



## QUICK REFERENCE GUIDE



### **Cisco Unified CallConnector for Microsoft Windows 1.5 Personal Edition Quick Reference Guide**

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# 1 Overview

Cisco Unified CallConnector for Microsoft Windows (formally know as Cisco Unified CallConnector) enables you to setup and manage your communication sessions from toolbars and various information windows embedded within Microsoft's Internet Explorer and Outlook. From these interfaces, you can:

- Make and answer calls
- Locate your contacts
- View the availability of other users
- Send QuickMessages

Cisco Unified CallConnector is available in two configurations:

- Personal use version for call control and QuickDialing
- Server version in which contact and presence information can be shared within your organization



## Note

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Before you use this guide, you must install and configure Cisco Unified CallConnector as described in the documentation listed in the “Additional Information” section on page 15.

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# 2 Starting and Accessing Features

You can access the Cisco Unified CallConnector functions from within Internet Explorer, Outlook, and the call popup window using a set of services that you must start on a PC.

## Starting Cisco Unified CallConnector

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**Step 1** Double-click the CallConnector Popup shortcut on the desktop.

**Step 2** To start Cisco Unified CallConnector services automatically, open the Options window and check **Start with Windows**.

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## Viewing the Cisco Unified CallConnector Toolbar

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**Step 1** Click **View** and **Toolbars** in the Internet Explorer menu and select **Unified CallConnector**. The toolbar is also automatically displayed when Outlook is started.

**Step 2** To view your contacts, click the **Contacts** button in the Cisco Unified CallConnector toolbar.

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### 3 Using the Call Popup Window

The Cisco Unified CallConnector call popup window displays information on the calls at your phone. Each call is represented by one window. The call popup window looks up the phone number in your contact database or Outlook and displays the name and organization information.

The Cisco Unified CallConnector call popup window provides two call control buttons and enables you to access the Actions menu, as shown in the figure below.



#### Controlling Calls From the Call Popup Window

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- Step 1** Click the call control button, for example **Answer** or **Hang-up**.
  - Step 2** If you are unable to take the call, click the **Busy** button to activate the phone Do-Not-Disturb settings.
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#### Selecting Additional Communication Options

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- Step 1** Click the **Actions** button (the arrow to the left of the call control buttons).  
This opens the Actions menu populated with the contact, collaboration, and communication choices available for the caller.
  - Step 2** Click the communication or collaboration option of your choice to launch a session.
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## 4 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 e-mail, SMS, or QuickMessage windows.

**Step 1** Press the **Pause-Break** key.



**Note** You can also access QuickSearch from the toolbar in Internet Explorer or Outlook.

**Step 2** To dial a number, type the number and press **Enter**.

**Step 3** To locate a contact, enter the first few letters of either the first or last name. The search results display, as shown in the example below.

The screenshot shows the QuickSearch interface. On the left, a search window titled 'Enter Name or Number' displays a list of contacts. 'Richard Dickerson' is selected. An arrow points to the right, where the 'Actions' menu for 'Richard Dickerson' is displayed. The menu includes options for calling, emailing, sending SMS, and instant messaging, as well as contact details and status information.

Call Work Phone		0164
Call Cell Phone		949-555-1039
Call Home Phone		949-555-0138
Call VoIP		
Send Email to rdickers@abc.com		
Send SMS to rdickers@abc.com		
Send Instant Message to Richard Dickerson		
Show Contact Detail		
Setup Task		
Setup Reminder/Appointment		
Take Note		
Search Google		
Status		Busy
Location		At Work
Message		At My Desk

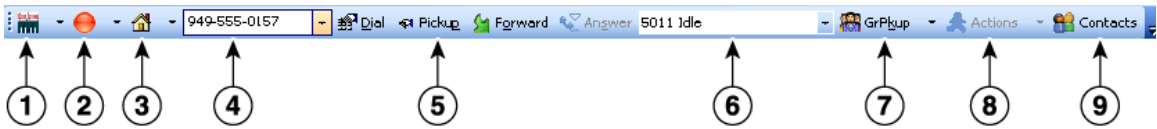
**Step 4** Scroll down or click the desired contact to open the Actions menu.

The Actions menu is populated with the information of the selected contact, including their availability, location, and away message.

**Step 5** Click the communication or collaboration option of your choice to launch a session.

## 5 Toolbar Overview

The Cisco Unified CallConnector toolbar runs within Internet Explorer and Outlook and provides unified one-click access to tools that enable you to control calls, quickly locate your contacts, send messages, and start collaboration sessions. Click the **Contacts** button to view information about your contacts, call logs, or the presence status of your colleagues.



1	About Menu — Provides access to Help and links to more information on Cisco Unified CallConnector.	5	Call Control Buttons — Enables you to control the call on your phone from these buttons. The buttons are context sensitive and change with the different call states (idle, ringing, connected, and held).
2	Availability — Enables you to set your current availability status and publish it to your colleagues. You must have the Cisco Unified CallConnector server version to use this feature.	6	Line Display Menu — A drop-down list that displays the state of the lines (also called extensions) configured on your phone. For each line, it displays the extension number, the call state, and the calling party information.
3	Location — Use to change your current location and indicate whether you are at work or away. You must have the Cisco Unified CallConnector server version to use this feature.	7	Telephony Features Menu — Lists all supported telephony features.
4	Search Bar — Enables you to enter a number to make a call or enter text to search for a contact. The drop-down list enables you to select a contact and select the communication or collaboration option. Click the pull-down arrow to view a list of outgoing calls.	8	Actions Menu — This contextual menu provides access to the additional contact numbers, collaboration, and communication methods for the currently active caller. It is populated with the caller's contact details.
		9	Contacts Button — Opens a window in Outlook and Explorer that enables you to view information about directories, call logs, presence status, and your rules.

## 6 Handling Calls Using the Toolbar

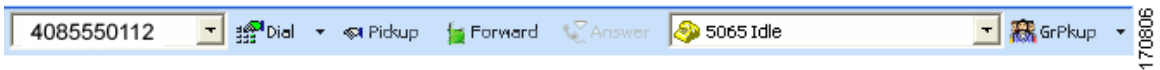
When your line is idle, you can use the buttons on the toolbar for:

- Dialing out
- Picking up a parked or ringing call (from an extension or group)
- Forwarding an incoming call
- Answering an incoming call



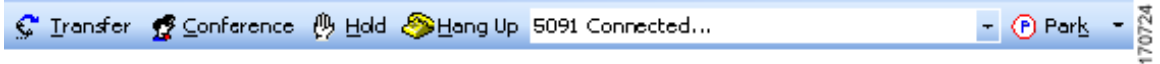
### Note

When dialing out, you can search for a contact by entering in the first few letters of the name. Select the desired contact from the drop-down menu and select the number you want to dial.



After you connect on a call, the call control buttons on the toolbar change to display new options. These options include:

- Transferring a call
- Conferencing
- Putting a call on hold
- Hanging up
- Parking a call

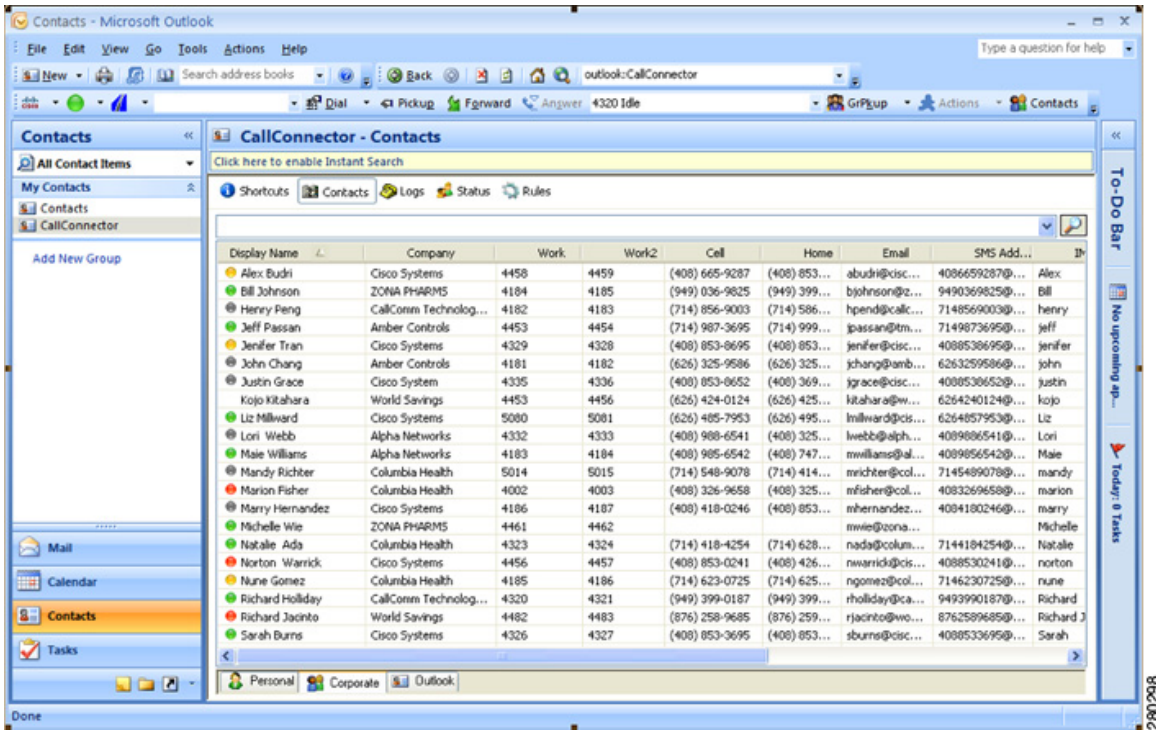


### Note

You can also access all of these telephone features by clicking the down-arrow next to the GrPkup or Park button.

# 7 Accessing Views

You can access a suite of contact and presence management views for Cisco Unified CallConnector from within Internet Explorer and Outlook. Below is an example of the Contacts view in Outlook.

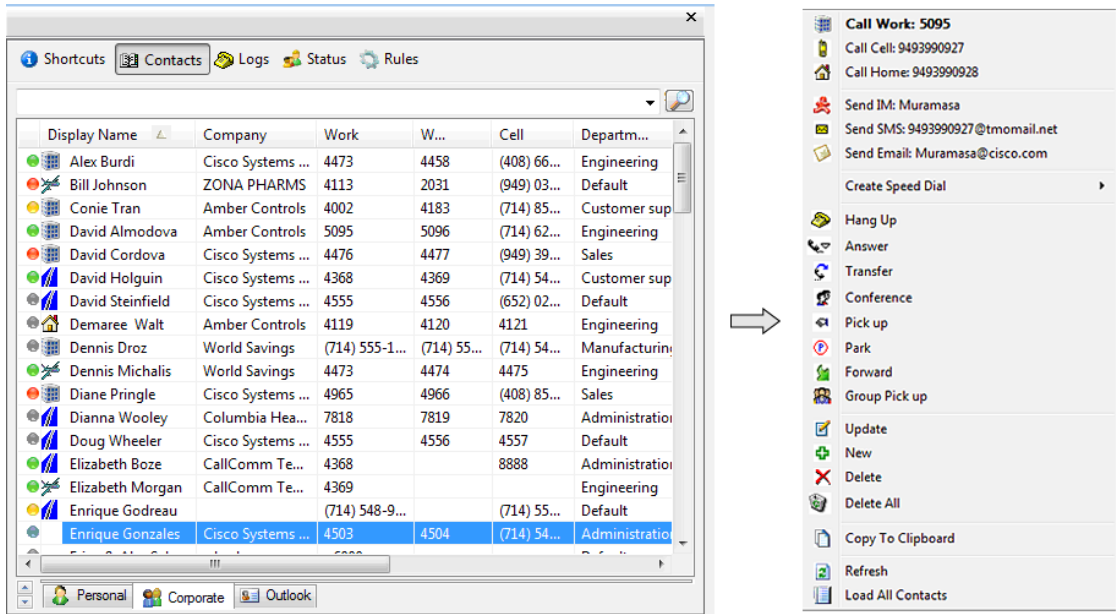


Click the **Contacts** button in the Cisco Unified CallConnector toolbar. In Outlook, you can also access these views by clicking the **Contacts** folder and then selecting **CallConnector** from the **My Contacts** list. Buttons at the top of the window allow you to switch to a specific view. The tabs at the bottom of the window allow you to select different folders or groups of information. You can access the following views:

- **Shortcuts** — Lists your speed dial numbers.
- **Contacts** — Accesses personal, corporate, and Outlook contact information.
- **Logs** — Displays the call history for all the calls made, received, and missed on your phone.
- **Status** — Displays the availability and location information of the users. You must have the Cisco Unified CallConnector server version to access this view.
- **Rules** — Allows you to specify automated routing and notification of calls. You must have the Cisco Unified CallConnector Mobility Service installed to use rules.

# 8 Managing Contacts

Cisco Unified CallConnector supports three contact databases — a Corporate database for shared organization contact information, a Personal database that is available for each individual user, and the Outlook contacts. The Contacts view (shown below) allows you to search, view, and manage this information. You can also right-click to access the Actions menu for each contact, as shown below.



## Viewing Contacts

In the Cisco Unified CallConnector Contacts window, click the Contacts button. To view contacts from another database, click the tab at the bottom of the window.

## Locating a Contact

Type the first few letters in the search bar, press **Enter**. To search for information in a column, first click the appropriate field label.

## Dialing a Number

Double-click an entry to dial the work number.

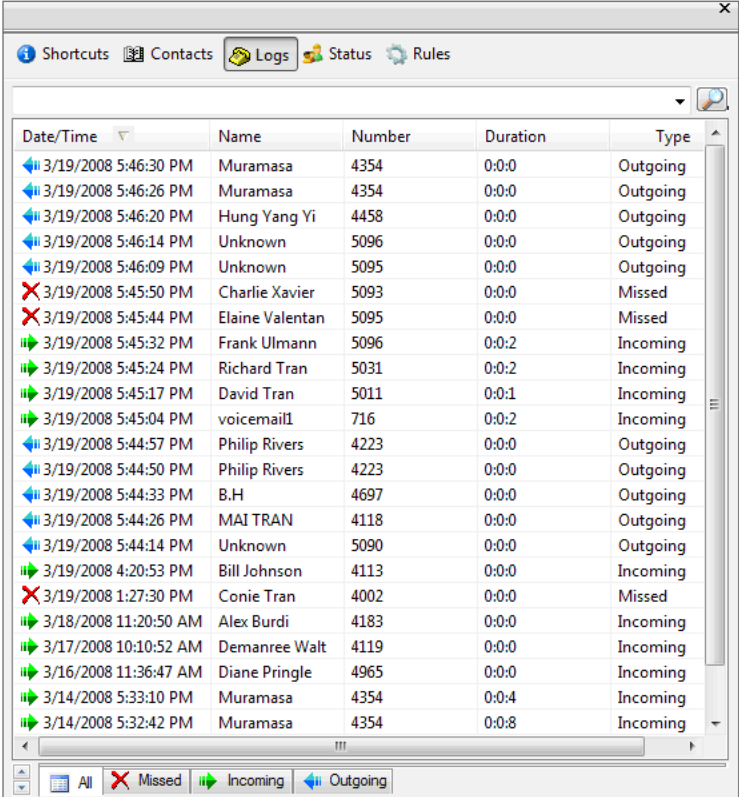
## Accessing Additional Features

Right-click to auto-dial, access telephony features, or send messages.



## 9 Using the Call Log

The Cisco Unified CallConnector Call Log view displays a history of the calls that have been made to or from your phone, as shown in the following example.



The screenshot shows the Cisco Unified CallConnector Call Log window. The window has a menu bar with 'Shortcuts', 'Contacts', 'Logs', 'Status', and 'Rules'. Below the menu bar is a search bar. The main area is a table with the following columns: Date/Time, Name, Number, Duration, and Type. The table contains a list of calls with various icons indicating their status (e.g., outgoing, incoming, missed). At the bottom of the window, there are tabs for 'All', 'Missed', 'Incoming', and 'Outgoing'. A context menu is open over the table, showing options: Dial, Transfer, Conference, Create SpeedDial, Delete, Delete All, and Refresh. An arrow points from the context menu to the 'Delete' option.

Date/Time	Name	Number	Duration	Type
3/19/2008 5:46:30 PM	Muramasa	4354	0:0:0	Outgoing
3/19/2008 5:46:26 PM	Muramasa	4354	0:0:0	Outgoing
3/19/2008 5:46:20 PM	Hung Yang Yi	4458	0:0:0	Outgoing
3/19/2008 5:46:14 PM	Unknown	5096	0:0:0	Outgoing
3/19/2008 5:46:09 PM	Unknown	5095	0:0:0	Outgoing
3/19/2008 5:45:50 PM	Charlie Xavier	5093	0:0:0	Missed
3/19/2008 5:45:44 PM	Elaine Valentan	5095	0:0:0	Missed
3/19/2008 5:45:32 PM	Frank Ulmann	5096	0:0:2	Incoming
3/19/2008 5:45:24 PM	Richard Tran	5031	0:0:2	Incoming
3/19/2008 5:45:17 PM	David Tran	5011	0:0:1	Incoming
3/19/2008 5:45:04 PM	voicemail1	716	0:0:2	Incoming
3/19/2008 5:44:57 PM	Philip Rivers	4223	0:0:0	Outgoing
3/19/2008 5:44:50 PM	Philip Rivers	4223	0:0:0	Outgoing
3/19/2008 5:44:33 PM	B.H	4697	0:0:0	Outgoing
3/19/2008 5:44:26 PM	MAI TRAN	4118	0:0:0	Outgoing
3/19/2008 5:44:14 PM	Unknown	5090	0:0:0	Outgoing
3/19/2008 4:20:53 PM	Bill Johnson	4113	0:0:0	Incoming
3/19/2008 1:27:30 PM	Conie Tran	4002	0:0:0	Missed
3/18/2008 11:20:50 AM	Alex Burdi	4183	0:0:0	Incoming
3/17/2008 10:10:52 AM	Demaree Walt	4119	0:0:0	Incoming
3/16/2008 11:36:47 AM	Diane Pringle	4965	0:0:0	Incoming
3/14/2008 5:33:10 PM	Muramasa	4354	0:0:4	Incoming
3/14/2008 5:32:42 PM	Muramasa	4354	0:0:8	Incoming

### Viewing Missed, Incoming, or Outgoing Calls

Click the tab in the bottom of the window to select the view.

### Dialing a Number

Double-click an entry to dial the number. Right-click to access other options.

### Locating a Log Entry

Type the first few letters (or date) in the search bar, press **Enter**. To search for information in a column, first click the appropriate field label.

# 10 Using QuickDial From Microsoft Windows Applications

You can auto-dial numbers from web pages or from any Windows application using QuickDial.

## Dialing a Number from Any Windows Application

Highlight the telephone number and click the Cisco Unified CallConnector icon in the system tray.

## Using QuickDial from a Web Page

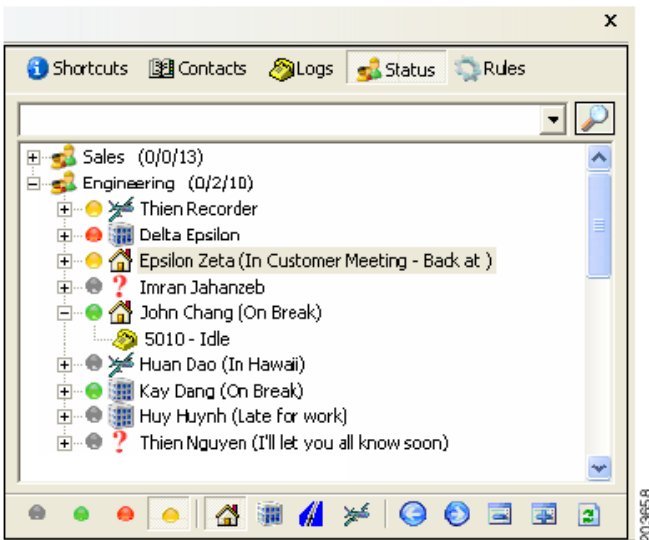
Click the **Number Highlighter** button in the toolbar to highlight the telephone numbers in the web page and click the number you want to dial.

# 11 Monitoring Presence Status



**Note** You must have the Cisco Unified CallConnector server version to monitor presence status.

The Cisco Unified CallConnector Status view provides a real-time view of the entire organization and has information on the availability of users and groups, the location of people, and the status of each extension. Users can manage their own presence status, make calls, and send QuickMessages from this view, as shown in the following example.



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## Viewing Groups (Departments)

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- Step 1** In the Cisco Unified CallConnector Contacts window, click the Status button.  
The list of Groups is displayed.
- Step 2** Right-click to add new contacts, send group QuickMessages, or send SMS messages  
For each Group, three figures are displayed (for example, (1/4/10)):
- Number of calls ringing
  - Number of available users
  - Total number of users in the group
- 

## Viewing Users

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- Step 1** Double-click the group name or click the plus-icon.  
The users in the group display. Each user's availability and location is displayed through icons and the Away Message is displayed to the right.
- Step 2** Double-click to send a QuickMessage and right-click to update presence, send a QuickMessage, SMS, or e-mail message.
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## Viewing Contacts

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- Step 1** Click the plus-icon by the username.  
A list of the user's contact numbers is displayed.
- Step 2** Double-click a contact to dial; right-click a contact for additional features.
-

# 12 Updating Availability



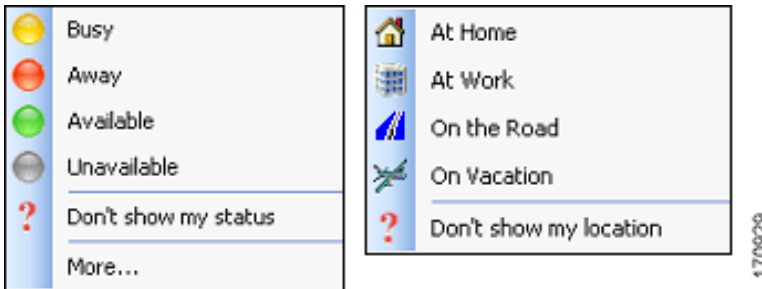
**Note** You must have the Cisco Unified CallConnector server version to update availability.

Cisco Unified CallConnector maintains three components of a user's presence information:

- Availability — Indicates the user's current status is Busy, Available, Away, or Unavailable.
- Location — Shows where each user is.
- Away Message — Provides additional notes on each user's availability.

In the server configuration, this information is broadcast to the Cisco Unified CallConnector subscribers.

The following figure shows the availability and location icons and their meanings.



**Note** Users can update their own availability and location. A manager can change the status of anyone in their group, and an administrator can update the presence status of all users.

- Step 1** Click the Availability menu and select from one of the options.
- Step 2** To enter an Away Message, select **More...** and enter the text.
- Step 3** To change your current location, click the Location menu in the Cisco Unified CallConnector toolbar and select your location.

# 13 Sending QuickMessages



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**Note** You must have the Cisco Unified CallConnector server version to send QuickMessages.

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Sending QuickMessages in the workplace allows you to quickly resolve a question or communicate without interrupting the workflow. With the server version of Cisco Unified CallConnector, users can send QuickMessages and text (SMS) messages to their colleagues.

## Sending an QuickMessage

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**Step 1** Search for a contact, and click **Send IM** or **Send SMS** from the Actions menu in the Contacts view.

You can also double-click the name of the person to which you want to send a message in the Status view or right-click a contact in the Contacts view and select the appropriate message option.

The appropriate message window displays.

**Step 2** To send the QuickMessage to multiple users, click add and select the users you want to join the QuickMessage session.

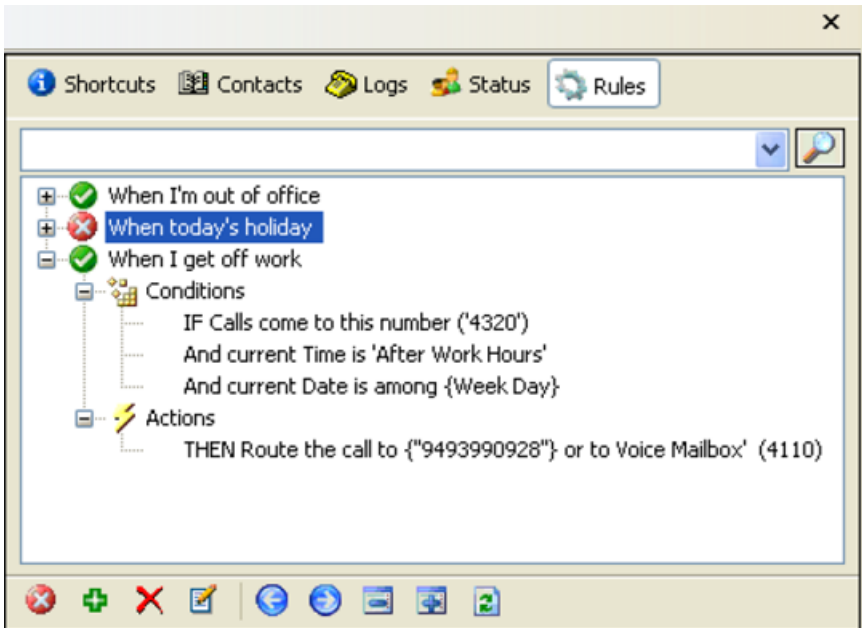
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# 14 Customizing Routing Rules



**Note** You must have the Cisco Unified CallConnector Mobility Service to view the Rules.

You can setup personal rules to receive your business calls at any of your contact numbers. If you are not available, the caller is able to leave a message in your mailbox. The Rules Window allows you to add, update, and delete your personal rules and determine how your business calls are routed, as shown in the following figure.



## Viewing Rules

In the Cisco Unified CallConnector Contacts window, click the Rules button. To view more information about the rule, expand the rule by clicking on the Plus sign or the Expand button.

## Enabling and Disabling a Rule

Rules are active only when they are enabled as indicated by the green checked circle. To enable or disable, right click on the rule and select Enable or Disable. You can also click on Enable/Disable button in the toolbar.

## **Adding a New Rule**

Right click in the Rule Window and select New Rule or click on the Add button at the bottom of the window. This will display the Rules Wizard to enter the rules parameters.

## **Updating a Rule**

Right click on the Rule you want to change and select Edit or click on the Edit button at the bottom of the window.

# **15 Additional Information**

For more information about Cisco UCC for Microsoft Windows 1.5, see the following documentation available at [http://www.cisco.com/en/US/products/ps7274/tsd\\_products\\_support\\_series\\_home.html](http://www.cisco.com/en/US/products/ps7274/tsd_products_support_series_home.html):

- Cisco UCC for Microsoft Windows 1.5 Mobile Edition Quick Reference Guide
- Cisco UCC for Microsoft Windows 1.5 Personal Edition Installation and User Guide
- Cisco UCC for Microsoft Windows 1.5 Server and Mobile Editions Administrator Guide
- Cisco UCC for Microsoft Windows 1.5 Mobile Edition User Guide
- Cisco UCC for Microsoft Windows 1.5 Release Notes

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