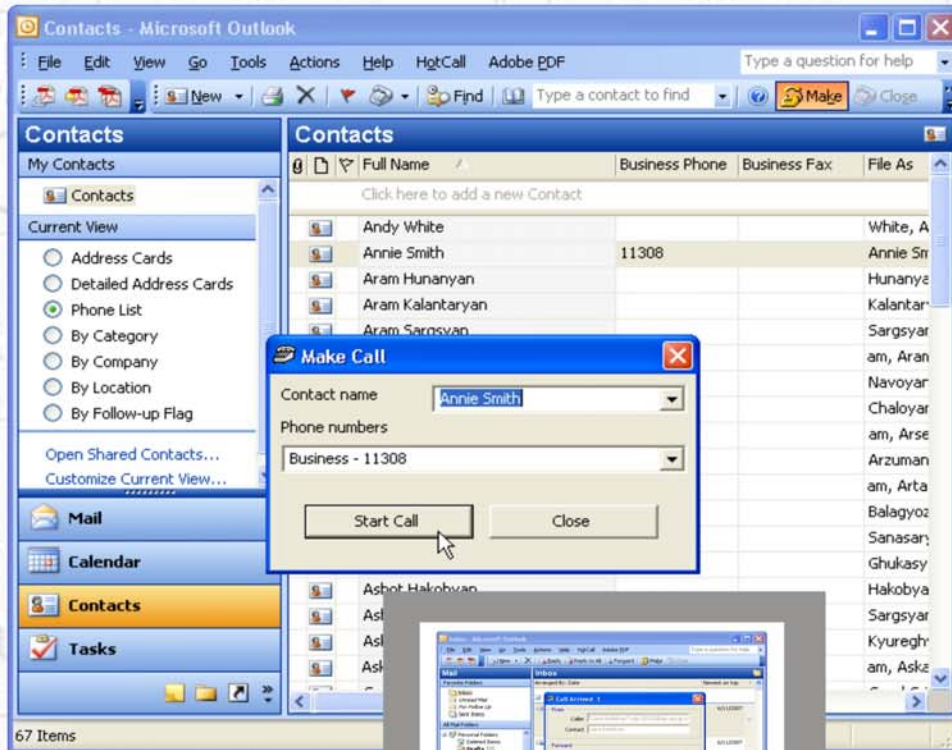# HotCall

HotCall Add-In for Microsoft Outlook

Manual:
User's Guide

Edition 1 SW Release 1.11.6 and higher, February 2009

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About This User's Guide

This guide gives step-by-step instructions on the setup and operation of the HotCall Add-In. The guide is divided into the following chapters:

Introducing the HotCall Add-In for Microsoft Outlook gives a basic idea of the HotCall Add-In.

Requirements will outline the Microsoft Outlook and Quadro software requirements.

Installation explains how to install the QCC.

The HotCall Menu describes the menu items included in the HotCall menu.

Configuring the HotCall Add-In describes the HotCall's configuration settings.

Using the HotCall Add-In explains how to run the HotCall Add-In.

Multilingual Support for the HotCall Add-In lists the languages the HotCall supports.

Introducing the HotCall Add-In for Microsoft Outlook

The HotCall Add-In is add-in software for Microsoft Outlook that allows Quadro users to make and receive calls from within Microsoft Outlook using their extensions on the Quadro.

Requirements

The following specifications are required for the operation of the HotCall Add-In:

Microsoft Outlook Version

- Microsoft Outlook 2002 or higher

Network Connectivity

- The Quadro and the host running the HotCall Add-In should be visible to each other.

    Please note: If the HotCall Add-In connects to the Quadro from the WAN interface, ensure a filtering rule for the host running the Add-In is created on the Quadro. Creating a rule is not required if the Quadro firewall is not set or its security level is low. For more information on creating filtering rules, see the Quadro online help for the Internet Uplink→*Filtering Rules* page.

Quadro Software Requirements

The HotCall Add-In for Microsoft Outlook is compatible with the following Quadro IP-PBXs running listed software:

- Quadro2x: SW-5.0.11 or higher
- Quadro4x/16x: SW-5.0.11 or higher
- Quadro6L: SW-5.0.10 or higher
- QuadroM-32x: SW-4.1.15 or higher

Installation

Please note: Before starting the HotCall Add-In installation, ensure Microsoft Outlook is not running.

To install the HotCall Add-In, run the setup file for the HotCall and follow the instructions of the HotCall Add-In setup wizard. Once the HotCall Add-In is installed, it will start each time Microsoft Outlook is run.

On its first launch, the HotCall will automatically open a dialog box with the configuration settings. Configure these settings as described in the section Configuring the HotCall Add-In. For the proper operation of the HotCall, it is also required to create appropriate dialing rules. See the section Mapping Phone Numbers to Quadro Routing Rules for more information.

To disable/enable or uninstall the HotCall, use the appropriate shortcuts placed in the Start Menu/Programs/Epygi Technologies/HotCall Add-In menu. The HotCall can also be disabled/enabled from within Microsoft Outlook using the COM Add-Ins utility (Tools→Options→Other→Advanced Options→*COM Add-Ins*).

The HotCall Menu

The HotCall Add-In adds a new menu (HotCall) and two toolbar buttons (Make and Close) to Microsoft Outlook (Fig. 1).
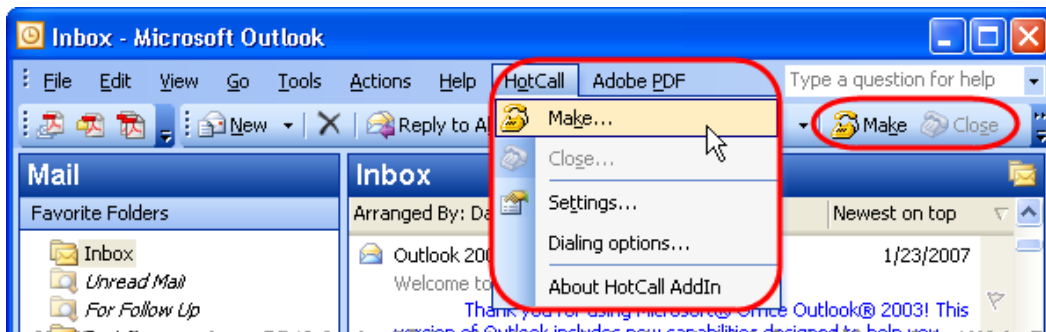

Fig. 1: Microsoft Outlook with HotCall Add-In installed

The following items are available in the HotCall menu:

- **Make -** opens a dialog box where the user enters or selects a phone number. See the section <u>Making Calls</u> for more information.

- **Close** - closes a call in progress. See the section <u>Closing Calls</u>.

- **Settings** - will open the HotCall Settings dialog box with the configuration settings of the HotCall. See the section <u>Configuring the HotCall Add-In</u>.

- **Dialing options** – a shortcut to the HotCall→Settings→*Dialing options* dialog box. See the Section <u>Mapping Phone Numbers to Quadro Routing</u>.

- **About HotCall AddIn** - opens a dialog box displaying the version of the HotCall Add-in that is currently installed and copyright details.

Configuring the HotCall Add-In

To configure the HotCall Add-In, open the **HotCall→Settings** dialog box and specify the following settings (Fig. 2).

- **Address -** the IP address or the host name of the Quadro where the user's extension is located.

- **Port** – the listening port of the Quadro for call control requests. The value for this port defaults to 4849 and is configurable from a hidden page on the Quadro.

- **Your extension** – the user's extension number on the specified Quadro (the HotCall extension).

- **Extension password -** the password of the above specified extension as configured on the Quadro.

- **Dialing options** – opens a dialog box where the user can specify rules required for mapping numbers dialed from within the HotCall Add-in onto Quadro's routing rules. Please see the section Mapping Phone Numbers to Quadro Routing.

- **Location Country** – allows you to select the country location in order to determine the regional phone code. With this option the caller will be correctly detected by the HotCall if the caller's number contains the location specific regional code while the number in the address book for that caller was defined without regional code.

- **Incoming calls handling** – if this checkbox is selected, the HotCall will intercept all incoming calls to the specified extension for further handling from Outlook. See Section the Handling Incoming Calls for more information. The **Timeout** text field specifies the time (in seconds) after which the HotCall will automatically accept the intercepted incoming call if no action has been taken to handle the call. If this checkbox is not selected, incoming calls to the HotCall extension will immediately ring the phone attached to the extension.

- **Reconnect on disconnection** - if this checkbox is selected, the HotCall will automatically try to re-establish a connection with the Quadro in case it is dropped for some reason. The **Try Every** text field specifies the time (in seconds) between two successive tries at re-establishing the connection.

Fig. 2: HotCall Settings window

- **Disable Micrososft TAPI phone** – selecting this checkbox disables the Telephony Application Program Interface (TAPI) included in Microsoft operating systems. If no TAPI phone is used on your PC, disable this checkbox to avoid confusion between TAPI's and HotCall Add-In's buttons, menu options, etc. appearing in Microsoft Outlook.

- **Load all contacts from Outlook** – selecting this checkbox will add the Outlook contacts to the **Contact name** drop-down list on the **Make call** dialog box. This allows the user to choose a contact directly from the **Make call** dialog box, as opposed to the option of selecting the contact from an Outlook folder or manually entering the phone number. (See the Section Making Calls). Please note that only the contacts that are assigned phone numbers will be added to the **Contact name** drop-down list.

- **Check version for update** – if this checkbox is selected, the HotCall will prompt to check the WEB for new updates once the new settings are applied and each time the Outlook starts up. If a new version is available, the HotCall will ask for a confirmation to install the version.

- **Log File options** – opens a dialog box (Fig. 3) where the user can choose a folder for storing the log file. The log file is an ASCII text file containing entries on events raised by the HotCall and the dates the events occurred. The following buttons are available on this dialog box:

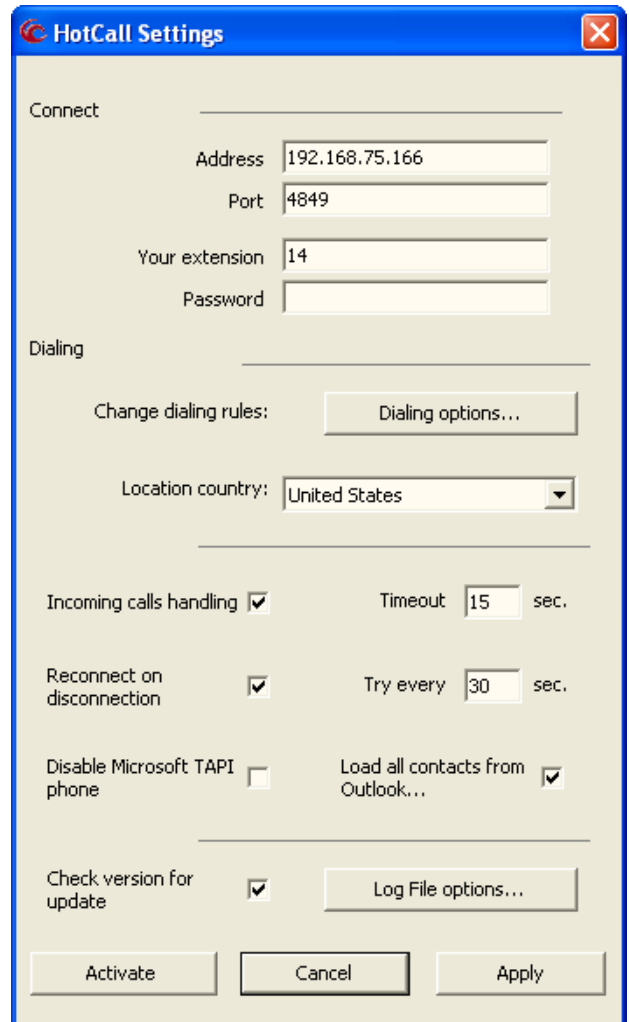 - o **Send to** creates a new email and attaches the log file to it.

o **Browse** opens a file chooser window to allow browsing for a folder to store the log file in.

o **Restore folder** changes the selected folder to the default one. If the default folder has been removed, a new folder will be created.

Fig. 3: Log File options dialog box

o **Apply** saves the selected path for the log file.

o **Cancel** closes the window without saving the changes.
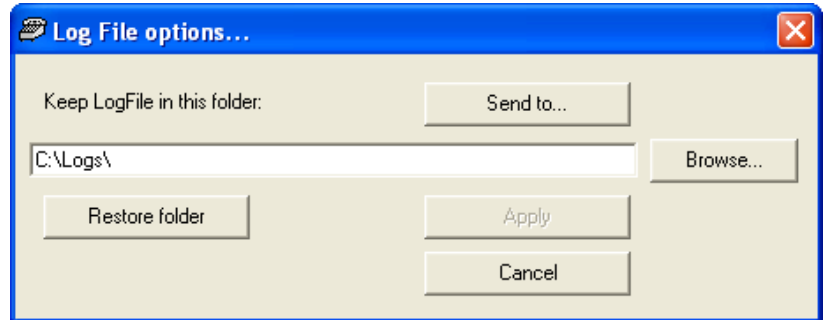
Once all the settings are specified, click the Activate button to connect the Add-In to the HotCall extension. If the connection is set up, the Activate button will change to Deactivate and the HotCall Settings dialog box will disappear automatically. To modify the connection settings, disconnect the HotCall from the Quadro by pressing the Deactivate button, and then specify the new values for the connection settings.

Please note: If the HotCall Add-In fails to connect to the Quadro, contact your Quadro administrator and ensure the Quadro's security level is low or the corresponding filtering rule is created to allow the Add-In a remote access to the Quadro.

The Dialing settings can be modified without deactivating/activating the connection with the Quadro. To do so, use the Apply and Cancel buttons.

- **Cancel** - closes the HotCall Settings dialog box without saving the new values for the settings.

- **Apply –** saves the new values specified for the **Dialing** settings.

Mapping Phone Numbers to Quadro Routing Rules

All calls initiated from within the HotCall are handled by the Quadro. Therefore, all outbound calls from the HotCall should match the routing rules specified in the Quadro. To ensure this, open the HotCall→Settings→*Dialing rules* dialog box (Fig. 4) and specify dialing rules appropriate to your contact's phone numbers. The HotCall Add-In will use these rules to automatically map dialed or selected numbers to a corresponding call routing rule.
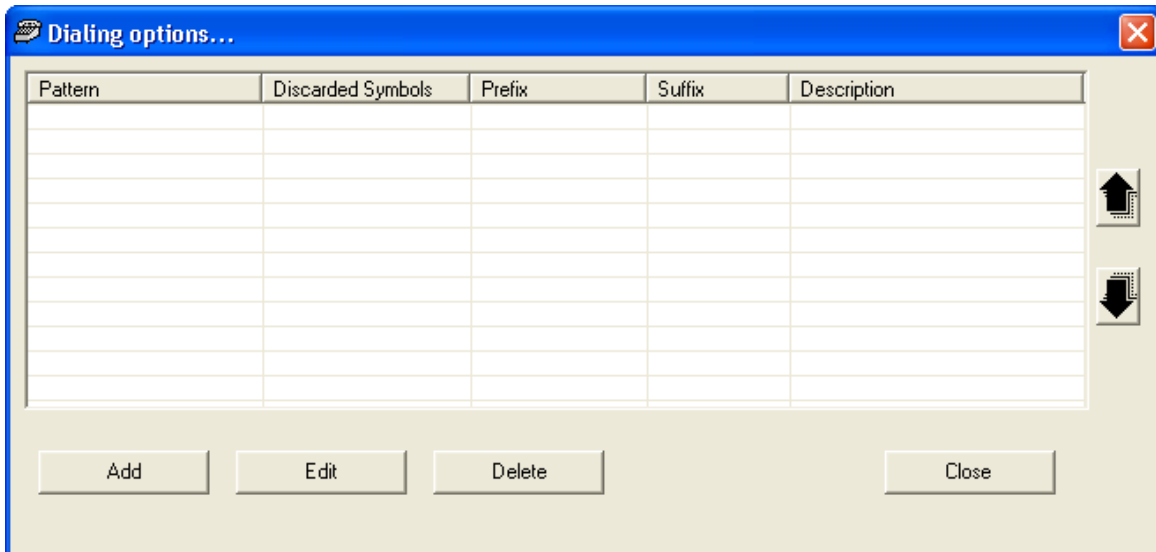

<div align="right">Fig. 4: Dialing rules window</div>

The following step-by-step instructions describe how to add a new dialing rule:

1. On the Dialing rules dialog box, click the Add button.

2. In the text fields displayed at the bottom of the form, specify the following settings:

    *   **Pattern:** A series of characters and wildcard specifying the phone numbers (or a group of phone numbers) of your Outlook contacts. The following wildcards can be used when specifying a pattern:

        ? – a single character (digits, letters, etc.)

        * - a series of characters

        Please note: Dashes '-', white spaces, opening '(' and closing ')' parentheses used in large numbers to enhance the readability are discarded before the dialing rules are applied. When adding a rule, please make sure the Pattern and Discarded Symbols settings do not take account of those symbols.

    *   **Discarded Symbols:** The number of characters to trim from the beginning of the selected/specified phone number.

    *   **Prefix:** Characters to be added to the beginning of the number.

    *   **Suffix:** Characters to be added to the end of the number.

    *   **Description:** Descriptive text for the specified dialing rule.

3. Click **Save** then **Close**.

If a phone number matches two or more patterns (for example *971 123 456* matches the patterns *971** and *971??????*), the HotCall will choose the pattern that contains fewer asterisks ('*'). If the matching patterns contain the same number of asterisks, the rule higher up the Dialing options list will be used. To change the position of a rule, use the Up and Down arrows on the right side of form. A rule selected for placing a call can be viewed from the HotCall log file.

Example: Assuming that certain PSTN numbers specified for Outlook Contacts start with an area or state code (e.g. *971*) and the digit *9* is used as a PSTN access code in the Quadro, follow these steps to create a dialing rule.

*   Enter *971** in the **Pattern** text filed.

- Enter *3* in the **Discarded Symbols** text filed.

- Enter 9 in the **Prefix** text filed.

- Leave the **Suffix** text filed empty.

- Enter some descriptive text for the rule, e.g. "Outbound calls to PSTN".

This rule will work in the following way: if the user dials or selects a number that is prefixed by *971*, the HotCall will replace this prefix by *9* and route the call to the Quadro where the appropriate routing rule will be chosen to place the call.

To edit a dialing rule, select the rule with a single mouse click and click on **Edit**. To delete a rule, select the rule and click on **Delete**.

Using the HotCall Add-In

Making Calls

To make a call from Outlook, please follow these steps:

1. Click the **Make** button on the Outlook toolbar, or choose **Make** from the **HotCall** menu. You may also choose a contact from an Outlook folder (Mail folders, Inbox, etc.), then press the **Make** button to call a selected contact. This opens the **Make Call** dialog button (Fig. 5).

2. On the **Make Call** dialog box, select a contact and a phone number from the appropriate drop-down menus. If a contact has been previously selected, the **Contact Name** list will indicate the selected contact's name. If not, the **Contact Name** drop-down list will list all Outlook contacts that are assigned a phone number if the **Load all contacts from Outlook** checkbox is selected (see the Section Configuring the HotCall Add-In); otherwise it will be empty. The **Phone numbers** list displays all telephone numbers stored for the contact. If the desired number is not available in this list or the selected person is not within your Outlook Contacts, enter the number in the **Phone numbers** text field using the keyboard buttons.

Fig. 5 Make Call dialog box

3. Click the **Start Call** button.
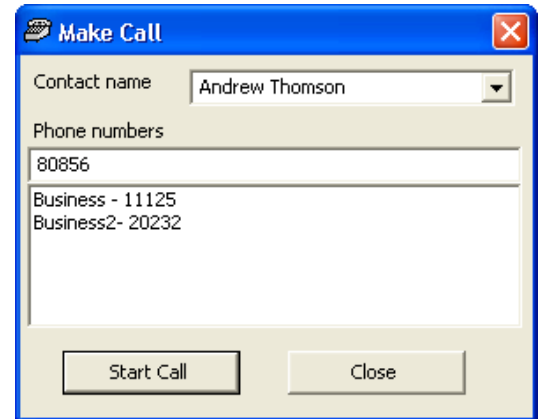
Once the **Start Call** button is pressed, the phone connected to the HotCall extension will start ringing. When you pick up the call, the Quadro will automatically dial the phone number selected in the **Make Call** dialog box. Signaling tones will indicate the progress of the call setup.

Closing Calls

To close a call in progress, click the **Close** button on the Outlook standard toolbar or choose **Close** from the HotCall menu.

Handling Incoming Calls

The HotCall Add-In can be configured to intercept incoming calls to the HotCall extension **- Your extension** (Fig. 2). Intercepted calls can be answered, rejected, or forwarded to a selected contact. To enable this function, select the **Incoming Calls Handling** checkbox on the **HotCall Settings** dialog box.

Once the **Incoming Calls Handling** feature is enabled, all calls incoming to the HotCall extension will be notified by the Call Arrived pop-up menu (Fig. 6). The Caller and Contact non-editable text fields display the caller's details: (1) the Caller is the caller's number as provided by the Quadro; (2) the Contact is the display name of the contact that has the detected number. If the caller is not within the Outlook Contacts, the Contact text field will be empty.

The following options are available for an intercepted call:

-   **Accept** – accepts an incoming call, i.e. the phone attached to the HotCall extension will start ringing.

-   **Reject** – rejects the incoming call.

-   **Forward** – forwards the call to a number selected as a **Forward** destination. To change the **Forward** destination (the contact or the phone), use the appropriate drop-down lists.
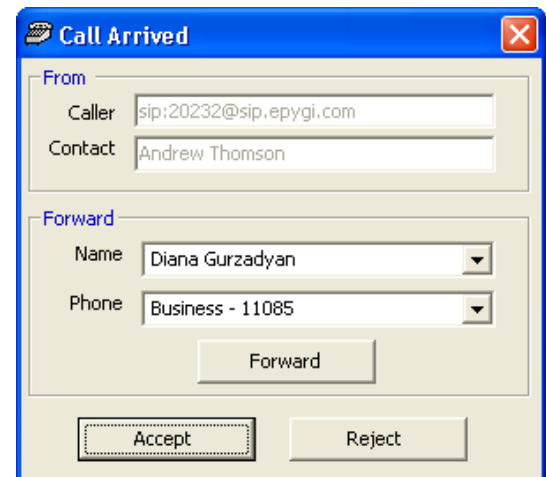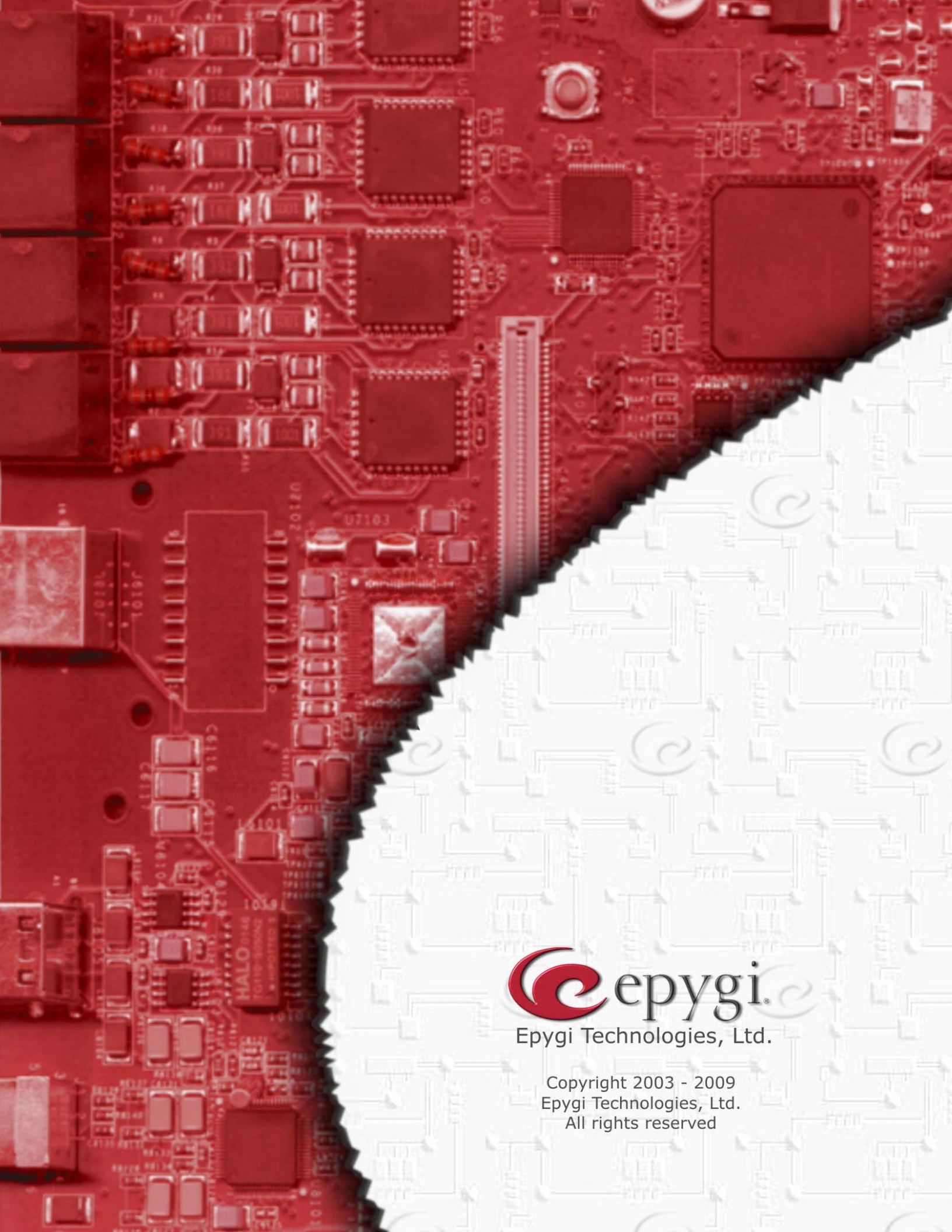
Fig. 6: Call Arrived pop-up menu

If none of the three above-mentioned buttons is pressed during the timeout specified on the **HotCall Settings** dialog box, the call will be automatically accepted.

Multilingual Support for the HotCall Add-In

The HotCall Add-In has multilingual support for Windows systems that allows the HotCall to automatically detect the system default language and localize its menus and settings accordingly. Currently, the Add-In supports seven languages: English, French, German, Russian, Portuguese, Italian and Spanish.

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