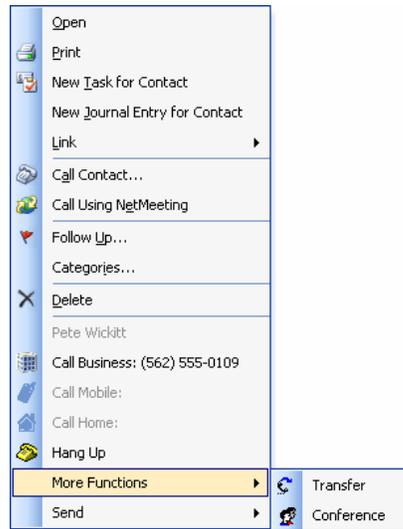
Instant messaging in the workplace can allow you to quickly resolve a question or communicate without interrupting the work flow. With the Cisco Unified CallConnector Server, users can send brief Instant Messages and Text (SMS) messages to their colleagues.



**Instant Message and Text (SMS) Message Windows**

## Outlook Menu Extensions

Some of the Outlook menu have been extended to add in the user contact information and telephony action choices. These menus are described in this section.



### Getting

To get help on the operation of the Cisco Unified CallConnector client, click on the Cisco icon on the toolbars and select Help. This will display a CallConnector Help window form which you can browse and search to locate the topic of interest.

For more information on the Cisco Unified CallConnector you can also go to the Cisco web site at:

<http://www.cisco.com/go/unifiedcallconnector>

### Help

# Installing and Configuration

This chapter describes the steps for downloading, installing and configuring the Cisco Unified CallConnector client. The following topics are discussed:

<b>Installation Overview -</b>	Provides an overview of the Cisco Unified CallConnector client installation process.
<b>Pre-requisites for Installation</b>	-Describes the information you need to have on hand during the installation of Cisco Unified CallConnector client.
<b>Download Site -</b>	Site from which the Cisco Unified CallConnector software can be downloaded.
<b>Installing the UCC Client</b>	Describes the steps and options for installing Cisco Unified CallConnector.
<b>Configuring the TSP</b>	The Cisco Unified CallConnector can use a telephone driver to connect to your IP Phone. This section describes how to configure this driver.
<b>Registering the Software -</b>	The Cisco Unified CallConnector software has to be registered before it can be used. This describes the options presented to you during this process.
<b>Application Settings</b>	This section describes the settings required in Internet Explorer and Outlook for Cisco Unified CallConnector
<b>Performing an Upgrading</b>	Describes the steps for upgrading an existing Cisco Unified CallConnector with a new install program.
<b>Removing the UCC Client</b>	This section describes the steps for removing and un-installing the Cisco Unified CallConnector program and all its components.

## Cisco Unified CallConnector Installation Overview

The Cisco Unified CallConnector client is installed on each personal computer from which you want to access its features. The Cisco Unified CallConnector includes a client installation program to check your system configuration, copy the software to the hard disk and make the required configuration settings for you. This installation program can be download from the Cisco site and run as described in the sections below.

The Cisco Unified CallConnector functions utilize controlling software that can be installed on either on your personal computer or on a server to be shared by all the CallConnector users. Options you select during the installation specify which of these configurations will be used by your Cisco Unified CallConnector client. These operating modes include the following:

- |                  |  |
|------------------|--|
| <b>Personal:</b> | In this configuration, all the controlling software for controlling your phone and the contact data are installed and run on your personal computer. There is no dependency on external software components. |
| <b>Local:</b>    | In the local mode, the telephone control software is installed and run on your personal computer, however the contact data and user configuration is accessed from the shared server.                        |
| <b>Server:</b>   | In the server mode, the control software is installed and run on the server computer and accessed from each of the Cisco Unified CallConnector client.   |

The installation of the Cisco Unified CallConnector client involves the following steps:

- Collecting the information required for obtaining and configuring the Cisco Unified CallConnector. This includes obtaining access to the download site or the installation program and the information that you will require during the installation process. See the Pre-requisites for Installation section below for these parameters.
- Acquiring the Unified CallConnector installation program. This can be downloaded from the Cisco Software Download Site or obtained from your Cisco channel partner.
- You will need to determine which operating mode of the Unified CallConnector has been purchased – Personal, Local or Server. (The Local and Server modes require that the Unified CallConnector server applications to be already installed and running.)
- Running the Unified CallConnector client installation on your personal computer, and entering the configuration information requested by the installation and Telephone Service Provider wizards.
- Registering your Unified CallConnector with the Cisco Activation server. This will require access to the Internet.
- Setting up the Cisco Unified CallConnector configuration parameters from the Options window.
- Enabling the Cisco Unified CallConnector toolbars in Internet Explorer and Outlook.

- Verifying that you are able to receive and make calls from Cisco Unified CallConnector user interfaces and able to access your contact data.

## ***Pre-Requisites for Installation***

As a part of the Cisco Unified CallConnector installation, you need to have certain network connectivity and configuration information. These include:

**Admin or Power User Account of Installation PC:** The installation program requires access to Windows registry and installation of services. These changes can only be performed with an account with admin or power user rights to the personal computer.

**Access to Download Site:** The installation files can be downloaded from the web server. You will need access to the download files.

### ***For Personal or Local Mode Installation***

**IP connectivity to the CallManager Express** in the network configurations that you will be using the Cisco Unified CallConnector. If you are planning to use the Cisco Unified CallConnector from the office, you should be able to access your IP Phone from your personal computer.

If you are using a Virtual Private Network (VPN) connection, you need to be able to connect to your IP Phone using your network access. Note: The VoIP services use a number of TCP/IP ports. All these ports need to be accessible through the firewalls.

**CME IP-Address and Port:** You will need to get the IP address and TAPI port of the CME Router from your system administrator or service provider. By default, port 2000 is used for TAPI connections to the router.

**IP-Phone User Name and Password:** The TAPI Service Provider is associated with an IP-Phone. This IP-Phone needs to have a User Name and Password configured. The User Name and Password is required by the CME TAPI Driver to register with the CME Router. Note: The password is case sensitive.

### ***For Server Mode Installation***

**IP connectivity to the Cisco Unified CallController Server** in the network configurations that you will be using the Cisco Unified CallConnector. If you are planning to use the Cisco Unified CallConnector from the office, you should be able to access the CallConnector Server from your personal computer.

**Server PC IP-Address and SIP Server Port:** You will need to get the IP address and port of the System SIP Server from your system administrator or service provider. By default, port 5060 is used for SIP Server connection.

**Login User Name and Password:** Your User Login Name and Password is required to log in to the CallConnector Server. Note: The password is case sensitive.

---

**Cisco Unified CallConnector Personal and Local (Controlling your IP-Phone):**

Item	Description	Source
Access to Download Site or Installation Software	Download or otherwise obtain the Cisco Unified CallConnector installation program	Service Provider or Sys-Admin
Serial Number	Licensed version of the Cisco Unified CallConnector requires a serial number. You can get started with an evaluation version if you do not have a serial number.	Service Provider or Sys-Admin
Email Profile Name	Profile to be used by the Cisco Unified CallConnector to login to the email server.	Sys-Admin
Email Password	Password used to log into your email service.	Sys-Admin
CME Router IP Address	This is the network address of the CME Router	Service Provider or Sys-Admin
CME TAPI Port	By default this is 2000.	Service Provider or Sys-Admin
User Name	User name configured for your IP-Phone	Service Provider or Sys-Admin
User Password	Password configured for the user on that IP-Phone	Service Provider or Sys-Admin

**Additional Information for Server (and Local) Mode:**

Item	Description	Source
Cisco Unified CallConnector Server IP Address	IP Address of the server computer running the Cisco Unified CallConnector server software	Sys-Admin
Login Name	Your Cisco Unified CallConnector user login name. In the personal mode, this information is set to a default value.	Sys-Admin
Login Password	Password used to log into the CallConnector service. In the personal mode, this information is set to a default value.	Sys-Admin

## Provisioning Configuration Data File:

A provisioning configuration data file can be provided by your system administrator containing the information required during the installation process. This is a text file that can be pre-loaded with the data used to configure your Cisco Unified CallConnector client. The install program looks for this file in the Windows Desktop folder. If the file exists, then information from this file is used to populate the Wizard fields during the installation.

If you have the provisioning configuration data file saved on the Windows Desktop, then the installation program will use the information from this file. You will need only to verify the data displayed by the Wizard and click on Next to complete the installation.

## Windows Access Rights:

During the installation of the Cisco Unified CallConnector, you need to have local admin rights to the personal computer. This is to allow various system files to be loaded and Windows registry entries to be written.

Note: If you are not logged in to the PC with the required access rights, the installation may fail or not run through completion.

## Minimum System Requirements

Your system must meet the minimum system requirements described in this section. We recommend that your system exceed the minimum when possible to ensure better performance.

## Hardware

Cisco Unified CallConnector requires the following minimum PC hardware configuration:

- Pentium PC (1GHz or greater recommended)
- 256 MB RAM
- 60 MB available hard disk space for Cisco Unified CallConnector
- Cisco IP Phone and supported Cisco Telephony Platform
- Network Access to the Telephony Service

## System Software

Cisco Unified CallConnector also requires the following PC software:

- Microsoft Windows XP Professional Service Pack 2
- Microsoft Windows 2003 Server for the server applications
- Installed and correctly configured TAPI driver software for your telephone (Personal and Local operating modes only).
- Installed and correctly configured Local Area Network with access to the Internet.

## Application Software

Cisco Unified CallConnector provides access to its features from within the following versions of Internet Explorer and Microsoft Outlook.:

- Internet Explorer Version 6.0 with Service Pack 2
- Microsoft Outlook 2000 or 2003

## Telephony Service

Cisco Unified CallManager Express 4.0 or higher. Each PC running the Cisco Unified CallConnector software needs to be connected to a Cisco Unified IP Phone.

Telephone Application Programming Interface (TAPI) is a specification that defines how the Windows applications communicate with the telephone hardware. Each TAPI-compatible device has its own TAPI driver just as different printers come with their own printer drivers.

## LAN Access

The Local Area Network is used in multi-user environments to share the directory data and to access services such as E-mail and the Telephony Service. Access to the Internet is also required for the activation process.

## Download Site

The Cisco Unified CallConnector can be downloaded and installed from the Web. Go to the link below, select Cisco Unified CallConnector for Microsoft Office, and download the installation files.

<<http://www.cisco.com/cgi-bin/tablebuild.pl/callconnector-ms>>

Note: A valid CCO User ID and Support Contract is required to access the software download center. If you don't have access contact your Cisco reseller.

## *Your Installation Package*

Before installing the Cisco Unified CallConnector, carefully check your package contents.

Your package should contain the following items:

- Cisco Unified CallConnector Installation Program.
- Quick Reference Guide

## Installing the Cisco Unified CallConnector

During the installation process, the Cisco Unified CallConnector install program will check your system's components and determines what files need to be upgraded. It will copy program files to a installation folder of your choice and system files to the Windows System directory.

The installation needs to be run on each personal computer on which the Cisco Unified CallConnector services is to be accessed.

### Step 1: Download the Installation Program

Log in to the Cisco Software Download site for the Cisco Unified CallConnector and download the latest Cisco Unified CallConnector client installation program. You can also obtain this from your Cisco Reseller.

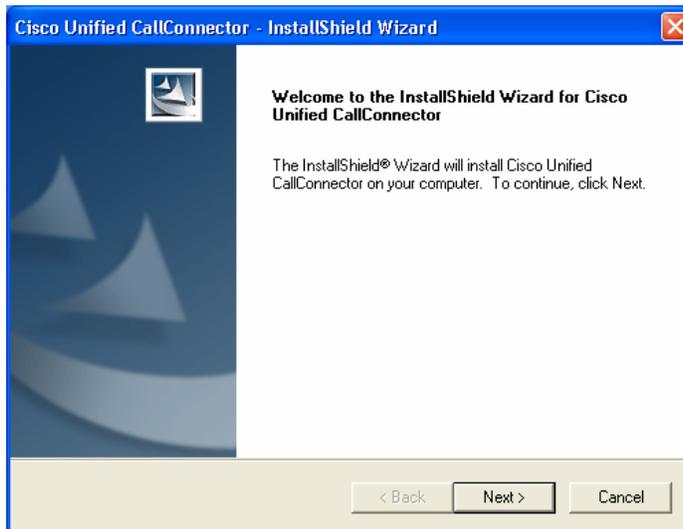
**Install from a File Server:** Your system administrator can send you an email with a link to the Cisco Unified CallConnector installation program and your configuration data. Save the configuration file on your desktop and then click on the installation program.

### Step 2: Run the Cisco Unified CallConnector Installation

**Close all Windows Applications:** Close all open applications, specifically Microsoft Outlook and Internet Explorer . Disable the screen-saver if the PC has one enabled.

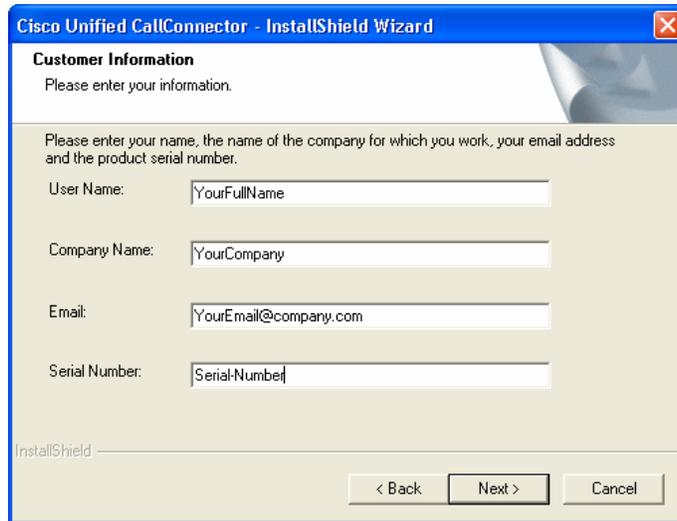
**To Install Cisco Unified CallConnector:** Launch the Cisco Unified CallConnector install program by double-clicking on it.

Once the install program is loaded, it presents the Welcome dialog.



Click on **Next** to display the Software License Agreement statement.

Please read the Software License Agreement statement and click on **Yes** to accept the license and Next button for the Customer Information window.



The screenshot shows a window titled "Cisco Unified CallConnector - InstallShield Wizard" with a "Customer Information" section. The text inside the window reads: "Please enter your information." followed by "Please enter your name, the name of the company for which you work, your email address and the product serial number." There are four input fields: "User Name:" with placeholder "YourFullName", "Company Name:" with placeholder "YourCompany", "Email:" with placeholder "YourEmail@company.com", and "Serial Number:" with placeholder "Serial-Number". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

- **User Name:** The name of person under which the software will be registered.
- **Company Name:** The name of registering person company or organization.
- **Email:** The email address of the registering person.
- **Serial Number:** Each instance of the Cisco Unified CallConnector software is enabled with a unique serial number. This serial number is provided to you with your purchase packet or sent you to you via email. If you do not have a serial number and wish to evaluate the Cisco Unified CallConnector for a limited time period, then enter 'TRIAL' in the Serial Number field. Note do not enter the single quotes.

***To proceed:***

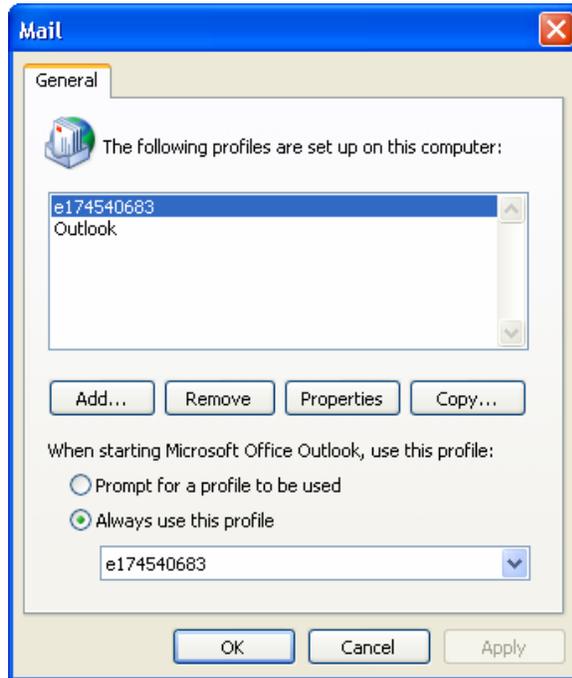
Enter your name, company and the software serial number. Click **Next** or press the **ENTER** key.

**User Options:**

The screen will prompt you for your default email settings and Cisco Unified CallConnector Server login settings.

**Email Profile:**

If you have multiple email accounts in Outlook or if you are setup to connect to a Microsoft Exchange server, then Outlook creates 'profiles' or a collections of the parameters required for accessing each out these email accounts. This information is accessible from the Control Panel Mail window as shown below:



You can setup Outlook to always use a particular account or to prompt you to select a profile when Outlook is started. The profiles configured on your computer are displayed by the installation program.

The Cisco Unified CallConnector will use the Email Profile information in the following way:

- If no profile is selected, then it uses the default email login.
- If a profile is specified, then it will try to log in to the email service with the parameters specified in that profile. If you are an Outlook user, then you should specify the Outlook profile so that the Cisco Unified CallConnector can connect to the exchange server on you behalf.

Note: If you have selected an incorrect email profile, then the Cisco Unified CallConnector will not be able to display Outlook/Exchange contact data or be able to send email messages. Do not select the Microsoft Outlook Internet Settings profile.

### **Cisco Unified CallConnector Server:**

The Cisco Unified CallConnector can operate in a Personal (using a telephony driver installed on your PC) or in a Server mode using services installed on another computer. This installation option lets you choose which operating mode and if using the server, the connection information.

If your system administrator has installed the Cisco Unified CallConnector Server to provide shared access to your telephone service and contact data, then you will be provided with the IP address of the Cisco Unified CallConnector server and your login information. Otherwise you should set the option 'Use Unified CallConnector Server'

unchecked.

### Setting Outlook Profile Information

- **E-mail Profile:** Enter the Microsoft Outlook profile that you use to access your email service. If you are an Exchange user then specify the Exchange profile here.
- **Password:** This password is used to log into the email server specified in the selected profile (if using Exchange, this is your Active Directory/Email Password).
- **Use Cisco Unified CallConnector Server:** Click the check box only if you will be connecting to a Cisco Unified CallConnector Server.

### Setting Server Connection Information

The Server connection information is only required if you system is configured with a Cisco Unified CallConnector Server.

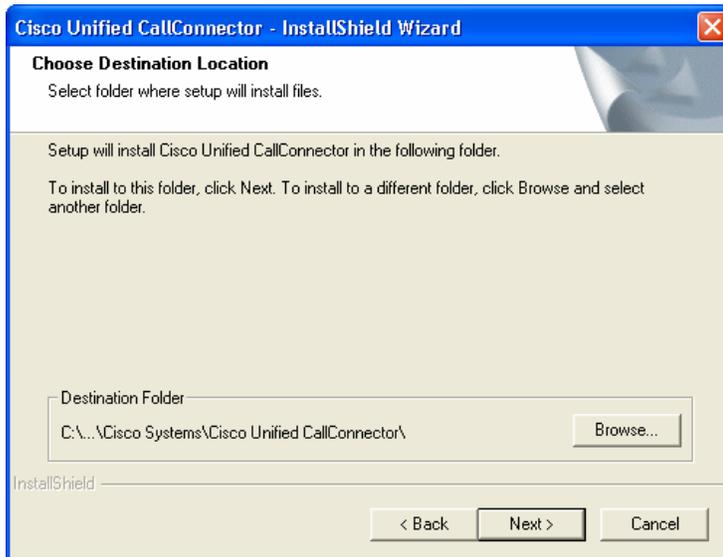
- **Server IP Address:** Enter the IP Address of the Cisco Unified CallConnector Server. This will be provided to you by your system administrator.
- **User Login Name:** You will need to have a User Account in the Cisco Unified CallConnector Server. To log into the Cisco Unified CallConnector Server your system administrator will provide your Login User Name. Enter this User Login Name.
- **Password:** Enter the password associated with your Cisco Unified CallConnector account.

#### **To proceed:**

Click **Next** or press the **ENTER** key to move to the next window.

### Program Files Location:

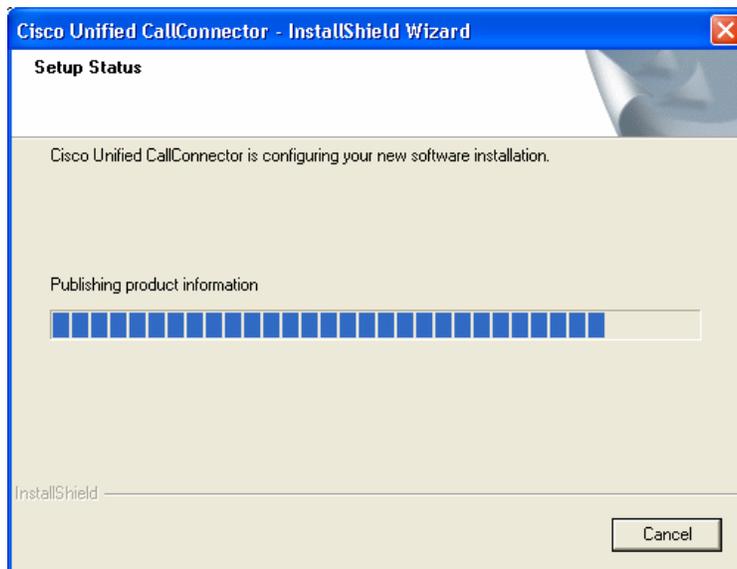
The next window allows you to specify the location to which the Cisco Unified CallConnector program files will be copied. Click on the Browse button to select a different folder than the default.



#### **To Proceed with the installation:**

- Choose the default program path or click on the **Browse** button and specify the desired path.
- Click on **Next** to move to the proceed with the installation.

The install program will prompt you to close all instances of Internet Explorer and Outlook. Note sometimes Outlook may be running as a process, you can open the Task Manager to verify that Outlook is not running.



The installation will copy the program and system files and update the registry and XML file settings.

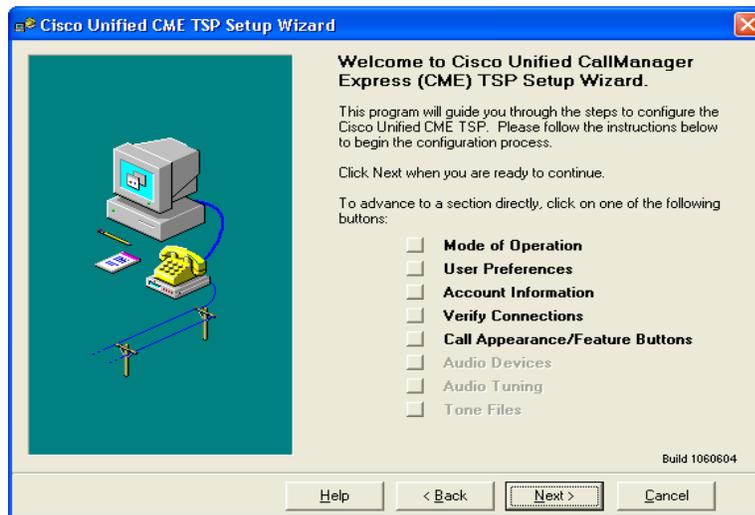
Once the files have been copied, it will launch the CME Telephone Service Provider Setup Wizard. If you are connecting in the server mode, then Click on Cancel to close and exit this Wizard, otherwise follow the instructions in the next section to configure your telephone service access.

## Configuring the CME Telephone Service Provider

The Telephone Service Provider (TSP) Setup Wizard allows you to configure the parameters of the CME TAPI driver to connect with and correctly operate with the CallManager Express line and features. It provides tools to validate the connection parameters and download the IP-Phone line configuration. This section provides an easy-to-use, step-by-step guide to setup the operating parameters for the CME TAPI Driver.

The CME Telephone Service Provider Wizard allows you to specify the following TSP parameters:

- Mode of Operation:** The Wizard let you specify whether the TSP will operate as an adjunct to an IP-Phone – allowing the TAPI application to remotely control the calls of the associated IP-Phone or itself emulate an IP-Phone –allowing the TAPI application to become a CallManager Express softphone.
- Use Preferences:** These options include connecting to the router at windows startup, turning on the speaker when a call is made and enable logging for capturing diagnostic traces.
- Account Information:** Specifies the IP address and the connection parameters of the IP-Phone that will be used by the TSP.
- Verify Connections to CME:** This allows you to verify the account information by connecting to the CallManager Express.
- Call Appearances/Feature Buttons:** The lines (buttons) configuration of the associated IP-Phone is specified to allow the TAPI Driver to correctly handle them.



Please click **Next** to proceed to setting up the TSP.

## Mode of Operation

This screen shows the user the version information of the TSP driver. Click on Next to continue.

The screenshot shows the 'Mode of Operation' window of the Cisco Unified CME TSP Setup Wizard. The window title is 'Cisco Unified CME TSP Setup Wizard'. The main heading is 'Mode of Operation'. Below the heading, it says 'Please select the mode of operation below:'. There are two radio button options: 'Call Control for IP Phone' (selected) and 'Advanced'. The 'Call Control for IP Phone' option has a sub-label: 'The TAPI Driver will control the selected IP Phone'. Below this, there are three text input fields for version information: 'CME TSP Versions:', 'CME TSP: Version 2.1', 'SCCP Protocol: Version 3', and 'Setup Wizard: Version 1060604'. At the bottom, it says 'Click on Next to continue.' and there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

## User Preferences

The following user preferences can be set from the Wizard:

The screenshot shows the 'User Preferences' window of the Cisco Unified CME TSP Setup Wizard. The window title is 'Cisco Unified CME TSP Setup Wizard'. The main heading is 'User Preferences'. Below the heading, it says 'Please select the options that you would like to be enabled:'. There are two radio button options: 'Connect to IP Phone on application start (recommended)' (selected) and 'Connect to IP Phone on Windows startup'. Below this, there are three checked checkboxes: 'Activate IP Phone Speaker when placing or receiving a call', 'Send Line Selection message when making a call', and 'Enable Trace Log file (when requested by TAC)'. There is a 'Level:' dropdown menu set to '0' and a 'Trace File:' text input field containing 'Iphone Service Provider\cCMETSPTrace.log'. At the bottom, it says 'Click on Next to continue.' and there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

- **Connect to IP Phone on Application Start:** Checking this option, causes the CME Telephone Service Provider to be started when the Cisco Unified CallConnector is run. This is the recommended option.
- **Connect to IP Phone on Windows Startup:** The CME TSP will register with the CallManager Express at Windows startup. If this option is not checked, then the TSP will register only when a TAPI application wants to use the TSP.
- **Activate IP Phone Speaker when Placing or Receiving a Call:** If the handset is on-hook, then the speaker on the IP-Phone is turned on when a new call is made or when a call is answered.
- **Send Line Selection Message when Making a Call:** On certain IP Phones this is required to make outgoing calls.
- **Enable Debug Trace:** The Debug Trace file enables technical support to isolate any problems you may be experiencing. Normally this should be turned off. If you are experiencing any problems, your technical support person may ask you to turn on the debug tracing and send them the trace file.

When you are done, please click **Next** to continue with the TSP Setup.

## Account Information

The following information is required by the CME TSP to connect to the CallManager Express. The account information selects the CallManager Express and IP-Phone for use by the TAPI Driver.

- **CME IP Address:** The IP Address of the Call Manager Express router.
- **TCP/IP Port for SCCP:** Port number used to communicate to the CallManager Express router. By default this is set to 2000.
- **User Name:** An IP-Phone that is to be used by the CME TSP must be configured with a User Name and Password. The TSP registers with the CallManager Express using this user name and password. The user name is uniquely associated with an IP-Phone. Contact your system administrator for your IP phone user name and password.
- **Password:** The password configured for the User Name above.
- **Verify Password:** Validation field for the password.

Note: The User Name and password are case sensitive and must exactly match the CallManager Express setting.

The screenshot shows the 'Account Information' window of the Cisco Unified CME TSP Setup Wizard. The window title is 'Cisco Unified CME TSP Setup Wizard'. The main heading is 'Account Information' with a key icon. Below the heading, it says 'Please enter your CallManager Express IP Phone information below:'. The form contains several input fields: 'PC Device ID/MAC Address' with the value '0014.2A92.2E02', 'CME IP Address' with '192.168.1.121', 'TCP/IP Port for SCCP' with '2000', 'IP Phone User Name' with 'phone-1', 'IP Phone Password' with '\*\*\*\*\*', and 'Verify Password' with '\*\*\*\*\*'. There is also a dropdown menu for 'Region/Service Provider' set to 'United States'. At the bottom, there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'. A note at the bottom of the form area says 'Click on Next to continue.'

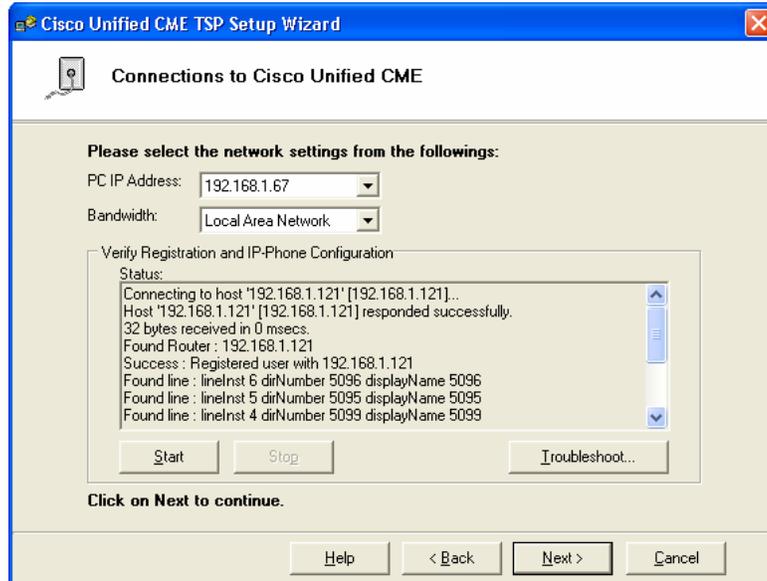
- Enter the IP address of your CME Router.
- Next, you will enter in the username and password of the IP phone you would like to connect to. Please also verify the password by typing it in a second time.

When you are finished entering the CME Router login information, please click Next to proceed.

## Connections to Cisco Unified CME

This window allows you to verify the account parameters entered in the previous window, verify network connectivity to the CallManager Express and to download the IP-Phone button configuration from the CallManager Express.

On this screen, you will verify the connection to the IP phone that you selected.



- Select the IP address of this PC and the bandwidth (default: Local Area Network).
- Click on Start and the Wizard will attempt to connect to your IP phone. If you successfully connected to the IP phone, then it will show the phone's line information. If the connection was unsuccessful, then it will show "Error: Can not register user. Invalid IP-address, User name or Password".

When you are finished, click Next.

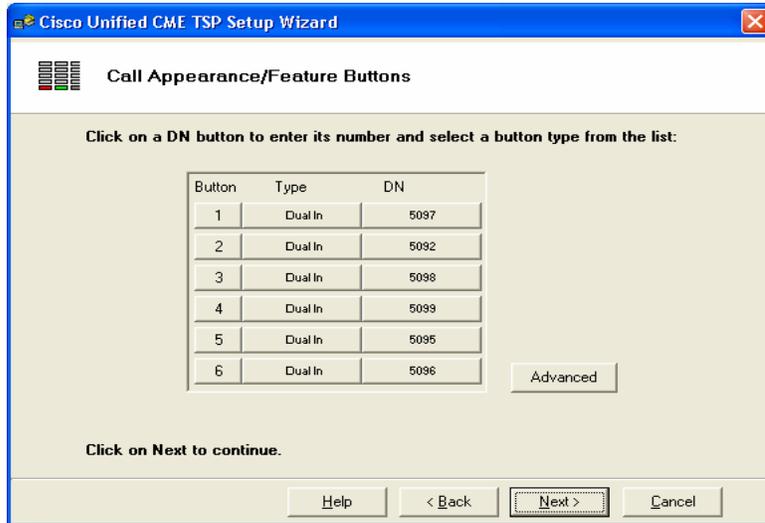
## Call Appearance/Feature Buttons

This window allows you view and map the buttons to correspond to the IP-Phone that you are using with this CME TAPI Driver. By default no changes are required for use with Cisco Unified CallConnector.

Each IP-Phone button is represented with a set of type of button and the second button specifies the label or number associated with the button.

To change the button type, click on the smaller button. From the pull down list you can select the button type.

To change the button label, click on the larger button, a pull down menu allows you to select from a list or enter a number.



### ***Saving Configuration Changes***

Congratulations, you are now done configuring the TSP driver. You will now be prompted to restart your PC. For the best performance, it is recommended that you restart your PC.

## ***Registering the Cisco Unified CallConnector***

All installations of the Cisco Unified CallConnector need to be activated with the Cisco Licensing Server. Activation is a process in which the Cisco Unified CallConnector program sends the serial number and the installed computer information to the licensing server. The Licensing server verifies the serial number and saves it along with the computer information.

The activation process is initiated when the CallConnector Popup is run the first time. If the activation process is not completed successfully, then the Cisco Unified CallConnector programs will not run. The activation window is shown below.



**Cisco Unified CallConnector License Registration**

The license activation process will register your serial number and some PC hardware information with Cisco Systems to prevent un-authorized use of software. Your PC needs to be connected to the Internet during this process.

Serial Number:  \*

To convert to a full licence, enter the valid serial number above and activate the software. The following information also saved with your serial number:

Name:  \*    Email:  \*

At your option, you may chose to provide the following additional information for Cisco Marketing:

Work Phone: <input type="text" value="555-1212"/>	City: <input type="text" value="your-city"/>
Company: <input type="text" value="your-company"/>	State: <input type="text" value="your-state"/>
Department: <input type="text" value="your-department"/>	ZIP Code: <input type="text" value="your-zip-code"/>
Address: <input type="text" value="your-address"/>	Country: <input type="text" value="your-country"/>

Send optional Personal Information to Cisco Systems

Cisco System user information privacy policies can be reviewed at:  
<http://www.cisco.com.userinformationprivacy>

Click on Activate to complete the installation otherwise Cancel to remove the application

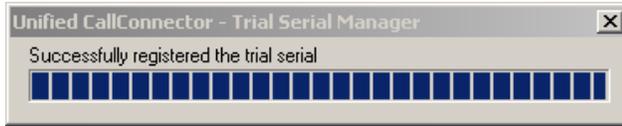
The Serial Number that you entered during the installation is displayed in the Serial Number field. If you entered 'Trial' for a limited time evaluation, then this is displayed. You can at any time convert the 'Trial' Serial Number to a fully licensed program by entering the serial number in this field.

If you are evaluating the Cisco Unified CallConnector, then the activation will obtain a trial-serial-number for you. This will be displayed in the Serial Number field.

During the activation process, you serial number, name, email address and certain machine information is sent to the licensing server. You can also enter some personal information and chose to send it to Cisco systems to help us understand the deployment of the solution. The personal information is only send if you select the checkbox 'Send optional personal information to Cisco Systems.'

To activate the Cisco Unified CallConnector, please make sure that you have access to the Internet from this personal computer and click on the Activate button.

The Cisco Unified CallConnector will access the Licensing Server over the Internet and send the activation information. A progress bar is displayed during this process as shown below:



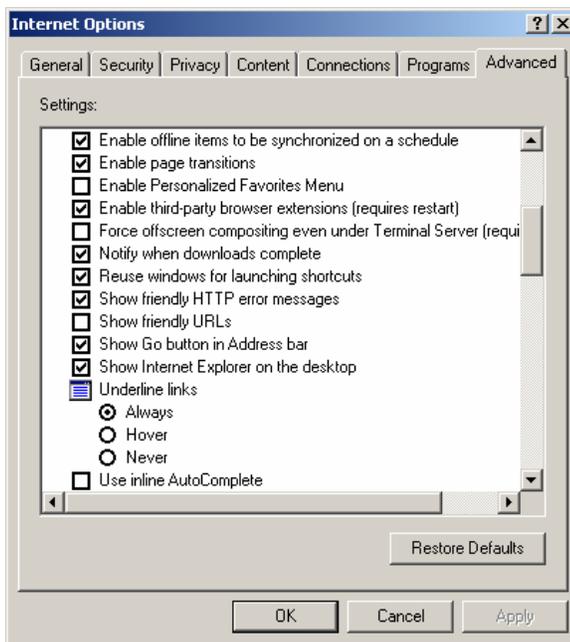
Notes:

If you are using the trial serial number, then the Cisco Unified CallConnector needs to access the Licensing Server every time the CallConnector Popup is run. This requires access to the Internet. The fully licensed Cisco Unified CallConnector activates only once. You can convert from a trial to a licensed version of the Cisco Unified CallConnector at any time.

## Internet Explorer and Outlook Settings

The Cisco Unified CallConnector Toolbars and Application Windows are 'Add-On' components in Internet Explorer and Outlook. This section describes some of the settings that have to be enabled for these components to operate.

Note: These Add-On components are automatically registered or added by the Cisco Unified CallConnector installation process. The information below is provided to help you isolate problems should they arise.



## Internet Explorer

Enable Third-Party Browser Extensions: The Cisco Unified CallConnector components are installed as Third-Party Browser extensions. This option in the Internet Explorer Options window (available from the Tools menu) in the Advanced tab under the Browsing category. The default settings of the Internet Explorer have this option enabled. Manage Add-ons

## ***Performing an upgrade***

If you want to upgrade your Cisco Unified CallController to a newer version, then you can download and run a later installation program. The installation program will ask you if you want to upgrade the Cisco Unified CallConnector files. Click on Yes to continue with the upgrade. Make sure that you have closed all instances of Internet Explorer and Outlook and the CallConnector Popup program. The install program will then copy the newer versions of the files to your computer.

## ***Removing Cisco Unified CallConnector***

You can remove the Cisco Unified CallConnector and all its files from the Windows Add/Remove program.

- From the Widows Start menu, select Settings and open the Control Panel.
- Double click on Add/Remove Programs
- Select Cisco Unified CallConnector and click on the Remove button.
- The Cisco Unified CallConnector Installation program will run. Click on the Remove button and next.

The Cisco Unified CallConnector will be un-installed from your computer.

# Getting Started

This chapter describes how to start the Cisco Unified CallConnector and to view the toolbars and windows in Internet Explorer and Outlook.

This chapter describes the following in more detail:

- Starting and Exiting -** How to start and exit the Cisco Unified CallConnector.
- CallConnector Options -** Describes the Cisco Unified CallConnector Options and how to change them.
- Logging In and Out -** Describes how to login and logout of the Local SIPServer from the Options-Server Window.
- Internet Explorer Toolbar -** Describes how to view the Cisco Unified CallConnector Toolbar in Internet Explorer.
- Outlook Toolbar -** Describes how to view the Cisco Unified CallConnector Toolbar in Outlook.
- Viewing Lines, Contacts, Logs -** Describes how to view line, Contacts, and Logs information.
- Opening QuickSearch -** Describes how to open the QuickSearch window and locate contacts.
- Managing Add-ons -** Describes how to verify Cisco Unified CallConnector toolbar and sidebar registration in Internet Explorer and Outlook.
- Getting Help -** Describes how to get Cisco Unified CallConnector help information.

## Starting and Exiting Cisco Unified CallConnector

### To Start Cisco Unified CallConnector:

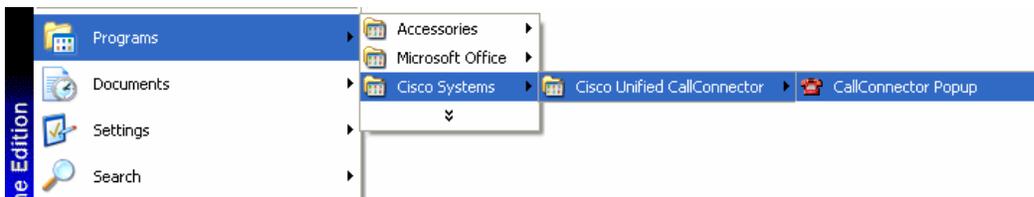
The Cisco Unified CallConnector can be started in several ways:

- From the Start Menu
- From the Desktop Icon
- Automatically start with Windows.

### Starting from Start Menu:

From the **Start-Programs** menu, select the **Cisco Systems** group and select the **Cisco Unified CallConnector** option, then click on CallConnector Popup.

The Cisco Unified CallConnector runs and proceeds with loading the databases and any configured TAPI drivers.



### Starting from the Desktop Icon:

Double-click on the red CallConnector Popup icon located on the desktop and it will start the Cisco Unified CallConnector (as shown below).

The Popup will start the required controlling software, automatically. It will display the initialization progress with prompts including:

```
CallConnector SIPServer Started-OK.  
CallConnector CallController Started-OK.  
CallConnector Login Started OK.  
Acquiring Lines Started-OK.
```

If the initialization fails at any step, then you will be notified of the error condition encountered.

Note: If you are running an evaluative version, then the Popup will connect to the License Server and verify the evaluation status.

The Popup application displays the options window. Click on hide to close the window. If you need to change any options settings, then click on apply to save the changes.

When the Popup application is running, a phone icon is displayed in the system tray as shown below.

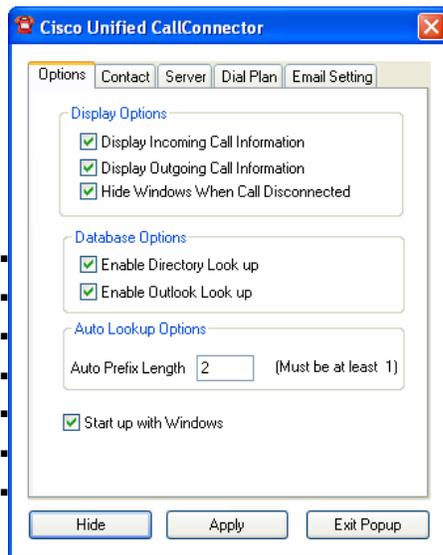


## Starting up with Windows:

You can setup the Cisco Unified CallConnector to start with Windows by following these steps:

- Right-click on the red telephone icon in the system tray to bring up the CallConnector Popup menu.
- Click on Options menu item; this will open the Options Window.
- Click on the Start up with Windows check box to setup the Cisco Unified CallConnector Popup to start up when you start Windows.

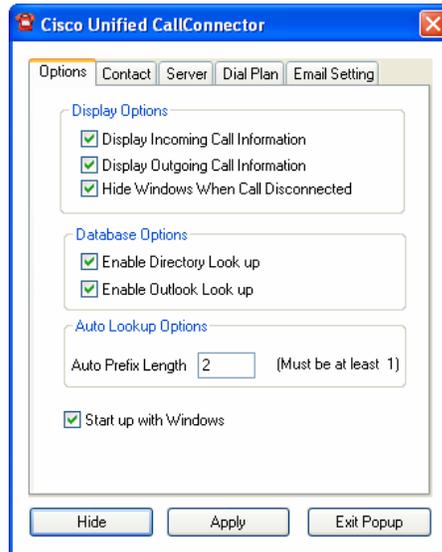
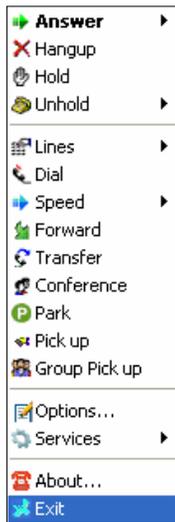
## To Exit Cisco Unified CallConnector:



- You can press the **Exit Popup** button at the bottom of the Options window.
- Right-click the red CallConnector Popup icon from the system tray and click **Exit**.

### To Hide the Options Window

- You can press the **X** button on the upper right hand corner of the CallConnector Options window.
- Click on the Hide button in the Options window.



## CallConnector Options

The options window consists of different tabs for configuring different options.

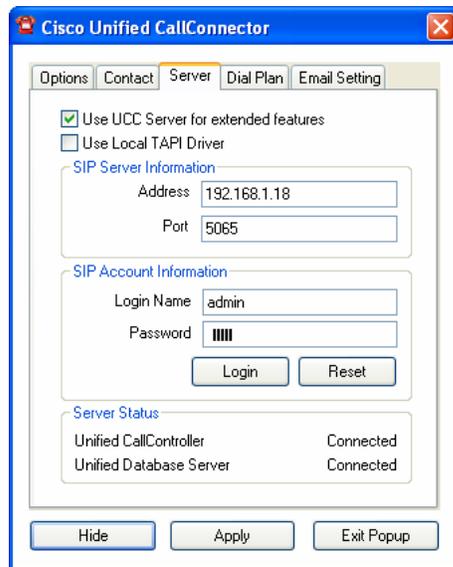
- Options** – Set the settings for popup balloon display, database lookups, auto lookup, and automatic Windows startup.
- Contact** – This is where the user may fill in all his/her personal contact information.
- Server** – This is where you can enter Cisco Unified CallConnector Server login information and switch between TAPI (local) and Server modes.
- Dial Plan** – This tab allows you to change your dial settings. The settings should automatically be preconfigured upon installation.
- E-mail Setting** – This tab allows you to choose which email profile you are using and configure your SMTP information.

**Note:** Please see Chapter 5 for the details on these parameters.

When you first start the Popup application, please be sure to enter your contact information, verify that you have the correct mode setup and are logged in. Dial up rules need to be setup to allow correct dial able numbers to be generated. The email settings are required to send text messages and to access the Outlook contact information.

## Logging In and Out

The Login/Logout capabilities are available on the Client/Server models of the Cisco Unified CallConnector. From the Cisco Unified CallConnector, you can view status and activities of other users. And vise-versa, your status can be monitored and viewed by the call supervisor and other users. To be able to communicate with other users, you will need to login to a Cisco Unified CallConnector Server.



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1-6 Cisco Unified CallConnector

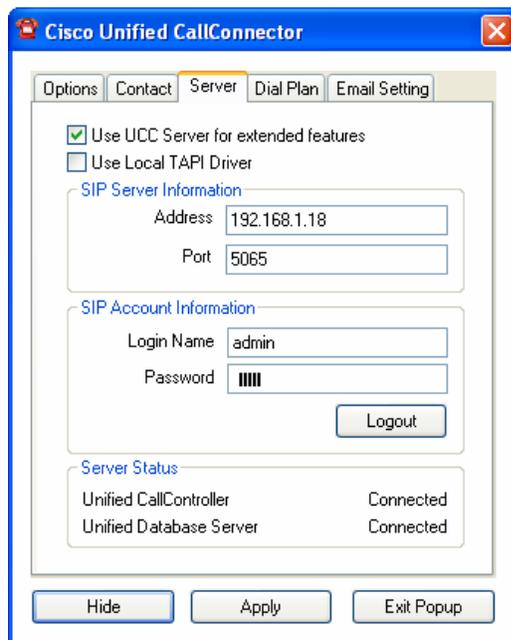
## To Login to the Cisco Unified CallConnector Server

Right-click on the red **CallConnector** Popup icon in the system tray and click on **Options**. Then click on the Server Tab. It will display all the server settings. Please do the following:

- Enter your name in the **Login Name** field.
- Enter your password in the **Password** field.
- Click on **Login** to login. If you successfully logged it will only show the Logout button and not the Login or Reset button.

## To Logout of the Cisco Unified CallConnector Server

Assuming that you are logged in as shown below, the **Logout** button should be present. Press the **Logout** button. You will notice that the CallConnector Popup icon in the system tray is grayed out because UCC Services are no longer available because you are logged out.



## Viewing Lines, Contacts, and Logs

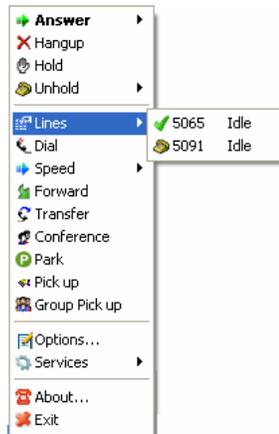
This section will cover how to view your available phone lines, your directory contacts, and your call logs.

### Viewing Lines:

There are 2 ways to view your phone lines:

**CallConnector Popup Menu:** Open CallConnector Popup from the desktop, and right-click on the red phone icon in the system tray. This will bring up the CallConnector Popup menu. Then hover your mouse over the Lines option and it will reveal your available phone lines.

**CallConnector Toolbar:** Open Internet Explorer. Then click on the text box located in the middle of the toolbar containing the current phone line. It will show a list of all available phone lines.

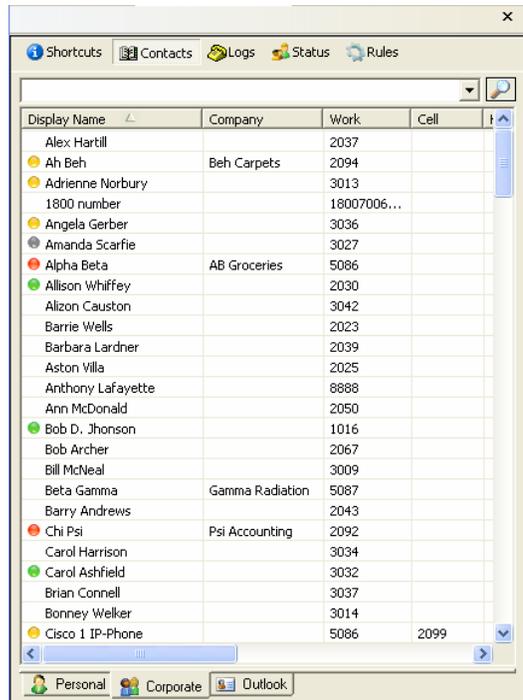


### Viewing the Contacts Window:

You may view **Directory Contacts** from the Sidebar in Internet Explorer or Outlook.

- First, verify that you are logged in. You will be properly logged in if the Popup phone icon in the system tray is red (otherwise it is grayed out)
- Open Internet Explorer or Outlook.
- Click on the **Contacts** button located on the Cisco Unified **CallConnector Toolbar**. (in Outlook you may have to click on the **CallConnector** file in Contacts).

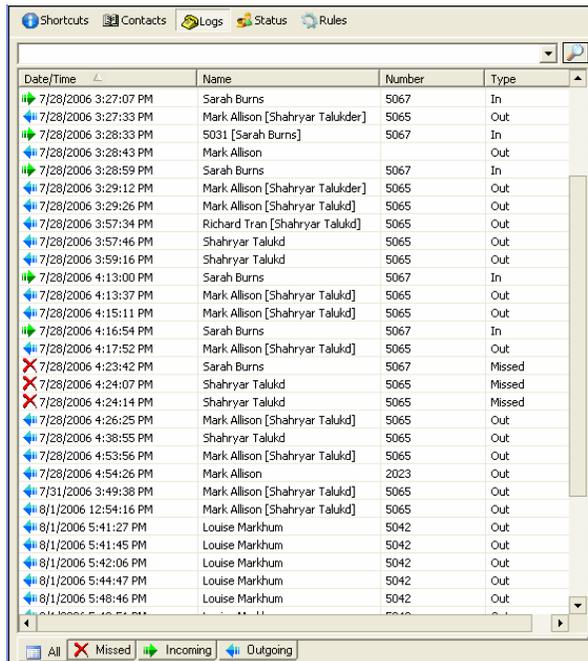
- While the Sidebar is present click on the Contacts tab.
- This will show your **Personal** Contacts.
- Then click on the **Corporate** tab below to reveal your Corporate Contacts. If you are in Server mode, Corporate Contacts are shared by all users.
- Then click on the **Outlook** tab to reveal your Outlook/Exchange Contacts.



## View Call Logs:

You may view your **Call Logs** from the Sidebar in Internet Explorer or Outlook.

- First, make sure you are logged in. You will be properly logged in if the Popup phone icon in the system tray is red (other wise it is grayed out)
- Open Internet Explorer or Outlook.
- Click on the Contacts button located on the Cisco Unified CallConnector Toolbar (in Outlook you may also have to click on the CallConnector file in Contacts).
- While the Sidebar is present click on the Logs tab.
- The tabs on the bottom will limit view to missed calls, incoming calls, or outgoing calls.



Date/Time	Name	Number	Type
7/28/2006 3:27:07 PM	Sarah Burns	5067	In
7/28/2006 3:27:33 PM	Mark Allison [Shahryar Talukder]	5065	Out
7/28/2006 3:28:33 PM	5031 [Sarah Burns]	5067	In
7/28/2006 3:28:43 PM	Mark Allison		Out
7/28/2006 3:28:59 PM	Sarah Burns	5067	In
7/28/2006 3:29:12 PM	Mark Allison [Shahryar Talukder]	5065	Out
7/28/2006 3:29:26 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 3:57:34 PM	Richard Tran [Shahryar Talukd]	5065	Out
7/28/2006 3:57:46 PM	Shahryar Talukd	5065	Out
7/28/2006 3:59:16 PM	Shahryar Talukd	5065	Out
7/28/2006 4:13:00 PM	Sarah Burns	5067	In
7/28/2006 4:13:37 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:15:11 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:16:54 PM	Sarah Burns	5067	In
7/28/2006 4:17:52 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:23:42 PM	Sarah Burns	5067	Missed
7/28/2006 4:24:07 PM	Shahryar Talukd	5065	Missed
7/28/2006 4:24:14 PM	Shahryar Talukd	5065	Missed
7/28/2006 4:26:25 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:38:55 PM	Shahryar Talukd	5065	Out
7/28/2006 4:53:56 PM	Mark Allison [Shahryar Talukd]	5065	Out
7/28/2006 4:54:26 PM	Mark Allison	2023	Out
7/31/2006 3:49:38 PM	Mark Allison [Shahryar Talukd]	5065	Out
8/1/2006 12:54:16 PM	Mark Allison [Shahryar Talukd]	5065	Out
8/1/2006 5:41:27 PM	Louise Markhum	5042	Out
8/1/2006 5:41:45 PM	Louise Markhum	5042	Out
8/1/2006 5:42:06 PM	Louise Markhum	5042	Out
8/1/2006 5:44:47 PM	Louise Markhum	5042	Out
8/1/2006 5:48:46 PM	Louise Markhum	5042	Out

## Managing Add-ons

If the Cisco Unified CallConnector Toolbars are not displayed after starting the Popup application, use this section to troubleshoot possible causes.

### Internet Explorer Toolbar and Sidebar

In order for the Internet Explorer Toolbar and Sidebar to function:

- Cisco Unified CallConnector toolbar and sidebar must be registered to Internet Explorer
- Cisco Unified CallConnector toolbar and sidebar must be enabled in Internet Explorer
- Cisco Unified CallConnector toolbar is not hidden.

### Register/Unregister Toolbar and Sidebar

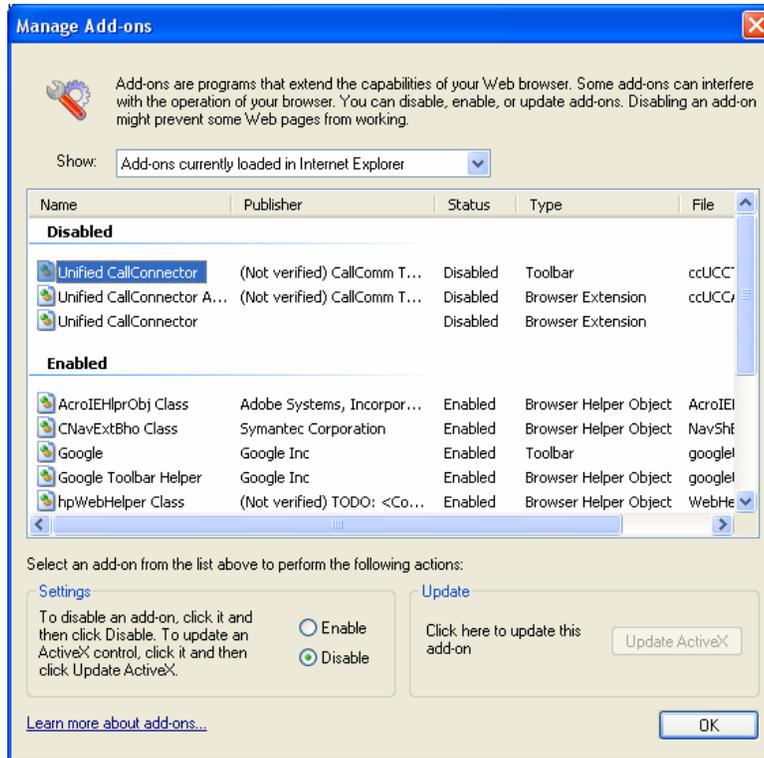
To check whether or not the toolbar and sidebar are available:

- Open Internet Explorer. Click on Tools and Manage Add-ons.
- Verify that the Cisco Unified CallConnector and Cisco Unified CallConnector Apps are both found in the Enabled or Disabled Section. If they are not, then they have not been registered with Internet Explorer. Please proceed with the following steps.
- Close all instances of Internet Explorer and exit Cisco Unified CallConnector first. Open the Program Files\Cisco Systems\Cisco Unified CallConnector\ folder.
- Double click on the registerAll.bat or registerIE.bat file. This will register the both the Toolbar and the Sidebar with Internet Explorer. When you open Internet Explorer it should be visible.

### Enable/Disable Toolbar and Sidebar

To enable or disable the toolbar and sidebar:

- Open Internet Explorer.
- Click on Tools and Manage Add-ons.
- Verify that the **Cisco Unified CallConnector** and **Cisco Unified CallConnector Apps** are both found in the Enabled or Disabled Section. If not, the go back to the previous section and follow all the steps.
- If a component is disabled (i.e. the Cisco Unified CallConnector Toolbar), then it will show up in the **Disabled** Section and cannot be used. It also cannot be made visible or made hidden in Internet Explorer.
- If a component is enabled, it will show up in the **Enabled** section and it can be used in Internet Explorer. Also, it can be made visible or made hidden in Internet Explorer.



### Hide/Unhide Toolbar and Sidebar

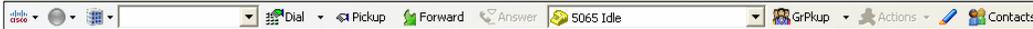
To hide or unhide the toolbar and Sidebar:

- Open Internet Explorer and click on Tools and Manage Add-Ons.
- Verify that the **Cisco Unified CallConnector** and **Cisco Unified CallConnector Apps** are both found in the Enabled section. If either component is in the **Disabled** section, enable it. If neither of the components are found in any section, then that means the Cisco Unified CallConnector IE component is not currently registered. Register the Cisco Unified CallConnector IE component as described in the section above.
- Right-click on the any part of the address bar or Internet Explorer buttons and it will show a menu with all the current toolbars. The toolbars that are checked are shown, the toolbars that are unchecked are hidden, the toolbars that are grayed out are disabled, and any toolbars not shown are not



registered with the Internet Explorer

- To hide or unhide the Sidebar, click on the Contacts button located on the Toolbar.



## Outlook Toolbar and Sidebar

In order for the Outlook Toolbar and Sidebar to be displayed, please verify these settings: Cisco Unified CallConnector toolbar and sidebar must be registered to Outlook. Cisco Unified CallConnector toolbar is not hidden.

### **Register/Unregister Toolbar and Sidebar**

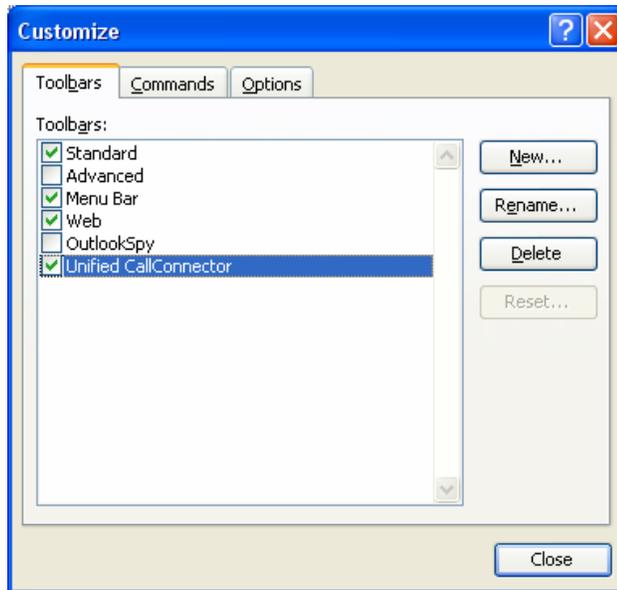
To check whether or not the toolbar and sidebar are registered:

- Open Outlook. Click on **Tools** and **Customize**. Then click on the **Toolbars** tab.
- Verify that the **Cisco Unified CallConnector** is visible. If it is not visible, then proceed to the following steps.
- Close and Exit Outlook and the UCC Popup application. Open the \Cisco Cisco Unified CallConnector\ folder.
- Double click on the **registerAll.bat** or **registerOutlook.bat** file. This will register the both the Toolbar and the Sidebar with Outlook. When you restart Outlook, the toolbar it should be visible.
- You can also unregister the Toolbar and Sidebar from Outlook Customize window. Open the Customize window, then select the Cisco Unified CallConnector and click on Delete. This will remove the Toolbar and Sidebar completely from Outlook.

### **Hide/Unhide Toolbar and Sidebar**

To hide or unhide the toolbar and Sidebar:

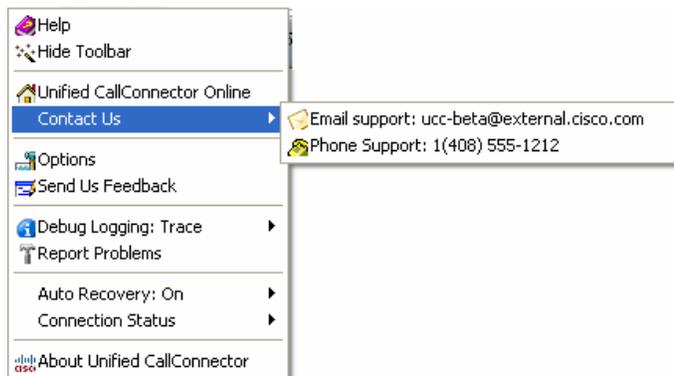
- Open Outlook. Click on Tools and Customize.
- Select the **Cisco Unified CallConnector**. If it is checked off, that means that the Toolbar and Sidebar are showing. If it is not checked off, then that means that the Toolbar and Sidebar are hidden.
- To hide the Cisco Unified CallConnector Toolbar and sidebar, uncheck the box. You can also hide the toolbar by opening the About menu and clicking the **Hide Toolbar** option.
- To unhide the Cisco Unified CallConnector Toolbar and sidebar, check the box.



## Getting Help

If you are in need of on-line help there are many ways to seek assistance.

- **Help File:** You can open the Help file from the toolbar about menu. You can do a search through various help topics and common error situations.
- **Contact Support:** By selecting this option from the About menu, it will bring up an new email message where you can message the Cisco Unified CallConnector Support team about your problems. It will also attach the correct debug log files to this email to be sent to the UCC Support.
- **Phone Support:** By selecting this option from the About menu, it will proceed to call phone line of the UCC Customer Support. They will answer your questions and guide you through solving your problems.



CHAPTER  
**5**

# Cisco Unified CallConnector Popup

Formatted: Bullets and Numbering

The Cisco Unified CallConnector Popup displays information on the incoming or outgoing call in a popup window. It also provides some basic call control functions in two context sensitive menu buttons. The Popup Icon in the system tray provides a menu from which additional telephony features and configuration options for the CallConnector can be accessed.

This chapter describes how to perform the basic call handling functions using the Cisco Unified CallConnector Popup and to access the CallConnector functions from the Popup menu. These include:

- Popup Window -** Describes the CallConnector Popup window that is displayed for incoming and outgoing calls.
- Popup Menu -** Describes the functions available from the Popup menu and how to use these functions for call handling.
- Call Control from Popup -** Describes how to control the call from the Popup window.
- CallConnector Options** The Cisco Unified CallConnector Options window is described in this section. .
- Starting/Stopping Services** The Cisco Unified CallController uses controlling software to access the databases and telephone system. This section describes how to manage these services from the Popup
- About Window -** The Popup About window displays the Serial Number and allows you to update from the evaluation to licensed version of the software.

## Popup Application

The CallConnector Popup application supports a number of Cisco Unified CallConnector features. These include:

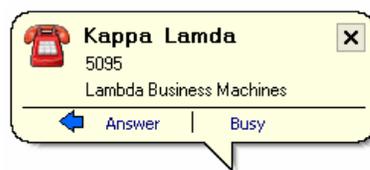
- Popup Window:** This Popup window displays information on each of the calls at the IP Phone and provides some basic call control capability.
- QuickMessages:** The Instant and Text Messages are received and sent by the Popup application (Only available in Server mode).
- Starting/Stopping Services:** Some controlling services are required by the Cisco Unified CallConnector user interfaces. The CallConnector Popup application starts up the required services and closes them upon exit.
- Options Window:** The user customizable parameters are displayed in the Options Window. The Options window is presented by the Popup application and the parameters are shared by all the Cisco Unified CallConnector components.
- Popup Menu:** The menu provides access to the additional functions supported by the Popup application.
- Activation Process:** The Popup application presents the activation dialog and also verifies the evaluation period.

You will need to run the CallConnector Popup application to access the Cisco Unified CallConnector features from the toolbars or application windows.

## CallConnector Popup Window

The CallConnector Popup window displays caller information about an incoming or outgoing phone call. Based on the telephone number, it performs a lookup in the user's contact databases and displays the name of the calling party and their organization if available. The Popup window includes two context sensitive call handling buttons and one button for opening the Actions menu.

From the Popup Window, you can answer a call, re-direct it to voice mail, place it on hold or end the call. The Action menu collects and displays additional caller contact information that can be used to perform functions such as making a call to an alternate number, sending an email, or making notes, or setting up a schedule, etc.



Cisco Unified CallConnector Popup Window

Window Component	Description
Icon	Cisco Unified CallConnector Popup icon
X	Close Popup window
Kappa Lambda	Name of the Caller. This name can be looked up from the contact directories or there is no match then the name provides by the call is displayed
5095	Telephone Number of the caller
Lambda Business Machines	Organization of the Caller. This information is looked up from the contact directories
Action Menu Arrow	Action Menu Button opens the action menu
Answer	CallControl Button 1: The call control options are displayed based on the state of the call. For an incoming call it displays Answer
Busy	CallControl Button 2: The call control options are displayed based on the state of the call. Pressing busy while a new call is ringing will invoke the DND feature, sending the call to voice mail.

### Cisco Unified CallConnector Popup Window

One Popup window is presented for each call on your IP Phone. If you have two calls, then two Popup windows will be displayed. When the call terminates, the popup windows is automatically closed. (This is the default setting).

## Managing the Popup Window

The Cisco Unified CallConnector provides a number of options for customizing the behavior and the information displayed by the Popup Window.

### *Popup Window Options*

The display of the Popup Window and the information presented in them is controlled by user selectable options in the CallConnector Options window. The following options settings impact the Popup window. These are described in more detail in the section CallConnector Options section and are summarized below.

#### **Display Incoming Call Information:**

Popup window is presented for incoming calls. If this is not checked, then the Popup window will not be displayed for incoming calls.

#### **Display Incoming Call Information:**

Popup window is presented for outgoing calls. If this is not checked, then the Popup window will not be displayed for outgoing calls.

#### **Hide Window when Call is Disconnected:**

The Popup window is automatically closed when the call disconnects. If this option is not checked, then the window needs to be closed manually.

#### **Enable Directory Lookup:**

Popup looks up the caller number in the CallConnector directory in both the personal and corporate databases.

**Enable Outlook Lookup:**

Popup looks up the caller number in the Outlook Contacts folder.

**To Move the Popup Window**

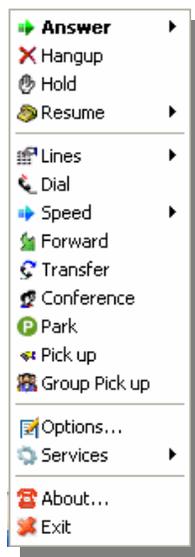
To move the Popup window, left-click in the region above the line and drag it to the desired position. This allows you to view any information below the popup window.

**Closing the Popup Window**

To close the Popup window, click on the close button on the top right hand corner. This will close the Popup window. Any call associated with that window is unaffected.

## Popup Menu

The additional features of the Popup application are accessed from the Popup Menu. You can open the menu by right-clicking in the CallConnector icon in the system tray. The CallConnector Popup menu is shown below and the table describes each on the menu items.



**Cisco Unified CallConnector Popup Menu**

### To Open Popup Menu

Right-Click on the CallController icon in the system tray to display the menu. Click outside the menu or press Esc to close the Popup menu.

Table 5.2 Description of the Popup Menu Items

Menu Item	Description
 Answer ▶	Answers the incoming ringing phone call. If there are multiple calls you can select the line to answer.
 Hangup	Hangs up the current call and returns the phone to idle state.
 Hold	Places the current phone call on hold.
 Unhold ▶	Resumes or re-connects the held phone call. If there are multiple help calls, you can select one of them from the list.
 Lines ▶	This displays the lines or extensions configured on your phone. If there are no lines displayed, then there is a configuration or startup error. You will not be able to make calls from the Cisco Unified CallConnector in this state.
 Dial	Dials the number in the QuickSearch bar.
 Speed ▶	Displays your speed dial list. You can make a call from this list by selecting one of the entries.
 Forward	Setup or clears a call forward to the number in the search bar
 Transfer	Transfers the current connected phone call to the number in QuickSearch.
 Conference	Dials the number in QuickSearch to conference call to the current connected phone call as a part of a three-party conference.
 Park	Parks the current call to the number in QuickSearch.
 Pick up	Pickup a ringing or held call from the number in QuickSearch..
 Group Pick up	Performs a pick up of a call ringing in the users pickup group
 Options...	Opens the CallConnector Options window and change the CallConnector configuration parameters.
 Services ▶	This menu item allows the user to view the status of the CallController services. It also allows the user to stop and restart these services.
 About...	Displays version information about Cisco Unified CallConnector.
 Exit	Closes and exits the Cisco Unified CallConnector Popup application. It also shuts down all local services.

## Managing Calls from Popup Window

You can control calls from the Popup window and from the Popup menu. These methods are described in this section.

The Popup window is displayed for each call on your IP Phone. It displays the telephone number and the name of the party in the call. In addition to the caller id information, there are two buttons for call control and a button to open the actions menu.

### Popup Window Call Control Buttons

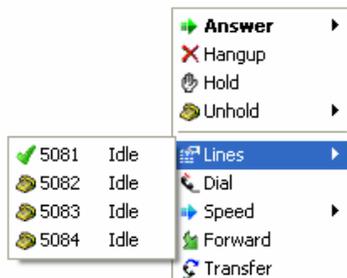
The two Popup Call Control buttons display different telephone features depending on the state of the call. The buttons available for each of the call state are described in the table below.

Call State	Telephone Feature	Description
Ringing (incoming call)	Answer	Click to answer and connect to the call
	Busy	Activate the Do-Not-Disturb feature configured on your phone
Connected Call	Hang-up	Disconnect the call
	Hold	Place the call on hold
Held Call	Resume	Re-establish connection with the held call
	Hang-up	End the call
Call Transfer		
Call Conference		

### Description of the Popup Menu Call State Icons

#### View Configured Lines

Right-Click to open Popup menu. Click on the **Lines** button. It will display a sub-menu of the line appearances on your phone. If you see two instances of the same number, then that means that this line is a dual-line. By clicking on a line to make it the default line for making outgoing calls.



### Make a Call

#### From Popup Menu:

Right-click on the CallConnector Popup menu and click on Dial. This will display the QuickDial window.

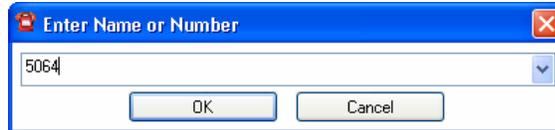
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Enter the number or locate a contact and select the desired number. A call is made to the number specified and the Popup window displays with the number and caller information.

#### Press Pause-Break Key:

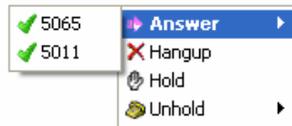
This will display the QuickDial window. Enter number or name as in above.

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If the number is not available or is busy, the Popup window will display BUSY.

### Answer a Call



The CallConnector Popup window displays the incoming caller information.

#### From Popup Window:

Click on the Answer button to answer the call.

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#### From Popup Menu:

Right-click on the CallConnector Popup menu and click on Answer. It will open a sub-menu showing the lines (extension numbers) with ringing calls.

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Click on the line to connect to that call.

### End a Call



The CallConnector Popup window presents the Hang-up and Hold button for a connected call.

**From Popup Window:**

Click on the Hang-up button to disconnect the call.

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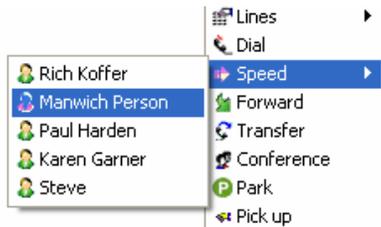
**From Popup Menu:**

Right-click on the CallConnector Popup menu and click on Hang-up. The currently active call will be dropped.

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**Speed Dial:**

Open CallConnector Popup menu. Click on the **Speed** button. If you have some speed dials setup, they will be displayed. You can select and auto-dial the Speed contact that you want without having to type in any numbers.



**Place a Call on Hold**

When connected to a call, the Popup window displays the name, number, and company of the person the user is connected to (if this person is in the Contact databases). During a connected phone conversation, the user is able to put the current call on hold, resume the current held call, and hang up the call.

**From Popup Window:**

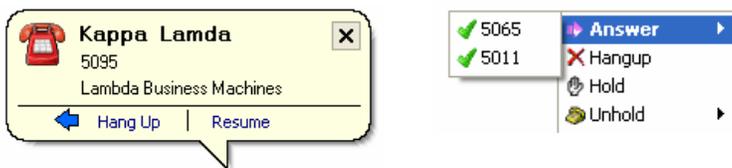
Click on the Hold button to place the call on hold.

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**From Popup Menu:**

Right-click on the CallConnector Popup menu and click on Hold. The currently active call will be placed on hold.

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### Retrieve a Held Call

**From Popup Window:**

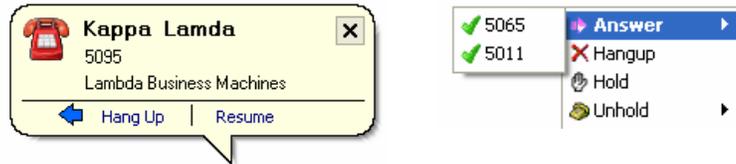
Click on the Retrieve button to re-connect the call on hold.

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**From Popup Menu:**

Right-click on the CallConnector Popup menu and click on Un-Hold or Retrieve. The held call will be re-connected

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### Call Forward

Open CallConnector Popup menu. Click on the **Forward** button. It will bring up a dial menu. Enter the number you would like to forward your calls to and click **OK**. Then it will display a message saying that all your calls were forwarded to the number you dialed and hang up.



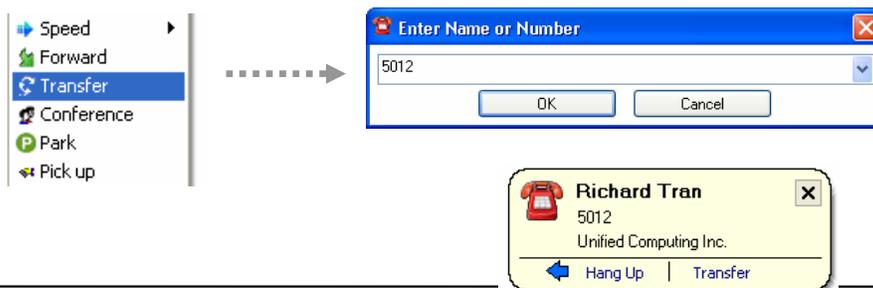
### Transfer a Connected Call

Open CallConnector Popup menu and then click on the **Transfer** button. It will bring up a dial menu.

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Enter the number you would like to transfer to and press **OK**.

A second popup window will open and proceed to dial the number. At this point, you may choose to perform a blind transfer by clicking **Transfer** on the popup balloon. If you would like to perform a consultative transfer, you may connect and talk to the person before pressing **Transfer** on the popup balloon.



## Setup a Conference

Open CallConnector Popup menu and click on the **Conference** button. It will bring up a dial menu. ← - - - - Formatted: Bullets and Numbering

Enter the number you would like to setup a 3-way conference with and press **OK**.

A second popup window will open and proceed to dial the number.

When the other party answers your phone call, a conference option will be displayed. Click on this **Conference** button to join all three parties in a conference call.



## Park

Open CallConnector Popup menu and click on the **Park** button. It will bring up a dial menu. ← - - - - Formatted: Bullets and Numbering

Enter the number you would like to **Park** the current phone call to and press **OK**.

It will park the current call and your phone will become idle. You are also able to **pickup** the phone call you just parked from the number called.

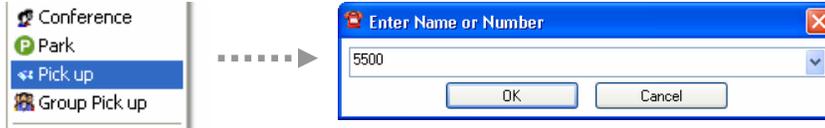


### Pickup

Open CallConnector Popup menu and click on the **Pickup** button. It will bring up a dial menu.

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Enter the number you would like to **Pickup** and press **OK**. This will pickup the ringing phone call from the number specified.



### Group Pickup

Open CallConnector Popup menu and click on the **Group Pickup** button. It will bring up a dial menu.

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Enter the number of the group you would like to **Pickup** and press **OK**. This will pickup the ringing phone call from the group number specified.



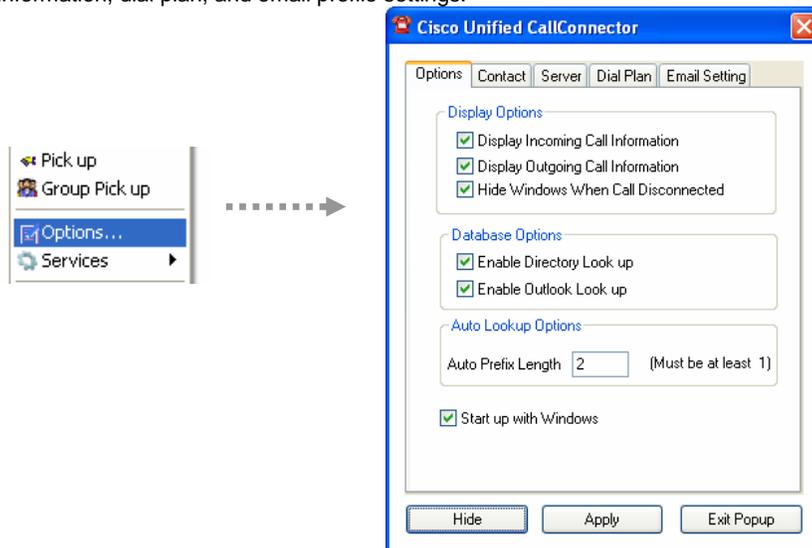
## Popup Window Action Menu

When performing a phone call or receiving a phone call, on the popup balloon, there is a blue arrow which signifies the action menu. Click on the blue arrow to reveal the action menu. The information in the action menu is different depending on which contact is being shown. From the action menu, you may call the contact, email the contact, send a text message to the contact, and IM to the contact. You may also see the contact detail if this is an Outlook contact. Also, you can take notes, find colleagues of this contact, setup a reminder, and setup a task. **Please see Chapter 6 for more information on the QuickSearch Action menu.**

<b>Call work</b>	<b>5065</b>
Call cell	949-555-0105
Call home	949-555-0104
<hr/>	
Take Call Notes	
Find Colleagues:	Ricky Lanson
<hr/>	
Send Email to	rlanson@abctech.com
Send IM to	rlanson
Send SMS:	rlanson@abctech.com
<hr/>	
Show Contact Detail:	Ricky Lanson
Search Google:	5065
<hr/>	
Setup Reminder	
Setup Task	

## CallConnector Options

Open CallConnector Popup menu and click on the **Options** button. It will display the Options windows where you can modify the current settings of the UCC. The settings of the UCC include display and database options, contact information, server login information, dial plan, and email profile settings.

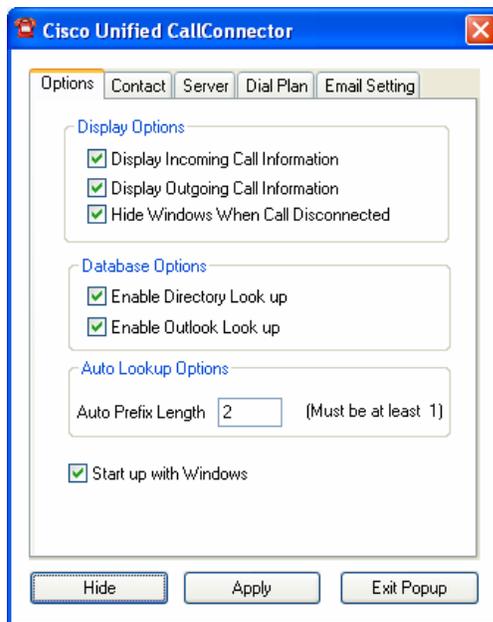


## Setting CallConnector Options

The options window consists of many different tabs for configuring different options.

- Options** – Set the settings for popup balloon display, Database lookups, auto lookup, and automatic Windows startup.
- Contact** – This is where the user may fill in all his/her personal contact information.
- Server** – This is where you can input Cisco Unified CallConnector Server login information and switch between TAPI (local) and Server modes.
- Dial Plan** – This tab allows you to change your Dial settings. The settings should automatically be preconfigured upon installation.
- E-mail Setting** – This tab allows you to choose which email profile you are using and configure your SMTP information.

### Options:



**Display Incoming Call Information** – If enabled, it will display a Popup balloon with call information every time there is an incoming phone call.

**Display Outgoing Call Information** – If enabled, it will display a Popup balloon with call information every time there is an outgoing phone call.

**Hide Windows When Call Disconnected** – If enabled, it will hide all Popup balloons when you are disconnected from a phone call.

**Enable Directory Lookup** – If enabled, it will allow all components (QuickSearch, and Popup caller/called contact information balloon) to perform a lookup on the Personal and Corporate contacts databases.

**Enable Outlook Lookup** – If enabled, it will allow all components (QuickSearch and Popup caller/called contact information balloon, and IE sidebar) to perform a lookup on the Outlook Contacts folder.

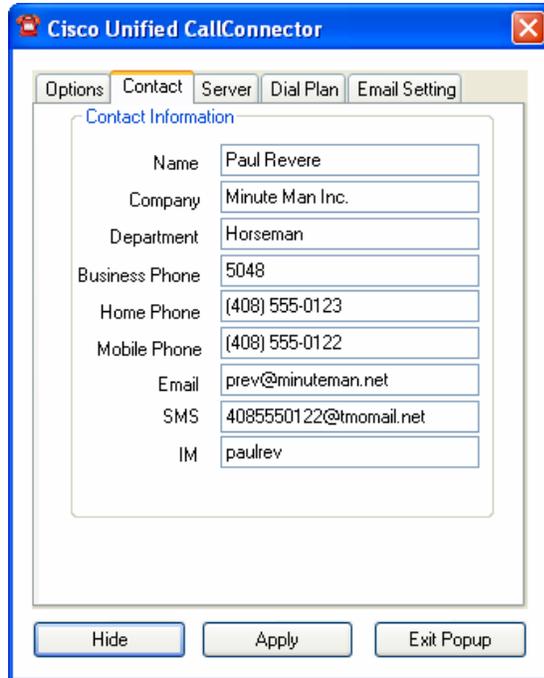
**Auto prefix Length** – The number will tell the UCC to perform the search and show the results after the user has typed x amount of characters.

**Startup with Windows** – If enabled, CallConnector Popup will automatically startup whenever Windows is started.

## Contact:

This section of the options menu contains the user's personal information. Please fill in all fields with your personal information. This information is associated with the **login** and **Presence online status**.

Name:	Your first and last name (the name you would like to have displayed).
Company:	The name of your company or organization.
Business Phone:	Your work phone number.
Home Phone:	Your home phone number.
Mobile Phone:	Your cell phone number.
E-mail:	Your personal or business e-mail address.
SMS:	Your text messaging number (your phone <a href="mailto:number@phonemailservice.com">number@phonemailservice.com</a> ).
IM:	The name of your Instant Messaging screen name.



## Server:

These settings determine which mode the Cisco Unified CallConnector is in, Personal using TAPI TSP or Server for call control.

This information is used to login to the Local SIP Server and the System SIP Server, depending on what mode you are in.

### Run in Server Mode:

If this is enabled, you will be logged into the **System SIP Server** (all services are accessed on a remote machine), a multi-user environment.

### Use Local TAPI Driver:

If this is enabled, you will be logged into Local SIP Server (all the services are accessed locally on your machine).

NOTE: If both options are enabled, then the telephone service is accessed from the local TAPI driver and the remaining services are accessed from the server.

### SIP Server Information:

Address is the IP Address of the System SIP Server, located on a remote machine. The Port is defaulted to 5065. Make sure no other service is using this port. This information remains the same in TAPI mode as well as Server mode.

### SIP Account Information:

This is composed of the username and password needed to login. Please note that the login information in TAPI mode may be different than the login information in Server mode.

The screenshot shows the 'Cisco Unified CallConnector' window with the 'Server' tab selected. The window contains the following elements:

- Options:**  Use UCC Server for extended features;  Use Local TAPI Driver.
- SIP Server Information:** Address: 192.168.1.18; Port: 5065.
- SIP Account Information:** Login Name: myusername; Password: [masked].
- Buttons:** Login, Reset.
- Server Status:** Unified CallController: Connected; Unified Database Server: Connected.
- Bottom Buttons:** Hide, Apply, Exit Popup.

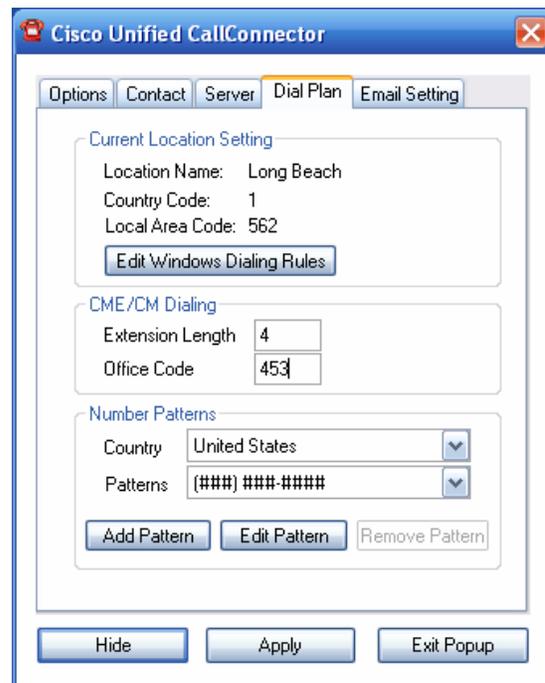
## Dial Plan:

The Dial Plan window has three sections:

**Current Location Settings:** This displays the current location settings from the Windows Dialing rules set for your personal computer. The current location parameters should set for the for the telephone system because the calls to the PSTN are made from this switch.

**CME/CM Dialing:** This section contains information related to internal (extension) dialing.

**Number Patterns:** This section allows you to define the area code and subscriber number lengths for each country. A default set of patterns are installed with the Cisco Unified CallConnector.



### Editing Dialing Rules

When a telephone number needs to be dialed the Cisco Unified CallConnector calls the Windows dialing rules to add the access and toll codes required to properly route the telephone call to the desired destination. These dialing rules have to be setup for your local area.

To setup or change the dialing rules, click on the Edit Windows Dialing Rules button to open the Phone and Modems window.

## CME/CM Dialing

These parameters are used for dialing extension numbers. The Extension number length is the number of digits are dialed for an internal number. The Office Code is used during lookup to pre-pend to the extension number.

## Number Patterns

The number pattern information is used to format dialable numbers into display or 'canonical' format numbers. Default patterns for most countries are stored. If your number format is not stored, then use the Add or Edit buttons to create patterns as needed. The number patterns must follow these rules:

Area code must be in brackets.

The Area Code and Subscriber number must be separated by a space.

Subscriber number can be separated for clarity by space, period or dash.

Numbers that do not require area codes, enter the number pattern without brackets.

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## Email Setting:

This information is used by the Cisco Unified CallConnector to send out SMS messages and to retrieve Outlook Contact information.

**SMTP Server:** The SMTP email server is used to send SMS messages. Enter the SMTP mail server address and port. The default port is 25. You will also need to fill in the email account information (address and the password).

**Outlook/Exchange Profile Setting:** This information is used to access your Outlook/Exchange contacts (for QuickSearch, and Directory Contacts). This information must be entered to allow the Cisco Unified CallConnector access to the Outlook information. Failure to properly setup the Outlook profile, could cause the Cisco Unified CallConnector or Outlook to terminate abnormally.

The screenshot shows the 'Cisco Unified CallConnector' window with the 'Email Setting' tab selected. The 'SMTP Setting' section contains the following fields: SMTP Server (smtp.minuteman.com), Port (25), a checked 'Required authentication' checkbox, Email account (prev@minuteman.com), and Password. The 'Outlook/Exchange Profile Setting' section contains a dropdown menu for Profile (set to Outlook) and a Password field. At the bottom of the dialog are three buttons: Hide, Apply, and Exit Popup.

## Logging In and Out

The Login/Logout capabilities are available on the Client/Server models of the Cisco Unified CallConnector. From the Cisco Unified CallConnector, you can view status and activities of other users. And vice-versa, your status can be monitored and viewed by other users. To be able to communicate with other users and share status, you will need to login to a Cisco Unified CallConnector Server.

### To Login to the Cisco Unified CallConnector Services

Right-click on the red **CallConnector** Popup icon in the system tray and click on **Options**. Then click on the Server Tab. It will display all the server settings. Please do the following:

If the 'Use UCC Server for extended features' option is not enabled, then click to enable the server option.

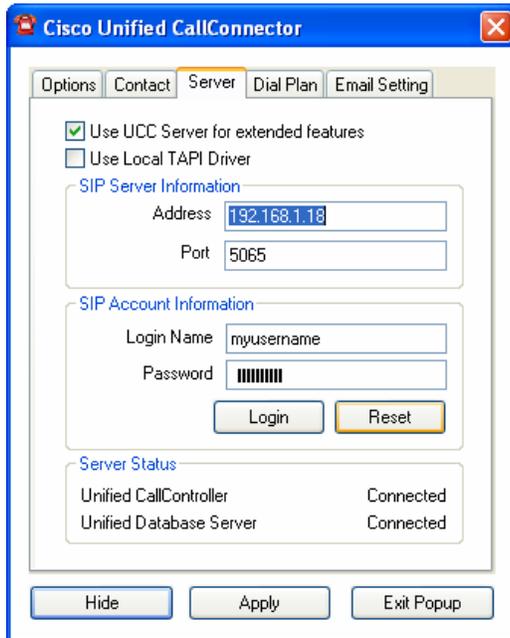
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Enter your name in the Login Name field.

Enter your password in the Password field.

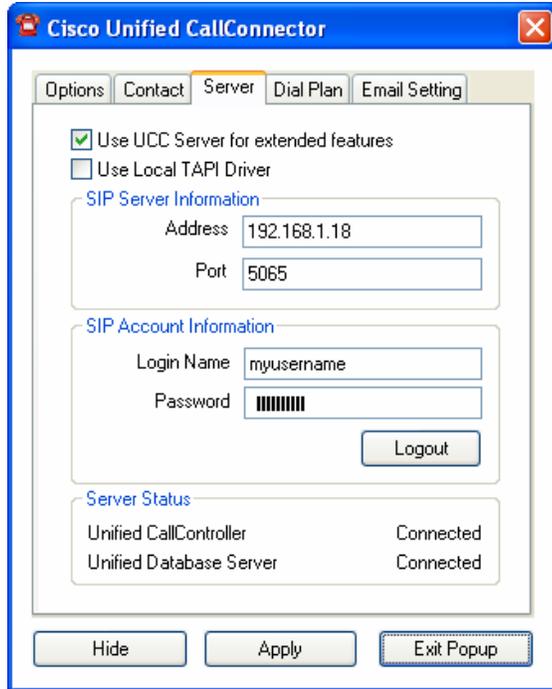
Click on the Login button to login. If you successfully logged it will only show the Logout button and not the Login or Reset button.

NOTE: If you are changing the operating mode of the CallConnector, then you will need to re-start the Popup application.



## To Logout of the Cisco Unified CallConnector Services

Assuming that you are logged in as shown below, the **Logout** button should be present. Press the **Logout** button. You will notice that the CallConnector Popup icon in the system tray is grayed out because UCC Services are no longer available because you are logged out.



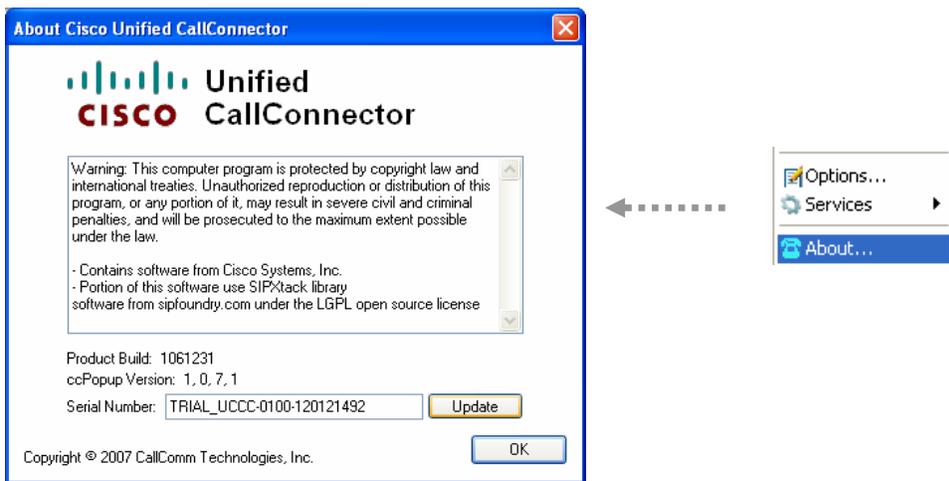
## Services

Open CallConnector Popup menu. Then move the mouse over to the **Options** button and a sub menu will appear. The submenu shows the user which services are **started** and which services are **stopped**. Also, the service



## About

Open CallConnector Popup menu. Then move the mouse over to the **About** button and click on it. It will bring up the **About** dialog. The About dialog contains Cisco Unified CallConnector version information as well as copyright information.



### ***To Change from Trial to Serial Number***

Your current serial number is displayed in at the bottom of the About window. If your Cisco Unified CallConnector software is running in the evaluation or trial mode, then the serial number field will have TRIAL in front.

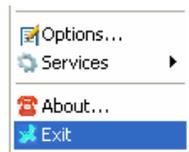
Enter the serial number in this field and click on Update. This will replace the current serial number with the new value you have entered.

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Restart the Popup application to activate the new serial number.

### **Exit:**

Open CallConnector Popup menu and click on the **Exit** button. This will cause the CallConnector Popup and all local services to shut down.





# QuickSearch

The Unified CallConnector QuickSearch feature allows you to locate your contacts and initiate communication sessions. You can access QuickSearch from any Windows application. Some of the communication sessions you can setup include making calls, sending messages (email and text) as well as opening up collaborative functions of Outlook.

This chapter describes how to use the QuickSearch and includes:

<b>QuickSearch Overview -</b>	Provides a brief overview of the QuickSearch function.
<b>QuickSearch Options</b>	This summarizes the Unified CallConnector Options that affect the QuickSearch functions.
<b>Opening QuickSearch -</b>	Describes how to open the QuickSearch window from Internet Explorer, Outlook and any Windows application.
<b>Locating Contacts -</b>	Describes how to locate contacts using the QuickSearch interface.
<b>Starting Communication Sessions</b>	The Action Menu provides the selected contact's details together with the communication access methods. This section describes how to initiate these communication sessions.
<b>Troubleshooting QuickSearch</b>	This summarizes the Unified CallConnector Options that effect the QuickSearch functions.

## QuickSearch Overview

The Unified CallConnector QuickSearch feature allows you to quickly search your contact lists to locate a contact. The contacts can be searched from the Outlook personal contacts folder, and from the Unified CallConnector personal and corporate directories. You do not have to switch to a particular application to locate your contacts. You can popup QuickSearch from any application that you might be currently working in. Once you have located a contact, QuickSearch displays the contact details in a menu from which you can also view the current availability status of your contact and click to open the most appropriate communication session. In summary, QuickSearch allows you to:

- Locate your contacts from within any application.
- The QuickSearch field is also displayed in the CallConnector toolbars in Internet Explorer and Outlook.
- Search by entering the first few letters of the contacts name.
- Performs searches over multiple directories – Outlook, and the CallConnector Personal and Corporate databases.
- Displays a list contacts along with their availability, full name and organization.
- Display the Work, Home and Mobile numbers for the selected contact.
- Displays the Email, Text and IM addresses for the selected contact.
- Displays the details of the availability, location and away message for the selected contact (Available with UCC Server only).
- Allows you to click and open contact details, schedule meeting and reminders, take notes or Google the number for more information.
- From the QuickSearch, you can make calls, send email/text messages.
- In addition to searching, you can enter a telephone number and auto-dial it from your phone.
- Display a list of the last numbers dialed to allow you to easily redial from the list.

## Types of Searches

When you type in the first few letters of a name, QuickSearch look for the matching name in three directories at the same time. Icons in the search result indicate the location of the contact.

	<b>Corporate Contacts:</b> These names and contact details are from your corporate directory. The corporate directory is a list of contacts that is shared among all the Unified CallConnector users in the server configuration.
	<b>Personal Contacts:</b> These names and contact details are from your personal directory. The personal directory contains your list of contacts that is not visible to any other Unified CallConnector user.
	<b>Outlook Contacts:</b> These names and contact details are from your personal Outlook contacts folder.

## QuickSearch Options

The following Unified CallConnector Options affect the QuickSearch. The Options are detailed in the Popup Window chapter and are listed here.

- Enable Directory Lookup: This enables lookup in the CallConnector directories.
- Enable Outlook Lookup: This enables lookup in the Outlook contact list.
- Search Options – Minimum Characters: The number of characters that have to be entered before a search is started.
- Dial Plan parameters: Define the conversion rules for automatically dialing a number.
- Email Settings – SMTP settings are used for sending the Text (SMS) messages.
- Email Settings – Outlook/Exchange Profile settings are used to connect to the exchange server.

## Opening the QuickSearch Window

The QuickSearch features are available from the following areas:

- QuickSearch Window
- QuickSearch field in the Unified CallConnector toolbar in Internet Explorer
- QuickSearch field in the Unified CallConnector toolbar in Outlook

### To Open QuickSearch Window

The CallConnector Popup application must be started and running. If you are running in the server mode, you must be logged in to the CallConnector server.

- Press the **Pause-Break** on the keyboard. You can be in any Windows application when you press this QuickSearch button (Pause-Break key).
- You can also right-click on the Popup icon in the system tray and select the Dial menu item.
- The QuickSearch window will be displayed as shown below.



#### Notes:

The CallConnector Options should have the Lookup Options enabled. The Directory Lookup option enables searching in the Personal and Corporate directories, and Enable Outlook Lookup enables searching in the Outlook personal contacts.

If you are an exchange user then the Exchange login information should have been entered in the profile settings in the Email section,

### **To Close QuickSearch Window**

- Press the CANCEL button or press the ESC on the keyboard.
- You can also click on the X (Close Window) button on the top right hand corner.
- QuickSearch window will be closed.

### **QuickSearch in Outlook and Internet Explorer**

The CallConnector toolbar in Outlook and Internet Explorer displays the QuickSearch field as shown below.



To access the QuickSearch function in the toolbars, click in the QuickSearch field and enter the search text.

## **Locating Contacts**

To locate your contacts using QuickSearch, make sure you have the Unified CallConnector services running and the toolbars open in Outlook and Internet Explorer, if you are searching from the toolbars.

### **To Locate Contacts**

- If you are using Internet Explorer or Outlook, click on the QuickSearch bar. If you are in some other application, then you can press the QuickSearch button to open the QuickSearch window.
- Type in a few letters of the name of contact. The search looks for the first name and then last name. You can enter the one or two letters of the first name and optionally space and the first one or two letters of the last name.
- Once you have entered the minimum letters specified in CallConnector Options, the QuickSearch will initiate the search and return results in a pull-down list.
- The lookup is performed on each of the directories that have specified in the CallConnector Options. For each contact found in the directories, QuickSearch displays the current availability (if available) as an icon, the directory in which the contact was found, the name of the contact (first and last name) and the name of the contact's organization or company. For example if you enter the letters "dav", then it will show you all the first names starting with "dav" such as Dave, David, Davis, etc. The more letters you type in the more narrowed down the results become. So after "dav" if you enter in the letter "i" (davi), then the results will show "david" and "davis".

- You can search on first and last name. For example, if you enter 'da' then space followed by the letter 'r', the search result below will narrow down to 'David Robinson'
- You can use the arrow keys to scroll down to desired contact name or use the mouse to select an entry.
- Press Enter or click on a name. This will display a menu with the contact details – the Action Menu'. You can make a call; send messages or setup collaboration sessions from this menu.
- Press Escape to close the drop down results.

**Notes:**

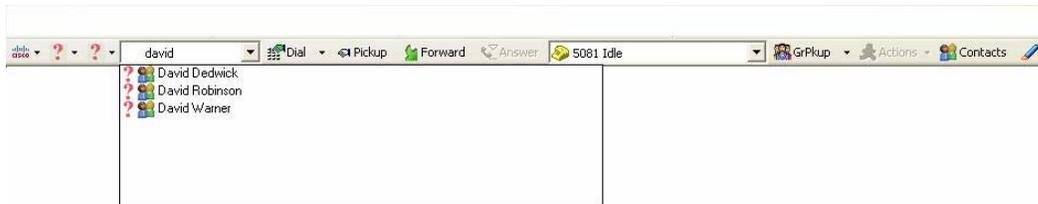
The 'Minimum Search Letters' in the CallConnector Options specifies the number of characters you need to enter before the search is started.

### Example of Search Sequence

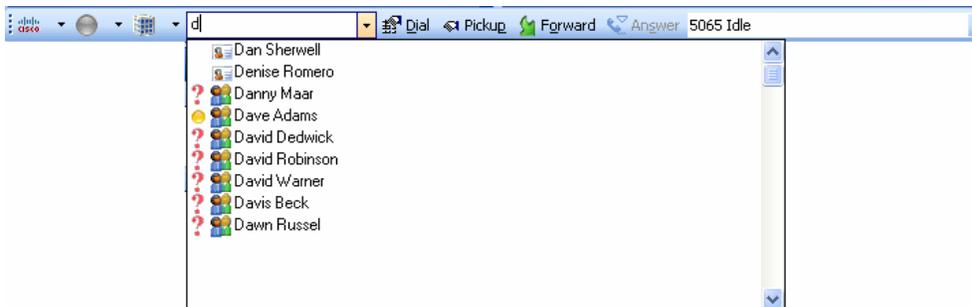
Internet Explorer: Enter the first few letters of the first name in the QuickSearch field of the CallConnector toolbar.



A drop-down list shows the results of the search. As you enter more letters the drop-down list displays only the names that now match the characters you have entered.



The figure below shows the same search in the Outlook CallConnector toolbar.



The figure below shows the same search in the CallConnector QuickSearch window.

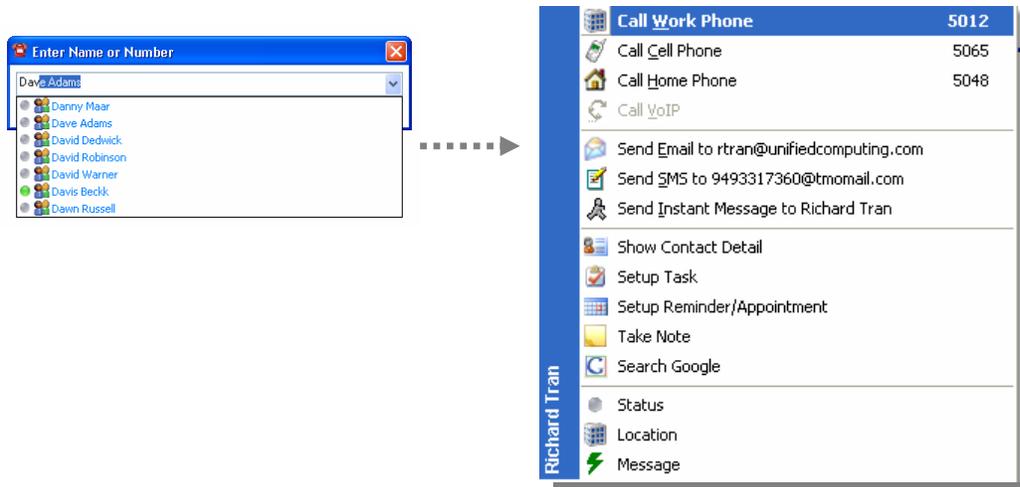


## Starting Communication Sessions

When you select a contact from the search results list, the contact details and together with their communication methods are displayed in the **Action Menu**. From this menu, you can place calls to the contact's different phone numbers, make notes or setup reminders, send emails, message, IM, view contact detail, search for this contact on Google, or setup tasks involving this contact or communication.

The Action Menu brings together several pieces of information to allow you to setup the most appropriate communication session with your contact and while you are communicating with your contact setup the follow-up work-items.

- View Availability:** Displays the current availability of the person that you are trying to reach. This includes their status, location and any message the person for people trying to reach them. This information can help you decide on the communication method best suited to reach your contact. Note: In the first release the availability information is displayed for people within your organization.
- Place a Call:** The Action Menu displays the available work, cell or mobile and home telephone numbers of your contact. You can select the appropriate menu entry to place a call to that number.
- Send a Message:** You can send a message to your contact. From the Unified CallConnector you can send an email, a text or SMS message to the contact's cell phone, or an Instant Message (UCC Server mode only) to a Unified CallConnector colleague.
- Start a Business Process:** As a follow-up to a call or a email message, you may need to initiate a business activity such as taking notes during a call, setting up meetings, appointments or reminders. The Unified CallConnector action menu makes these functions available to you with a single mouse click.

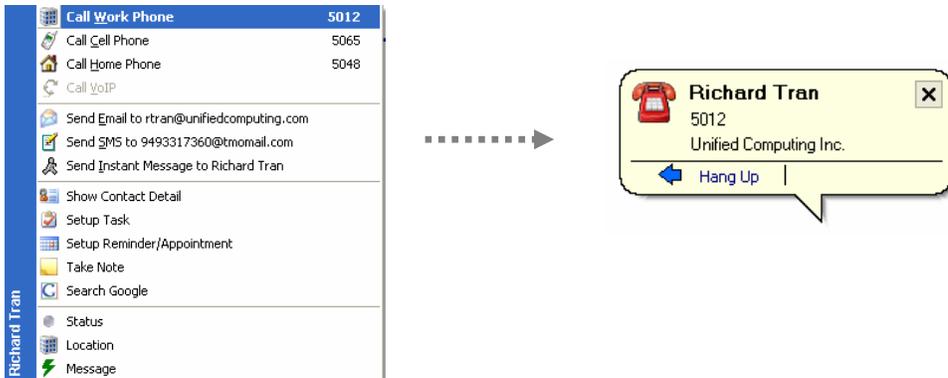


### Action Menu Items

Menu Item	Description
Call Work	Click to make a call to the contacts work number
Call Cell	Click to make a call to the contacts cell or mobile number
Call Home	Click to make a call to the contacts home number
Take Notes	Open a New Outlook Note window
Find Colleagues'	Locate contacts that are in the same department or organization
Send Email	Open the email send message window with this email address inserted in the To field.
Send IM	Open a Unified CallConnector Instant Message window addressed to the selected contact
Send SMS	Open a Unified CallConnector Text Message window addressed to the selected contacts SMS providers address.
Show Contact Details	Opens the Outlook Contact details for the selected contact
Search Google	Opens a Web page to the Google URL and searches for the contacts name or number
Setup Remainder	Opens the Outlook Appointments window
Setup Tasks	Opens the Outlook Tasks window to allow you to enter a new task
Status	Displays the current availability status of the contact both icon and text
Location	Displays the current location of the contact
Message	Displays any message that has been posted by the contact

### Make a Call

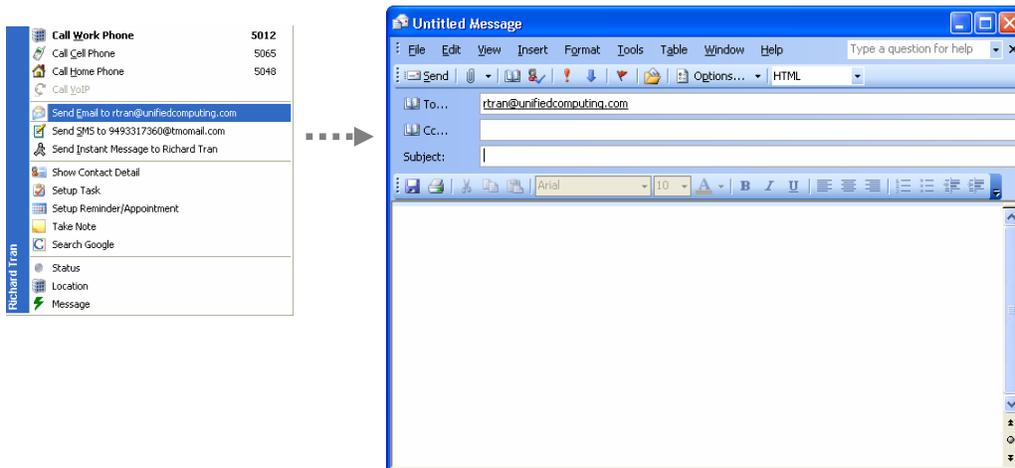
- Scroll down to the desired number to call. Available choices include the work telephone number, cell or mobile telephone number or the home telephone number.
- Press Enter or Click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will place the call to the number from your IP Phone. The number dialed is converted to a dialable number, that is the required prefixes and conversions are made to the number string before it is dialed.



### Send an Email Message

- From the CallConnector Action menu you can send an email, text or SMS message to a cell phone or an instant message to a colleague.
- Scroll down to the **Send Email** menu item.
- Press Enter or Click on the email menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open the Outlook New message window with the email address populated in the **To** field. Note: The email address needs to be available in the menu for the **To** field.

You can enter the subject and the message body and click on send to transmit the email.



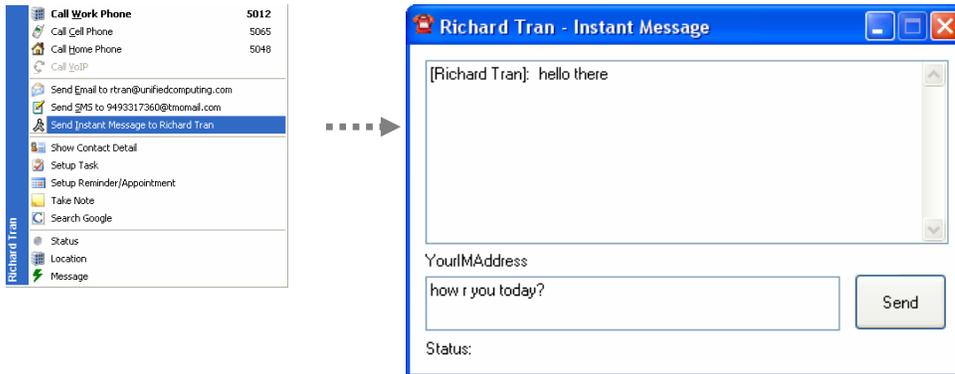
### Send a Text Message

- Scroll down to the **Send SMS** menu item.
- Press Enter or Click on the Send SMS menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open the Send Text Message window with the SMS address populated in the **To** field. Note: The SMS address needs to be available in the menu for the **To** field.
- You can enter the subject and the message body and click on send to transmit the message.



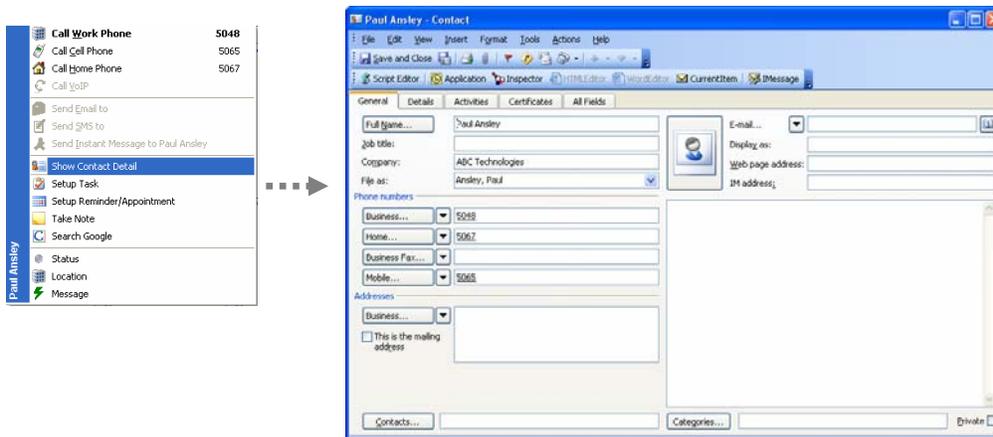
### Send an Instant Message

- Scroll down to the **Send IM** menu item and press Enter or Click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open the Instant Message window and start a Instant Message session with your contact. Enter your message in the send box below and click on Send or press Enter. The Instant Message will be send and popup at your colleagues desktop.
- The Status area displays the



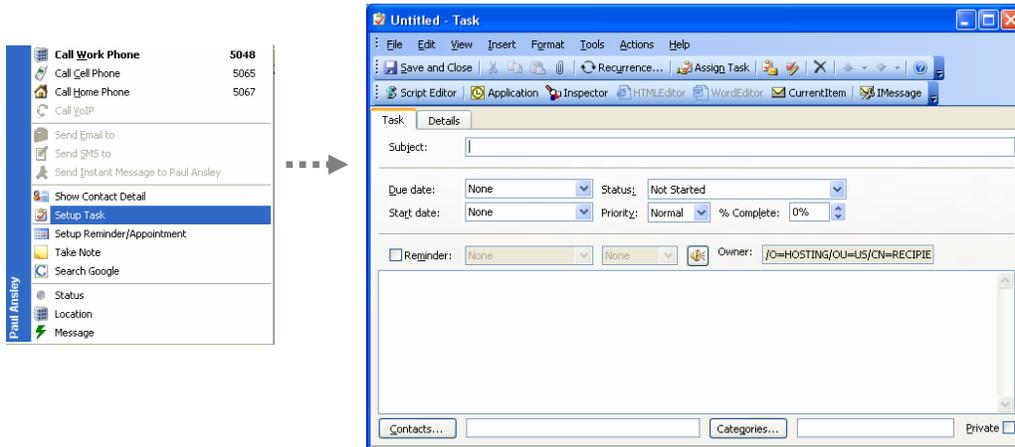
### View Contact Details

**Show Contact Details** Opens the Outlook contact detail window. If the contact is not an Outlook contact then this will not open the detail window. Scroll down to the Show Contacts Detail, press Enter or click on the item. The CallConnector will bring up the Outlook detail window.



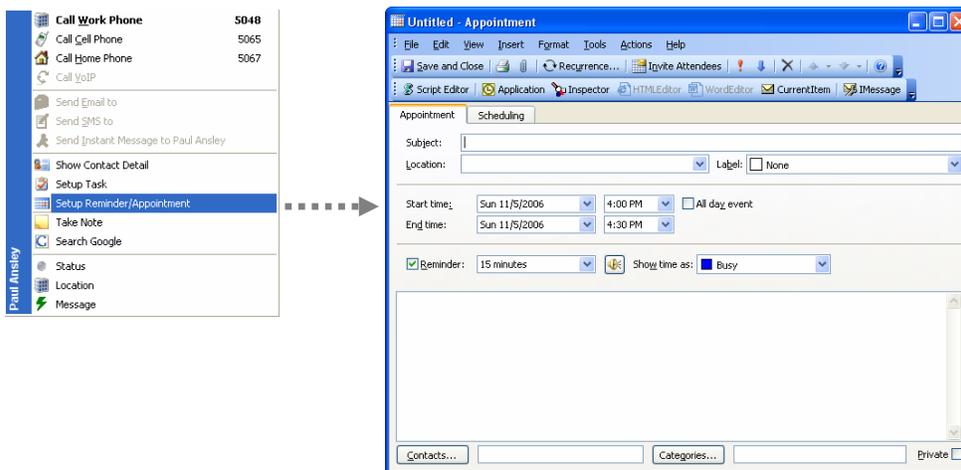
## Setup a New Task

- Scroll down to the Setup Task menu item and press Enter or click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open the Outlook New Task window.
- You can enter the subject and the task details and save the information.



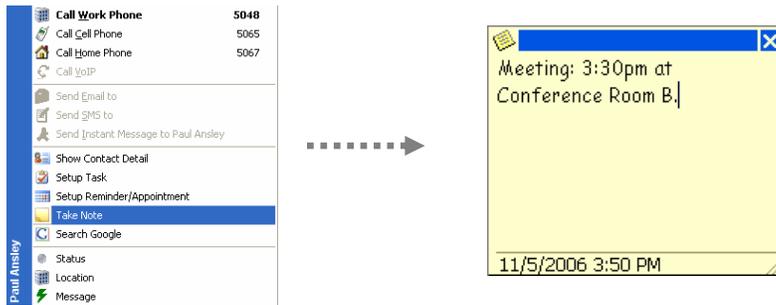
## Setup Remainder/Appointments

- Scroll down to the Setup Remainder/Appointment menu item and press Enter or click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open the Outlook New Task window. Enter the subject and the appointment details and save the information.



### Take Notes

- Scroll down to the Take Notes menu item and press Enter or click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open a new Outlook Notes window. Enter the notes.
- 



### Search Google

- Scroll down to the Search Google menu item and press Enter or click on the menu item. You may also press the underlined letter to select the menu item.
- The CallConnector will open a new browser window to the Google home page and start a search for the caller's telephone number.

## View Status

The contact's presence information in the Action Menu shows their current availability (available, busy, away, unavailable), where they are at this time location (home, work, road, vacation), and message which can be any text string.

	<b>Call Work Phone</b>	<b>2091</b>
	Call Cell Phone	5048
	Call Home Phone	5067
	Call VoIP	
<hr/>		
	Send Email to phi@asianrestaurant.com	
	Send SMS to 54654654@tmomail.net	
	Send Instant Message to Phi Chi	
<hr/>		
	Show Contact Detail	
	Setup Task	
	Setup Reminder/Appointment	
	Take Note	
	Search Google	
<hr/>		
	Status	Busy
	Location	Work
	Message	In a Conference

CHAPTER

7

# QuickDial

The Unified CallConnector QuickDial provides an integration of the PC-based phone numbers with the telephone system at a basic level by auto-dialing these numbers from within any application. This chapter describes the several methods supported by the QuickDial feature and includes:

This chapter describes how to use the Directory and includes:

- |                                     |   |
|-------------------------------------|---|
| <b>QuickDial Overview:</b>          | Provides a summary of the QuickDial feature and the different autodial methods.   |
| <b>Select-n-Dial:</b>               | Describes the method for auto-dialing any number that can be highlighted in any application.  |
| <b>Highlighter for Web Dialing:</b> | The Highlighter is a feature of the Internet Explorer toolbar that lets you turn telephone numbers in a web page into a dial-able button. This section describes the Highlighter feature.   |
| <b>Dial from QuickSearch:</b>       | Describes the method for bringing up the dial window from any application and enter the number to dial.   |
| <b>Outlook Menus:</b>               | A number of the Unified CallConnector features are available from within the standard Outlook menus. This section describes how to use the Unified CallConnector features from these menus. |

## QuickDial Overview

The QuickDial feature of the Unified CallConnector provides several methods of using the contact information; specifically telephone numbers that may be stored in various different applications to auto-dial and make calls. QuickDial provides computer-telephony integration for all Windows applications without requiring any changes to the application. The Unified CallConnector provides multiple methods for Quick-Dialing which support the following capabilities:

- User selection of the number from any Windows application.
- Conversion of the number to a dialable format.
- Auto-dialing of the number from your IP-phone.
- Display of call progress on the various CallConnector interfaces.
- Control of the call from the CallConnector interfaces.
- Integration of the call with your business processes using the CallConnector functionality.
- Keeping a record of the call in the CallConnector Call Logs.

The different QuickDial methods include:

**Select-n-Dial:** Select a number in any Windows application and click on the auto-dial Unified CallConnector phone icon..

**Highlighter:** Converts numbers displayed on a web page into dial-able buttons.

**QuickSearch Dialing:** Open QuickSearch window from any application and enter the number to dial.

**Outlook Menu:** Since Outlook menus have the CallConnector features embedded in them including dialing the different contact numbers.

## Select-n-Dial

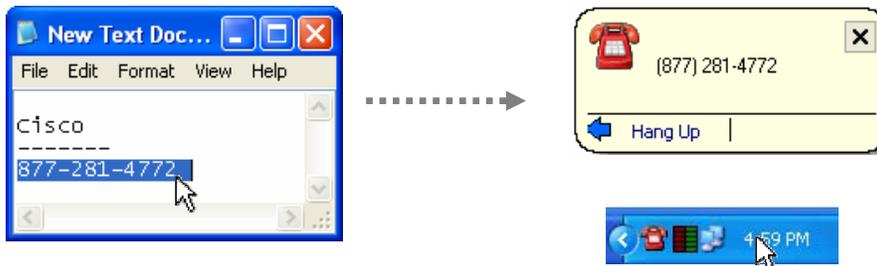
The Select-n-Dial method of QuickDial allows you to select a number just as though you are going to copy it from any Windows application, and then click on the Unified CallConnector system tray phone icon to auto-dial it.

**Note:** Some Windows applications do not allow a number to be selected. The Select-n-Dial method will not work for these applications.

## To Select-n-Dial:

- Make sure that the CallConnector Popup application is running.
- Select the telephone number by holding down the left-mouse button and moving the mouse over the number. The application needs to allow you to copy the selected text. Also the selected text should be in the telephone number format.
- Click on the Popup icon in the system tray.
- The CallConnector will auto-dial the number and the Popup Window will be presented to display the Call information.
- To drop the call, you can click on **Hang-up** in the Popup Window or right-click on the Popup icon and click on the **Hang-up** menu item.

**Note:** If the Select-n-Dial is not working, you can check in the clipboard to verify that the number can be copied.



## Highlighter for Web-Dialing

The Highlighter feature scans the web page you are currently browsing looking for telephone number patterns. If it detects telephone numbers, it will convert the number into a clickable button. A page may have many telephone numbers. You can click on any of these telephone number buttons to make a phone call to the number.

### **Patterns Recognized by Highlighter:**

- A text string is considered to be a telephone number if it has the following characteristics:
- Outside line number.
- Open and closed parentheses.
- 7 to 10 digit number.
- Dashes found in the string of consecutive numbers.

### **Web Page Formats Not Recognized by Highlighter:**

- Numbers that are within tables and/or scripts or in separate frames in the web page may not be recognized by the Highlighter.
- Numbers that are not well-formed i.e. not in 'canonical' telephone number format.
- Numbers that are local numbers without country code and without brackets
- If the analyzer fails at a particular number string, subsequent numbers on that page may not be converted to a dialable link,

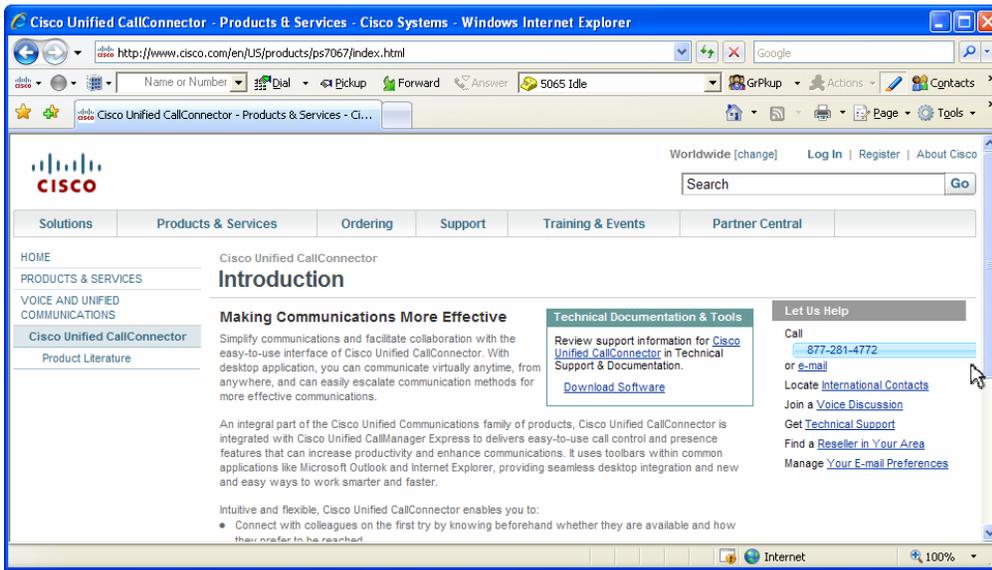
### **To Use the Highlighter Button:**

- Browse to the page that you want to dial from.
- Click on the Highlighter button on the far right hand corner of the Toolbar.
- Recognized text strings will be converted to a clickable button (highlighted in light blue).
- Click on the desired telephone button to make a call to the number.
- The number will then be dialed and a Popup Window will be shown on the screen.

### **Right-Click Menu**

- Right-Click on a Highlighted telephone number in the web page. The menu will display the following options:
- Dial - to place the call,
- Transfer and Conference - to transfer or conference your current call to the highlighted number.
- Create Speed or Outlook Numbers - allows you to add the number in your contact database.

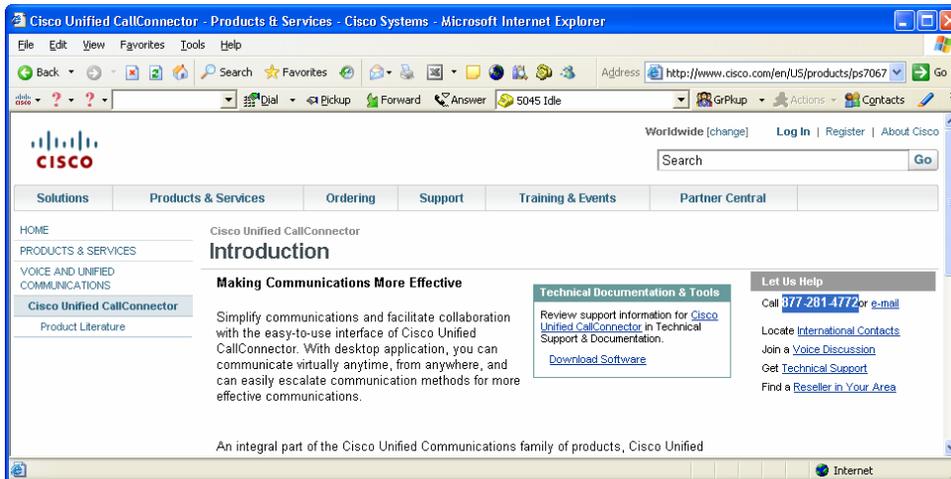
Clicking on the Highlighter Button on a Web Page



**To Use Select-n-Dial on a Web Page:**

- You can, of course, use the Select-n-Dial feature on any web page.
- Highlight the desired phone number.
- Click on the UCC system tray icon (red telephone icon) to make the phone call to that number.
- The number will then be dialed and a Popup Window will be shown on the screen.

## Select-n-Dial on a Web Page

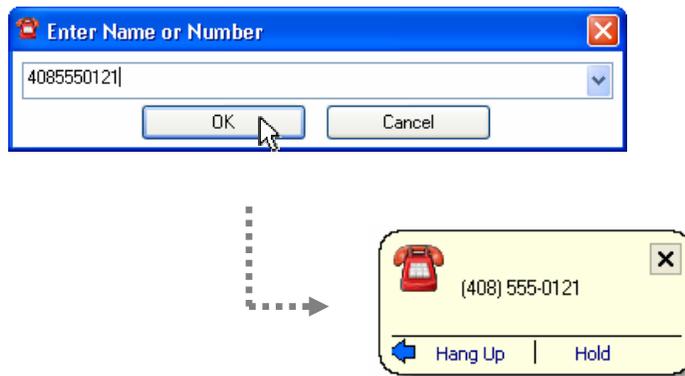


## Dial from QuickSearch

The QuickSearch window allows you to enter a number and place a call from within any Windows application.

### To dial using the QuickSearch window from any application:

- Run any Windows application.
- Press the **Pause Break** key and the QuickSearch window will be displayed.
- Type in the desired telephone number and press **enter** or click **ok**.
- An outgoing call will be made to that number.



## Outlook Menus

The following Outlook menus are embedded with the Unified CallConnector features:

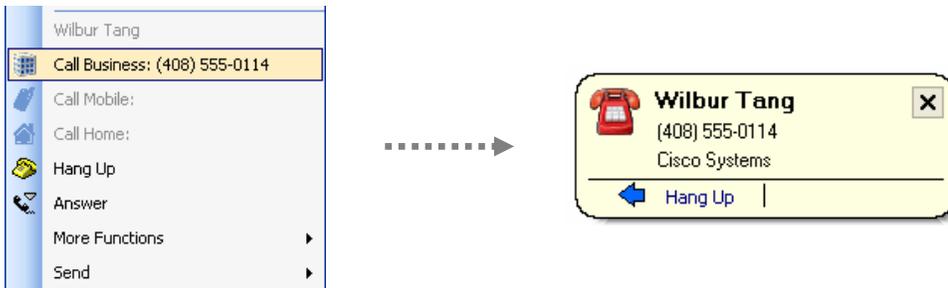
- Click on a Outlook Contact
- Right-click in Contact

The CallConnector fields available in these menus include:

CallConnector Fields	Description
Call Business	Makes a phone call to the contact's work phone number.
Call Mobile	Makes a phone call to the contact's cell phone number.
Call Home	Makes a phone call to the contact's home phone number.
Hang up	Terminates the current phone call.
Answer	Answers the current ringing phone call.
Transfer	Transfers the current call to the contact's work phone number.
Conference	Conferences the current call with the contact's work phone number.
Send SMS	Send a text message to this contact.
Send IM	Send an instant message to this contact.

### **To Quick Dial from Outlook Contacts:**

- Open Outlook.
- Click on Contacts from the Outlook menu on the left-hand side.
- It will display your Outlook contacts.
- Right-click on the desired contact and it will bring up a menu with CallConnector features located at the bottom.
- Click on the Call Business, Call Mobile, or Call Home menu item.
- A call will then be made to the phone number selected.



### **To Quick Dial the Contact's Work Number:**

- Open Outlook. Click on Contacts from the Outlook menu on the left-hand side. It will display your Outlook contacts.
- Click on the desired contact. The work number of the contact is placed in the CallConnector toolbar in the search box.
- Click on the Dial button in the toolbar to auto-dial the number.

**To Dial Using Outlook Dial Buttons:** 

- Open Outlook. Click on Contacts from the menu on the left-hand side. It will display your Outlook contacts.
- Click on the contact that you would like to call.
- Click on the dial button located above the Unified CallConnector Toolbar in Outlook.
- Then click on the **start call** button.
- It will make a call to the number dialed.

Contacts			
	Full Name	Company	File As
Click here to add a new C...			
	Carla Donald	Cisco Systems	Donald, Carla
	Charlie Garcia	Cisco Systems	Garcia, Charlie
	Honna DeMarco	Cisco Systems	DeMarco, Honna



**New Call**

Number to dial

Contact:

Number:

Create new Journal Entry when starting new call

Call status: On hook



**Carla Donald**

(408) 555-0100

Cisco Systems

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Hang Up

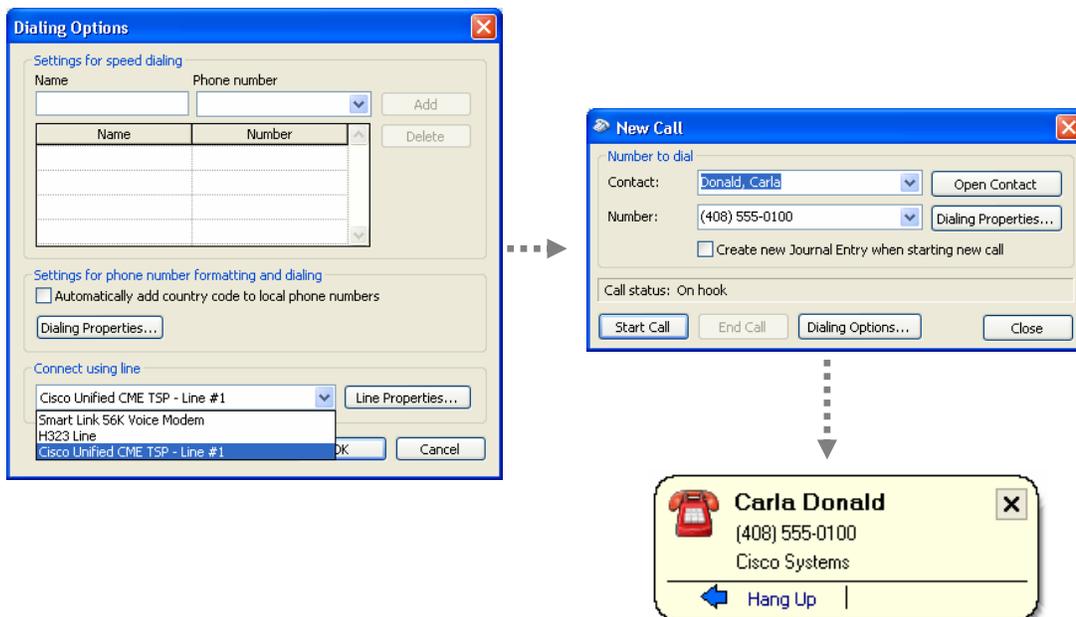
## CallConnector TAPI Driver

The CallConnector TAPI Driver is installed for use in the Personal and Local modes of operation. TAPI-enabled Windows applications such as Outlook, Windows Dialer, can use this TAPI Driver to make calls.

Note: The CallConnector TAPI Driver is not available to other applications.

### To Dial Using the CallConnector TAPI Driver:

- Open Outlook and click on Contacts from the menu on the left-hand side. It will display your Outlook contacts.
- Click on the contact that you would like to call.
- Click on the dial button located above the Unified CallConnector Toolbar in Outlook.
- A **New Call** Window will appear. Then click on Dialing Options.
- The **Dialing Options** window will appear.
- Then select the CME Telephone Server Provider as the TAPI Driver where it says **Connect Using Line**. Then click **OK**.
- The CME TSP Must be properly configured and running for this feature to work.
- Use the application dial button to place the call.
- A call will be made to the phone number dialed.



# Using Toolbar

The Unified CallConnector allows you to control the calls on your IP Phone from the Internet Explorer and Outlook Toolbars. You can also locate contacts, send messages and change your presence status.

This chapter describes the features available from the CallConnector Toolbars and how you can use them. It includes:

<b>Toolbar Overview:</b>	Describes the different attributes and functionality available from the Toolbars.
<b>About Menu:</b>	Describes the different features of the about menu such as opening the help window, contacting support and sending error reports.
<b>Changing Presence Status:</b>	Describes how to change your availability and location status and away message.
<b>Using Toolbar Search:</b>	Briefly describes the QuickSearch bar in the Toolbar. For Details see the Chapter on QuickSearch.
<b>Controlling Calls:</b>	Describes how to use the toolbar buttons to control the call on your IP Phone.
<b>Viewing Line Status:</b>	The Toolbar lets you handle calls on multiple lines. This section describes how to view and the status of your lines and select a line to make calls.
<b>Telephony Features:</b>	This is the toolbar menu that contains the telephony features available from your IP Phone. These features are described in this section.
<b>Action Menu:</b>	When you are on a call and the CallConnector populates the Action Menu with the contact details and communication access methods for the person that you are talking to. This section describes how you can use this information.
<b>Viewing Contacts:</b>	The Contacts window allows you to open the CallConnector information windows showing the speed shortcuts, directories log and status windows.
<b>Using Highlighter:</b>	The Highlighter, available in Internet Explorer only, allows you to convert numbers on the web page in to dialable buttons. This describes how to use the Highlighter.

## Toolbar Overview

The Unified CallConnector toolbar integrates and provides quick access to your contact and methods for communicating with them. These methods are available from within the applications that you use every day – the Microsoft Office family members Outlook and Internet Explorer. Instead of switching between multiple applications, the Unified CallConnector brings to you, in your workspace, information on incoming calls with the caller number looked up in your contact lists so that you can see who is calling. It also combines this information with the ability to answer, transfer, conference or drop the calls from your desktop. You can quickly locate your contacts, viewing their current availability status and so that you can select the most appropriate method for communication with them – including sending them messages as email, text message or instant message or place a call to their work, mobile or home numbers. You can provide your whereabouts and reachability information to your colleagues and view their status to promote more effective and efficient communication.



Toolbar Functions	Descriptions
About Menu:	The About menu provides access to the help file, links to the support and product information, CallConnector Options window and facilities for reporting problems.
Presence Status	These two buttons display your current availability and location. Each is associated with a pull-down menu to allow you to change your presence states. This information is propagated out to your colleagues.
QuickSearch	The QuickSearch combines three functions – a place to enter a number for auto-dialing, a search bar for locating contacts and a pull down list providing the last ten dialed numbers to let you redial them.
Call Control Buttons	The Call Control buttons provide access to the telephone features of your IP Phone. These are call-state context sensitive, that is they change based on the state of the active call in the Line Display list. From these Call Control buttons, you can make calls, answer calls, transfer, conference etc.
Line Display	The Line Display shows the current status of all the lines on you IP Phone. It shows off-hook, dialing, ringing, connected, hold, conference, busy, and idle status. The Call Control buttons are applied to the selected line.
Feature Menu	The Telephone Features menu displays a list of all the telephone features supported by the CallConnector.
Action Menu	The Action menu
Contacts	The contact button allows access to the CallConnector sidebar which features speed dial, viewing contact directories, viewing call logs, and viewing users' presence status.
Highlighter	This button when used on any web page will highlight every phone number and turn it into a clickable link. When the user clicks on a telephone link, it will dial out to the phone number selected.

The Unified CallConnector toolbars can be viewed in the Microsoft Outlook and Internet Explorer. These toolbars are complemented by information windows (sidebars) from which you can view your personal and corporate contacts and look up the availability of your colleagues. These information windows are described in the next few chapters. This chapter provides detailed instructions for using the CallConnector toolbars.

### ***Differences between IE and Outlook Toolbars***

Small differences exist between the CallConnector toolbars in Outlook and Internet Explorer. These are listed below:

- The Internet Explorer CallConnector toolbar needs to be manually enabled for viewing. This needs to be done once and the Internet Explorer remembers the setting. The Outlook CallConnector toolbar is loaded automatically.
- The shortcut keys for accessing the different function may be different in the two toolbars depending on the availability of unused shortcut keys in the two different applications.
- The Contacts button opens the CallConnector View window in Outlook and the sidebars in Internet Explorer. In Outlook the CallConnector view can be opened by clicking on the CallConnector menu item in My Contacts, while the CallConnector toolbar and sidebars can be opened and closed from buttons in the standard Internet Explorer toolbar.
- In the Internet Explorer, there is a right-click menu (available from a non-CallConnector toolbar) from which you can re-connect to the CallConnector services.
- The Speed Dial menu is not available from Outlook toolbar.
- Outlook toolbar can be dragged and docked any of the four sides of the Outlook window.

### ***Toolbar States***

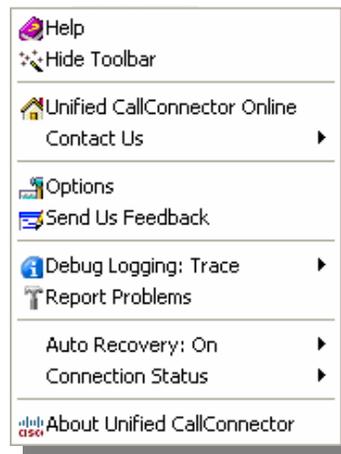
The toolbars and sidebars use some controlling software that provide the connections to the communication systems such as the Cisco CallManager Express. These controlling software or services provide the ability to control calls, access the directory data, view presence status and also the inter-process communications. If any of these services are not available, then the related parts of the toolbar and sidebar windows are disabled and grayed out. Examples of one of these states are shown below -  
Telephony Services not available – is shown below.



## About Menu:

This menu features different miscellaneous options such as:

- **Accessing Unified CallConnector Help:** You can access and search the help file for different Unified CallConnector topics, how-to instructions, and trouble shooting.
- **Hiding the toolbar:** This option will hide the toolbar. This has the same effect as right clicking on the other toolbar (not Unified CallConnector) and unselecting the Unified CallConnector.
- **Getting Additional Unified CallConnector Information:** This provides a link to the Unified CallConnector website.
- **Contacting Unified CallConnector Support:** This allows you to send an Email to the Unified CallConnector Team or place a call to the support group.
- **Change CallConnector Options:** This option opens the CallConnector Options window. This is the same as right-clicking on the Popup tray icon and click on Options.
- **Send Us Feedback:** This option allows you to send comment, feature and enhancement requests to the development team via email.
- **Enabling/Disabling Debug logging,** This option will enable and disable the debug logging, which writes debug entries to the trace files.
- **Reporting Problems to the UCC team:** This option allows you to send an email describing the problem you are experiencing along with the debug files and the module and PC software versions.
- **Auto-Recovery:** This option allows you to turn on or off the re-try attempts to open and connection after failure.
- **Connection Status:** This displays the status of the CallConnector server/services that are used by the toolbar.
- **Checking version information:** This option will show the version information of the all the Unified CallConnector components and the copyright statement.



---

## Reporting Problems

If you are experiencing some problems with the Unified CallConnector, you can enable the software options to collect the debug logging information and send these trace files to the Unified CallConnector support team.

### **To Enable Debug Logging:**

- Click on the Cisco logo in the toolbar and select the Debug Logging option from the menu.
- A menu of the debug levels will be displayed from the severest error to debug tracing. Depending on the level you select, only that and higher levels of debug information will be written other trace files. By default the logging is set to write error conditions. Your support team may ask you to set the debugging to a different level depending on the nature of the problem.
- Click to select the debug level and enable writing to the log files.

### **To Disable Debug Logging:**

- Click on the Cisco logo in the toolbar and select the Debug Logging option from the menu.
- A menu of the debug levels will be displayed from the severest error to debug tracing.
- Click on the Disable Logging menu item. This will disable writing to the log files.

### **To Report a Problem:**

The following steps can be used to collect and report CallConnector problems to your support team:

- Click on the Cisco logo in the toolbar and enable debug logging to the desired level. This will generally be the Debug or Trace levels. Note that more information is written for each successive levels.
- Exit and restart the Unified CallConnector.
- Run through the scenario to recreate the problem.
- Click on the Cisco logo in the toolbar and select the Report Problem option. This will open a Send Message window as shown below.
- Describe the problem in detail with the steps for re-creating the problem or the conditions in which the problem occurs.
- Enter your TAC case number and add TAC contact's email to the send address.
- Enter your contact information.
- Send the email. The CallConnector automatically collects the system environment and CallConnector module versions along with the trace files and sends the message to the support group.

NOTE: Customers with a Cisco Support contract may also open a TAC case using the usual procedure as documented on Cisco.com ([www.cisco.com/go/support](http://www.cisco.com/go/support)). Using this

tool does not open a new Cisco TAC case for support of the issue being reported, nor is in guaranteed that someone from Cisco will contact you.

## Changing Your Presence Status

Presence Status is the information that you make available to your colleagues about your whereabouts and reachability. This makes it possible for your organization operate more efficiently by reaching available people with the right skills, using the most appropriate methods to reach a person. Your Presence status can also be associated with rules to take your incoming communication requests and routing them based on your personal settings. (Both the Presence Services and Rules functionality require additional Unified CallConnector Server components).

This section describes how you can use the toolbar buttons to change your presence status. There are four components to the presence status: Availability (Available, Unavailable, Busy, Away) and Location (Work, Home, Road, Vacation), Away Message (Stepped Out, Away from Keyboard, Busy, Be Right Back, etc) and your IP Phone status. You can change your presence status from the Toolbar buttons. For more information on view the current status of your colleagues, please refer to Chapter 12: Viewing Presence Status.

Availability Presence States	Description
 Unavailable	User status: <b>Unavailable</b> .
 Available	User status: <b>Available</b> .
 Away	User status: <b>Away</b> .
 Busy	User status: <b>Busy</b> .
<b>Location Presence States</b>	
 Home	User location: <b>At Home</b> .
 Work	User location: <b>At Work</b> .
 Road	User location: <b>On the Road</b> .
 Vacation	User location: <b>On Vacation</b> .
Away Message	Brief text message providing information to the presence viewer

### ***Effect of Changing Presence***

When you modify your presence status, then following related changes can take place:

- If you are connected to the Unified CallConnector Server, all the CallConnector users are notified of the presence change.
- If your system is configured with the Mobility/Rules Server, then the rules you have specified for this presence state can become activated.
- Your presence information is updated in the contact databases and will be displayed in the search results.
- If you have local rules enabled for this presence state, then the rules can become activated.

### ***To Change Your Availability***

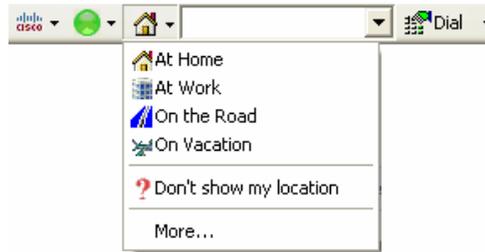
- Click on the Availability button in the toolbar (as shown below) and it will bring up the availability menu.
- Select your availability preference: busy, away, available, or unavailable.
- If you do not want to display a specific, then click on “Don’t show my status”.
- You can create a custom list that has pre-set availability, location and away message by clicking on “More...” and it will bring you to a menu where you may set your Availability, Location, and Away Message.
- Your availability will be changed and all other users will be able to see that change.



### ***To Change Your Location***

- Click on the Location button in the toolbar (as shown below) and it will bring up the Location Menu.
- Select your location setting: home, work, on the road, or vacation.
- If you do not want to show your location, then click on “Don’t show my location”.
- You can create a custom list that has pre-set availability, location and away message by clicking on “More...” and it will bring you to a menu where you may set your Availability, Location, and Away Message.

- Your location setting will be changed and all other users will be able to see that change.



## Toolbar QuickSearch

The Unified CallConnector provides direct access to the QuickSearch feature, that allows users to search their contacts and perform actions on a contact such as sending a phone call and messaging their contacts as well as viewing their information. This eliminates the need to always to look through the directory contacts in the sidebar to search for contacts.

- The QuickSearch bar provides three functions:
- Locate a contact from any of your Outlook, Personal or Corporate directories.
- Enter a number for auto-dialing
- Click on the pull-down menu for the last outbound calls. You can select one to re-dial.

## How to Use the QuickSearch

- Verify that CallConnector services are running by starting CallConnector Popup.
- Then open IE or Outlook and verify that the toolbar is registered and available for use.
- Then click on the combo box and begin typing the names of the contact that you are searching for.
- Results containing the full display names and their company's will be listed.
- You will notice that the more letters you type in, the more specific the search gets. For instance, if you type in "da", then the search will narrow down to all names that start with "da" such as David, Davis, Danny, and Daniel. If you continue to type in letters such as "dav", then the search will narrow down to David and Davis.
- Then you can scroll through the list of results using the keyboard up and down buttons or the mouse.

- You may select any contact by clicking on his name or hitting the enter key. This will show the action menu where you may perform certain actions on this contact such as calling, messaging, or searching them.

Here, you typed in “da” and received the results that started with “da”: Danny Maar, Darian Lawrence, and David Granger.

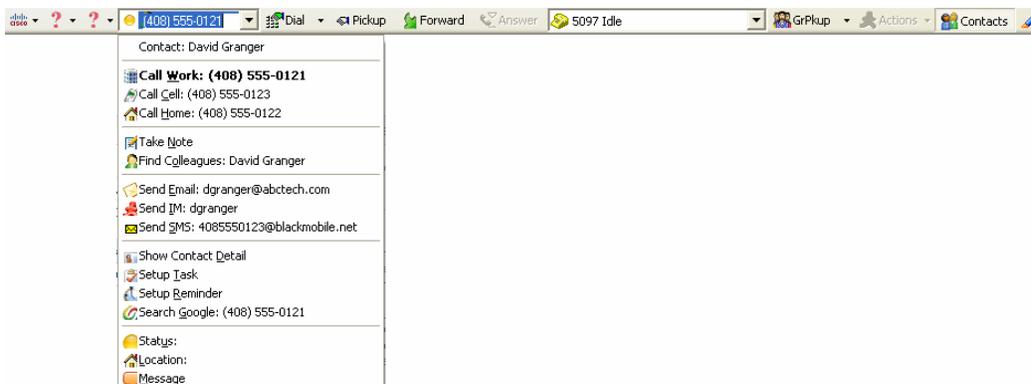


Here, you typed in “dav” and received results containing only David. You can select a contact by using the mouse or keyboard up and down arrow keys.



## Toolbar Action Menu

If you select a contact, then an action menu will appear with all of the contact's information. You will be able to perform different actions depending on which action you choose. Each action is associated with the contact's information. For more information on QuickSearch, please refer to Chapter 6: QuickSearch in this manual.



**Call Work:** This will make an outgoing phone call to the contact's work number.

**Call Cell:** This will make an outgoing phone call to the contact's cell phone (mobile) number.

**Call Home:** This will make an outgoing phone call to the contact's home number.

**Take Note:** This will open up a post-it note (similar to notepad) where you may record notes.

**Find Colleagues:** Currently not supported.

**Send Email:** This will open up a new Email message with the Email address already filled in. You may write up an email and send it to that contact.

**Send IM:** This open up a blank IM message window with the contact's IM screen name filled in. You may write a message and click send to send it to this contact, if this contact is currently logged in.

**Send SMS:** This will open up a new SMS message window with the person's cell phone mail address filled in. You may type in a message and send this text message to that contact.

**Show Contact Detail:** This applies only if the contact is **NOT** a directory contact, but an Outlook contact. This will bring up a window containing all of this contact's information. It is similar to a contact address card.

**Setup Task:** This will open up a new Outlook window allowing you to create a new task, which will be saved into your Outlook profile.

**Setup Reminder:** This will open up a new Outlook window allowing you to create a new reminder, which will be saved into your Outlook profile.

**Search Google:** This will open up a new Internet Explorer window and will perform a Google search on the contact's work phone.

**Presence Information:** The last 3 items on the action menu are non-selectable. They just show the availability, location, and away message of the user.

## Controlling Calls from Toolbar

Using the telephony buttons, the user has access to a wide array of telephony actions such as dialing, answering, hold, resume, hang up, transfer, conference, park, and pickup.

 Dial	This function allows the user to make an outgoing phone call, redial with a previously dialed number, and dial a speed dial shortcut.
 Answer	This function answers the incoming ringing phone call and puts the phone into connected state.
 HangUp	This function hangs up the current call and returns the phone to idle state.
 Hold	This function puts the current phone call on hold.
 Resume	This function resumes the held phone call.
 Forward	This function allows all incoming calls to be redirect to another phone number.
 Transfer	This function allows the current connected phone call to be transferred to another phone number.
 Conference	This function allows the current connected phone call to become part of a conference with 3 <sup>rd</sup> phone.
 Park	This function allows the current connected phone call to be routed to an unused extension number. This allows for anyone else to pickup this phone call.
 Pickup	This function allows the user to answer another person's phone call.
 GrPkup	This function allows the user to answer another person's phone call within any group by dialing a specific group number that the ringing phone belongs to.

### Dial/Redial/Speed Dial:

The Unified CallConnector provides a number of methods for placing calls from your desktop utilizing the contact telephone numbers in your PC. You can manually enter a number and click to dial it from your IP Phone. Or you can auto-dial from your Speed list. You can also view the last few numbers called and select one to redial.

**Dial:** Click on the combo box. Type in a phone number and click dial to make a call.

**Redial:** Make sure the combo box is empty. Click on the down arrow button next to the combo box. Then select the phone number you would like to dial. Then click the dial button to make a call.

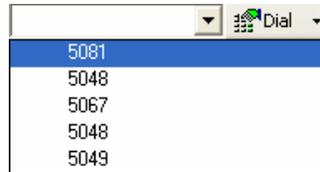
**Speed Dial:** Click on the arrow button to the right of the dial button. It will bring up a speed dial menu. Select a speed dial number and it will proceed to dial out.

### To Dial a Number



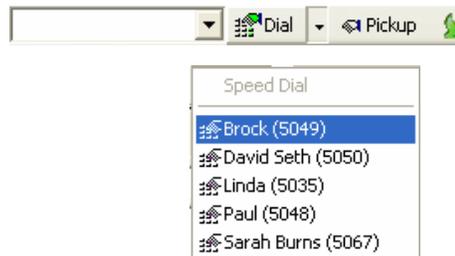
- Verify that your line is idle. You may check this in the Line Display window.
- Click on the QuickSearch bar and enter the telephone number.
- Press Enter or click on Dial to make the call.
- The selected line will display Ringback, indicating that the telephone called is in a ringing state.

### To Re-Dial a Number



- Verify that you are in an idle state.
- Click on the arrow button next to the QuickSearch bar. The QuickSearch bar should be empty for the pull-down list to display the Outbound calls. Otherwise the list will display the previous search results.
- The Re-Dial list displays the last ten outbound calls made from the CallConnector or IP Phone.
- Scroll down to the desired entry and press enter or click to place the call.

### To Dial from your Speed List



- Verify that the status is in an idle state.
- Click on the arrow next to the Dial button. A menu with your speed dial numbers will be displayed.
- Scroll down to the Speed number or click on it to place the call.

## Answer a Call

An incoming call is displayed in the Line Display as a Ringing call with the name and number of the caller. The toolbar telephony buttons will change from the idle buttons to the incoming call buttons that includes the Answer button. You can answer the call from the toolbar by clicking on the Answer button and connect to the caller on your IP Phone. The Line Display will change to connected from Ringing.



- When you have an incoming call, the Line Display will show Ringing and the Answer button will be presented in the toolbar.
- To answer the call, click on the Answer button. If you have more than one call, you can click on the Line Display menu button to view the state of your lines.
- Your phone line status will then become connected.

## End a Call

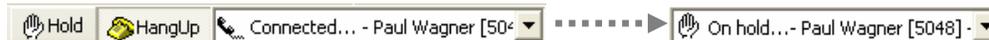
After connecting with another phone the user may choose to terminate the phone call by clicking on the Hang-up button. The line status will become idle.



- This feature is available when you are connected on a phone call. You can check this from the Line Display.
- To end the current phone call, click on the Hang-up button.
- After ending the phone call, your line will return to an idle state.

## Hold a Call

You can place a call on hold by clicking on the Hold button. The call will be placed on hold at the IP Phone.



- This feature is available when you are connected on a call (you can check this from the Line Display bar).
- To place the phone call on hold, click on the hold button.
- Your phone call will be put on hold.
- From the hold state of one phone call, you are given 2 actions:
  - Resume:** You may resume the call by resuming the phone call.
  - Dial:** You may make another phone call to a different person by:
    - Select another phone line from the line status drop down box.
    - Type in a phone number into the combo box.
    - Click dial to perform the outgoing phone call.

## Retrieve a Held Call

When a phone call is put on hold, you may resume the phone call by pressing the **resume/unhold** button.



- When you have a call held on your phone, select that call from the line display menu..
- To resume the conversation, click on the resume button.
- Your line status will return to the connected state.

## Forward a Call

You can forward all incoming phone calls by typing in a number in the combo box and then clicking on the forward button. This will redirect all phone calls to the phone number dialed.



- Call forward is available only in the idle state and can be applied to the primary extension number.
- Enter the phone number, which you would like to re-route all your incoming calls to, in the combo box.
- When you are done entering in the number, click on Forward. Your calls will be router to the phone number you just entered.
- If you would like to reset the call forward option, please click on call forward once again to disable it.

## Transfer a Call

If you are connected in a phone call, you can transfer the call to another phone number. To transfer a call, you must be connected to the caller. Then enter the phone number, you would like to transfer to, in the search bar and click on the transfer button. Later it will prompt you to click transfer again to complete the call transfer. Your status will then become idle. The Toolbar supports the supervised transfer feature.



- Verify that you are in a connected state with the other party.
- Then type in the number, you would like to transfer the call to, in the combo box. Then click on transfer to setup the transfer.



- Once you've setup the transfer, it should show that the phone called is ringing.

- Click on the transfer button to complete the transfer.



After the transfer is complete your line status will be set to idle and showing an unused phone-line.

## Conference a Call

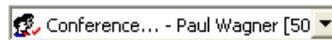
If you are connected in a phone call, you can add an additional phone to the current call, making it a three person phone call. To setup a conference, you must already be connected on call. Then enter the number, you would like to conference with, in the combo box. Then click on conference. As soon as the other phone answers the phone call you may proceed to press conference again to complete the conference.



- Verify that you are in a connected state, connected in a phone call to another phone.
- Then type in the number of the phone you would like to conference with.
- Then click on the conference button.
- The CallConnector will proceed to place a call to the contact.



- Verify that the phone called has answered the phone call.
- If you look at the line status it will show the name and number of the person just called.
- After the phone call has been answered by the 3<sup>rd</sup> party, you may click on the conference button a second time to complete the conference.



- When the conference setup is complete you will be in a conference.
- You should be able to talk to the other both parties in the phone call.
- When on a conference call, there are two telephone options available to you:
- **Hold:** Put the current conference call on hold.
- **Hang up:** Terminate the current conference phone call.

## Parking a Call

If you are connected in a phone call, you may park a phone call to an extension number. This feature is similar to a transfer, except it transfers the connected call to an unused extension number. To park a phone call, one must be in a connected phone call. Then the user must type in a phone number, to park the current call to, in the combo box. Then click on park and the current call will be parked. Because the phone call was parked it needs to be picked up at a later time.



- Verify that you are in a connected phone call.
- Then type a phone number in the combo box.
- Click on Park, located next to the line status box, and it proceed to park the connected phone call to the unused extension.

Your line status will become idle.

Because you parked the phone call to an extension number, you or someone else will need to pick up that phone call.

## To Pick Up a Call

In order to pickup a phone call, verify that your line status is idle. Then type in a phone number into the combo box. This phone number is the number you will be picking up the phone call from. Then click on pick up. You will be connected to the phone



- Verify that the phone status is idle.
- Click on the Pick-up button, without entering a number. The Unified CallConnector automatically dials the \* digit to pick up calls from you pickup group.
- To pick up a call from a specific number, enter that number, that you would like to pick up a call from, into the search bar.
- Click on the Pickup button. You will be connected to the ringing phone call from the number you just dialed.
- Your line status will then change to connected.

## Group Pick Up:

In order to group pickup a phone call, verify that your line status is idle. Then type in a phone number into the combo box. This number is the phone number of the group that you're picking up the call from. Then click on group pick up.



- Verify that the phone status is idle.
- Then type in a number, that you would like to pick up a call from, into the combo box.
- Click group pickup and it will connect you to the ringing phone call from the number you just dialed.
- Your line status will then change to connected.

## Viewing Line Status

This section will cover viewing lines status from the toolbar.

- CallConnector Toolbar:
- Verify that the UCC services are running.
- Open Internet Explorer.
- Then click on the text box located in the middle of the toolbar containing the current phone line. It will show a list of all available phone lines.
- If you click on it, it will reveal a drop down list of all available phone lines and their individual statuses: off-hook, dialing, ringing, connected, hold, conference, busy, and idle status.



**Idle status:** When you phone line is currently not occupied or used in a phone call.

**Dialing out/ Ringback Status:** When your phone is dialing out to another phone.



**Ringing Status:** This occurs when there is an incoming call. You may click the answer button to accept this phone call.



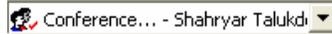
**Connected Status:** When your phone has connected to another phone.



**On Hold:** When you put the current phone call on hold.



**Conference:** When you are in conference call with two other phones.



## Telephone Features Menu:

The toolbar displays the features based on the state of the current call. The telephony features menu provides access to all the supported telephone features. These are listed and described below:

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**Group Pickup:** Allow you to pick up a call from the Pickup group specified..

**Dial:** Auto-dial the number entered in the search bar.

**Forward:** Setup a call forward to the number entered in the search bar.

**Hang-up:** Disconnect the currently connected call..

**Park:** Park the connected call to the number entered in the search bar.

**Setup Conference:** Add a third party to the current call.

**Do-Not-Disturb:** Initiates the phone Do-Not-Disturb feature. The incoming calls do not ring.

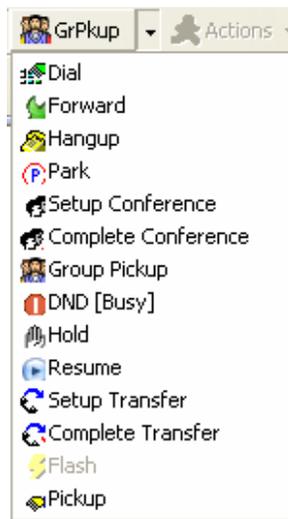
**Hold:** Places the current call on hold.

**Resume:** Reconnects to the held call.

**Setup Transfer:** Initiates a call transfer to the number entered in the search bar.

**Complete Transfer:** Sends the current call to the transfer number.

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**Flash:** Sends a hook-flash (no currently supported).

**Pickup:** Initiates a call pickup from the default pickup group if no number has been entered. If a number is entered in the search bar, then it tries to pickup a ringing or held call from that number .

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## Opening Contact Windows

The Contacts button in the toolbar can be used to open and close the Unified CallConnector sidebar window to provide access to the Shortcuts, Contacts, Logs and Status information..



Clicking on the Contacts button will toggle (open and close) the sidebar window.

## Highlighter Button



The Highlighter button searches for telephone numbers in the current web page and converts them in to dialable links. Click on the Highlighter button to initiate the telephone number search. If the Highlighter is enabled, then clicking it again will turn off this feature.

This feature is described in more details in the QuickDial chapter.



# Accessing Shortcuts

The Unified CallConnector provides a Shortcuts window for you to quickly configure and access numbers, features and applications. From the Shortcuts folder, you can auto-dial these number. You can also use these number as a part of telephone features – such as transfer or conference.

This chapter describes how to use the Shortcuts and includes:

<b>Shortcuts Overview -</b>	Provides a brief overview of the Shortcuts Window and functionality.
<b>Configuring Speed Dial</b>	Describes how to add and setup Speed Dial shortcuts.
<b>Speed Dial Telephony Actions</b>	This describes how to make calls and access the telephony features from the Shortcuts window.
<b>Speed Dial Search</b>	Describes how you are able to search through a list of shortcuts..

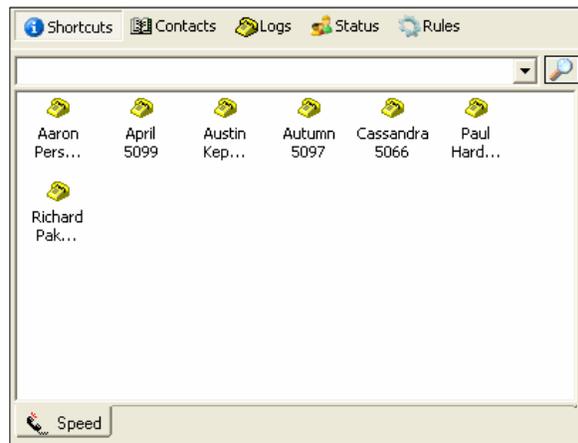
## Shortcuts Window Overview

The Shortcuts window lets you quickly access pre-defined functions with a single mouse click. The initial set of shortcuts provide the speed dial feature. Later releases will provide additional capabilities in this window. The Speed Dial function include:

**Managing Speed Dial Numbers:** Allows you to create, update, and delete Speed Dial numbers. These Speed Dial numbers can be accessed from pull-down menus in the toolbars.

**Dialing Speed Numbers:** Allows you to auto-dial the number stored at the button.

**Access Telephone Features:** Allows you to access the features configured on your telephone from the Shortcuts window. These include Dial, Hang-up, Answer, Transfer, Conference, Pickup, Park, Forward, Group Pickup.



## Viewing Shortcuts

The Shortcuts are one of the Unified CallConnector applications. To view the Shortcuts window:

- Click on the **Contacts** button in the Unified CallConnector toolbar. In Outlook you can also click on CallConnector in the My Contacts. This will open the sidebar in Internet Explorer or the Outlook View window and display the CallConnector applications.
- Click on the Shortcuts button to switch to the Shortcuts window if it is not already open. The Shortcuts window can have multiple tabs. The first tab is the Speed Dial list.
- Click on this Speed tab to add, delete or update your CallConnector speed numbers.

## Managing Speed Dial Numbers

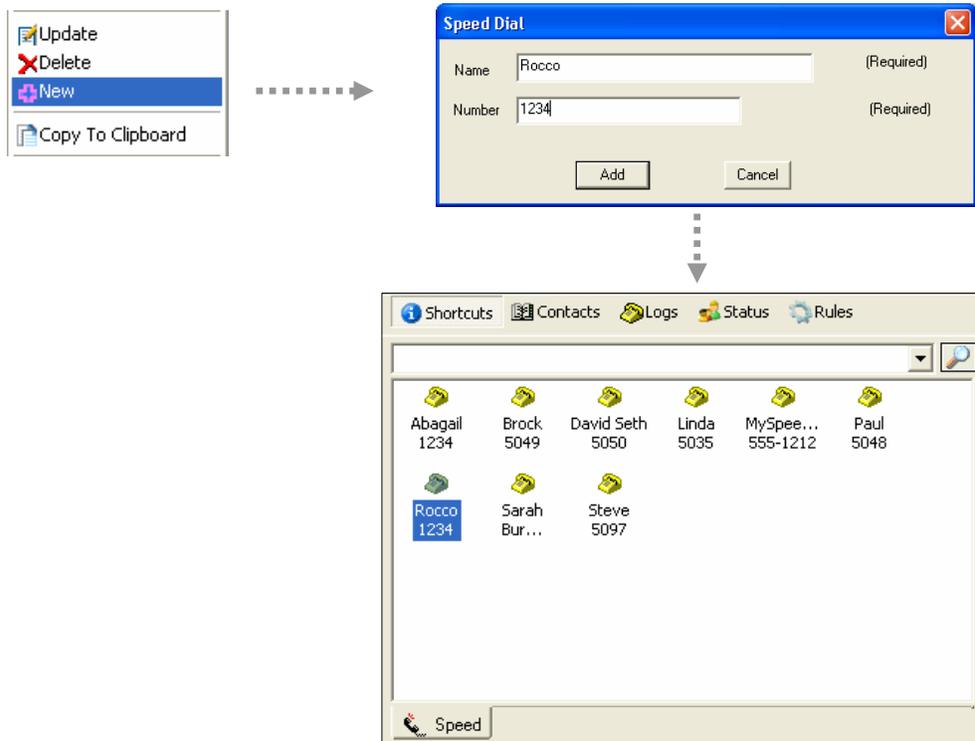
Each speed dial entry is associated with a name and telephone number. Once you have added some speed dial entries, these can be auto-dialed, used in the telephone features and accessed from menus in the toolbars.

You can add, modify and delete the Speed Dial entries from the Shortcuts window. These features can be accessed from the right-click on any speed dial icon.

 Update	Update the selected speed dial with a new name and/or number.
 Delete	Delete the selected speed dial.
 New	Create a new speed dial with a name and number.

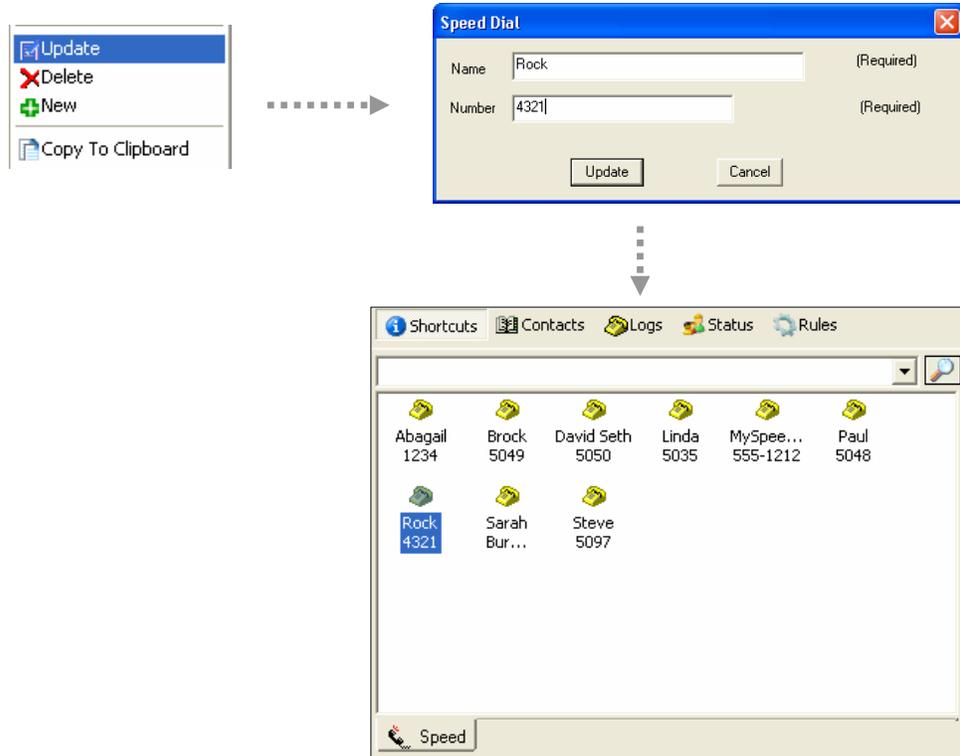
### Creating a New Speed Dial

- Right-click on a Speed Dial icon or inside the Shortcuts window. The Speed Dial Actions menu will be displayed.
- Click on **New**.
- Enter the Speed Dial entry name and the telephone number.
- Click **Add** to create a new Speed Dial entry.



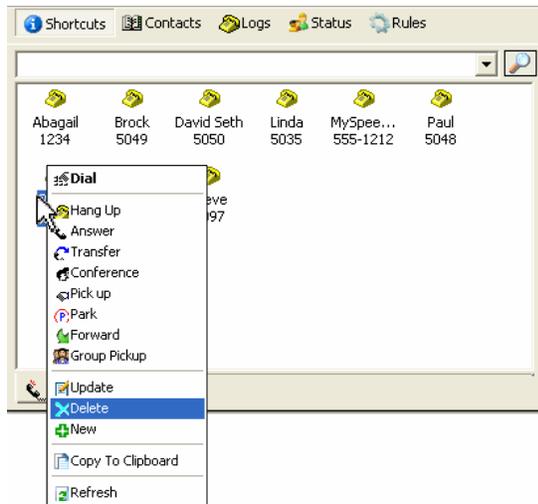
### Updating an Existing Speed Dial Entry

- Right-click on the Speed Dial entry.
- Click on **Update**. This will bring up the Speed Dial properties window.
- Update the Name and the Number fields.
- Click **Update** to save the change or Cancel to exit the window.



### To Delete Speed Dial Entries

- To delete a Speed Dial entry select it and press Delete or right-click and select Delete.
- To delete all Speed Dial entries, right-click on the blank area and click Delete All.
- Deleting any shortcuts will trigger an auto-refresh so you see the updated shortcut list.



### ***Refreshing the Speed Dial Window***

- Right-click on any contact or blank space. This will bring up the Action menu.
- Click Refresh.
- This will reload all of the current speed dial shortcuts from the database.

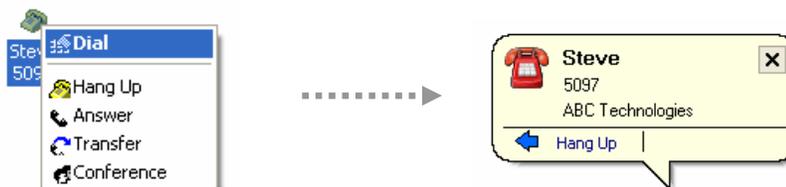


## Speed Dial Telephony Actions

You can use Speed Dial shortcuts in your call control operations such as placing calls, answering, conferencing, transferring, picking up, parking, and forwarding phone calls. These functions can be executed by auto-dialing the number configured in for the selected Speed Dial entry.

### To Place a Call

- Verify that your line is idle.
- Double-click on the speed dial icon for the entry you want the call. You can also select the entry and press Enter.
- You can also right-click and from the Actions menu select Dial.
- The number configured for the Speed entry will be dialed out.



### Hang up the Active Call

- Verify that your line is in a connected state (you're on a call).
- Right-click on the shortcut and select Hang up.
- The call will be dropped and the line will return to idle.



### Answer a Call

- Verify that there is an incoming phone call.
- Right-click on any shortcut and select Answer.
- You will be connected to the ringing calls.



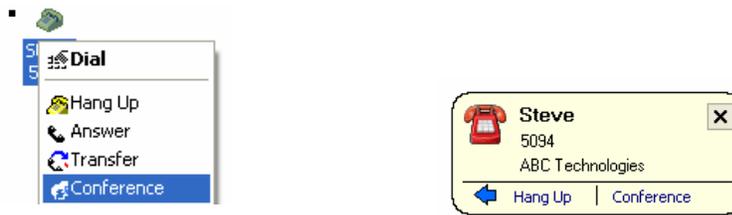
### Transfer to the Speed Number

- When you are on a call and the call state is connected, right-click on the Speed Dial entry that you want to transfer the call to.
- From the Action menu, select Transfer. The CallConnector will setup a transfer to the Speed Dial number.
- To complete the transfer by clicking the transfer button on the toolbar or from CallConnector Popup.



### Conference in the Speed Entry

- When you are on a call and the call state is connected, right-click on the Speed Dial entry that you want to conference.
- Right-click on the shortcut and select Conference. The CallConnector will initiate a conference to the number in the selected shortcut.
- You can complete the conference by click the conference button on the toolbar or from the CallConnector Popup.





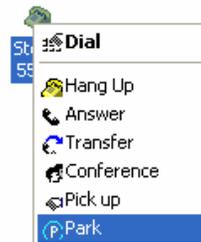
### To Pick up a Call

- Verify that your line is idle. Right-click on the shortcut from which you want to pick up a call.
- From the Action menu, select Pickup. The Connector will pick up the ringing phone call from the shortcut selected.



### To Park to a Speed Entry

- Verify that your line is idle. Right-click on the shortcut to which you want to park a call
- Right-click on the shortcut. Click Call Park. The CallConnector will park (blind transfer) the connected call to the shortcut selected.



### To Forward to Speed Number

- Right-click on the shortcut and select Forward.
- The CallConnector will setup an un-conditional call forward to the selected number.
- Incoming calls, will forwarded to the shortcut selected.
- To disable call forwarding, right-click on a contact and select Forward again.



### **Group Pick up**

- Verify that your phone status is in idle state. Also verify that there is a ringing telephone.
- Right-click on the shortcut.
- Then click Group Pickup. The CallConnector will pick up any ringing phone call from the group number selected.
- Your phone status will become connected and you will be able to talk to the other party.



### **Speed Dial Search**

You can search and locate Speed Dial entries.

#### **To Find a Speed entry**

- Enter the first few characters of the entry, press Enter or click on the Search icon.
- The matching speed entries will be displayed.
- To clear the search results, delete the text in the search bar and press enter.



# Directory Contacts

The Unified CallConnector Directory displays information on people, their contact numbers, message addresses and presence status. The Unified CallConnector supports multiple directories, including personal directory and shared group or organizational directory and display of your Outlook contacts.

The Directory is integrated part of the Unified CallConnector and supports lookup of caller information and the QuickSearch features.

This chapter describes how to use the Directory and includes:

<b>Directory Overview:</b>	Describes the CallConnector Contacts user interface and explains how to start, close, and open a specific one.
<b>Locating Information:</b>	Describes the methods for searching the contact databases for a specific entry.
<b>Updating Information:</b>	Describes how to add, modify, or delete the entries in the Directory.
<b>Call Handling:</b>	Describes the different ways of dialing numbers, transferring calls, and setting up a conference and using the contact numbers in telephone features.
<b>Sending Messages:</b>	Describes how to send Email, Instant and SMS messages from the Contacts window.
<b>Moving Information:</b>	Describes how to move the Directory information to other folders and applications.

## Contacts Overview

The Unified CallConnector Contacts displays a list of names from the databases. It allows you to maintain extensive information on your contacts and lets you quickly locate entries and directly use this information to auto-dial and send email. The Directory also lets you view information from external directory services. The Unified CallConnector allows you to setup multiple directory databases. The Directory supports the following functions:

- Table View** Displays a sorted list of entries.
- Search** Locates an entry as you type in the first few letters.
- Quick Sort** Change the sort order of the listing in the Table view.
- Select Directory** Open a different directory databases.
- Edit Entries** Add, modify, or delete entries in the directory.
- Call Handling** Dials numbers, transfer calls, and set up conferences from the directory.
- Send Email** Sends email from the directory.
- Multiple Listed Numbers** Supports multiple phone numbers per entry.

### Types of Contact Databases

The Unified CallConnector supports three contact directories. The information of each contact directory is kept in separate files or databases. These directories are:

- Personal Contacts:** The personal contacts list is a repository for our personal contacts. The Personal Contacts are a list of contact information that is stored in the CallConnector databases. This information is not available to any one else.
- Corporate Contacts:** This contacts list is designed to store organizational contact information. In Server mode, these contacts are shared and available to all Unified CallConnector users.
- Outlook Contacts:** This is the information from your Outlook contacts. This list is retrieved from your Outlook profile using your Outlook username and password.

### Information Fields

The Contacts directories support data fields for the following information:

- Names:** Three name fields are provided for First Name, Last Name and Display Name.
- Organization:** The directories provide fields for the organization name of the contact and the department the contact belongs to.
- Telephone Numbers:** Work, Mobile and Home numbers are supported in the contact databases.

- Message Addresses: Email, Instant Message and Text or SMS address fields are provided to store the addresses required to send these different kinds of messages.
- Presence Information: The Contacts databases allow you to save Availability, Location and an Away message for each contact.

## Viewing Your Contacts

The Directory Contacts are displayed in the Unified CallConnector information windows in the Internet Explorer sidebar and in the Outlook View window. Each type of contact is displayed in a separate tabbed window within the Contacts display area.

### To Open Contacts Window

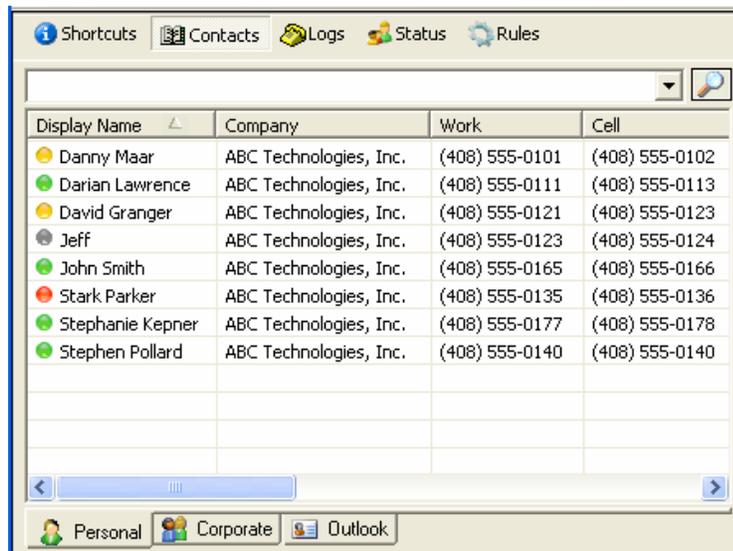
- Open the Internet Explorer or Outlook and click on the Contacts button in the toolbar. This will open the CallConnector information windows.
- Click on the Contacts button in the CallConnector information window to open the Contacts display.

### To Close Contacts Window

- Click on the Contacts button in the CallConnector again or click on the close window button (x) to close the information windows.

## Contacts Window

The CallConnector Contacts or Directory window displays in the sidebar of the Internet Explorer or in the View window in Outlook.



The screenshot shows a window titled 'Unified CallConnector Directory window' with a toolbar at the top containing 'Shortcuts', 'Contacts', 'Logs', 'Status', and 'Rules'. Below the toolbar is a search bar with a magnifying glass icon. The main area contains a table with the following data:

Display Name	Company	Work	Cell
Danny Maar	ABC Technologies, Inc.	(408) 555-0101	(408) 555-0102
Darian Lawrence	ABC Technologies, Inc.	(408) 555-0111	(408) 555-0113
David Granger	ABC Technologies, Inc.	(408) 555-0121	(408) 555-0123
Jeff	ABC Technologies, Inc.	(408) 555-0123	(408) 555-0124
John Smith	ABC Technologies, Inc.	(408) 555-0165	(408) 555-0166
Stark Parker	ABC Technologies, Inc.	(408) 555-0135	(408) 555-0136
Stephanie Kepner	ABC Technologies, Inc.	(408) 555-0177	(408) 555-0178
Stephen Pollard	ABC Technologies, Inc.	(408) 555-0140	(408) 555-0140

At the bottom of the window, there are three tabs: 'Personal', 'Corporate', and 'Outlook'.

Unified CallConnector Directory window

The **Directory** window consists of the following regions and buttons:

- Tabs:** The Tabs at the bottom of the Contacts window display the three different contact directories supported by the Unified CallConnector. The currently selected directory is the tab that is in the foreground.
- Search Bar:** Allows you to locate contacts in the contact directory being viewed. The Search button can be used to start a search.
- Contact Window:** The central region of the window displays entries in tabular view from the directory database. In this view, fields are displayed in columns, and the information is sorted by the highlighted field.
- Field Labels:** Each field of the contact directory is displayed in a column with the Field Label providing the name of the information element. An up or down arrow indicated the sort field and the direction of the sorting –ascending or descending.
- Presence Icons:** The Presence Icons in the Display Name field indicate the current availability of the contact. The Presence function has to be available for that particular contact directory and the specific contact.

## Adjusting the Contacts View

Like the white pages in your phonebook, this lists the entries in the database in the selected sorting order.

The tabular directory listing is ordered or sorted by a particular field such as name or telephone number. A tabular listing may be searched to locate specific entries as described in the next section.

You may change the display of the contact information in the following ways:

To Do This	Do...
Change field size	Move cursor to field separator, drag left or right to resize.
Move fields to another position	Click on label and drag the field to the desired position.
View additional fields	Use the horizontal toolbar to move the display left or right.

Table 1-1 To change the summary interface

## Sorting Contact Lists

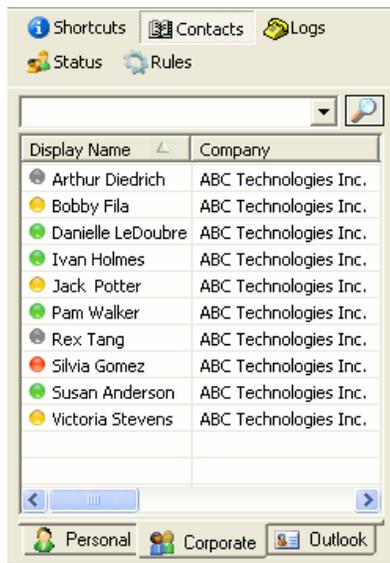
You can sort the contact lists by the contents of each field in ascending and descending order. This makes it more convenient when looking through a long list of contacts and it allows you to search for information contained in that field.

Click on any field title and it will sort the list of contacts by that field title. For instance, if you click on Display name, it will sort by display name ascending from A-Z.

The default sort is ascending. You will notice next to the field title there is an up arrow indicating that it has sorted the contact list by ascending order.

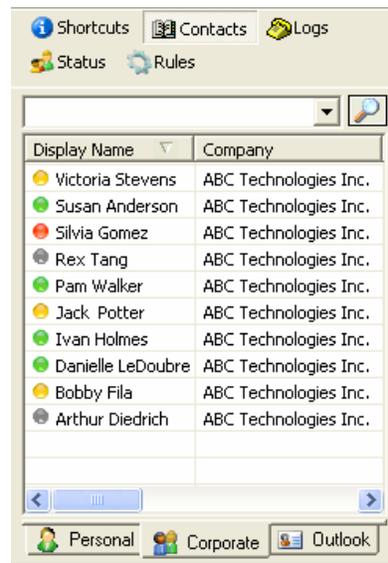
If you click the field title again, it will sort the list in descending order, indicated by a down arrow next to the field title.

Note that you may sort any of the 11 different fields: Name, Company, Work phone number, Cell phone number, Home phone number, Email address, SMS address (for text message), Instant Message name, First name, Last name, and Department.



The screenshot shows a contact list window with a search bar and navigation buttons. The table below shows the contact list sorted by Display Name in ascending order. The 'Display Name' column has an upward-pointing arrow next to the header.

Display Name ▲	Company
Arthur Diedrich	ABC Technologies Inc.
Bobby Fila	ABC Technologies Inc.
Danielle LeDobre	ABC Technologies Inc.
Ivan Holmes	ABC Technologies Inc.
Jack Potter	ABC Technologies Inc.
Pam Walker	ABC Technologies Inc.
Rex Tang	ABC Technologies Inc.
Silvia Gomez	ABC Technologies Inc.
Susan Anderson	ABC Technologies Inc.
Victoria Stevens	ABC Technologies Inc.



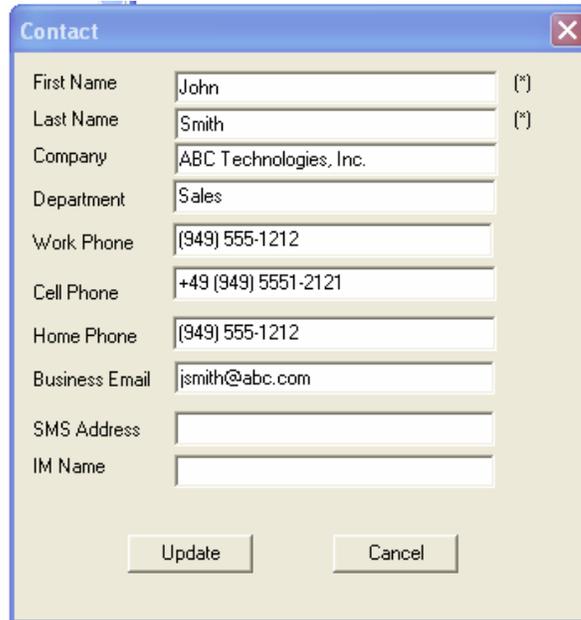
The screenshot shows the same contact list window, but now sorted by Display Name in descending order. The 'Display Name' column has a downward-pointing arrow next to the header.

Display Name ▼	Company
Victoria Stevens	ABC Technologies Inc.
Susan Anderson	ABC Technologies Inc.
Silvia Gomez	ABC Technologies Inc.
Rex Tang	ABC Technologies Inc.
Pam Walker	ABC Technologies Inc.
Jack Potter	ABC Technologies Inc.
Ivan Holmes	ABC Technologies Inc.
Danielle LeDobre	ABC Technologies Inc.
Bobby Fila	ABC Technologies Inc.
Arthur Diedrich	ABC Technologies Inc.

## Directory Detail View

The contact information on each entry can be viewed by opening the Directory Detail window.

The Directory Detail window can be opened by right-clicking on an entry and selecting Update.



The screenshot shows a 'Contact' window with the following fields and values:

Field	Value	Required
First Name	John	(*)
Last Name	Smith	(*)
Company	ABC Technologies, Inc.	
Department	Sales	
Work Phone	(949) 555-1212	
Cell Phone	+49 (949) 5551-2121	
Home Phone	(949) 555-1212	
Business Email	jsmith@abc.com	
SMS Address		
IM Name		

Buttons: Update, Cancel

The **Directory Detail** window displays all the editable fields of information in the directory database.

## Contacts Menu

Right-click on any contact (Personal, Corporate or Outlook), to bring up the Contacts menu. From this menu you can perform telephony, messaging, contact editing, and create speed dial operations that apply to the contact's information. The Contacts menu brings together the contact information and the methods for setting up communication and collaborative sessions with the contact data.

The telephony actions include placing a call to the work, mobile or home telephone number, accessing telephone features such as answer, hang up, transfer, conference, pick up, park, forward, and group pickup.

The message actions include: sending Email, Text (SMS) or IM (Instant Message). You can also maintain the contact data by adding a new contact, update existing contact information, delete the contacts, or copy the contact information to the clipboard.

These Contact Menu actions are described below:



Menu Item	Description
Call Work	Call the Contact's Work telephone number
Call Cell	Call the Contact's Mobile telephone number
Call Home	Call the Contact's Home telephone number
Send	Open Send Menu to select Email, Text or IM message
Create Speed Dial	Create a Speed Dial shortcut with the Contact's Work number.
Hang-up	Drop the currently active call
Answer	Answer the active ringing call
Transfer	Initiate transfer to the Contacts work number
Conference	Start a conference session with the contacts work number
Pick up	Pick Contact's work number
Park	Park the current call to the contacts work number
Forward	Forward all calls to the contact' work number
Group Pickup	Press the Group Pick up button
Update	Make changes to this record
New	Create a new contact record
Delete	Delete this record
Delete All	Delete all contact records
Copy to Clipboard	Copy the contact record to the clipboard
Refresh	Reload the contact data from the directory

## Contact Telephony Actions

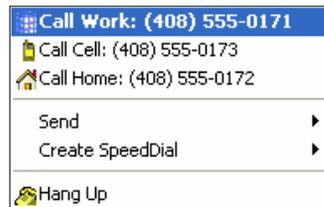
### *To Place a Call*

Verify that your line status is currently idle.

Right-click on the contact, you would like to dial, to open the action menu.

Click on Call Work, Call Cell, or Call Home.

The CallConnector will proceed to make an outgoing call to that phone number.



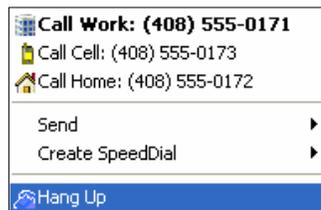
### *Hang up a Call:*

Verify that your line status is currently connected (in a phone call).

Right-click on any contact to open the action menu.

Click on Hang up.

The UCC will terminate the phone call and the line status will return to idle.



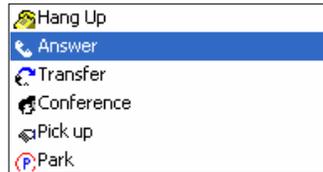
**Answer the Call:**

Verify that your line status is currently ringing (there is an incoming phone call).

Right-click on any contact to open the action menu.

Click on Answer.

The UCC will answer the incoming phone call and the status will become connected.



**To Transfer a Call:**

Verify that your line status is currently connected (in a phone call).

Right-click on the contact, you would like to transfer to, and it will open up an action menu.

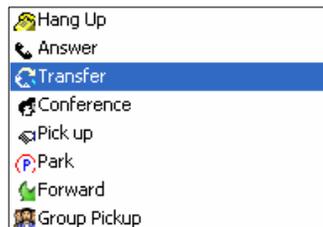
Click on Transfer.

A call will be made out to that contact and the transfer will be setup.

Currently the transfer function from the toolbar only supports blind transfer. So to complete the transfer from the toolbar you must click transfer again from the toolbar before the other party picks up the call.

Otherwise, you must click transfer on the popup balloon in the lower right corner of the screen to complete the transfer after the other party has picked up the call.

After the transfer is successful, your line status will return to idle.



**To Conference a Call:**

Verify that your line status is currently connected (in a phone call).

Right-click on the contact that you would like to conference and it will open up an action menu.

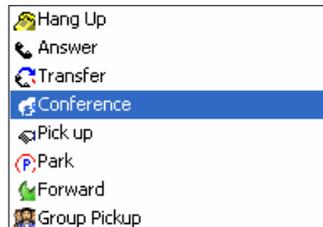
Select the Conference option.

A call will be made out to that contact and a conference will be setup.

You may only complete a conference call when the other party answers the phone call.

When the other party has answered the phone call, click on the conference button located on the toolbar to complete the conference. All three members of the phone call will be able to speak to each other.

The status will become conference.



**Pickup:**

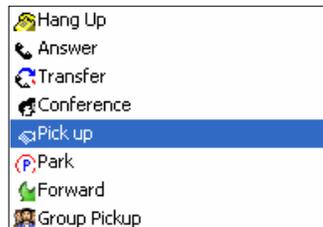
In order for you to pick up a phone call, verify that there is an incoming phone call to another phone (that you are not controlling) so that it is in ringing status.

Right-click on the name of the contact whose phone is ringing and an action menu will appear.

Select the Pick up option.

The UCC will proceed to dial that phone and retrieve the ringing phone call.

Your phone line status will become connected to the incoming phone call.



### **To Park a Call:**

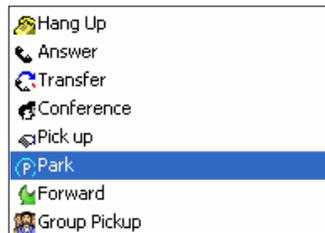
Verify that your line status is currently connected (in a phone call).

Right-click on the contact, that you would like to park the current call to, and an action menu will appear.

Then select the Park option.

The UCC will proceed to park (transfer) the call to the phone number dialed. No further action is necessary and your line status will return to idle.

The number the call is parked to must be a specific unused extension (for parking) setup by the CME.



### **Forward Calls to Work Number:**

Verify that your line status is currently idle.

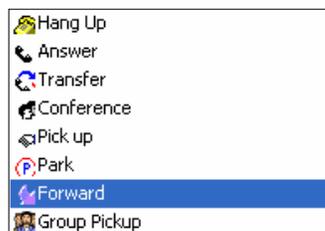
Right-click on the contact, that you would like to forward all your calls to, and an action menu will appear.

Then select the Forward option.

The UCC will proceed to make a call. This call will let the CME know to forward all calls to the selected phone number.

Then click hang up.

Verify that all calls were forwarded to the number selected by creating an incoming phone call to your phone number. If your phone number doesn't ring but the forwarded phone number does ring, then it is successful.



**Group Pickup:**

Verify that your line status is currently idle. Verify that the phone number being dialed is a group phone number. Also verify that the number you are performing the pickup on has an incoming phone call and is part of the group that you are calling.

Right-click on the contact (which has a group number), that you would like pickup a phone number from, and an action menu will appear.

Select the Group Pickup option.

It will dial and pickup the ringing phone call from the contact selected.

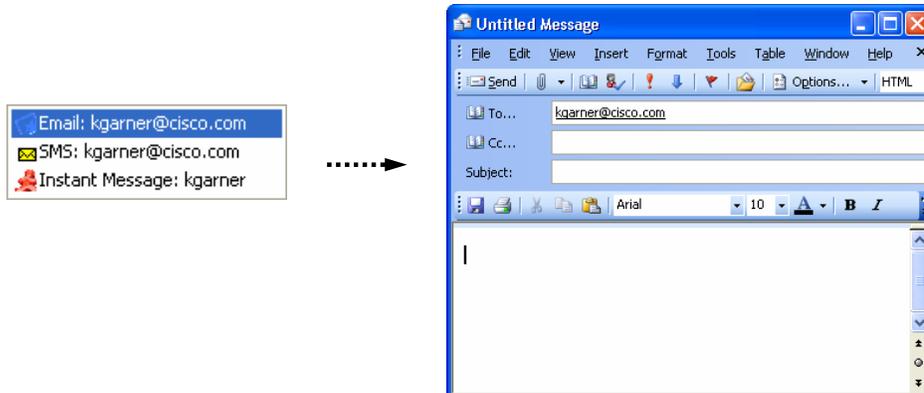
Your line status will become connected (in a phone call).



## Sending Message

### Send Email:

- Right-click on contact to open the Action Menu.
- Click on the Send menu item and a sub menu will appear.
- Click on the Email option.
- A blank Email form will appear, using your default Email client with the contact's Email address filled in.
- You may write a message and click send.



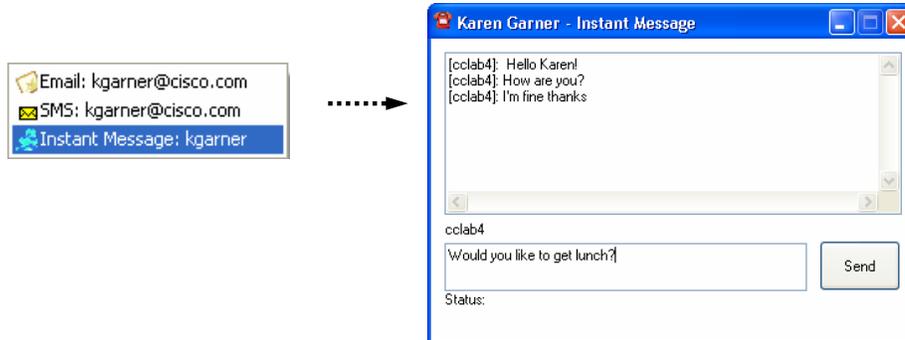
### Send SMS:

- Right-click on contact to open the Action Menu.
- Click on the mouse over to the Send menu item and a sub menu will appear.
- Click on the SMS option.
- A blank message with the contact's SMS address will appear.
- Fill in the message and click on Send. This will send the message to the user's SMS inbox.



**Send Instant Message:**

- Right-click on contact to open the Action Menu.
- Click on the mouse over to the Send menu item and a sub menu will appear.
- Click on the IM option.
- An Instant Message window will appear with the contact's login name.
- You are now able to chat live with this contact by entering a message and clicking send.
- If the contact is logged in, he/she will receive this message.



## Managing Contact Information

### Update (Contact):

Right-click on a contact and an Action Menu will appear.

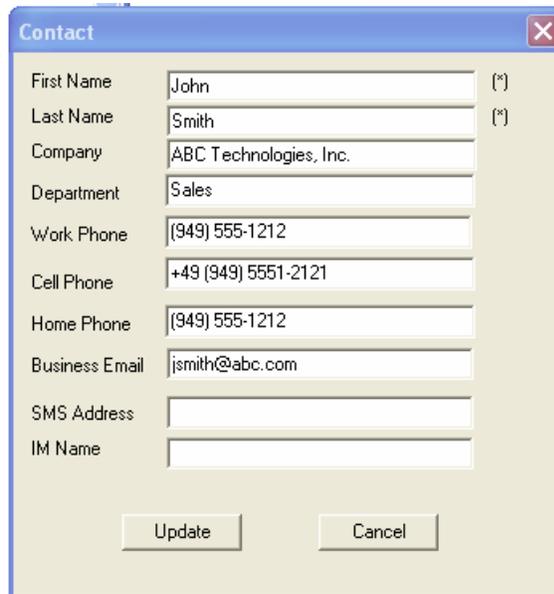
Select Update.

It will bring you to a menu showing all of the parameters of the contact. These parameters include: Name, Company, Work phone number, Cell phone number, Home phone number, Email address, SMS address (for text message), Instant Message name, First name, Last name, and Department Any of the parameters may be changed.

To type in a new parameter, delete the old one and type in a new one.

When you are finished making changes to this contact, click on update to complete the update. You can view the changes in the contacts window.

Contact Update Menu:



A screenshot of a "Contact" dialog box with a blue title bar and a close button. The dialog contains several text input fields with labels on the left and asterisks on the right indicating required fields. The fields are: First Name (John), Last Name (Smith), Company (ABC Technologies, Inc.), Department (Sales), Work Phone ((949) 555-1212), Cell Phone (+49 (949) 5551-2121), Home Phone ((949) 555-1212), Business Email (jsmith@abc.com), SMS Address, and IM Name. At the bottom are "Update" and "Cancel" buttons.

**New (Contact):**

Right-click on a contact and an Action Menu will appear.

Select the New option and it will bring up a Add New Contact window.

Fill in as many parameters as you can. The minimum required fields to create a new contact are: First Name, and Last Name.

When you are done filling in the fields, click on Add and a new contact will be added.

You may verify the creation of this contact by viewing the contact in the directory contacts window.

Add Contacts Window

The 'Contact' dialog box contains the following fields:

- First Name: John (\*)
- Last Name: Smith (\*)
- Company: ABC Technologies, Inc.
- Department: Sales
- Work Phone: (949) 555-1212
- Cell Phone: +49 (949) 5551-2121
- Home Phone: (949) 555-1212
- Business Email: jsmith@abc.com
- SMS Address: (empty)
- IM Name: (empty)

Buttons: Update, Cancel

Contacts Window

Display Name	Company
Arthur Diedrich	ABC Technologies Inc.
Bobby Fila	ABC Technologies Inc.
Danielle LeDoubre	ABC Technologies Inc.
Ivan Holmes	ABC Technologies Inc.
Jack Potter	ABC Technologies Inc.
Michael Palmer	ABC Technologies Inc.
Pam Walker	ABC Technologies Inc.
Rex Tang	ABC Technologies Inc.
Silvia Gomez	ABC Technologies Inc.
Susan Anderson	ABC Technologies Inc.
Wicky	ABC Technologies Inc.

Buttons: Personal, Corporate, Outlook

**Delete (Contact):**

Right-click on a contact and an Action Menu will appear.

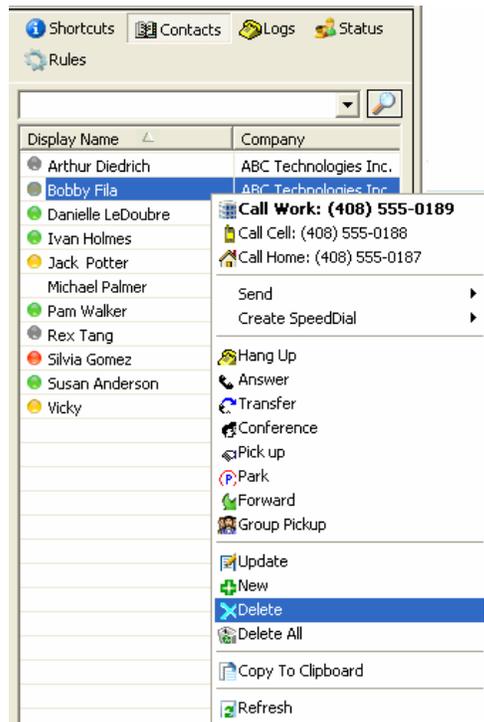
Select the delete option.

The contact will be deleted from the Contacts Window.

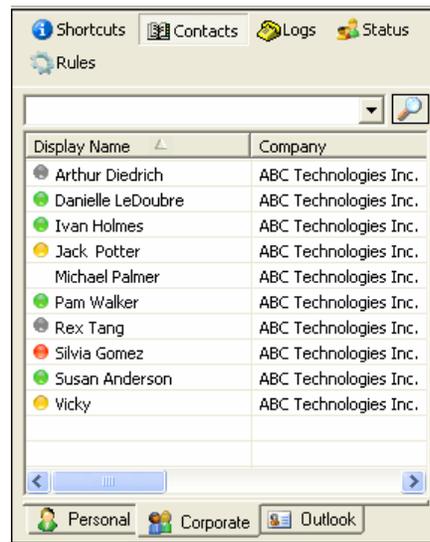
Verify that the contact was deleted from the Contacts Window.

### Delete Bobby Fila

Deleted



### Contacts Window: Bobby Fila



### Delete All (Contacts):

- Right-click on any contact or blank space and an Action Menu will appear.
- Select the delete all option.
- All contacts will be deleted from the Contacts Window.
- Verify that all contacts were deleted from the Contacts Window and that the Contacts Window is now blank.

Please note that delete all doesn't delete all of the contacts Personal, Corporate, and Outlook Contacts at once.

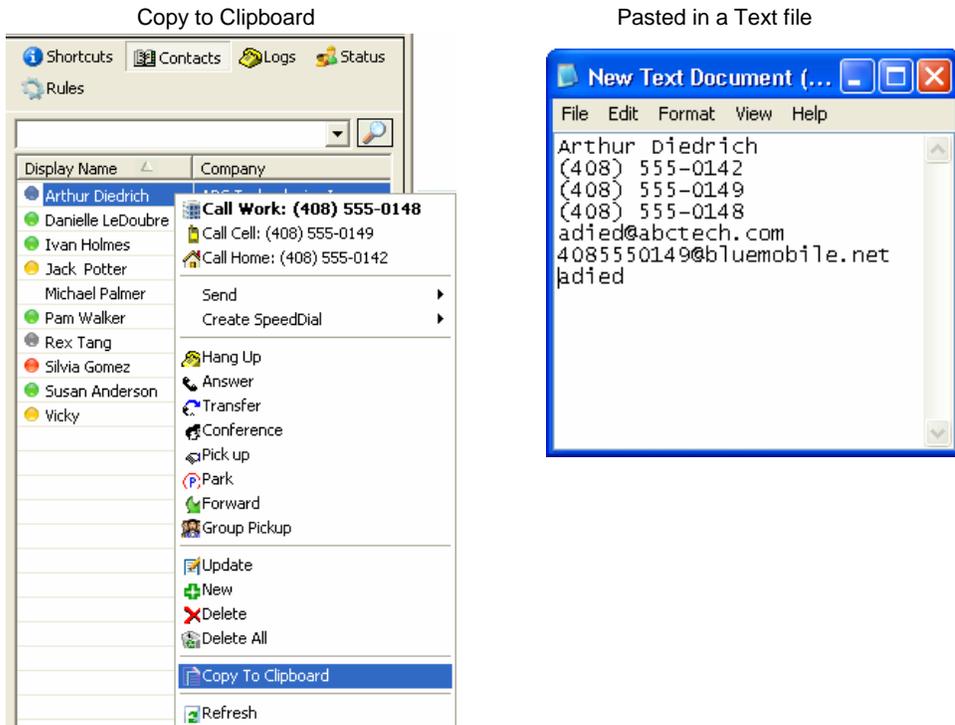
### Copy to Clipboard:

Right-click on a contact and an Action Menu will appear.

Select the Copy to Clipboard option.

It will then copy this contact's information to a clipboard. This information includes: Display Name, Work phone number, Cell phone number, Home phone number, Email, SMS address, and IM Name.

You may then paste this information into other documents such as Email, Notepad, or Word.



**Refresh:**

- Right-click on any contact or blank space and an action menu will appear.
- Select the refresh option.
- The screen will go blank for one moment and will repopulate the table with the current contacts.

Note that you may want to refresh the page if any changes were made to the database (i.e. other users adding, editing, or deleting Corporate Contacts).



# View Call Logs

The Unified CallConnector Call Logs displays information on Incoming, Outgoing, and Missed phone calls. It keeps a record of all the calls made and received, the names of the contacts that called you or you called, the time and date of the calls, and the phone numbers of the calls.

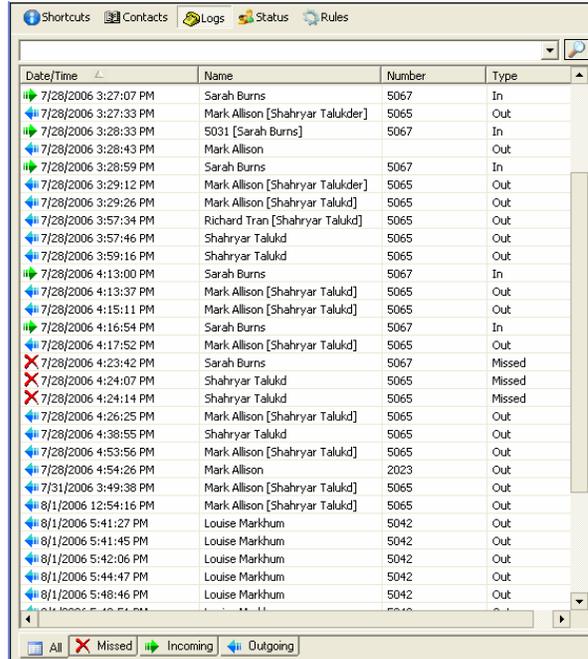
This chapter describes how to use the Call Logs and includes:

- |                             |  |
|-----------------------------|--|
| <b>Call Logs Overview:</b>  | Describes the CallConnector Call Logs user interface and functionalities.  |
| <b>Viewing Call Logs:</b>   | Describes the method for viewing, sorting, and searching the Call Logs, and Refreshing the Call Logs list.                         |
| <b>Call Handling:</b>       | Describes the different ways of dialing numbers, transferring calls, and setting up a conference and using the Call Log interface. |
| <b>Call Log Management:</b> | Describes how to clear call logs from the database, creating speed dials, and copying call logs to a clipboard.                    |

## Call Logs Overview

The Unified CallConnector Call Logs displays all a list of all calls made and received from your UCC program. It allows you to view important information about phone calls and lets you quickly search calls with specific attributes. It also allows you to perform telephony actions from the right-click action menu. The Call Logs also allows you to sort your call logs by date/time, name, number, and call type. You may also view each type of call individually.

The Call Log Window:



Field Name	Description
Time/Date	The time and date of the phone call
Name	The name of the contact
Number	The phone number of the contact
Type	The type of call

## Viewing Call Logs

You may view your **Call Logs** from the Sidebar in Internet Explorer or Outlook.

First, make sure you are logged in (either TAPI or Server mode).

Open Internet Explorer or Outlook.

Click on the **Contacts** button located on the Unified **CallConnector Toolbar** (in Outlook you may also have to click on the **CallConnector** file in MyContacts). The sidebar will appear.

Click on the Logs button on the sidebar window. A list of call logs will be shown.

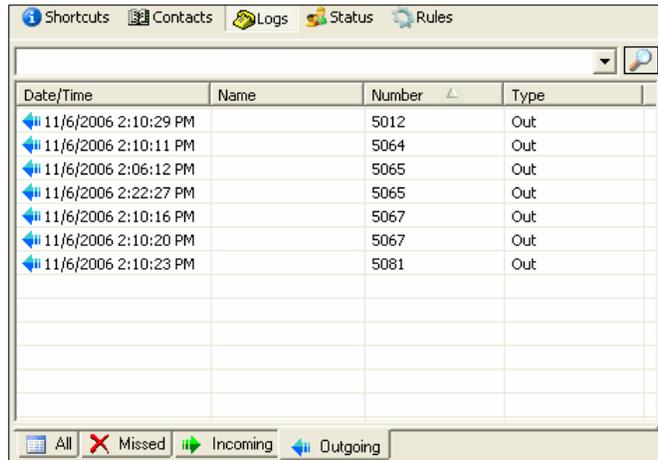
The call logs contain 4 fields: Time/Date, Name, Number, and Type.

Each call log can be one of three types of calls: Outgoing, Incoming, and Missed calls.

- To view the call logs filtered by type of call you may click on the tabs at the bottom of the call logs window titled: All, Outgoing, Incoming, Missed. This will show only a call of a certain type (i.e. Outgoing calls) and hide all other calls.

	Outgoing Phone call: When you make a call out to another phone.
	Incoming Phone call: When a another person calls you and you pickup the phone.
	Missed Phone call: When another person calls your Phone and you are unable to answer it.

**Outgoing Phone Calls**



Date/Time	Name	Number	Type
 11/6/2006 2:10:29 PM		5012	Out
 11/6/2006 2:10:11 PM		5064	Out
 11/6/2006 2:06:12 PM		5065	Out
 11/6/2006 2:22:27 PM		5065	Out
 11/6/2006 2:10:16 PM		5067	Out
 11/6/2006 2:10:20 PM		5067	Out
 11/6/2006 2:10:23 PM		5081	Out

 All
  Missed
  Incoming
  Outgoing

### Incoming Phone Calls

Date/Time	Name	Number	Type
11/6/2006 2:12:16 PM		5011	In
11/6/2006 2:12:21 PM		5011	In
11/6/2006 2:11:58 PM		5065	In
11/6/2006 2:11:51 PM		5067	In
11/6/2006 2:06:44 PM		5081	In
11/6/2006 2:12:04 PM		5081	In
11/6/2006 2:12:25 PM		5081	In

### Missed Phone Calls

Date/Time	Name	Number	Type
11/6/2006 2:11:12 PM		5011	Missed
11/6/2006 2:11:32 PM		5065	Missed
11/6/2006 2:11:38 PM		5065	Missed
11/6/2006 2:11:43 PM		5067	Missed
11/6/2006 2:11:46 PM		5067	Missed
11/6/2006 2:06:31 PM		5081	Missed
11/6/2006 2:11:02 PM		5081	Missed
11/6/2006 2:11:07 PM		5081	Missed
11/6/2006 2:11:22 PM		5081	Missed

## Sorting Call Logs

Call Logs includes a sorting feature that allows you to view the call logs sorted based on date/time, name, number, and type. To sort your call logs, please follow these steps:

Open the Call Logs window.

By default, the call logs are sorted by most recent call first, which is Date/Time in descending order.

Click on the Date/Time, Name, Number, or Type buttons located just above the list of call logs.

When you click on the button, it will first sort the list by that field name in ascending order.

If you click the same button again, it will sort the list by that field name in descending order.

Call Logs Sorted by Name in Ascending Order

Date/Time	Name	Number	Type
12/6/2006 12:29:24 PM	Bill Morton ...	5050	Missed
12/6/2006 12:18:08 PM	Elaine Valenta...	5095	Out
12/6/2006 12:16:26 PM	Mike Henandez...	5048	Out
12/6/2006 12:29:02 PM	Mike Henandez...	5048	In
12/6/2006 2:09:20 PM	Richard Pak	5065	Out
12/6/2006 2:09:26 PM	Richard Pak	5065	Out
12/6/2006 12:18:13 PM	test phone81 ...	5081	Out
12/6/2006 12:18:32 PM	test phone81 ...	5081	Missed
12/6/2006 12:19:06 PM	test phone81 ...	5081	In
12/6/2006 12:19:25 PM	test phone81 ...	5081	In
12/6/2006 2:09:20 PM	Richard Pak	5065	Out
12/6/2006 2:09:26 PM	Richard Pak	5065	Out
12/6/2006 12:16:26 PM	Mike Henandez...	5048	Out
12/6/2006 12:29:02 PM	Mike Henandez...	5048	In
12/6/2006 12:18:43 PM	test phone83 ...	5083	Missed
12/6/2006 12:18:09 PM	thien	5011	Missed

Call Logs Sorted by Name in Descending Order

## Searching Call Logs

Call Logs includes a search feature which allows the user to search the Call Logs based on the fieldnames. This allows for quick filtering of all call logs. Searching for call logs is described in the following steps:

Open the Call Logs window.

By default the Date/Time fieldname is selected first.

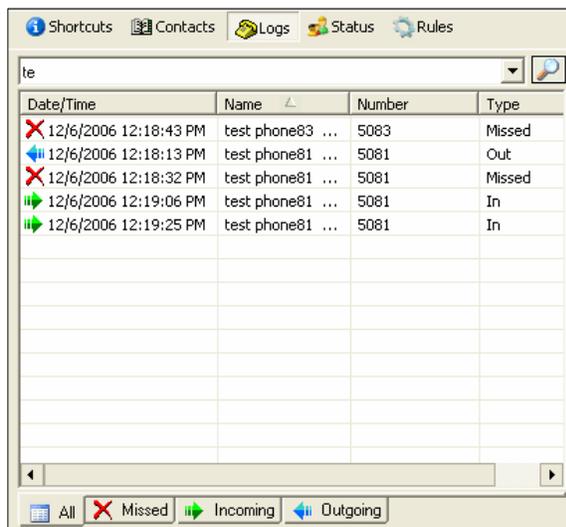
Please choose the fieldname, which you would like to search under by clicking on any of the fieldname buttons located just above the list of call logs. The available fieldnames are Date/Time, Name, Number, and Call.

After you clicked on the fieldname, type in the name or number you would like to search in the text box and click on the button with the magnifying glass.

It will search under the fieldname that you chose with the numbers or letters that you typed it and filter out all non-matching results.

If you leave the text box blank and click on the search button (magnifying glass), it will show you all the call logs.

Call Log Search with the Letters: te



## Refresh Call Logs

Using the refresh feature in the Call Logs window will reload the most current call logs from the database. You may want to do this if the call logs list is not refreshing every time a phone call occurs.

First open the Call Logs Window.

Right click anywhere on the Call Logs list. A menu will appear.

Click on the Refresh menu item.

The Call Logs window will reload all the Call Log entries.



## Call Handling

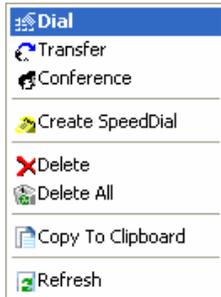
A useful feature from Call Logs is being able to use telephony functions while in the Call Log window. The Call Logs action menu telephony features include: Dial, Transfer, Conference, and Hang up. The Call Logs action menu management features include create speed dial, delete log, delete all logs, and refresh window.

Telephony Function	Description
 Dial	Dials the phone number of the contact in the Call Log selected.
 Transfer	Transfers the current phone call to the number selected.
 Conference	Sets up a conference with the number selected.
 Create SpeedDial	Creates a speed dial from the Call Log entry selected.
 Delete	Deletes the Call Log entry selected.
 Delete All	Deletes all Call Log entries from the Call Log list.
 Copy To Clipboard	Copies the Name and Number of the contact in the Call Log to the Clipboard.
 Refresh	Reloads all Call Log entries into the Call Log Window.

## Dial:

Right-click on a Call Log entry and it will show the telephony menu.  
Click on the Dial menu item.  
It will proceed to make a call to that contact.

Dial Menu Item



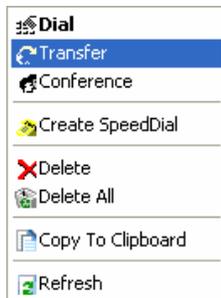
Popup Window: Dialing out



## Transfer:

Verify that you are connected in a phone call.  
Right-click on a Call Log entry and it will show the telephony menu.  
Click on the Transfer menu item.  
It will dial the number selected and a popup window will appear.  
Click on the transfer button on the balloon to perform a blind transfer. If you would like to perform a consultative transfer, you may wait until you talk to the person you are calling before pressing the transfer button on the popup window.  
It will proceed to transfer the phone call to the number selected and your line status will return to idle.

Transfer Menu Item



Popup Window with Transfer



## Conference:

- Verify that you are connected in a phone call.
- Right-click on a Call Log entry and it will show the telephony menu.
- Click on the Conference menu item.
- It will dial the number selected and a popup window will appear.
- Please wait until the person on the other line answers the phone to press the conference button.
- When the contact answers the phone call, click you may speak to the person, and then click on the conference button on the popup window.
- The call will become a 3-way phone conference.

Conference Menu Item



Popup Window with Conference



## Call Log Management

The call log management features include deleting call logs, creating speed dial, and copying call logs to a clipboard. These features are useful when you need to clear call logs or to store them somewhere else.

### Delete Call Logs

- Right-click on a Call Log entry that you would like to delete and it will show the telephony menu.
- Click on the Delete menu item.
- It will clear this Call Log entry.
- You can verify that this is deleted by refreshing Call Log Window.



the

Call Log Delete Menu Item

### Delete All Call Logs

Right-click on any Call Log entry and it will show the telephony menu.

Click on the Delete All menu item.

It will clear the list of all Call Log entries.

You can verify that all files are deleted by refreshing the Call Log Window.

Call Log Delete All Menu Item



### Create Speed Dial

Right-click on a Call Log entry and it will show the telephony menu.

Click on the Create SpeedDial menu item.

It will create a speed dial with the name and phone number of the contact from this Call Log entry.

You can verify that it created a speed dial by click on the Shortcuts button on the Sidebar. The new entry that you just created should be shown.

Create SpeedDial Menu Item



Shortcuts Window



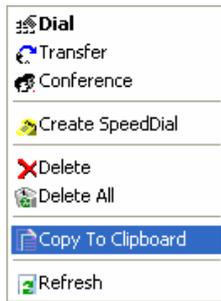
### ***Copy to Clipboard***

Right-click on the Call Log entry you would like to copy and it will show the telephony menu.

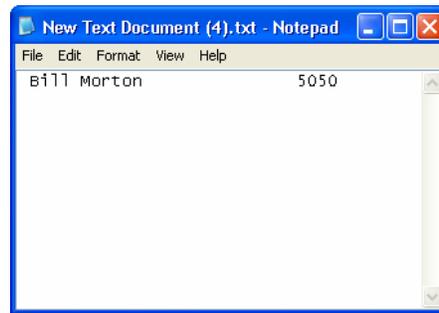
Click on the Copy to Clipboard menu item. It will copy the name and the number of the contact from the Call Log to the clipboard.

In any windows application, right-click and select paste or press ctrl + v to paste the contact information.

Copy to Clipboard Menu Item



Information Pasted into a Text File



# Monitoring Status

This chapter describes the steps for viewing the presence status, changing presence status, and performing telephony and messaging actions on other users. The following topics are discussed.

<b>Presence Overview -</b>	Provides an overview of the Presence Status feature.
<b>Viewing Presence Status-</b>	Describes the steps and options for viewing Presence information using the Status Window.
<b>Changing Presence Status -</b>	Describes the steps for changing one's presence status.
<b>Call Control</b>	Describes the steps for performing telephony and messaging actions on other users.
<b>Sending Instant Messages</b>	Describes the steps for performing telephony and messaging actions on other users

## **CallConnector Presence Overview**

The CallConnector Presence Service collects information about a user's availability and location, including whether or not they are using their telephone at a particular time. This information is made available to the CallConnector users from within their every day business applications such as Internet Explorer or Outlook. The presence information is also displayed when you use the CallConnector QuickSearch to locate contacts. Using this real-time presence information, users can connect with colleagues more efficiently through determining the most effective method for communicating with them at that time thus avoiding phone or message tag.

The CallConnector Presence Information comprises of four components:

Availability:	Four availability states are defined – available, unavailable, busy and away. These allow you to indicate to your colleagues about whether you are available to communicate with them
Location:	This presence status indicates where you are at the current time. It includes work, home, work-related traveling and personal time- vacation.
Telephone Status:	The telephone status provides information on the call state of your primary work number.
Away Message:	The Away Message provides a facility for expanding the availability with customized messages such as back in 2 hours etc.

The Unified CallConnector provides presence information for both the CallConnector users and non-users. The CallConnector Presence Server extracts the user information from the Corporate Directory on the CallController Server. It organizes the contact names by Department (Group) and publishes this information to the CallConnector clients. From the CallConnector toolbars, user's change their presence status and view the presence states of all the contacts in the Corporate Directory.

The CallConnector Presence Service requires the Unified CallConnector Services to be running within the organization to provide the sharing of resources among the CallConnector users. Requirements for use of the Presence Status feature:

- Unified CallConnector Client installed

- Unified CallConnector Server installed and running

- CallConnector Client must be set to Server Mode (can be changed in CallConnector Popup Options)

- An account on the Unified CallConnector Server with the ability to login

- The CallConnector Popup must be running and the user must be logged into the Unified CallConnector Server

- Internet Explorer/Outlook toolbar and sidebar both registered and running.

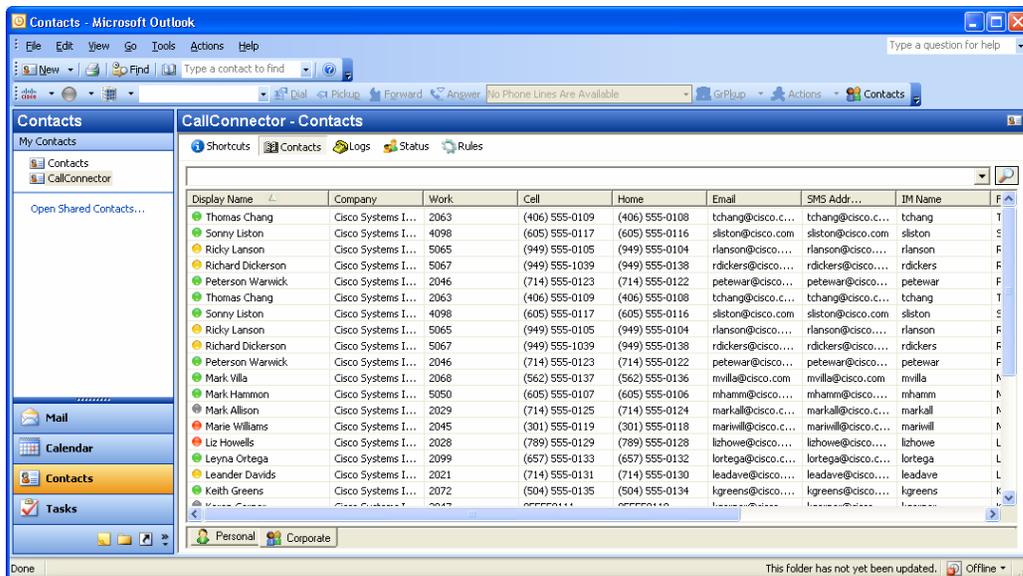
- For telephone status, the Radius accounting functions need to be enabled on the CallManager Express.

## Viewing Presence Status

The Presence Information can be viewed in a number of different ways. These include:

- My Availability:** This is a status button on the CallConnector toolbars displaying your current availability status.
- My Location:** This is a status button on the CallConnector toolbars displaying your current location.
- QuickSearch:** The search results returned from a QuickSearch display the availability status of the contacts (where available)
- QuickDial:** The QuickDial menu's that can be brought up to view the contact's details.
- Contacts:** The Personal, Corporate and Personal directories are able to display the presence status. However only the Corporate Directory contacts are monitored by the Presence Server at this time.
- Status:** The Status Window displays a list of all the contacts in the Corporate directory along with their availability, location and away messages. This is the primary window from which the presence information can viewed.

The Corporate Directory displaying the availability status is shown below.



## Opening the Status Window

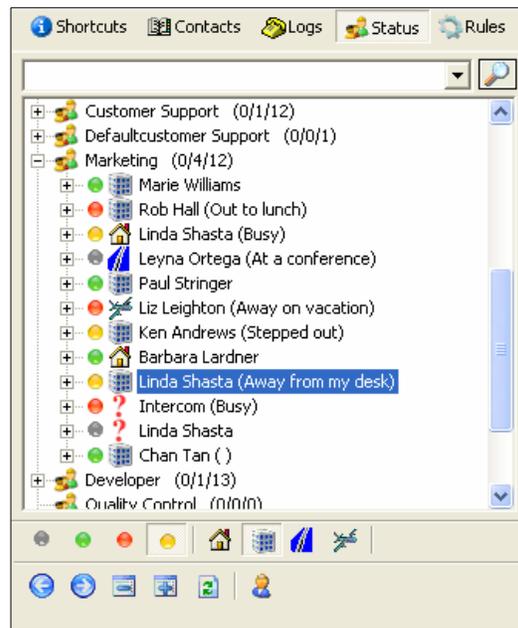
To view Presence Status, you must have all CallConnector services running and be logged into the CallConnector Server. Then do the following:

Open Internet Explorer or Outlook.

Click on the Contacts button on the Toolbar to open the Sidebar.

When the Sidebar is open, click on the Status tab to show the Status window (Presence Status).

The Presence Status window is described below.



The Presence Status window displayed in the Outlook View or in the Internet Explorer sidebar is comprised of the following regions:

**Search Bar:** Allows you to enter names or number to locate them in the Status window.

**Status Display:** This displays a hierarchical list with three levels of hierarchy – Department or Groups, Users and Phones. For each department or group within the organization the status window shows the number of calls ringing, the available users and the total number of users in the group. For the users, the display information includes icons for availability and location, the user name and the away message. Three telephone numbers can be displayed with each user – work, mobile and home. For the work number, the call states including the caller number and names are displayed where available.

**Status Toolbar:** At the bottom of the Status window, the toolbar allows you to change availability and location, navigate the tree hierarchy and locate your own entry in the list.

## Navigation Icons

These icons are used to help navigate through the different groups and viewing information such as members of a group or phone numbers of a user.

Icon	Description
	This icon is an icon may appear next to a group or user. It signifies that a group or user has not been expanded yet. You may click on this icon to expand the group or user. If you expand a group, it will show all the users of the group. If you expand a user, it will show all the phone numbers (work, home, cell) of the user.
	This icon is an icon that may appear next to a group or user. It signifies that a group or user has been expanded. You may collapse this group or user by clicking on this icon. When a group is collapsed, all of its users will be hidden. When a user is collapsed, all of the user's phone numbers will be hidden.
	This icon can be found at the bottom of the Status Window. If you've highlighted a group and click this icon, it will highlight the previous group. If you've highlighted a user of a group and click this icon, it will highlight the previous user of that group.
	This icon can be found at the bottom of the Status Window. If you've highlighted a group and click this icon, it will highlight the next group. If you've highlighted a user of a group and click this icon, it will highlight the next user of that group.
	This icon can be found at the bottom of the Status Window. By clicking on it, you will collapse all expanded groups.
	This icon can be found at the bottom of the Status Window. By clicking on it, you will completely expand all groups.
	This icon can be found at the bottom of the Status Window. By clicking on it, you will reload all the groups from the Presence Server into the Status Window.
	This icon can be found at the bottom of the Status Window. By clicking on it, it will display the location of the your user information (including which group you belong to and your phone numbers).

## Status Icons

These icons indicate the status of a group or user. A group's status is composed of the number of active calls in the group, the number of available users in the group, and the total number of users listed in the group. A user's status is composed of the user's availability, location, and message (if the user is away).

Icon	Description
 Marketing (0/4/12)	Group Icon in Status window showing Group Name and number of ringing, available and total members.
 Linda Shasta (Busy)	User with icons indicating Availability (colored spheres), Location status, and Away Message in bracket.
	User status: Unavailable.
	User status: Available.
	User status: Away.
	User status: Busy.
	User location: At Home.
	User location: At Work.
	User location: On the Road.
	User location: On Vacation.

## Viewing a Group

To view a group, you must first verify that the CallConnector client components are running, Internet Explorer or Outlook is open, and the Status Window is open (from the CallConnector sidebar). Here are the steps to viewing a group:

If the Status Window hasn't been viewed in a long time, you may want to click on the refresh button located at the bottom of the Status Window. This will reload all groups from the UCC Presence Server to the Status Window. This ensures that the information you see is the most current information (groups and users).

Once in the status window, all of the available groups will be shown. Many of the groups will be shown with plus signs next to them. This means that all of these groups are collapsed, hiding the users of the group.

If a group has no plus or minus sign next to it, then that means the group currently contains no users.

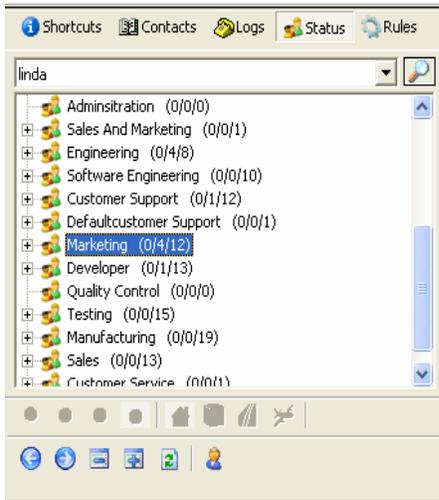
To the right of each group, there are three numbers. These values indicate the current status of the group. The first value (number on the left) indicates the current number of active phone calls in the group: phones dialing out, receiving a phone call, or connected in a phone call. The second value (middle number) indicates the current number of users, with the availability status: Available, in the group. The third value (number on the right) indicates the total number of users in this group.

To select different groups, you may use the left and right arrow icons at the bottom of the Status window. By clicking on the left arrow icon, it will select the previous group (above the currently selected group). By clicking on the right arrow icon, it will select the next group (below the currently selected group).

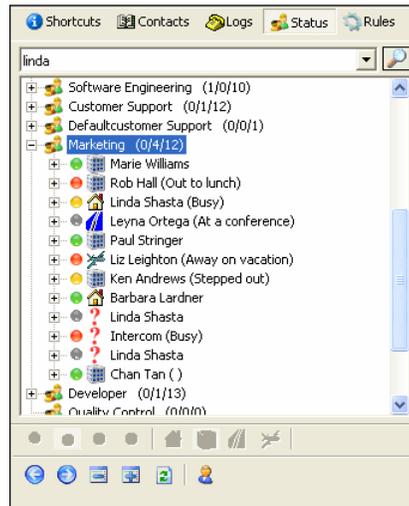
To view the users contained inside a group, you may simply click on the plus icon located on the left side of a group. The plus icon indicates expand. When you click on the plus icon of a group, it will expand the group and reveal all the members contained in that group.

Another way of viewing the users, contained inside a group, is by click on the “expand all” icon (plus icon) located at the bottom of the Status Window. This will expand all groups showing all users of all groups. To collapse all of the users of all groups, simply click on the “collapse all” icon (minus icon) at the bottom of the Status Window (located next to the plus icon).

List of Collapsed Groups



An Expanded Group



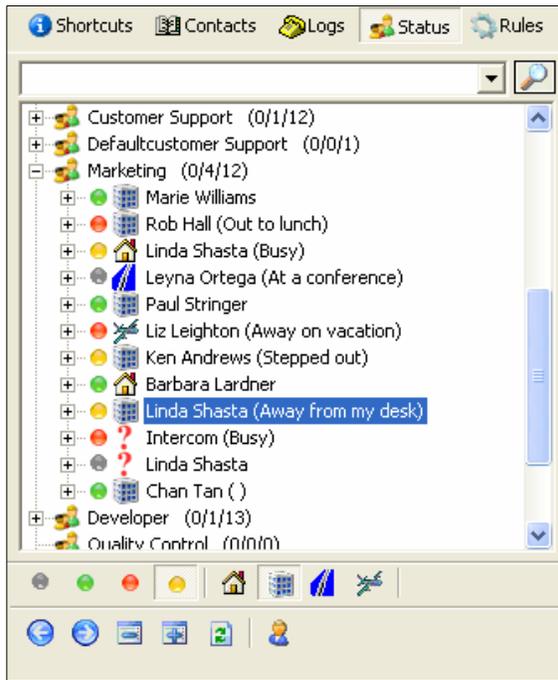
## Viewing a User's Status

To view a user's status, you must first verify that the UCC client components are running, Internet Explorer or Outlook is open, and the Status Window is open (from the UCC Sidebar). Here are the steps to viewing a user's status:

First, select and expand a group by clicking the plus sign next to a group. Once the group is expanded, a list of all of the users of that group will be shown indented and underneath that group name.

Each user has 2 status icons located next to their name. This is known as the presence status of a user. The presence status of a user is composed of 2 statuses and a message: availability and location. The message is displayed to the right of their name.

A user's availability, location status, and message can be changed by that user, the managers for that group and the administrator. When it is changed, it is automatically updated in your status window without having to refresh the window.



The highlighted user is Busy, At Work, and has the message "Away from my desk".

## Viewing a User's Telephone Status

To view a user's phone status, you must first verify that the UCC client components are running, you are logged into the UCC Server, Internet Explorer or Outlook is open, and the Status Window is open (from the UCC Sidebar). Note the telephone status here refers to the status of one of the IP Phone extension numbers. The telephone status information is provided only for the IP Phones. Any telephone numbers in the Corporate directory that match the caller or called numbers in the telephone state messages from the CallManager Express are updated with the new call state. If a user has all their numbers as the IP Phone extension, then the status of those extensions will be displayed in the Status window.

### ***To view a user's telephone status:***

First select a group and expand it by clicking on the plus icon next to the group's name. This will reveal all of that group's users.

Select a user and expand that user by clicking on the plus icon next to the user's name. This will reveal that user's three phone numbers which include the work phone, mobile phone, and home phone of that user.

The Telephone Status is displayed both at the user level and also at the phone device level of the Status hierarchy.

By default, if this user is not in a phone call or if the status is not known, then phone status is displayed as idle.

If the extension has an incoming call ringing, then the extension status will show **Ringin** status for that user as shown below. The Location status is replaced with the telephone status. If a call was placed from the extension and was getting ringback tone, then the extension status will display **Ringback**. The number and name of the other party in the call is also displayed if available.

If the extension is connected, then the Telephone Status will **Connected** status for that user and telephone as shown below.

Phone Icons:

Icons	Description
	This icon represents the user's <b>work</b> phone number.
	This icon represents the user's <b>home</b> phone number.
	This icon represents the user's <b>mobile</b> phone number.

Phone Status:

 Linda Shasta  5065 - Idle	<b>Idle status</b> indicates that the current user is not in the middle of a phone call.
 Linda Shasta  5065 Ringing... - Danny Hwang [5031]	<b>Ringin status</b> indicates that there is an incoming call from another user to this phone number. It also shows the name and number of the person calling.
 Linda Shasta  5065 Ringback... - Peter Applebee [5048]	<b>Ringback status</b> indicates that this user is making an outgoing call to another user. It also shows the name and number of the user being called.

## Changing Presence Status

In addition to viewing other user's presence status, you have the ability to change your own status to let other users know your current availability status. To change your status, you must first verify that the UCC client components are running, you are logged into the UCC Server, Internet Explorer or Outlook is open, and the Status Window is open (from the UCC Sidebar).

### Changing Status from Status Toolbar

- Click on the "My Contact" button. This button is located at the bottom of the Status Window and next to the refresh button. This button will expand the group that you belong to and highlight your name. You can also navigate to your name in the status window or search and locate the entry.

- Buttons in the Status Toolbar allow you to change your status. The first eight buttons allow you to change your availability and location. The remaining buttons allow you to navigate in the status list.
- Click on the availability button to change your current availability to the selected state. Similarly you can click on a location to change you location display to the selected value - at home, at work, on the road, and on vacation.
- After you have changed your presence status, you may notice that the changes made are readily reflected on your highlighted name.



Linda Shasta: Available and at Work

### **Changing Status from Menu**

- Click on the “My Contact” button. This button is located at the bottom of the Status Window and next to the refresh button. This button will expand the group that you belong to and highlight your name. You can also navigate to your name in the status window or search and locate the entry.
- Right-click on your name and the Status Menu will be shown.
- If you move the mouse over to the Availability option, a sub menu will appear and allow you to choose either of these availability statuses: Available, Unavailable, Busy, Away, Don't show my status. The status that is in bold lettering is the one that is currently chosen.
- If you move the mouse over to the Location option, a sub menu will appear and allow you to choose either of these location statuses: At Work, At Home, On the Road, On Vacation, Don't show my location. That status that is in bold lettering is the one that is currently chosen.
- If you move the mouse over to the Message option, a sub menu will appear and allow you to choose either of these messages: Busy, Be right back, Stepped out, Away from the keyboard, on the phone, and New message (custom message). The New Message option will allow the user to type in his/her own custom message, which will be displayed next to the user's name.



### Changing Availability Status

#### Changing Location Status



#### Changing Message



## Call Control Status

*from*

The status window not only allows the user to view other user's presence status, it also allows the user to perform telephony actions much like the Directory Contacts window.

The telephony actions that are available are: Dial, Transfer, Conference, Park, Forward, and Pickup.

You can also create speed dials and refresh.

Expand a user entry to display the phone numbers. Right click on any of the user's phone numbers and it will bring you to the telephony actions menu.

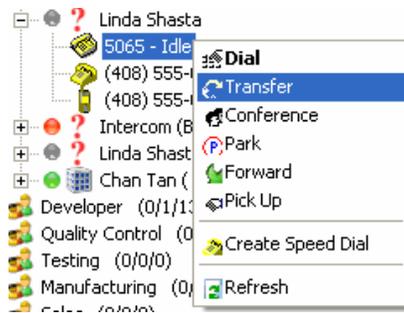
To Dial:

- Double-click on the phone number in the status window.
- You can also right-click on a telephone number in the list and bring up the CallControl menu and select Dial to auto-dial the number.



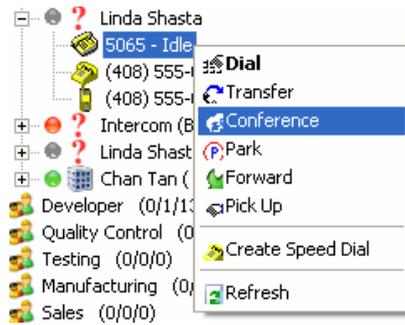
**To Transfer**

- When you are connected on a phone call.
- Find the user you want transfer the current call to. Then right-click on the work, mobile or home phone numbers in the display list to show the telephony actions menu.
- Click on the Transfer button and the CallConnector will set up a transfer to the selected number.



**To Setup a Conference:**

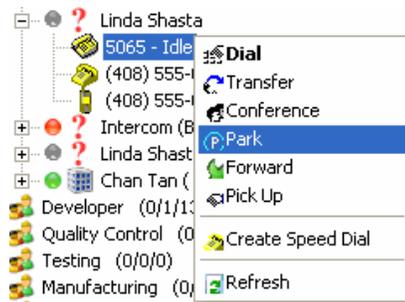
- When you are connected on a phone call.
- Find the user you want to conference into the current call. Then right-click on the work, mobile or home phone numbers in the status window. The Status Menu will display.
- Click on the Conference button and the CallConnector will set up conference to the selected number.



**To Park a Call:**

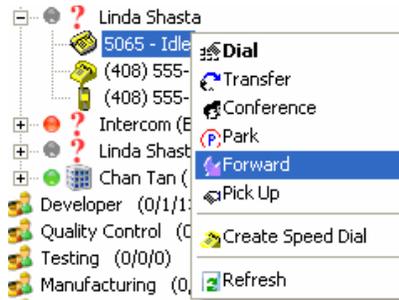
When you are connected on a phone call.

- Find the user you want park the current call to. Then right-click on the work phone numbers in the display list to show the telephony actions menu. This number can only be a CallManager Express number.
- Click on the Park button and the CallConnector will park the call to the selected number..



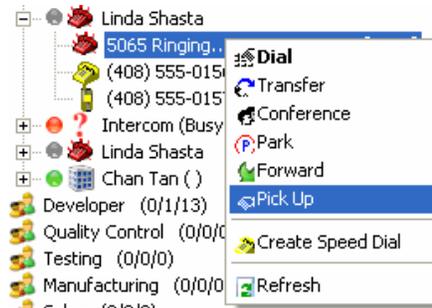
**Forward a Call:**

- Select a user's number to which you would like to forward all of your calls. Then right-click on a phone number to show the telephony actions menu.
- Click on the Forward function and it will re-route all phone calls to the number selected. Then hang up the phone call.
- To disable the call forwarding that you just implemented, right-click on this user's phone number again the select Forward.



**Pickup:**

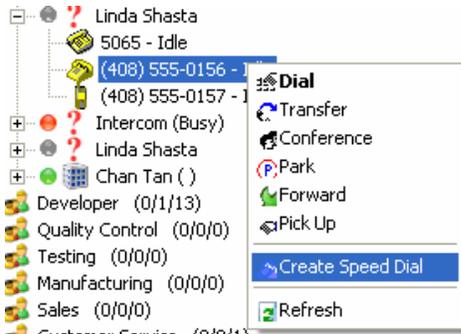
- Double-click on the user name or phone that is ringing, the call will be picked up.
- You can also right-click on the phone icon that is shown to be ringing and a telephony action menu will show.
- Select the Pick Up option and it will pick up the ringing phone call.
- Your status will then become connected.



**Create Speed Dial:**

- Expand the user from whom you would like to create a speed dial.
- Right-click on any of the user's phone numbers to show the telephony actions menu.
- Select "Create Speed Dial" and it will create a new speed dial from the phone number you just selected.
- You may verify that a speed dial is created by clicking on the Speed tab on the Internet Explorer/Outlook Sidebar.

Select Create Speed Dial

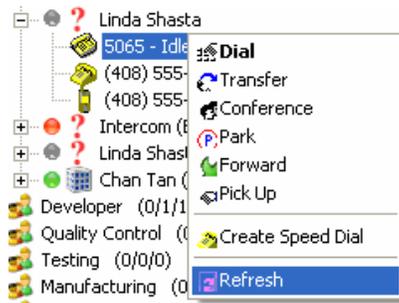


Speed Dial Created



**Refresh:**

- Expand any user and right-click on any phone number to show the telephony actions menu.
- Then click on the refresh button. This will reload the groups and users of each group back into the Status Window. This function is the same as clicking the refresh icon at the bottom of the Status Window.



## Messaging Actions

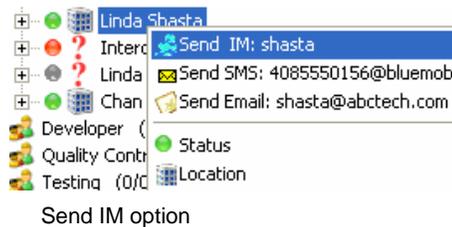
The status window not only allows the user to view other user's presence status, it also allows the user to send message much like the Directory Contacts window.

You can send message using the following methods: Email, Text or SMS, and IM (Instant Message).

To send messages, right click on a user and it will show the user's message actions menu.

### **Send IM (Instant Message):**

- Double-click on a user name to open the IM widow.
- You can also right-click on a user to whom you would like to send an IM. It will show a message actions menu.
- Select the send IM option and a blank IM window will popup.
- Type in a message and click send. The UCC will send this message to the user selected.
- You may verify that this function works if the other party receives the message.



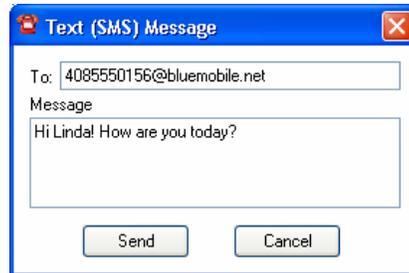
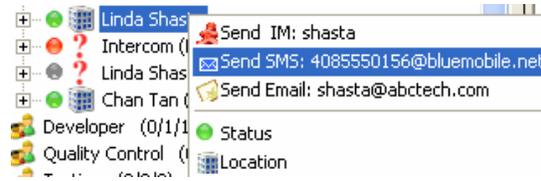
Send IM option



### **Send SMS (Text Message)**

- Right-click on a user to whom you would like to send a Text or SMS message. It will show a message actions menu.
- Select the send SMS option and a blank SMS window will popup.

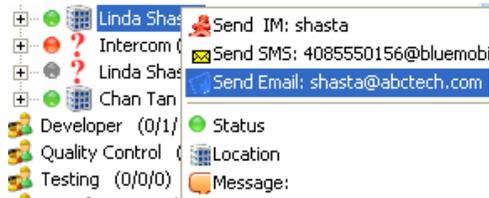
- Type in a message and click send. The UCC will send this message to the SMS mailbox of the user selected. Note you have to setup the SMTP mail parameters in the CallConnector Options window.
- You may verify that this message was sent, by having the user check his SMS mailbox.



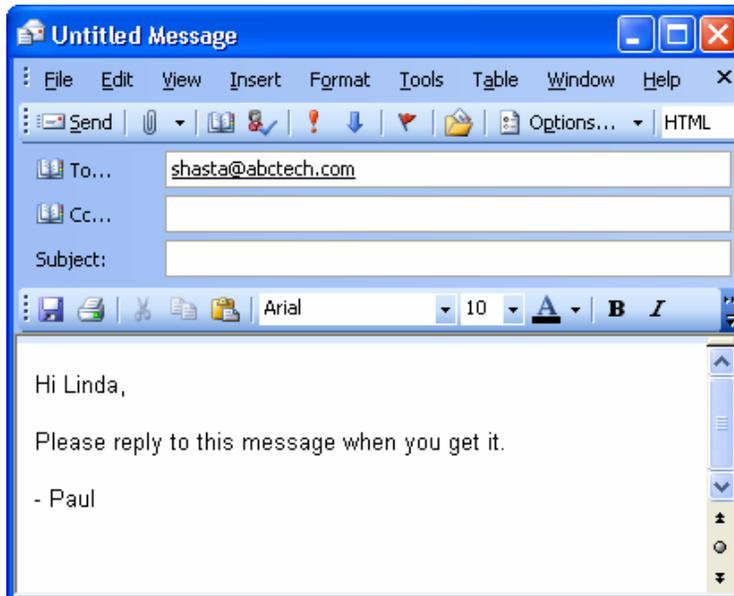
Send SMS Option and SMS Message Window

**Send Email:**

- Right-click on a user to whom you would like to send an Email. It will show a message actions menu.
- Select the send Email option and a blank Email window will pop up. The Email window will be from your default email client (i.e. Outlook).
- The recipient's email address is already filled in. You just need to type in a message and click send. The UCC will proceed to send this message this user's email.



Send Email Option



Blank Email Form with Recipient's Email Filled in

# Troubleshooting

This chapter describes the common error conditions that occur with the Unified CallConnector Client and steps to solving these problems. The following are the areas of possible error conditions what will be covered:

**Troubleshooting Overview:** This section provides a brief overview of the troubleshooting section.

**Installation Troubleshooting:** This section describes possible errors that may occur during Installation and how to solve them.

**Activation Troubleshooting:** Registering UCC Client with the License Server.

**Popup Troubleshooting:** Describes the errors that may occur while using the UCC Popup and steps to solving these errors.

**IE Troubleshooting:** Site from which the Unified CallConnector software can be downloaded.

**Outlook Troubleshooting:** Describes the steps and options for installing Unified CallConnector.

## ***Unified CallConnector Troubleshooting Overview***

While using the Unified CallConnector, users may experience some common problems. This chapter focuses on troubleshooting these common problems. The troubleshooting information contains information on the nature of the problems and steps to solving these problems. Troubleshooting is covered in these sections:

**Installation:** This section covers problems during installation, TSP/CME phone setup, and the registration process.

**Startup:** This section covers problems with starting up the UCC Client in Internet Explorer, Outlook, and Popup.

**Popup:** This section covers problems involving the UCC Popup menu interface.

**Toolbar:** This section covers problems involving the toolbar features in Internet Explorer and Outlook.

**Sidebar:** This section covers the problems related to the contacts sidebar features in Internet Explorer and Outlook.

## ***Installation Troubleshooting***

### **Unable to Write to the Registry**

#### ***Description***

The install program checks if you have rights to write to the Windows registry, otherwise it will display an error message.

#### ***Possible Causes***

Registry error message "You do not have sufficient privileges to run this installation" is displayed when:

The Install Program is unable to write to the sections of the Windows registry during the installation.

You may also see this as blank fields in the Wizard interface.

#### ***Procedures***

Step 1: Logout of Windows and login using an account that has at a minimum power user rights on that computer.

### **CME TSP is Not Displayed**

#### ***Description***

The Cisco CME TSP is not displayed in the Phone and Modems control panel window or in the list of TAPI drivers.

#### ***Possible Causes***

The CME TSP will not be displayed if:

The TSP has not been added to the Windows system.

The TSP was incorrectly installed.

The TSP was removed from the Phone and Modems window.

The CME TSP file has been deleted.

#### ***Procedures***

Step 1: Add the CME TSP from the Phone and Modems control panel window.

From the Control Panel, open the Phone and Modems window and click on the Advanced tab. If the "Cisco CME Telephony Service Provider" is not displayed, then click on Add and add it to Windows.

Step 2: If the CME TSP cannot be added, then re-install the CME TSP.

## How to Remove the CME TSP

### **Description**

The CME TSP is started at Windows startup; it briefly registers with the CallManager Express to obtain the line configuration information and then un-registers. If there are problems with the TSP during Windows startup, the CME TSP can be removed from the active TAPI drivers list.

### **Procedures**

Step 1: From the Control Panel, open the Phone and Modems window and click on the Advanced tab.

Step 2: Select the "Cisco CME Telephony Service Provider" and click on Remove. The CME TSP will be removed from the list of active TAPI Drivers.

## Cannot Register with the IP Phone

### **Description**

The CallManager Express can be successfully pinged and "found", but the Wizard or TSP cannot register.

### **Possible Causes**

There can be several reasons for this failure:  
Invalid user name and password have been entered.  
Another TSP is running and using the same IP-Phone.  
The IP-Phone has not been configured with the User Name and Password.

### **Procedures**

Step 1: Verify that the account information has been entered correctly.  
Re-enter the information and verify connectivity using the Wizard.

Step 2: If the Wizard still displays the error, then contact your system administrator or service provider.

## **Activation Troubleshooting**

### **Registration Fails with Timeout**

#### **Description**

When you click to Activate your serial number, the progress bar run through three times and posts an error message.

#### **Possible Causes**

There can be several reasons for this failure:  
  
You do not have access to the Internet from this PC

Access to the UnifiedCallConnector site is not available.

### **Procedures**

- Step 1: Verify that you have access to Internet. Browse to the [www.cisco.com](http://www.cisco.com) site.
- Step 2: Verify that you have access to the Registration Server site. Browse to [www.unifiedcallconnector.com](http://www.unifiedcallconnector.com).
- Step 3: If the Registration still displays the error, then contact your system administrator or service provider.

## **Incorrect Serial Number Entered**

### **Description**

The Registration process does not proceed because of an invalid serial number or an expired trial serial number.

### **Possible Causes**

There can be several reasons for this failure:

The Serial Number is already being used.  
Your evaluation period has expired.

### **Procedures**

- Step 1: Run the CallConnector Popup application, this will present the Registration Windows.
- Step 2: Enter a valid serial number provided to you when you purchased the software.
- Step 3: Click on Activate to register the new serial number.

## **Popup Troubleshooting**

### **Popup System Tray Icon Becomes Gray**

#### **Description**

The red Popup icon in the System Tray becomes grayed out.

#### **Possible Causes**

There can be several reasons for this failure:

The Local SIP Server has stopped.  
The System SIP Server has stopped.  
The CallController Server has stopped and you cannot get phone lines.

#### **Procedures**

- Step 1: Check to see whether the Local SIP Server has stopped.
- Step 2: Right-click on the Popup system tray icon.

Step 3: Then move the mouse over the Services menu item. A menu showing the status of the local services will appear.

Step 4: If the Local SIP Server is stopped, then please start the service by clicking on Start All Services.

Step 5: Check to see whether the System SIP Server has stopped. You can check this on the server machine that it is running from. In Control Panel\Administrative Tools\Services, you can verify if the System SIP Server has stopped.

Step 6: If it has stopped, right-click on the service and select start.

Step 7: Check to see whether the CallController Server has stopped. If you are in TAPI mode, open Control Panel\Administrative Tools\Services. Check whether ccCallController service has stopped. If it stopped, right-click on the service and select start to restart the service.

Step 8: If you are in Server mode, check to make sure whether the CallController Server has stopped on the Server machine. You can check that from the Services menu. Find the service called CallController Server and see if it is started or stopped. If it stopped, right-click on the service and select start to restart the service.

## Speed Dial Shortcuts Not Showing

### **Description**

When you open the Popup menu and move your mouse over the speed menu item, no speed dial shortcuts are shown.

### **Possible Causes**

There can be several reasons for this failure:

You are not logged in.  
The Database Server is down.

### **Procedures**

Step 1: Check whether or not you are logged in or logged out.

Step 2: Right-click on the red Popup system tray icon and select the options menu item. Click on the Server tab.

Step 3: If in SIP Account information it displays a logout button, then you are logged in. If it shows a Login and Reset button, then you are logged out.

Step 4: If you are logged out, then type your Login name and password and click on the Login button to login.

Step 5: Check whether or not the Database Server is down.

Step 6: If you are in TAPI mode, the CallController acts as the Database server. Check in Services to see if the ccCallController service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.

Step 7: If you are in Server mode, check the Database Server on the Server machine to see if it has stopped. If it has stopped, then start the service from the Services menu.

## Phone Lines are Not Shown or Cannot Dial

### **Description**

When trying to select a phone line from the Popup menu, the phone lines are not shown. Or attempting to dial, but the call is not being dialed out.

### **Possible Causes**

There can be several reasons for this failure:

- You are not logged in.
- CallController Server is stopped.
- IP Phone has been disconnected or not in service.
- IP Phone has not been configured with the CME.

### **Procedures**

Step 1: Check whether or not you are logged in or logged out.

Step 2: Right-click on the red Popup system tray icon and select the options menu item. Click on the Server tab.

Step 3: If in SIP Account information it displays a logout button, then you are logged in. If it shows a Login and Reset button, then you are logged out.

Step 4: If you are logged out, then type your Login name and password and click on the Login button to login.

Step 5: Check whether or not the CallController Server is down.

Step 6: If you are in TAPI mode, check in Services to see if the ccCallController service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.

Step 7: If you are in Server mode, check the CallController Server on the Server machine to see if it has stopped. If it has stopped, then start the service from the Services menu.

Step 8: Check to see if your IP phone has been disconnected or not in service. If it is not showing any status on the screen, it may be unplugged. If it is, then plug it in. If the screen on your IP phone is not showing any phone lines, it may not be connected to the CME. If it is not connected to the CME, plug it in.

Step 9: If your IP phone is connected to the CME, plugged into a power source, but not showing any lines on the screen, then it may not be configured. Please contact your System Administrator or Service provider to configure the phone with the CME.

## QuickSearch Does Not Work

### **Description**

When trying to perform a QuickSearch from the Dial window.

### **Possible Causes**

There can be several reasons for this failure:

- You are not logged in.

Database Server is stopped.  
Directory Lookup and/or Outlook lookup is disabled.

### **Procedures**

- Step 1: Check whether or not you are logged in or logged out.
- Step 2: Right-click on the red Popup system tray icon and select the options menu item. Click on the Server tab.
- Step 3: If in SIP Account information it displays a logout button, then you are logged in. If it shows a Login and Reset button, then you are logged out.
- Step 4: If you are logged out, then type your Login name and password and click on the Login button to login.
- Step 5: Check whether or not the Database Server is down.
- Step 6: If you are in TAPI mode, the CallController acts as the Database server. Check in Services to see if the ccCallController service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.
- Step 7: If you are in Server mode, check the Database Server on the Server machine to see if it has stopped. If it has stopped, then start the service from the Services menu.
- Step 8: Check whether the Directory/Outlook lookup is disabled.
- Step 9: Open the Options menu from the Popup menu.
- Step 10: In the Options tab, make sure the Directory and Outlook lookup is checked. If they are not checked, please check them.

## **Balloon Popup Not Appearing During a Call**

### **Description**

When dialing out or receiving a phone call, the balloon popup is not appearing with the other party's information.

### **Possible Causes**

There can be several reasons for this failure:

Display Incoming Phone Call and Display Outgoing Phone Call options are disabled.

### **Procedures**

Step 1: Check whether or not the Display Incoming Phone Call and Display Outgoing Phone Call options are enabled.

Step 2: Open the Options menu from the Popup menu.

Step 3: Make sure that the Display Incoming Phone Call and Outgoing Phone Call are checked off. If they are not, please enable them.

## **Balloon Popup Not Showing Correct Contact Information**

### **Description**

When dialing out or receiving a phone call, the balloon popup is not showing the correct contact information.

### **Possible Causes**

There can be several reasons for this failure:

Database Server is Down.

Directory Lookup and/or Outlook lookup option is disabled.

There exists 2 or more people in the Directory Contacts with the same phone number. It could be just displaying the information of the wrong person.

### **Procedures**

Step 1: Check whether or not the Database Server is down.

Step 2: If you are in TAPI mode, the CallController acts as the Database server. Check in Services to see if the ccCallController service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.

Step 3: If you are in Server mode, check the Database Server on the Server machine to see if it has stopped. If it has stopped, then start the service from the Services menu.

Step 4: Check whether the Directory/Outlook lookup is disabled.

Step 5: Open the Options menu from the Popup menu.

Step 6: In the Options tab, make sure the Directory and Outlook lookup is checked. If they are not checked, please check them off.

Step 7: Check whether there are 2 or more people in the Directory Contacts with the same phone number.

Step 8: Open IE and open the IE Sidebar. Then click on the Contacts tab.

Step 9: Begin sorting the contacts by business phone number ascending. Check to see if the contact you are searching for shares the same phone number with the other contacts. If so, then delete the other contacts or change their phone numbers.

Step 10: Repeat step 9 with Corporate Contacts.

## Cannot Login

### **Description**

You cannot login.

### **Possible Causes**

There can be several reasons for this failure:

Wrong User information.  
Local SIP Server stopped (TAPI Mode).  
System SIP Server stopped (Server Mode).  
Database Server has stopped.

### **Procedures**

Step 1: Check whether you typed in the wrong user information.

Step 2: The login information for TAPI mode and Server mode are completely different.

Step 3: If you are unsure about what your username and password are for either modes or you don't have a username and password, talk to your system administrator or service provider for assistance.

Step 4: Check whether the Local SIP Server has stopped. If it is stopped, there is no way for your client to communicate with the System SIP Server or Local CallController to log in.

Step 5: On your machine, check in Services to see if the ccLocalSIPServer service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.

Step 6: Check whether the System SIP Server has stopped. If you are logging in, in Server mode, the System SIP Server must be running to authenticate the user.

Step 7: On the Server machine, check in Services to see if the ccSystemSIPServer service is stopped. If it has stopped, then select the service and click the "play" icon on the top to start the service.

Step 8: Check whether the Database Server has stopped running. In order for the user to be logged in the System SIP Server (Server mode) or CallController (TAPI mode) needs to be able to access the database to authenticate the user.

## **Internet Explorer Troubleshooting**

### **Toolbar:**

### **Do not See Toolbar in Internet Explorer**

#### **Description**

The Unified CallConnector Toolbar does not show in the Internet Explorer.

#### **Possible Causes**

There can be several reasons for this failure:

The first time, you need to manually select the Unified CallConnector toolbar.  
The Internet Explorer toolbar components were not registered properly during installation.

#### **Procedures**

Step 1: Verify that you have enabled the Unified CallConnector toolbar. From Internet Explorer, open the Manage Add-ons from the Tools menu.  
Step 2: Verify that the Unified CallConnector Browser extension, Unified CallConnector Toolbar, and Unified CallConnector Apps Browser extension is in the Enabled part of the menu.  
Step 2: If the Unified CallConnector entry is not available (not in Enabled or Disabled), then close all instances on Internet Explorer and then from the Unified CallConnector program folder and run unregisterIE.bat. Once that is completed, run registerIE.bat.  
Step 3: If the toolbar still does not display, then contact your system administrator or service provider.

### **Grey Popup icon or Toolbar**

#### **Description**

The IE or Outlook toolbar or the Popup icon in the system tray are gray.

#### **Possible Causes**

There can be several reasons for this failure:

One of the controlling software has failed.  
You do not have access to the IP Phone.

#### **Procedures**

Step 1: Restart the CallConnector Popup. Right click on the Popup icon and exit. Then double-click on the desktop icon.  
Step 2: If the toolbar and Popup icon are still grey, then verify that you have access to the IP Phone as described in the 'Cannot Register with the IP Phone.'

Step 3: If you still have a problem, then contact your system administrator or service provider.

## ***Outlook Troubleshooting***

### **Toolbar:**

#### **Do not See Toolbar in Outlook**

##### ***Description***

The Unified CallConnector Toolbar does not show in the Internet Explorer.

##### ***Possible Causes***

There can be several reasons for this failure:

The first time, you need to manually select the Unified CallConnector toolbar.  
The Internet Explorer toolbar components were not registered properly during installation.

##### ***Procedures***

Step 1: Verify that you have enabled the Unified CallConnector toolbar. From the Internet Explorer View menu, click on Toolbar and enable the Unified CallConnector.  
Step 2: If the Unified CallConnector entry is not available, then close all instances on Internet Explorer and then from the Unified CallConnector program folder double-click on unregisterIE.bat . Once that is completed, then double-click on registerIE.bat  
Step 3: If the toolbar still does not display, then contact your system administrator or service provider.