Using Click to Dial With Your Cisco Unified IP Phone

The click-to-dial function of Cisco Unified Phone Application Suite lets you dial a phone number with one click from within the following applications:

- Microsoft Outlook 2003 with Service Pack (SP) 2 or later
- Microsoft Word 2003 with Service Pack (SP) 2
- Microsoft Excel 2003 with Service Pack (SP) 2
- Microsoft PowerPoint 2003 with Service Pack (SP) 2
- Cisco Unified Phone Application Suite desktop application click-to-dial menu item

Click to dial is enabled and ready to use once you have installed the Cisco Unified Phone Application Suite desktop application and have configured your Preferences in the Cisco Unified Phone Application Suite screen as described in the Configuring Your Preferences chapter.

For the list of Cisco Unified IP Phones that support click to dial, see System Requirements, page 2.

Note
The term Cisco Unified IP Phone is used generically throughout this manual to refer to the phone you are using in conjunction with the features this manual describes. This term also applies to Cisco IP Communicator and Cisco Unified Personal Communicator when the click-to-dial feature is referenced and described.

This section contains the following topics:

- Important Note About Plug-Ins, page 21
- Using Click to Dial from Microsoft Outlook, page 22
- Using Click to Dial from Microsoft Office Applications with Smart Tag Support, page 23
- Using Click to Dial from the Desktop Application, page 28
- Troubleshooting Connectivity Issues, page 29

Important Note About Plug-Ins

If your computer security software, such as Cisco Security Agent, monitors the loading of plug-ins to Microsoft Outlook and Microsoft Office applications, you may receive security warnings for Cisco Unified Phone Application Suite plug-ins as you open these applications.

Typically, these warnings ask you to verify that the monitored activity is valid. The default response of such warnings is usually to deny the request; therefore, be sure to allow the actions initiated by the plug-ins or Cisco Unified Phone Application Suite application.
Using Click to Dial from Microsoft Outlook

Make sure that the Cisco Unified Phone Application Suite icon is visible in the Contacts view of Microsoft Outlook (usually appears near the upper-left corner of the Contacts view). If this icon does not appear, follow the instructions in Re-enabling the Microsoft Outlook Plug-In, page 23.

This section contains these topics:

- Dialing a Phone Number, page 22
- Re-enabling the Microsoft Outlook Plug-In, page 23

Dialing a Phone Number

If you already have contact names configured in Microsoft Outlook, you can use click to dial. If you do not have any contact names configured, you need to configure at least one contact before you can use click to dial.

To use the click-to-dial feature to call any phone number for any of your contacts, follow these steps:

Procedure

**Step 1** Open Microsoft Outlook, and navigate to the Contacts view, then highlight the contact you want to call.

The contact name appears in the toolbar next to the Cisco Unified Phone Application Suite icon.

**Step 2** Click on the drop-down list to the right of the contact’s name.

All the phone numbers that you have already configured for this contact now appear.

**Step 3** Click the number you want to call.

A pop-up window briefly displays to indicate that Cisco Unified Phone Application Suite is dialing the number.

**Note** If you receive a message indicating that a connectivity problem exists, see Troubleshooting Connectivity Issues, page 29.

As soon as the remote party answers the call, the speaker of the phone you have configured to use for click-to-dial is activated.
Re-enabling the Microsoft Outlook Plug-In

The Microsoft Outlook click-to-dial plug-in `phonesuite_outlookaddin` is enabled during installation of Cisco Unified Phone Application Suite. However, if the plug-in subsequently becomes disabled, the Cisco Unified Phone Application Suite icon does not display in the Contacts view and click-to-dial becomes temporarily disabled. To re-enable the plug-in, follow these steps:

**Procedure**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>With Microsoft Outlook open, choose <strong>Help &gt; About Microsoft Outlook</strong>, then choose <strong>Disabled Items</strong>. If <code>phonesuite_outlookaddin.dll</code> is in the list of disables items, enable it, then restart Microsoft Outlook.</td>
</tr>
<tr>
<td>Step 2</td>
<td>With Microsoft Outlook open, choose <strong>Tools</strong> in the navigation area, then choose <strong>Options</strong>.</td>
</tr>
<tr>
<td>Step 3</td>
<td>On the Options screen, choose <strong>Other</strong>, then choose <strong>Advanced Options</strong>.</td>
</tr>
<tr>
<td>Step 4</td>
<td>On the Advanced Options screen, choose <strong>COM Add-Ins....</strong></td>
</tr>
<tr>
<td>Step 5</td>
<td>On the COM Add-Ins pop-up window, check the box next to <code>phonesuite_outlookaddin</code>, then click <strong>OK</strong>.</td>
</tr>
<tr>
<td>Step 6</td>
<td>On the Advanced Options screen, click <strong>OK</strong>.</td>
</tr>
<tr>
<td>Step 7</td>
<td>On the Options screen, click <strong>OK</strong>.</td>
</tr>
<tr>
<td>Step 8</td>
<td>Close Microsoft Outlook, then re-open Microsoft Outlook.</td>
</tr>
</tbody>
</table>
| Step 9 | Choose the **Contacts** view.  

The Cisco Unified Phone Application Suite icon should now be appear.

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Using Click to Dial from Microsoft Office Applications with Smart Tag Support

You can use the click-to-dial feature from within Microsoft Office 2003 applications with Smart Tag support. These applications include Microsoft Word, Microsoft PowerPoint and Microsoft Excel. When you install Cisco Unified Phone Application Suite, Microsoft Windows’ Smart Tags are enabled within these Microsoft Office applications. By entering a valid phone number in a Word, Excel or PowerPoint document, you can dial that number by using the associated Smart Tag.

This section contains these topics:

- **Important Tips About Entering Phone Numbers for Smart Tags**, page 24
- **Dialing a Phone Number from a Smart Tag**, page 26
- **Re-Enabling Smart Tags in Microsoft Office Applications**, page 28
## Important Tips About Entering Phone Numbers for Smart Tags

You can read the online help about Smart Tags in any of your Microsoft Office applications, but Table 4 has a few important tips to help ensure that the Smart Tags are in effect for Cisco Unified Application Phone Suite.

### Table 4   Smart Tag Tips

<table>
<thead>
<tr>
<th>Application</th>
<th>Tip</th>
</tr>
</thead>
</table>
| All Microsoft Office applications that support Smart Tags | • Phone numbers can have dashes and parentheses as appropriate; for example, the following format for U.S. number are allowed:  
  – 800-555-1212  
  – (800) 555-1212  
  – (800)555-1212  
  • You can check with your system administrator to find out what default area code has been configured; then, if you want to dial a number in that area code, you do not need to include the area code in the phone number.  
  • International phone numbers must be preceded with a plus sign (+), as in the following example of an accepted format to make a call from the United States to a number in Japan:  
    +353 91 38 4622  
  • International numbers must begin with the country code; do not use any access code preceding the country code.  
  
  **Note** Verify with your system administrator that configured route patterns in Cisco Unified Communications Manager will handle access codes. |
| Microsoft Office Word | Phone numbers must be separated by a space or a blank line before the Smart Tag will appear. |
| Microsoft Office Excel | Smart Tags will not appear until you have clicked outside the cell in which you have entered a phone number. |

Table 5 shows some examples of valid phone number formats.
Table 5  Some Valid Phone Number Formats

<table>
<thead>
<tr>
<th>Number</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>415-222-3333</td>
<td>Mobile phone NANP</td>
</tr>
<tr>
<td>(020)222-3333</td>
<td>Outside Amsterdam</td>
</tr>
<tr>
<td>222-3333</td>
<td>US local</td>
</tr>
<tr>
<td>222 3333</td>
<td>US local</td>
</tr>
<tr>
<td>(020) 222 3333</td>
<td>Outside Amsterdam</td>
</tr>
<tr>
<td>+31 20 222 3333</td>
<td>Outside the Netherlands</td>
</tr>
<tr>
<td>1 415 222 3333</td>
<td>Outside San Francisco</td>
</tr>
<tr>
<td>415 222 3333</td>
<td>Mobile phones NANP</td>
</tr>
<tr>
<td>+1 415 222 3333</td>
<td>Outside NANP</td>
</tr>
<tr>
<td>222 333</td>
<td>Within Oslo</td>
</tr>
<tr>
<td>(02) 222 333</td>
<td>Within Norway, outside Oslo</td>
</tr>
<tr>
<td>+47 2 333 4444</td>
<td>Outside Norway</td>
</tr>
<tr>
<td>(020) 222 3333</td>
<td>Within Norway including Oslo</td>
</tr>
<tr>
<td>+47 2233 4444</td>
<td>Outside Norway</td>
</tr>
<tr>
<td>01 22 33 44 55</td>
<td>Paris</td>
</tr>
<tr>
<td>02 222 3333</td>
<td>Brussels</td>
</tr>
<tr>
<td>022 222 3333</td>
<td>Geneva</td>
</tr>
<tr>
<td>021 222 3333</td>
<td>Cape Town</td>
</tr>
<tr>
<td>+420 233 444 5555</td>
<td>Prague</td>
</tr>
<tr>
<td>4152223333</td>
<td>Mobile phones NANP</td>
</tr>
</tbody>
</table>

Note If Smart Tags do not appear, try re-scanning the document by navigating (from within the open document) to Tools > AutoCorrect Options > Smart Tags, then clicking on Recheck Document.
### Dialing a Phone Number from a Smart Tag

To dial a phone number from within a Microsoft Office application using Smart Tags, follow these steps:

#### Procedure

**Step 1** Enter a phone number or list of numbers into your Microsoft Office application.

For information on accepted formats for phone numbers, see [Important Tips About Entering Phone Numbers for Smart Tags](#), page 24.

If Smart Tags are enabled, faint dotted lines will appear under each recognized phone number, as shown in the following example below:

```
800-555-1212
```

In addition, when you move your cursor directly over the phone number, the Smart Tag action button (a circled “i”) should appear. If the dotted lines and the Smart Tag action button do not appear as described, the Smart Tags may have become disabled. In this situation, see the [Re-Enabling Smart Tags in Microsoft Office Applications](#), page 28.

**Step 2** Click on the The Smart Tag actions button (a circled “i”), and the following Smart Tag icon appears:

![Smart Tag icon](#)

With this icon, a popup menu also displays and lists all the Smart Tag options from which to choose.

See Table 6 for a description of each Smart Tag option.

**Step 3** Perform any action you want.

If you choose to dial the number, a pop-up window briefly displays to indicate that Cisco Unified Phone Application Suite is dialing the number.

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**Note** If you receive a message indicating that a connectivity problem exists, see [Troubleshooting Connectivity Issues](#), page 29.

As soon as the remote party answers the call, the speaker of the phone you have configured to use for click-to-dial is activated.

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**Note** Not all fields shown in Table 6 are necessarily shown in the Smart Tag options of each Microsoft Office application. Read Microsoft Office online help for details.
Customizing Phone Number Recognizer

The regular expressions that are used by the Smart Tag Plug-in to recognize phone numbers in Microsoft Word, PowerPoint, or Excel documents are defined in the `smarttagrules.xml` configuration file. This file is located at:

C:\Documents and Settings\[Microsoft Windows user name]\Application Data\Cisco\Unified Phone Application Suite.

You can define up to five regular expressions for phone-number recognition. For the expressions to take effect after you change the content of the `smarttagrules.xml` file, you must restart the Cisco Unified Phone Application Suite desktop application and all Microsoft Office applications.

Note: If you are not familiar with regular expressions, ask your system administrator for help.
Re-Enabling Smart Tags in Microsoft Office Applications

If the Smart Tag icon does not appear when you move your cursor directly over a phone number, first check to make sure that the phone number is in the correct format. Refer to Important Tips About Entering Phone Numbers for Smart Tags, page 24.

If the format is correct, it is possible that the Smart Tags feature became disabled. To re-enable Smart Tags, follow these steps:

Procedure

Step 1 With your Microsoft Office Application open, choose Help > About Microsoft Excel, Help > About Microsoft Word, or Help > About Microsoft PowerPoint, then choose Disabled Items. If phonesuite_smarttag.dll is disabled, enable it, then restart the Microsoft Office application.

Step 2 In your Microsoft Office Application, navigate to Tools > AutoCorrect Options, then click the Smart Tags tab.

Step 3 Make sure each of the following boxes are checked:
   – “Label text with smart tags”
   – “Cisco Unified Phone Application Suite” located under “Recognizers”
   – “Show Smart Tag Actions buttons”

Step 4 Click OK.

The Smart Tag actions button (circled “i”) should now appear when you move your cursor directly over a phone number.

Using Click to Dial from the Desktop Application

To use click to dial from the Cisco Unified Phone Application Suite desktop application, follow these steps:

Note Only the 10 most recent, unique numbers that you called using the click-to-dial feature are available to call from the desktop application.
Procedure

Step 1  Right-click on from the icon tray and choose Click To Dial.
Choosing this item brings up a sub-menu called Recent Outbound Calls, from which you can choose
to dial a number or clear the list of all records.
If you want to clear the list of records, click on Clear All Outbound Call Records.
However, if you want to make a call, proceed to Step 2.

Step 2  From the list of recent calls, click the number you want to call.
A pop-up window briefly displays to indicate that Cisco Unified Phone Application Suite is dialing
the number.
If you receive a message indicating that a connectivity problem exists, see Troubleshooting
Connectivity Issues, page 29.
As soon as the remote party answers the call, the speaker of the phone you have configured to use
for click-to-dial is activated.

Troubleshooting Connectivity Issues

If you receive a connectivity-issue error message when trying to make a call using click to dial, try performing
these steps:

Procedure

 Step 1  Verify that your click-to-dial phone is registered to Cisco Unified Communications Manager.
Step 2  Verify that user credential and server IP address fields are correct on the Cisco Unified Phone
Application Suite Preferences screen. Follow the instructions in Using the Preferences Screen,
page 7
Step 3  Ask your system administrator to verify that the Cisco WebDialer service is running properly on the
server.