

Outlook™, Internet Explorer™, Firefox™ Telephony Toolbar Administrator Guide

January 13, 2009

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1 Introduction

1.1 Purpose

This Administrator Guide is designed to provide information about planning, installing, and configuring the Telephony Toolbar. This document is not intended to supplement or replace the hardware manufacturer's instructions for equipment installation, maintenance, and support. This documentation assumes Telephony Toolbar customers have a clear understanding of the underlying operating system and associated hardware.

Information in this document is specifically related to the current release of the Telephony Toolbar. This information is subject to change without notice. Please consult the appropriate VoicePipe Communications personnel for any updated information.

Although this document contains information regarding the Telephony Toolbar, it is important customers follow the appropriate support procedure for problem resolution. For issues regarding operating systems and associated hardware please consult your respective reseller or support representative. When you have questions about the Telephony Toolbar, please feel free to contact the Zayo Managed Services Customer Support Center.

1.2 Audience

This document is intended for anyone responsible for the deployment and management of the Telephony Toolbar software. The document is primarily aimed at network administrators and/or systems integrators who wish to install the Telephony Toolbar software for end-user console activities on the Zayo Managed Services platform.

2 Hardware & Software Requirements

Please note the requirements listed here are the minimum requirements for proper Telephony Toolbar behavior. It is strongly recommended computer systems intending to run the Telephony Toolbar have capabilities meeting or exceeding these minimums.

2.1 Telephony Toolbar Requirements

The Telephony Toolbar is only supported on the Microsoft Windows platform.

Microsoft Windows Hardware Platform:

- 1.2 GHz or higher, Pentium 3 or compatible CPU
- 128 megabytes (MB) of RAM recommended minimum; more memory improves performance
- 60 MB available hard disk space
- Video Graphics Card with 8MB of RAM, minimum
- Super VGA Monitor, 15" or larger
- 800x600 screen resolution minimum; 1024 x 768 is recommended
- TCP/IP connectivity to the platform on port designated by service provider (default port is 2208)

Software Requirements:

- Windows 2000 with SP4 (or higher)
- Windows XP
- Windows Installer 2.0 (required for Windows 2000 SP2 systems)
- Internet Explorer 6.0 or later (required for IE Editions)
- Mozilla Firefox 2.0 or later (required for Firefox Editions)
- Outlook 2000 SP3, 2002/XP SP2 or 2003 (required for Outlook Editions)

Platform Access Requirements:

- Internet Explorer and Outlook COM-Add-in access
- Firefox Add-on access
- For installation, a Windows user account with administrative rights is required.

- Internet Explorer and Outlook COM-Add-in access
- For post installation, a Windows user account with the following rights are required:
 - Registry HKEY_LOCAL_MACHINE hive
 - Read
 - Enumerate
 - Query
 - Registry HKEY_CURRENT_USER hive
 - Full Access
 - Installation Directory Path (default = C:\Program Files\TelephonyToolbar)
 - Write
 - Read
 - Execute

2.2 Supported IP Phones

The Telephony Toolbar works with any Zayo Managed Services supported phones. However, it works best with Polycom phones which support advanced call control features allowing the phone to automatically go off-hook.

3 Installation Guide

3.1 Installing the Telephony Toolbar

For directions on installing the Telephony Toolbar, please refer to the “*Telephony Toolbar Quick Installation Guide*” found at <http://resource.zayoms.com>.

3.2 Uninstalling the Telephony Toolbar

This section describes the uninstall process for the Telephony Toolbar. This section does not include uninstalling other software. Please consult the documentation/support of the specific software vendor for uninstall information.

3.2.1 Uninstall Process

- The Telephony Toolbar is very simple to uninstall using the following procedure:
- Close all instances of Internet Explorer, Outlook, and Firefox.
- Open the PC’s Control Panel, select **ADD/REMOVE PROGRAMS**, and navigate down to select **TELEPHONY TOOLBAR**
- Click on the **REMOVE** button associated with the entry.
- Finally, click **YES** to end the uninstall process.

4 Telephony Toolbar Troubleshooting

This section outlines common installation and operational problems that might be encountered.

4.1 Installation

4.1.1 Minimum System Requirements Not Met

Be sure the minimum system requirements for the Telephony Toolbar are met as outlined in the [Hardware & Software Requirements](#) section of this document. Unpredictable behavior sometimes occurs if the Toolbar is installed on systems not meeting the minimum requirements.

4.1.2 Unable to Communicate with Application Server

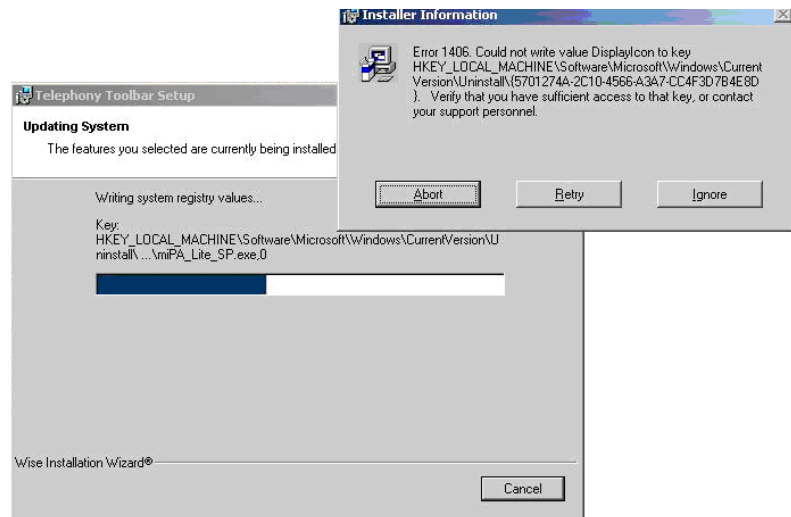
To prevent the Toolbar from no longer communicating with the Zayo Managed Services application server, resulting in sporadic failures such as feature buttons becoming unavailable, click-to-dial not working, caller id popup box not working, “freezing” Outlook, configure your network firewall to open

the following ports:

- UDP port 2208 from IP addresses 63.123.133.30 and 204.11.119.31 (for Denver servers) or IP addresses 137.192.1.1 and 137.192.1.2 (for Minneapolis servers) must be allowed in through the firewall.

4.1.3 User Does not Have Local Administrator Rights on PC

In order to properly install the Telephony Toolbar, the actual person who will be using the toolbar must be logged into the PC and must have local Administrator rights. If the user does not have local Administrator rights, the toolbar will not install properly and the installation will produce errors, such as shown below. If the toolbar is installed under a different Windows PC account than the user who will be using the toolbar, Telephony Toolbar startup errors will occur.



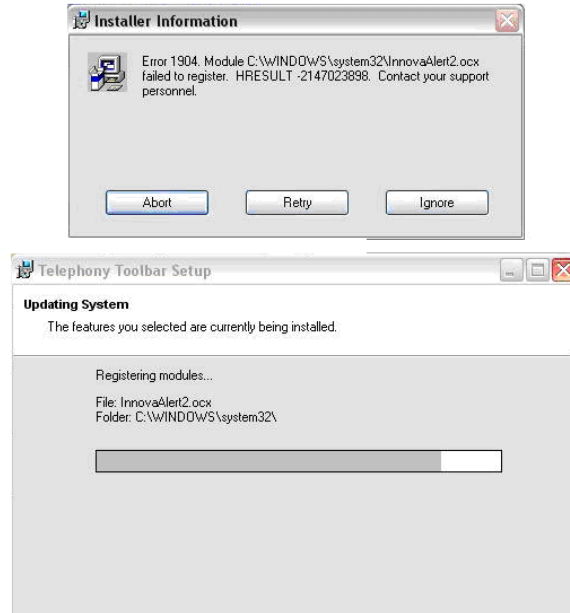
4.1.4 Security Software on PC Preventing Proper Installation

Temporarily turn off any virus, firewall or spyware protection software running on the PC before attempting to install the Toolbar. These programs can prevent the Toolbar from installing properly, preventing it from working correctly.

After the Toolbar is installed, these PC protection applications can be turned back on. If prompted by the PC's firewall or spyware software, allow the Telephony Toolbar to run (do not block).

4.1.5 Unable to Register InnovaAlert2.ocx Module


During installation, if you get an error message similar to "*Module C:\Windows\system32\InnovaAlert2.ocx failed to register,*" this is most likely due to having a newer chipset in your PC supporting Data Execution Prevention (DEP) and you are running Windows XP (service pack 2).




As of Windows XP SP2, Microsoft has enabled Data Execution Prevention (DEP); a feature that is included in newer processor series from AMD and Intel. Data execution prevention (DEP) is a set of hardware and software technologies that perform additional checks on memory to help protect against malicious code exploits. Intel refers to their version of DEP as XD or "execution disabling bit". AMD refers to their version of DEP as the "NX-bit" or "No Execute bit".

Solution or Workaround

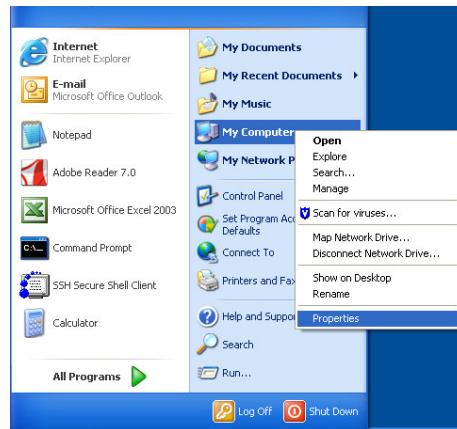
Disable DEP in Windows XP SP2 using the steps below.

 **Note:** Users with Intel processors may also need to disable the "XD" or Execution Disabling Bit in their computer's CMOS/BIOS. Since each computer's CMOS is different, reference the computer's manual or contact the manufacturer of the computer in question for assistance with this step.

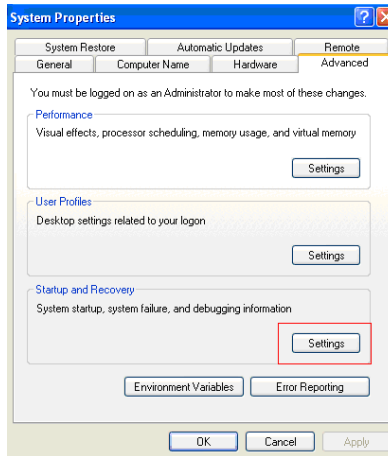
 **WARNING:** The instructions below include making changes to essential parts of your operating system. It is recommended that you backup your operating system and files, including the registry, before proceeding. Consult with a qualified computer systems professional, if necessary.

Zayo Managed Services can not guarantee results from incorrect modifications while following these instructions. Therefore, use caution and proceed at your own risk.

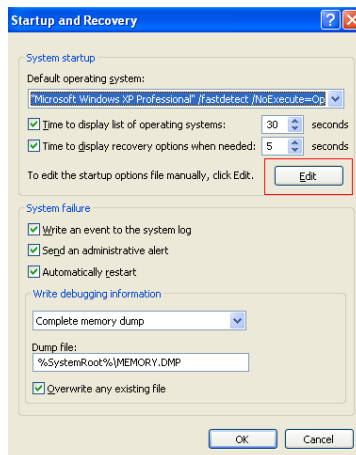
1. Login into the PC with Administrator rights.
2. Click **Start**, right-click **My Computer**, and then click **Properties**.



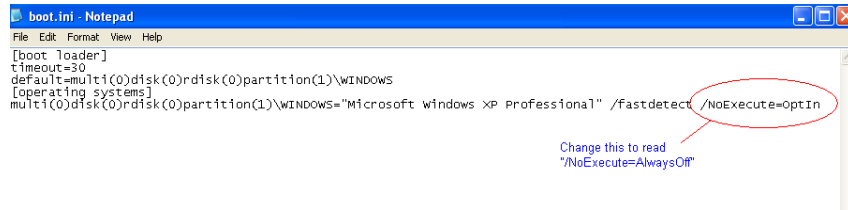
3. Click on the **Advanced** tab.
4. Select the Settings button under **Startup and Recovery**.



5. Click the **Edit** button "to edit the startup options file manually"



6. Locate and change the string **/NoExecute=OptIn** to **/NoExecute=AlwaysOff**



7. Save the file and reboot the PC

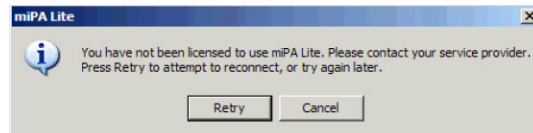
Now the Telephony Toolbar should install with no “Module C:\WINDOWS\system32\InnovaAlert2.ocx failed to register” error message.

After installation, change the boot.ini back to its original state, returning the added layer of security.

4.2 Operation

4.2.1 Not Licensed

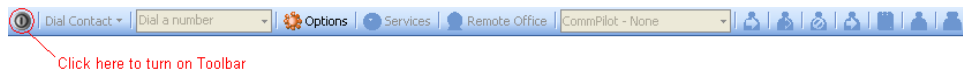
When logging in, the Toolbar displays a dialog box indicating you have not been licensed to use it.



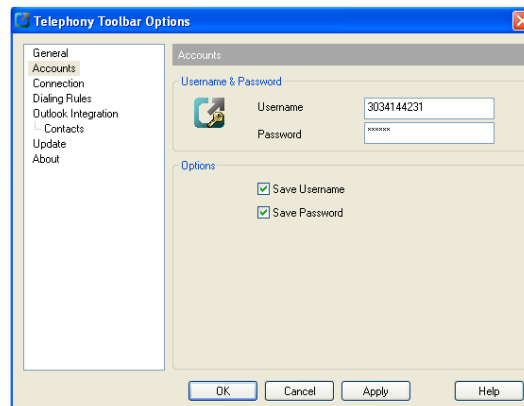
This error indicates the Toolbar Client License has not been added to the list of services for this VoicePipe extension. Contact Zayo Managed Services about adding this license.

4.2.2 Toolbar Appears Gray


1. The Toolbar may be turned off. Turn on the Toolbar by clicking on the circular button on the far left-side

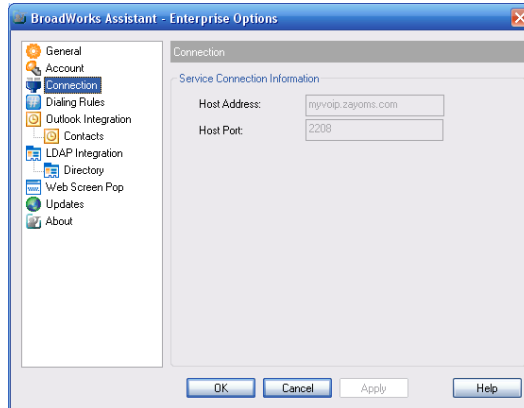


2. Incorrect username or password is being used. The most common cause is when the Zayo Managed Services Web Portal password has been changed or has expired. The toolbar uses the same login information as the Web portal, so when the Web portal password is changed, the Toolbar password must be updated. Click on the **Options** button to set the username and password.



3. The Toolbar Service Connections settings may be set incorrectly.

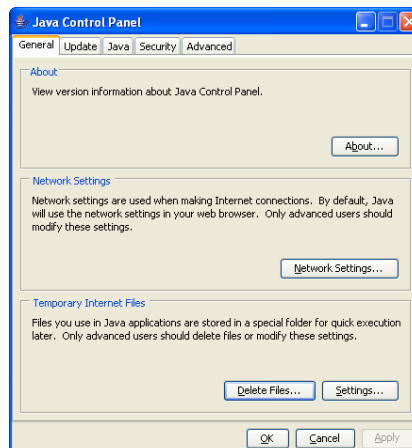
- Click on the Options button within the toolbar. 
- Click on the **Connection** tab and verify the **Host Address** is **myvoip.zayoms.com** (or **voicepipe.onvoip.net** if you are a legacy VoicePipe customer and your phone service has not yet been migrated to Zayo Managed Services call control platform) and the **Server Port** is **2208**.

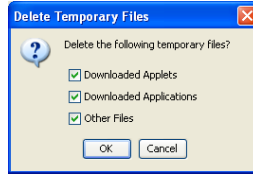


4. The Toolbar was not installed while logged into the user's Windows account. To properly install the Toolbar, installation must be performed while logged into Windows as the user who is going to use the Toolbar. The user requires local Administrative rights during the install (local Admin rights for the user can be disabled after installation).
5. The PC's Java Cache may need to be cleared. This can be the case if there was a fail-over event where phones became registered with a backup proxy or application server and the Toolbar continued communicating with the original application server.

To clear the Java Cache:

- Close all Internet Explorer windows
- From the PC's Start/Settings/Control Panel menu, double click the **Java** icon to open it.
- Select the **General tab** and click the **Delete Files** button under the *Temporary Internet Files* section.
- Another dialog box will appear. Check all options and click **OK**.



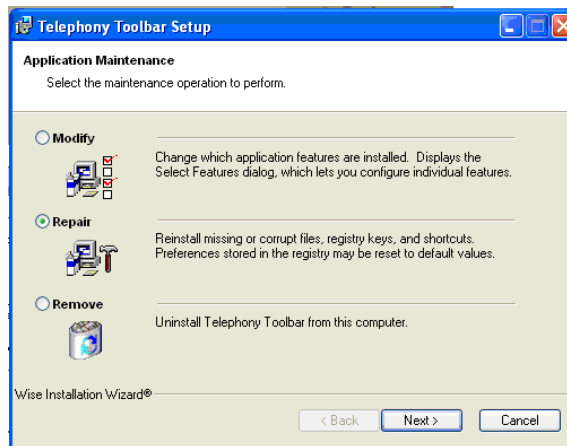


Note: Another method to clear the Java Cache is to close all IE windows then delete *c:\documents and settings\<user_profile>\application data\sun\java\deployment\cache\javapi\v1.0\jar*. **

6. Something may have caused the Toolbar to become corrupted. This is apparent when the Toolbar not only stays gray, but there are also buttons missing on the Toolbar.

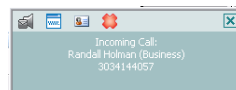


Go to <http://resource.zayoms.com> and download the Telephony Toolbar and re-run the installation. Run the Toolbar installation using the **Repair** option.



4.2.3 Caller ID Popup Does Not Appear

1. Before the Caller ID popup will appear, you must have Outlook, Internet Explorer or Firefox open and be logged into the Toolbar.



2. The supporting popup application module may have become unregistered (or did not register during installation).

- Try manually registering the popup application
 - a. Log into the PC with Administrator rights
 - b. Click on **Start** then **Run**
 - c. Type the command:
regsvr32 c:\windows\system32\innovaalert2.ocx
- If a success dialog box does not appear, but rather an error message indicating that InnovaAlert2.ocx failed to register, this may be due to your PC having newer processor that supports Data Execution Protection (DEP) and is running Windows XP. See above Installation troubleshooting on how to turn off DEP to allow InnovaAlert2.ocx to register.

4.2.4 Call Treatments Not Working as Expected

Call treatments are not working as expected (i.e. call forward, do not disturb, click-to-dial)

- Check to see if *Remote Office* is turned on

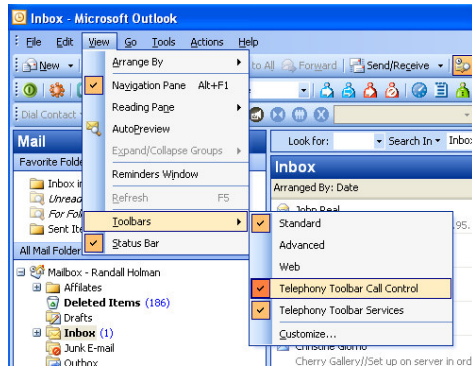


- Check to see if a *CommPilot* profile is set, such as “Out of Office.” CommPilot profiles override all other call treatments. Turn off a CommPilot profile by selecting *CommPilot – None*.



4.2.5 Toolbar Does Not Appear – Part I

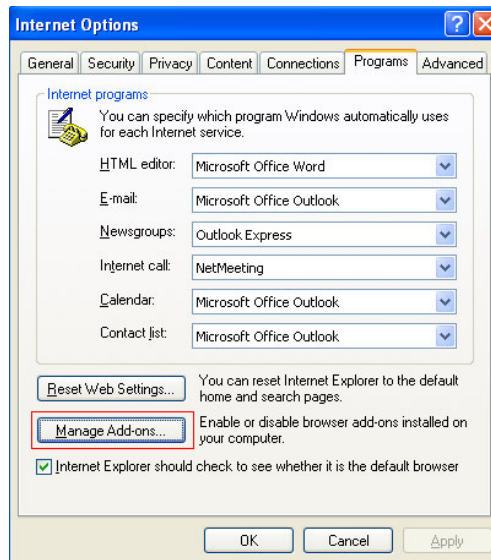
- The Toolbar may not have been installed while logged into Windows as the user who is going to use the Toolbar. If the Toolbar was installed while logged on as another Windows user, the Toolbar may not be installed properly.
- From Outlook, Internet Explorer, or Firefox toolbar, select **View/Toolbars** and make sure the **Telephony Toolbar Call Control** and **Telephony Toolbar Services** are checked.



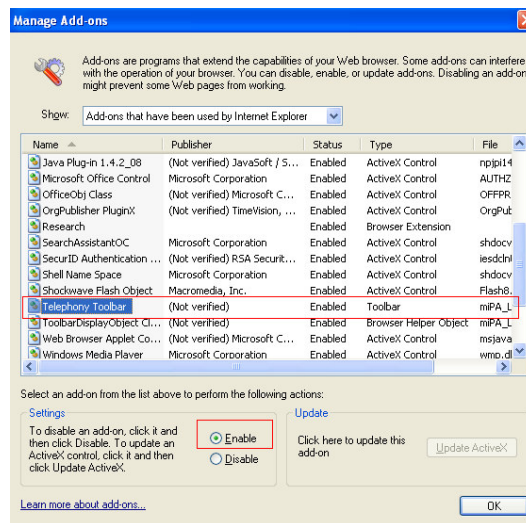
- If the **Telephony Toolbar** does not appear in the list of toolbars, and the Telephony Toolbar has been installed successfully, then the Toolbar may be disabled from loading when Outlook or IE is started.

Checking Internet Explorer for Automatic Toolbar Startup

1. Select **Tools/Internet Options** and click the **Programs** tab.
2. Click on the **Manage Add-ons** button.

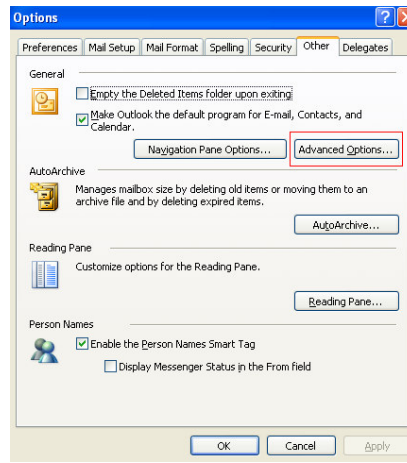


3. Look for **Telephony Toolbar** in the list of add-ons and verify that it is **Enabled**.

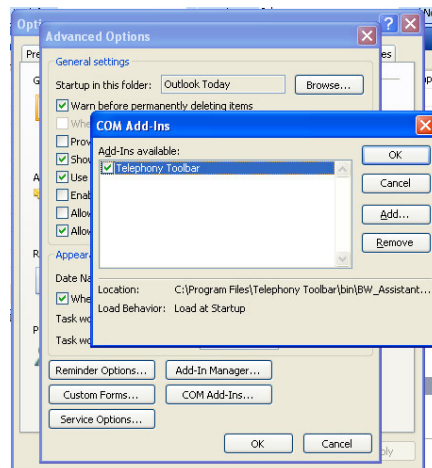


Checking Outlook for Automatic Toolbar Startup

1. Select **Tools/Options** and click on the **Other** tab
2. Click on the **Advanced Options** button

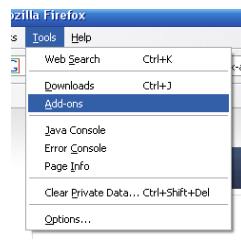


3. Click on the **COM Add-Ins** button and make sure the **Telephony Toolbar** is checked.

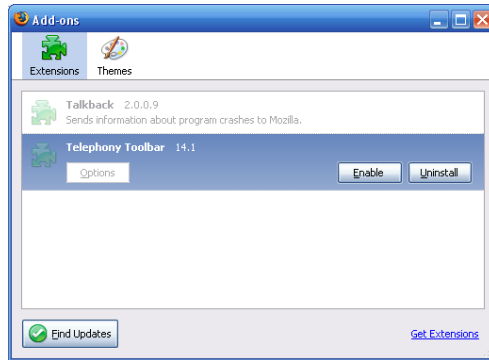


Checking Firefox for Automatic Toolbar Startup

1. Select Tools / Add-ons from the menu.



2. If the **Enable** button is shown for the Telephony Toolbar, then press the Enable button. Then close and restart Firefox.

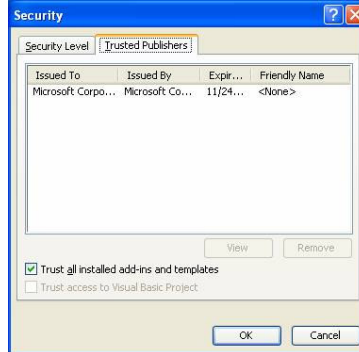


4.2.6 Toolbar Does Not Appear – Part II

Within Microsoft Outlook, if you checked the Telephony Toolbar COM Add-In and the Toolbar still does not appear, it may be because the Telephony Toolbar COM Add-In will not stay checked because it is no longer Registered with Windows and Outlook. If you go back into the COM Add-Ins option in Outlook and find the Telephony Toolbar unchecked, even though you checked it, there are two possible causes – 1) Outlook security settings, 2) Outlook is purposely disabling the Telephony Toolbar COM Ad-In caused by Outlook starting up in safe mode at some point.

Check Outlook Security Settings

- Within Outlook, navigate to **Tools/Macro/Security** and click on the **Trusted Publishers** tab.
- Check the box for **“Trust all installed add-ins and templates”**

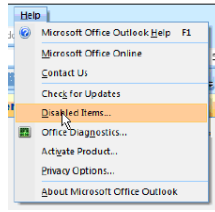


- If the checkbox for “Trust all installed add-ins and templates” is grayed out and not available to enable, then the security level needs to be lowered. Click on the **Security Level** tab. If “Very High” is checked, then lower the level to **“High.”** The checkbox for *Trust all installed add-ins and templates* in the *Trusted Publishers* screen will now be available for you to check.

Manually Re-add the Telephony Toolbar COM Add-In (option 1)

If Outlook failed to start properly, and started in Safe Mode, this will prevent any COM Add-Ins from being loaded again. Outlook will uncheck the Telephony Toolbar COM Add-In even though you checked it. Reinstallation of the Telephony Toolbar will not work either. To fix this condition, the Telephony Toolbar must be manually removed from the COM Add-Ins and then manually added back in.

1. Click on Help then select *Disabled Items* from the menu (note: if *Disabled Items* is not shown, then proceed to Manually Re-add the Telephony Toolbar COM Add-In (option 2)).

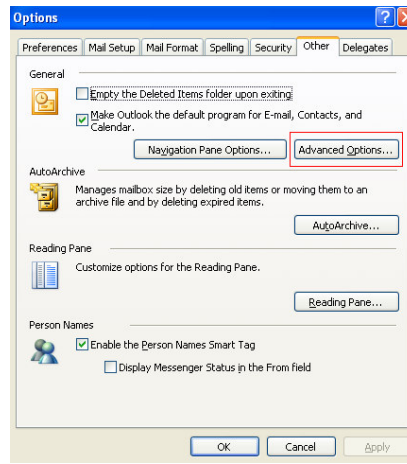


2. In the dialog box, select the *Telephony Toolbar* if visible in the list and then click **Enable** and restart Outlook.

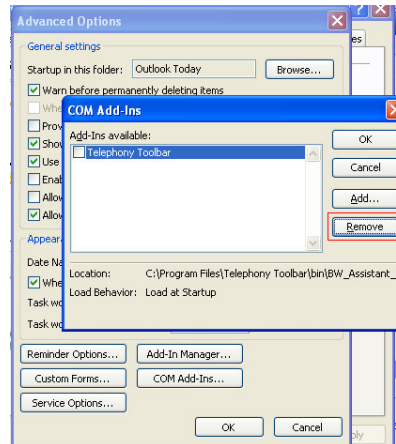
Manually Re-add the Telephony Toolbar COM Add-In (option 2)

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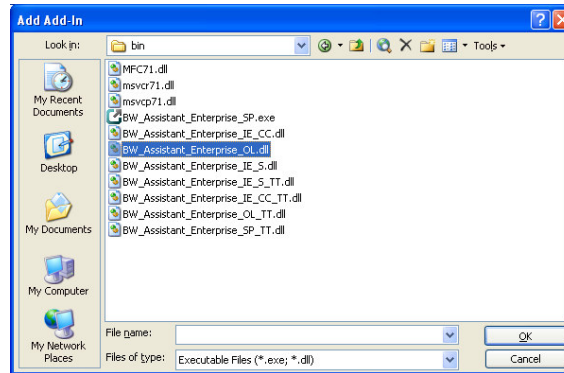
1. Select **Tools/Options** and click on the **Other** tab
2. Click on the **Advanced Options** button



3. Click on the **COM Add-Ins** button. Highlight the **Telephony Toolbar** and click the **Remove** button.

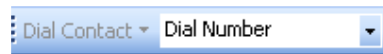


4. **Shut down Outlook** and then restart Outlook.
5. Navigate back to the COM Add-Ins and click on the Add button. Within the file selection box, click on **My Computer** and navigate to the **C:\Program Files\Telephony Toolbar\bin** subdirectory. Highlight the file, **BW_Assistant_Enterprise_OL.dll** and click **OK**.



6. Close all dialog boxes by click the **OK** button.
7. Shut down Outlook and then restart.

4.2.7 Dial Contact Remains Gray When Navigating Shared Contact Folder in Outlook



Dial Contact remains gray

If the **Dial Contact** drop-down remains gray when a group shared Outlook Contact is highlighted preventing click-to-dial on the shared Contact, this is due to the current permissions settings on your email server.

Changing the permissions on the shared mailbox/contacts folder from “Owner” to “Publishing Editor” will allow the Dial Contact drop down to work with shared contacts.

4.3 **Known Anomalies**

4.3.1 Incorrect Caller Name/Phone Number Displays in Popup

When an Outlook Contact is added without filling in the **Full Name** field, this can cause incorrect name/phone number information to appear in the Caller ID popup window.

