



WE MAKE IT POSSIBLE

WHC Toolbar

Application User guide

Wholesale Hosted Communications
(WHC 3.0)

July 2017



Confidentiality

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Version Control

This document is controlled and issued by the BT Wholesale (BTW) Product Manager. Please ensure that you have the latest version of this document, existing Communications Providers (CP) can download this from the WHC Document Centre, and new customers should check with their Account Managers.

Description of change	Issue	Date
Published version for launch	Final 1.0	04 July 2017

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Introduction

The following document type describes a current or recently launched WHC Site or User application.

An application is used to control existing feature, or provide new features to Sites or Users. An application is typically downloaded onto a local device, whether it be a PC, Smartphone or Tablet. Applications may be inclusive of User feature packs or may be chargeable extras that enable the User to fulfil or enhance this job role.

This User guide will cover off CP Administration, Company/Site Administration and End user Administration.

When WHC launch new applications or even enhancements, this document type is provided to all CP's.

Overview

The Toolbar User feature is an application that enables a user to control calls and turn WHC features on or off from the application within Outlook, Internet Explorer or Firefox, saving them the need to log into the Configuration Portal (Business Portal). With the Toolbar, users have access to the main functionality of the service and can control this at the click of a button.

The application comes with standard branding and cannot be branded.

Technology Availability

This application is available on the following WHC technologies:

- Centrex Users
 - Fixed - All
 - Mobile - All

Audience

This document is intended for WHC CP and their order entry and support personnel (CP Administrator), as it contains elements of provisioning, installation and configuration.

Application Description - Toolbar

The Toolbar enables a user to control calls and turn features on or off from the Toolbar in Outlook, Internet Explorer or Firefox, saving them the need to log into a portal. With the Toolbar users have access to some of the main functionality of the service and can control this at the click of a button, this includes:

- Anonomous Call Rejection
- Call forwarding – Always, No Answer, Busy
- Do Not Disturb
- Comm Pilot Express
- External Calling ID Delivery
- Internal Calling ID Delivery
- Simultaneous Ringing
- Outgoing Call Control – Automatic Call Back, Calling Line ID Delivery Blocking
- Call Control –Call Waiting, Remote Office

Hardware & Software Description

The Toolbar application can only be installed on Windows PCs and must be used in conjunction with Internet Explorer 7 or later or Firefox Version 3, 10 or 11. The Toolbar will also integrate with Microsoft Outlook, once installed. It is strongly recommended that computer systems intending to run the Toolbar have capabilities exceeding the ones outlined below.

Operating Systems

Toolbar is deployed on the Microsoft Windows platform.

Hardware Requirements

The hardware requirements include:

- 1.2 GHz or higher Pentium 3 or compatible CPU
- 128 megabytes (MB) of RAM recommended minimum; more memory generally improves performance
- 60 MB available hard disk space
- Video graphics card with 8 MB of RAM (minimum)
- Super VGA monitor (15 inches or larger)
- 800 x 600 screen resolution minimum, 1024 x768 is recommended

Software Requirements

The software requirements include:

- Windows XP, Windows Vista, Windows 7, Windows 8 or Citrix Presentation Server 3, 4, or 6
- Windows Installer 2.0
- IIS web server is supported for silent updates
- Internet Explorer 7.0, 8.0, 9.0, or 10.0 (required for IE toolbar edition)
- Mozilla Firefox 11 or later (required for Firefox toolbar edition)
- Outlook 2003, 2007, 2010, 2013 (required for Outlook toolbar edition)
- Microsoft Active Directory has been tested and supported for LDAP integration
- Squid Web Proxy Server has been tested and supported for silent updates

Please note the following exceptions

- Toolbar works only with the 32-bit version of Internet Explorer.
- When Toolbar runs on a 64-bit version of Windows 7 and uses a Firefox browser, *User Account Control (UAC)* must be set to “Never notify”
- When Firefox is updated to version 21 or later, or from version 21 to an earlier version, Toolbar must be reinstalled

Network and Firewall Requirements

You may need to allow access for the following on your firewall:

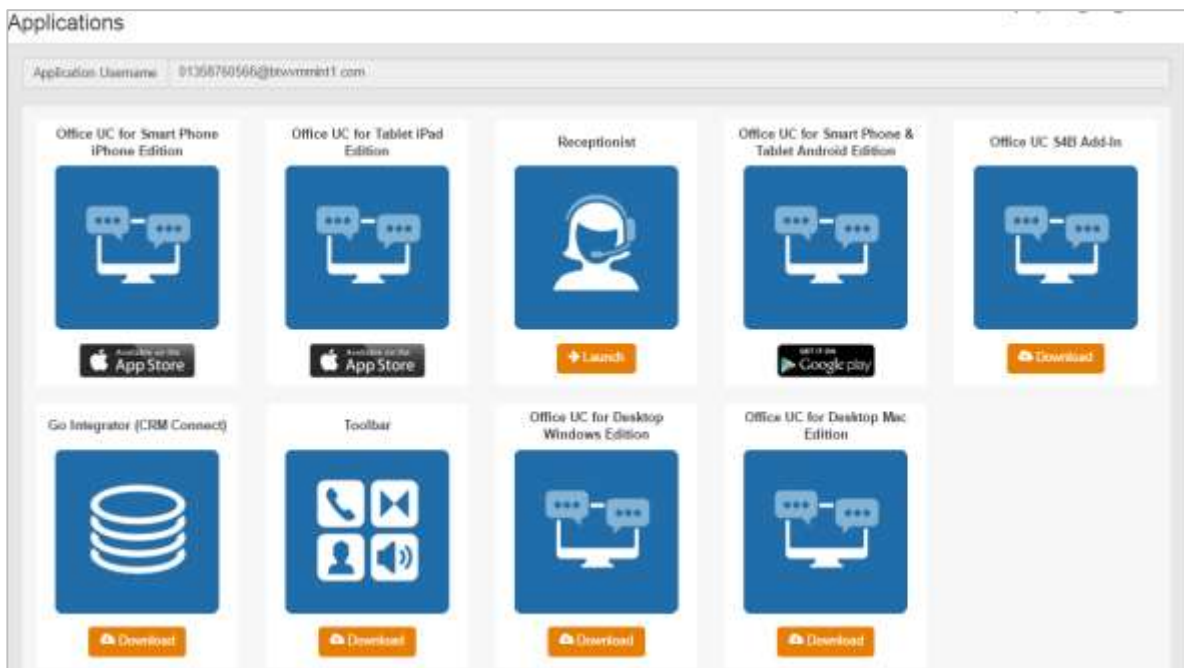
Application	Protocol	Destination	Destination Port
Application Signaling	SIP	_sip_udp.ipcomms-btwbslnws09.bt.com 147.152.35.102/29 147.152.35.110/29	UDP/TCP 5060 to 5075
Application Media	RTP	147.152.35.100/29 147.152.35.108/29	UDP16384 to 32766
oolbar	Proprietary	applications.yourwhc.co.uk 193.113.10.12 193.113.11.12	TCP 2209

Provisioning & Configuration

All provisioning activity takes place on the Business Zone ordering portal unless explicitly stated. All configuration activity takes place on the Configuration Portal (Business Portal) unless explicitly stated.

Provisioning

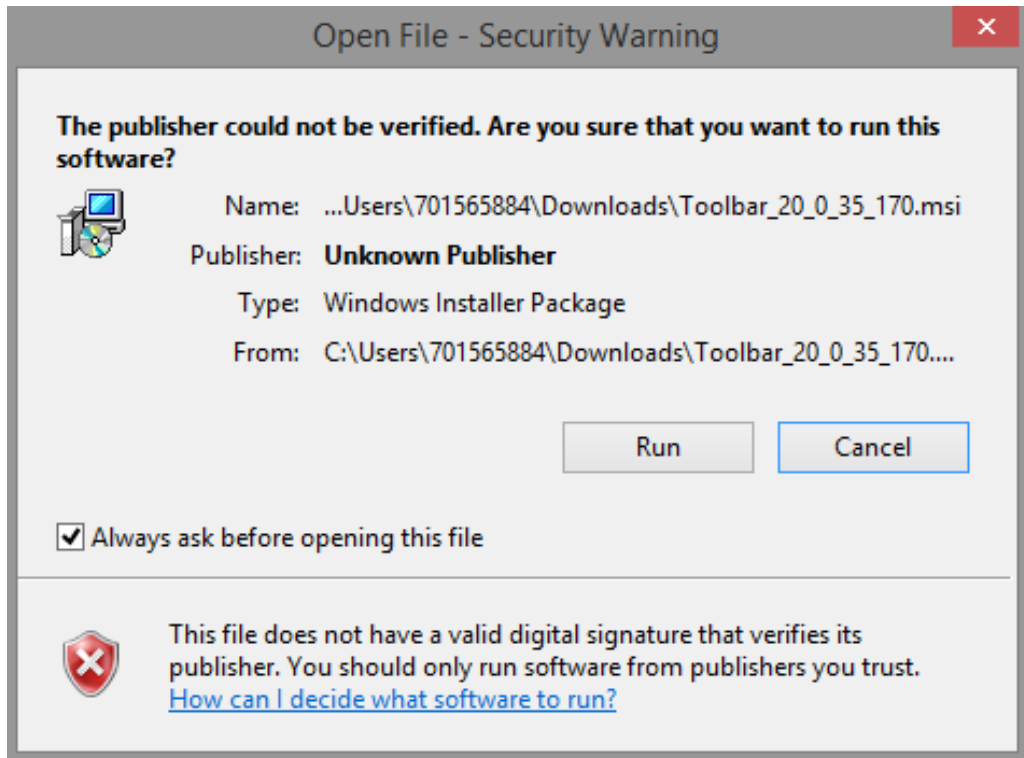
This application is inclusive within the Fixed User and Mobile User License pack, but not available to Functional Users. Once one of these license packs has been ordered from the Business Zones Ordering portal, the application download will appear in the Application section of the Business Portal as per the image below.



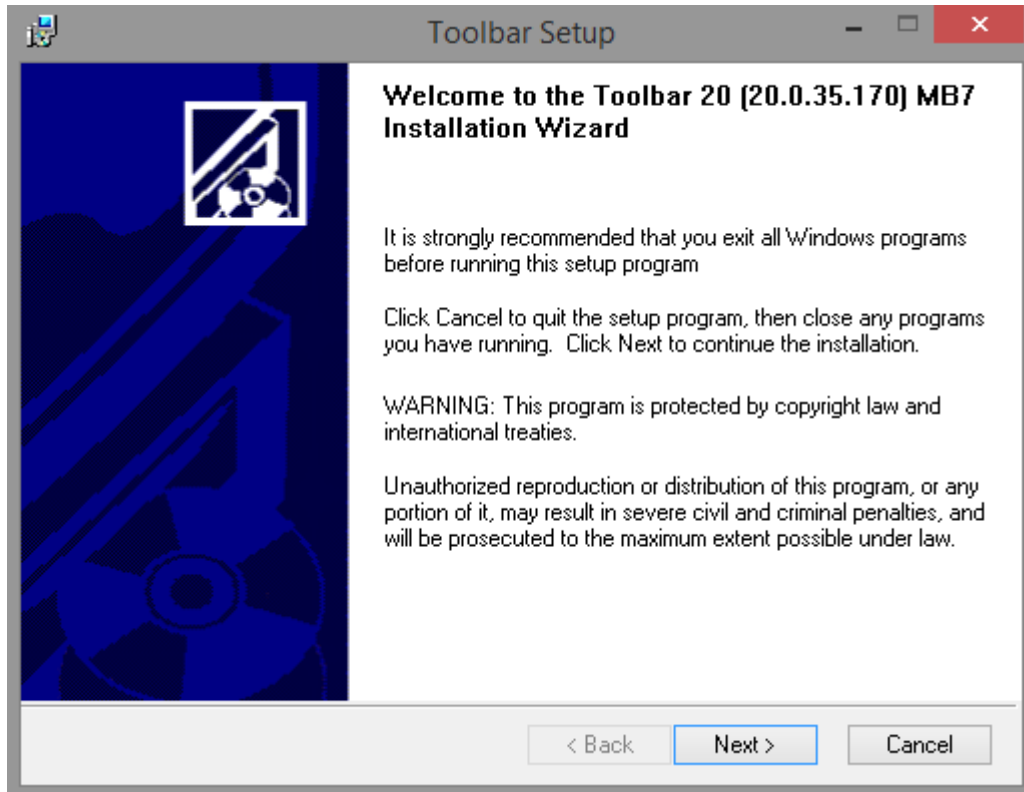
Download & Installation Instructions

Once you have provisioned a Fixed or Mobile User License, and the User has received their welcome email, they can now download the application from the Business Portal. When they click download they will be prompted to download the application.

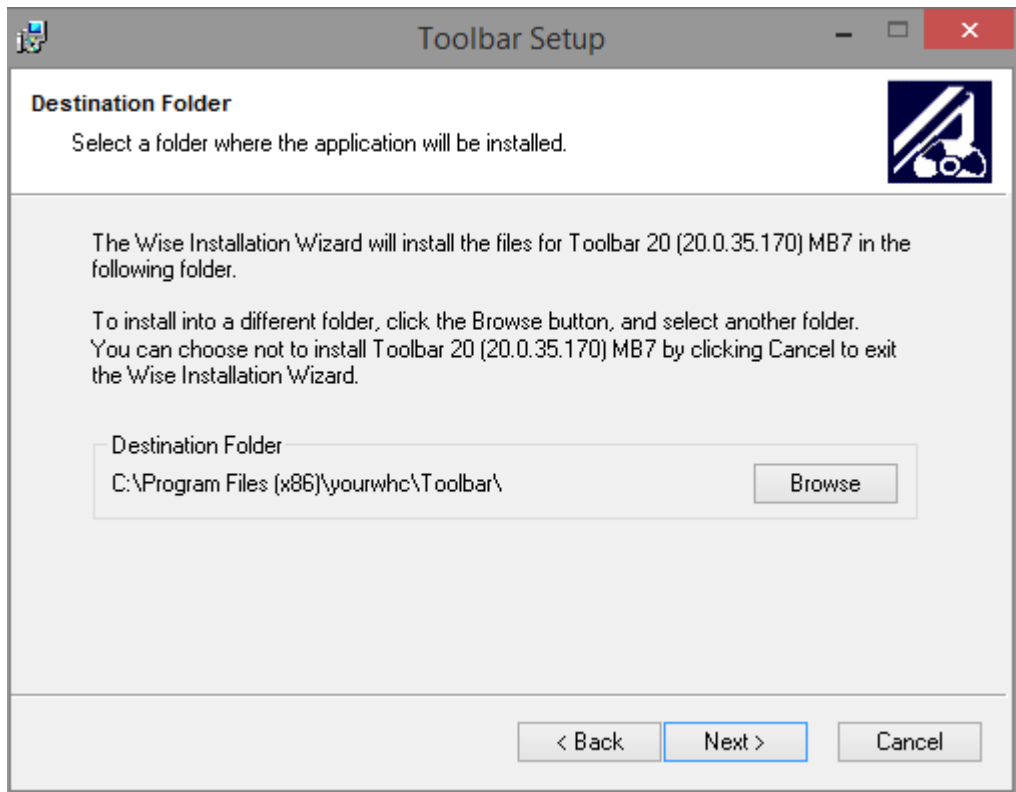
Once you have downloaded, close all existing programs including Internet Explorer and Microsoft Outlook. Now go to the area you have saved it to and double-click the file to begin installation. When the screen prompt below appears click on **Run**.



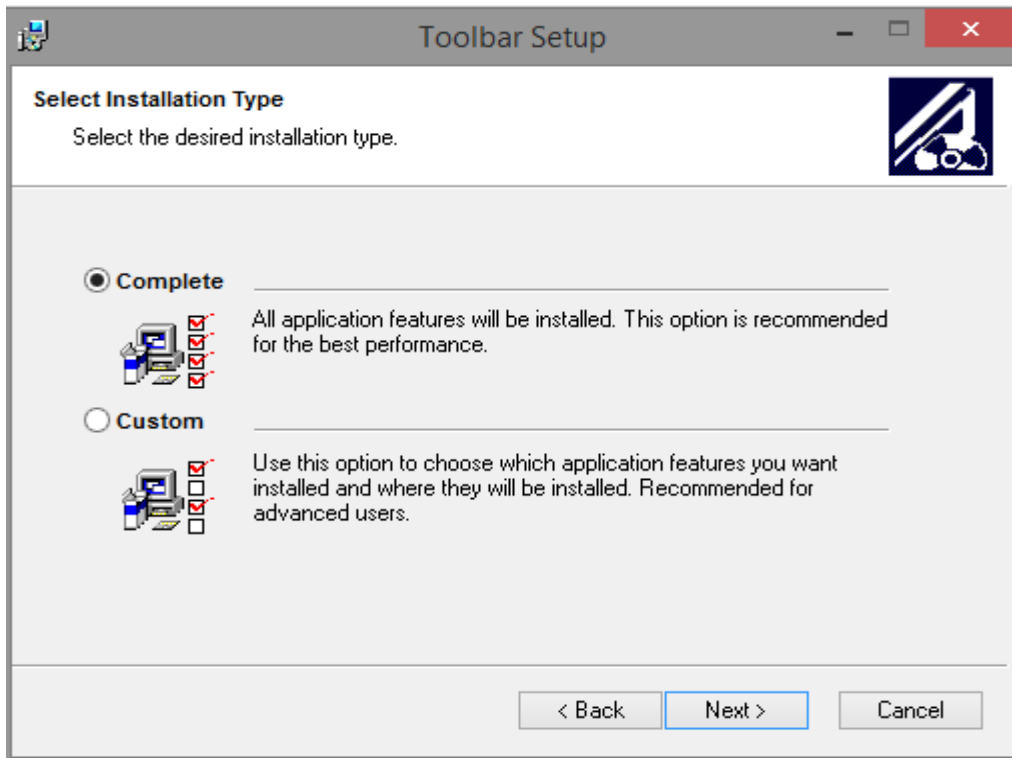
Please wait patiently as there is a short delay while the install extracts files onto the local machine and initiates the install. When ready, you will see the following screen. Click on **Next** to continue.



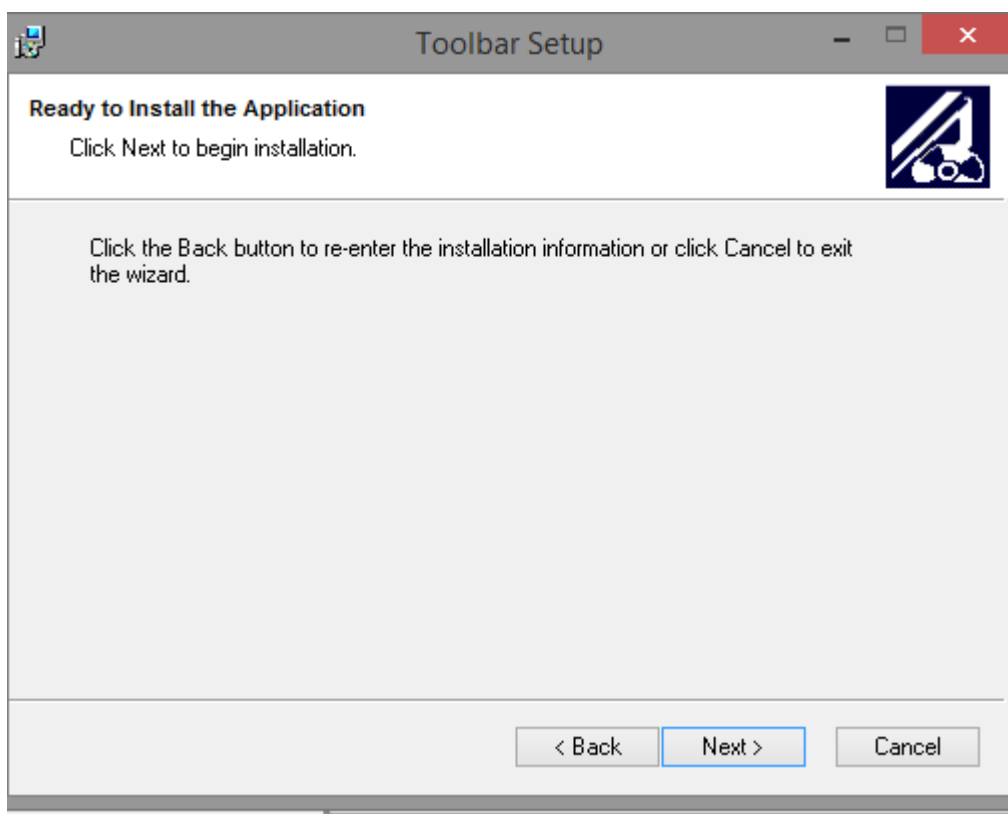
Click **Next** again leaving the default installation path as it is.



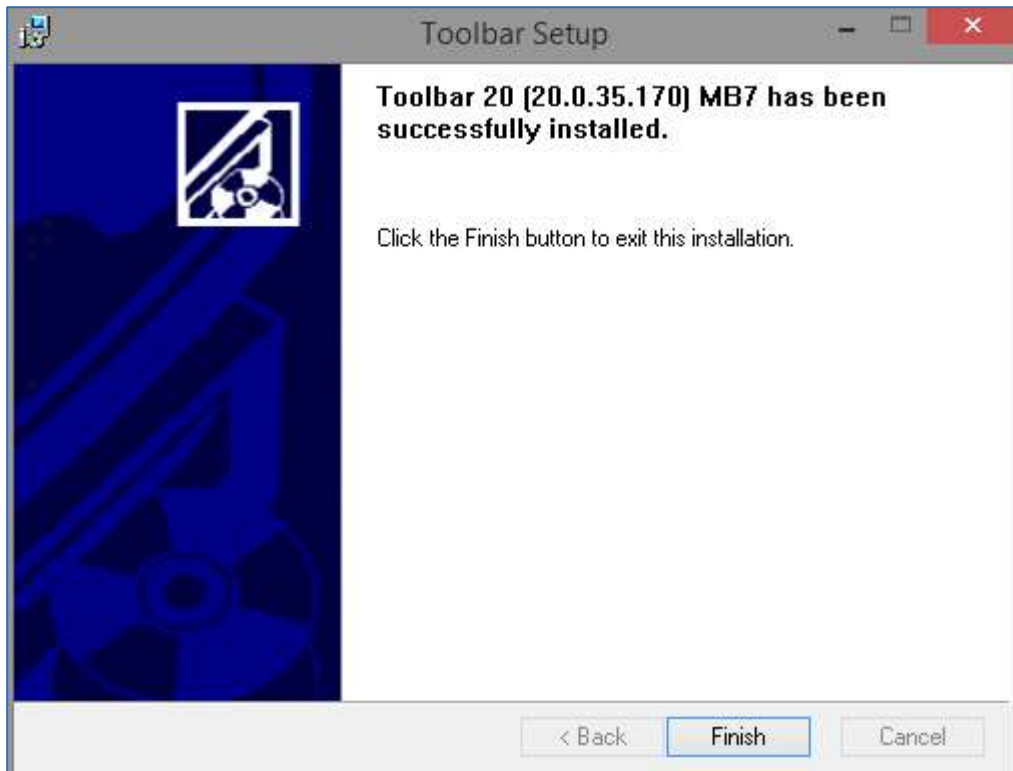
Click **Next** leaving the default selection alone.



Click **Next** again.



Once successfully installed, you will see the following window. Click **Finish**.



Configuration

The Welcome Email sent to End Users will guide them to navigate to the Business Portal to download the application and obtain their Username.

Please note this Username is the same for all Applications, but is different to the Business Portal credentials. The username can be seen in the Applications tab as shown below:

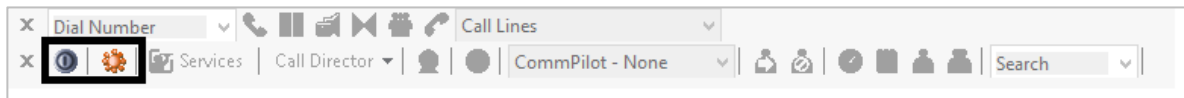


The password for all applications is not sent to the User and needs to be set in the Business Portal by navigating to **My Account**,



Select **Password to Change** box, then click on **Application**, enter password and then select **Save**.

Now the user needs to open Internet Explorer and then click on the Login or Settings button.



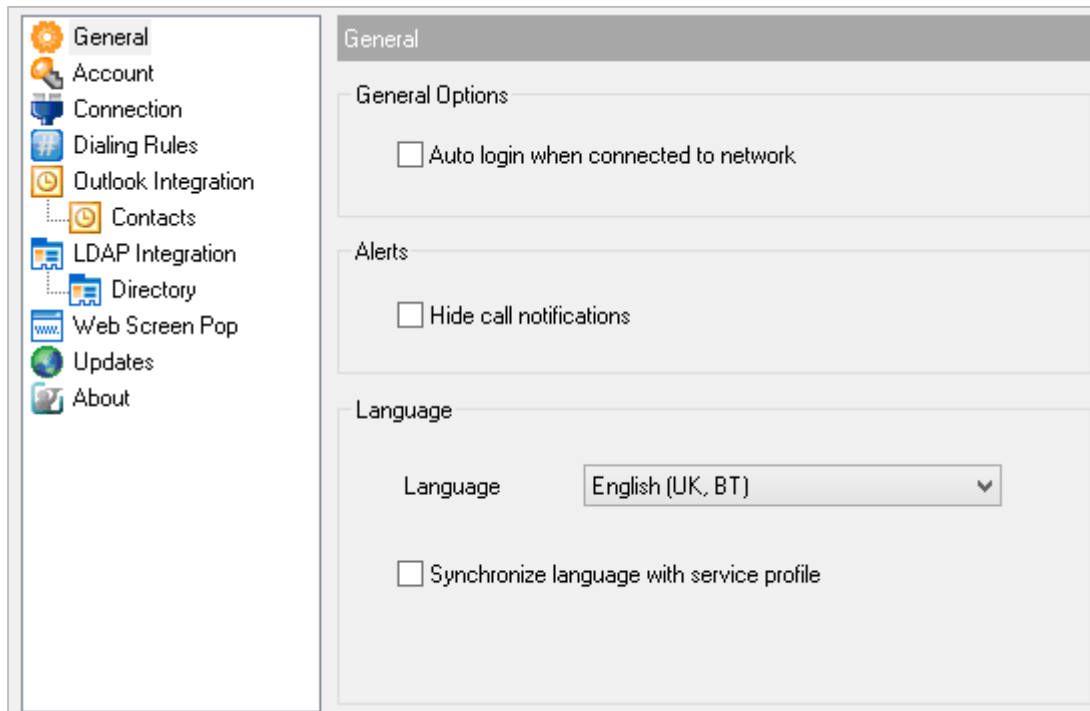
Options

The *Options* dialog allows you to configure the connection and account settings that Toolbar uses to communicate with WHC. The left-hand side of the dialog contains a tree view, listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- Click **OK** to save all changes and close the dialog.
- Click **Apply** to save all changes without closing the dialog. Cancel closes the dialog without saving your changes.

General

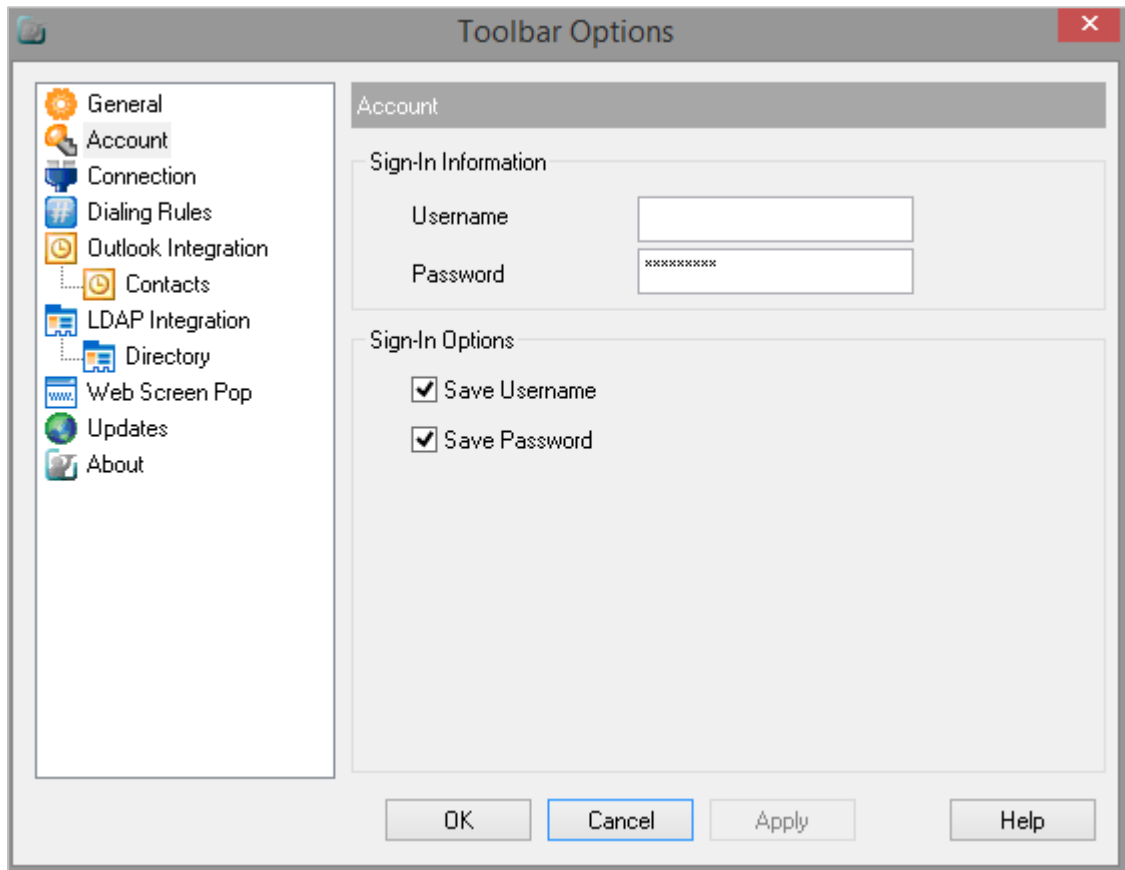
The *General* page allows you to configure the automatic login behaviour of the Toolbar



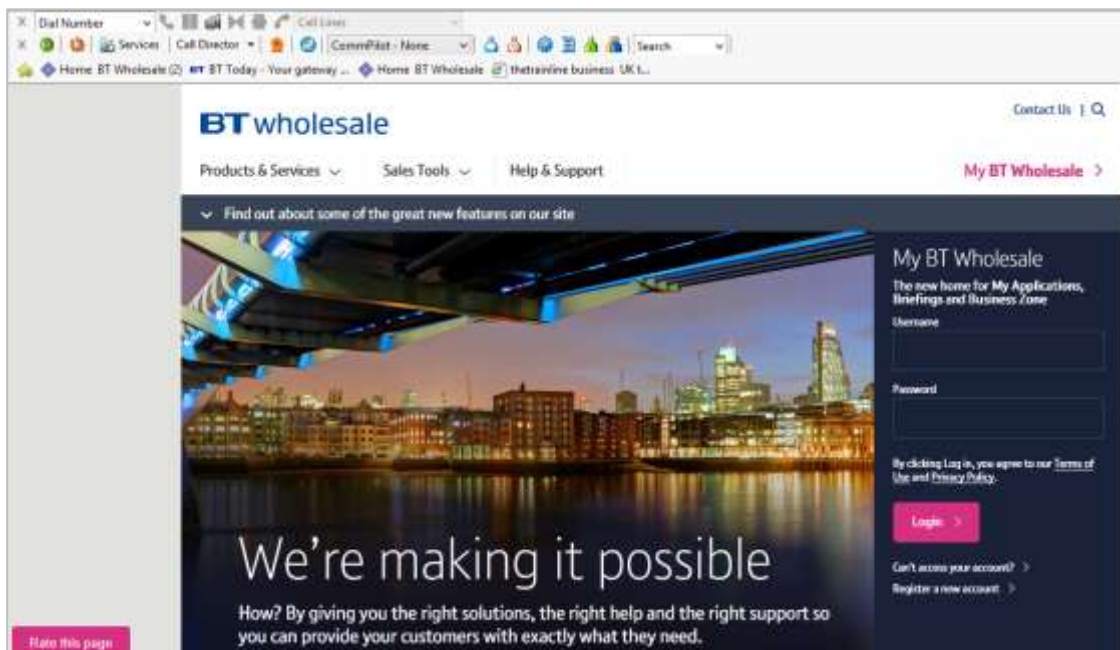
- *Auto login when connected to network* automatically logs you into the Toolbar.
- *Hide Call Notification* disables the call notification window. When this box is checked, the call notification does not appear when Toolbar detects an incoming or outgoing call.

Account

The application Username and Password should be entered into this section to allow login.

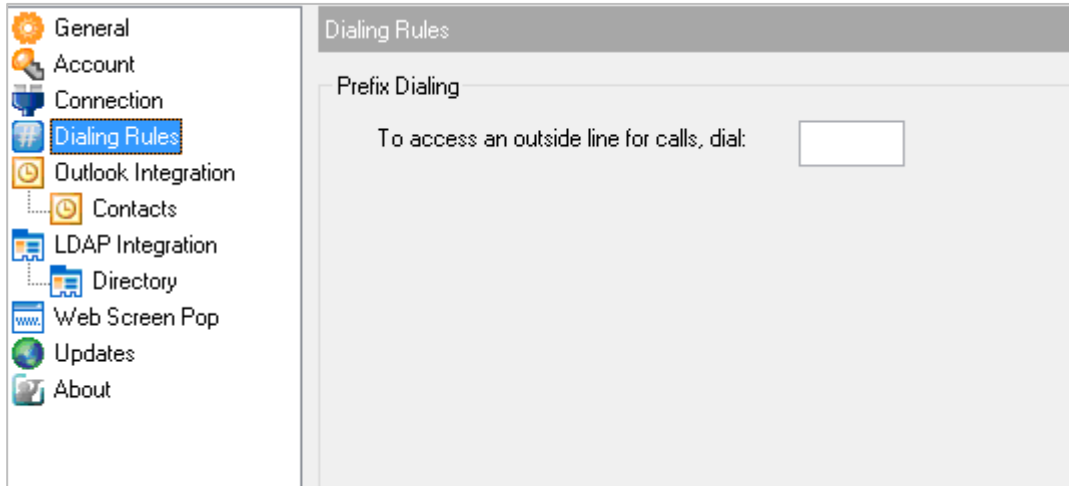


Once the user details are successfully entered, the Toolbar buttons will all appear in colour as per the screenshot below.



Dialing Rules

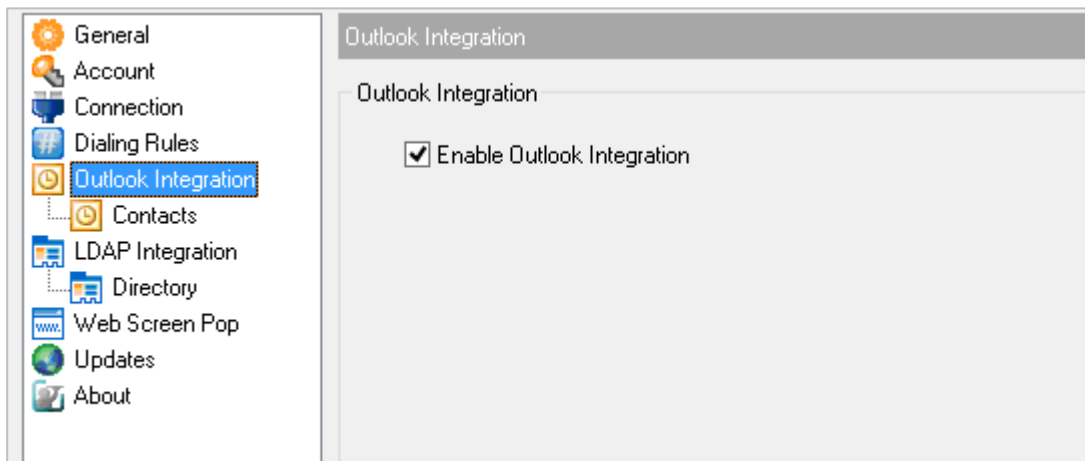
To access an outside line for calls, specify a prefix number that Toolbar includes automatically when dialling external numbers.



If entered, this number is pre-pended only to dialed numbers that contain more than six digits. Up to five digits may be entered in this field. Valid characters are the numbers 0 to 9 and the symbol “+”. If you include the “+” character, it must be the first character in the field.

Outlook Integration

The *Outlook Integration* page enables and disables the use of Toolbar with Microsoft Outlook. In Outlook 2007 editions and above, you are unable to dial a contact in your in box using the right click-to-dial function.



The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated.

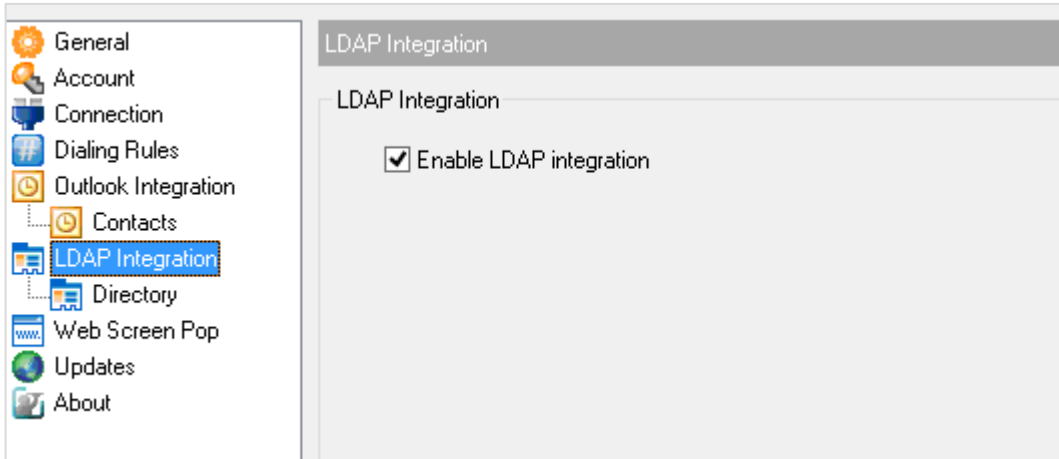
Contacts Page

The *Contacts* page allows you to configure the way Toolbar integrates with your Outlook contact list.

- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup for incoming calls* determines whether Toolbar uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

LDAP Integration

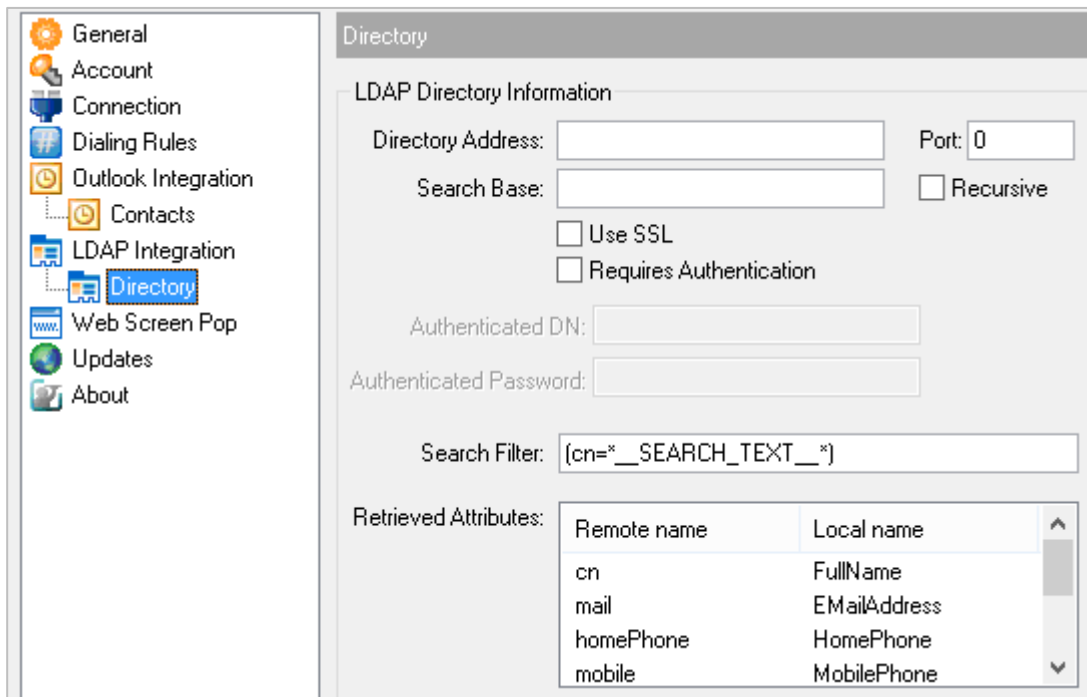
The *LDAP Integration* page allows you to configure the settings Toolbar uses to connect to the LDAP directory server.



Enable LDAP Integration determines whether Toolbar provides LDAP directory lookup services. Checking this box enables the controls on the *Directory* page.

Directory Page

The *Directory* page allows you to provide the configuration settings required for Toolbar to connect to your directory server.



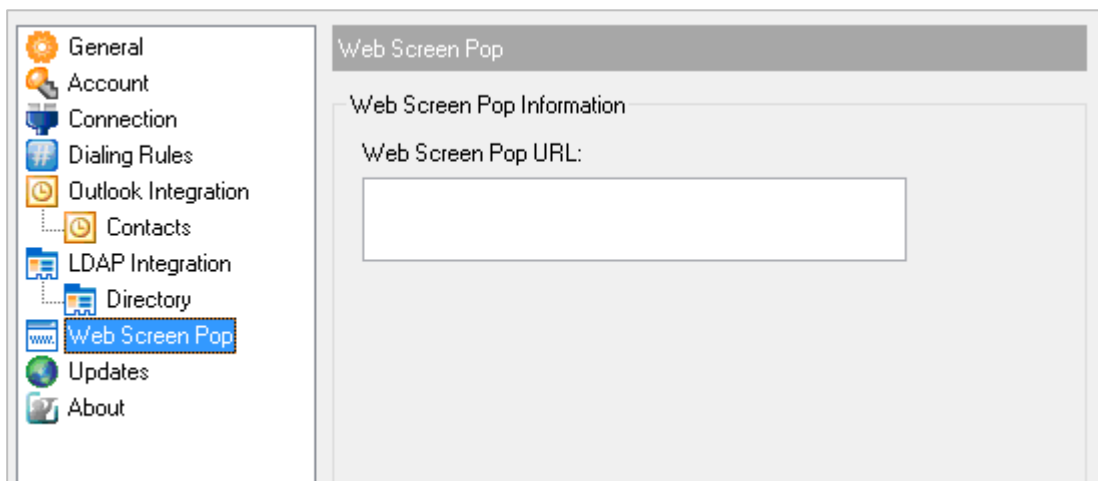
Once you successfully log in, the controls on this page become inactive.

- *Directory Address* specifies the network address of the LDAP directory server.
- *Port* the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.

- *Search Base* determines the location in the directory server tree that Toolbar looks in when executing a search.
- *Recursive*, when checked, searches all sub-trees within the search base until the specifications are found.
- *Use SSL* (Secure Sockets Layer) determines whether Toolbar uses SSL to connect to the directory server. Note that enabling SSL may require the use of a different port.
- *Requires Authentication* indicates whether Toolbar must provide a user name and password to the directory server to conduct searches.
- *Authenticated DN* is the user name Toolbar uses when connecting to the directory server when *Requires Authentication* is checked.
- *Authenticated Password* corresponds to the *Authentication DN*.
- *Search Filter* specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*_SEARCH_TEXT_*). Alternatively in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Retrieved attributes* is a table that controls the way that Toolbar maps attributes returned from the directory server to columns displayed in the list of search results.
- In each row of the table, enter an *LDAP* attribute in the *Remote Name* column. In the *Local Name* column, enter a corresponding local attribute. Typical Remote Name values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".

Web Screen Pop

The *Web Screen Pop* page allows you to configure a web page that you can open from the call notification window.



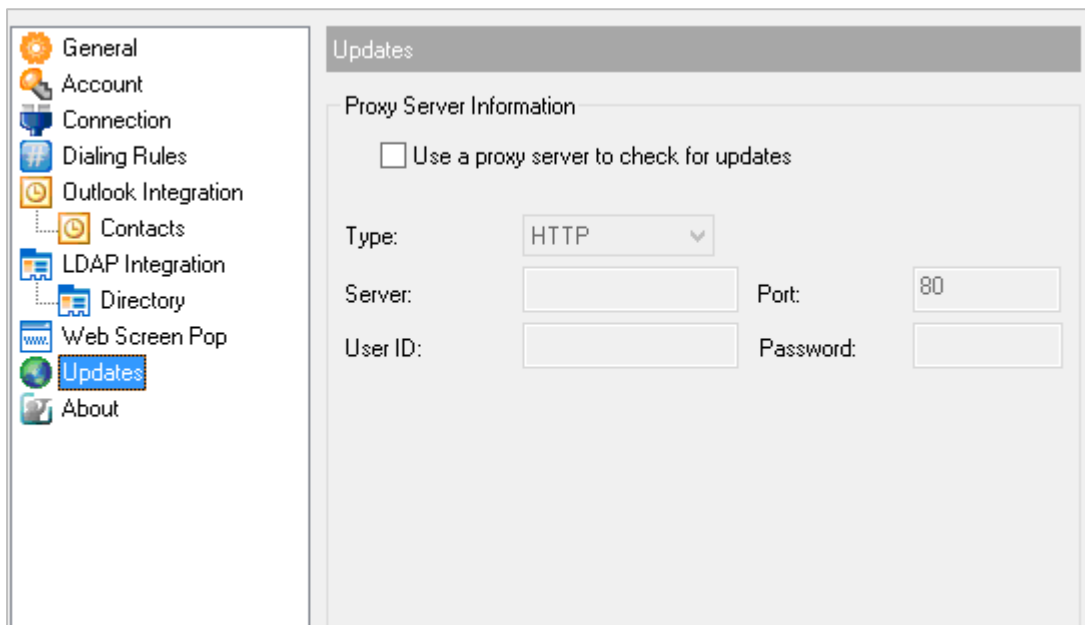
The *Web Screen Pop URL* determines the URL that Toolbar opens using the default browser when you click **Web Screen Pop** in the Call Notification pop-up window. In addition to the URL, there are

a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- **__USER__**: The user's WHC ID. (Note that in this case the "user" is the WHC subscriber.)
- **__FIRST__**: The first name of the user.
- **__LAST__**: The last name of the user.
- **__EMAIL__**: The e-mail address of the user.
- **__GROUP__**: The name of the WHC group the user belongs to.
- **__SERVICE_PROVIDER__**: The name of the WHC service provider the user belongs to.
- **__PHONE__**: The phone number of the user.
- **__REMOTE_PHONE__**: The phone number of the remote party.
- **__REMOTE_NAME__**: The name of the remote party (when available).
- **__CALL_TYPE__**: "Incoming" or "Outgoing".

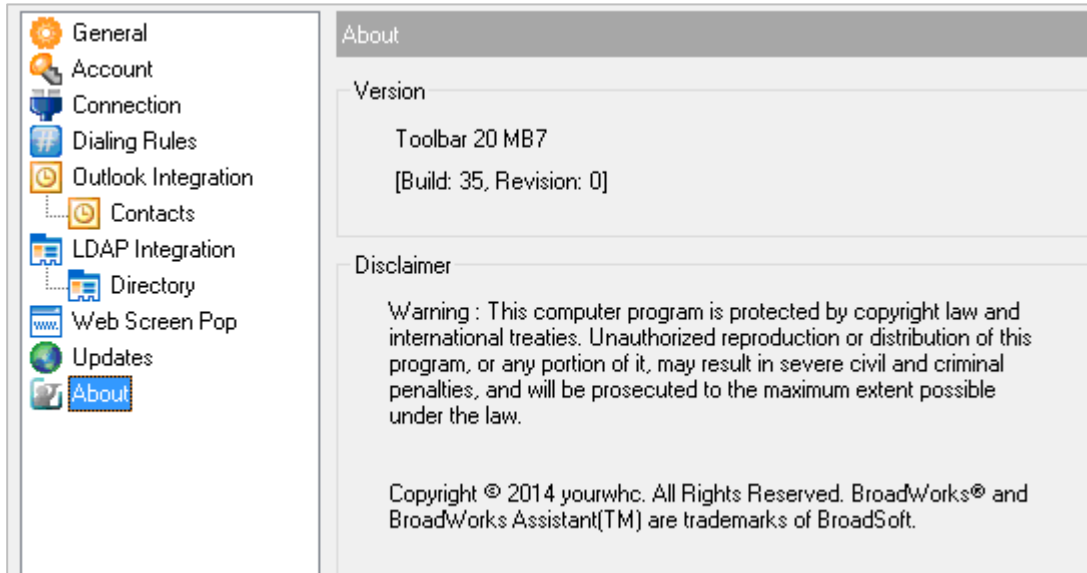
Updates

No changes here will have an effect so please ignore this section as it is pre-configured to communicate with our WHC application server.



About Page

The *About* page displays the version, copyright notices, and product disclaimers associated with Toolbar. It can be useful when providing information to support representatives for your service provider.



The information displayed is as follows:

- Toolbar Version
- Toolbar Disclaimer

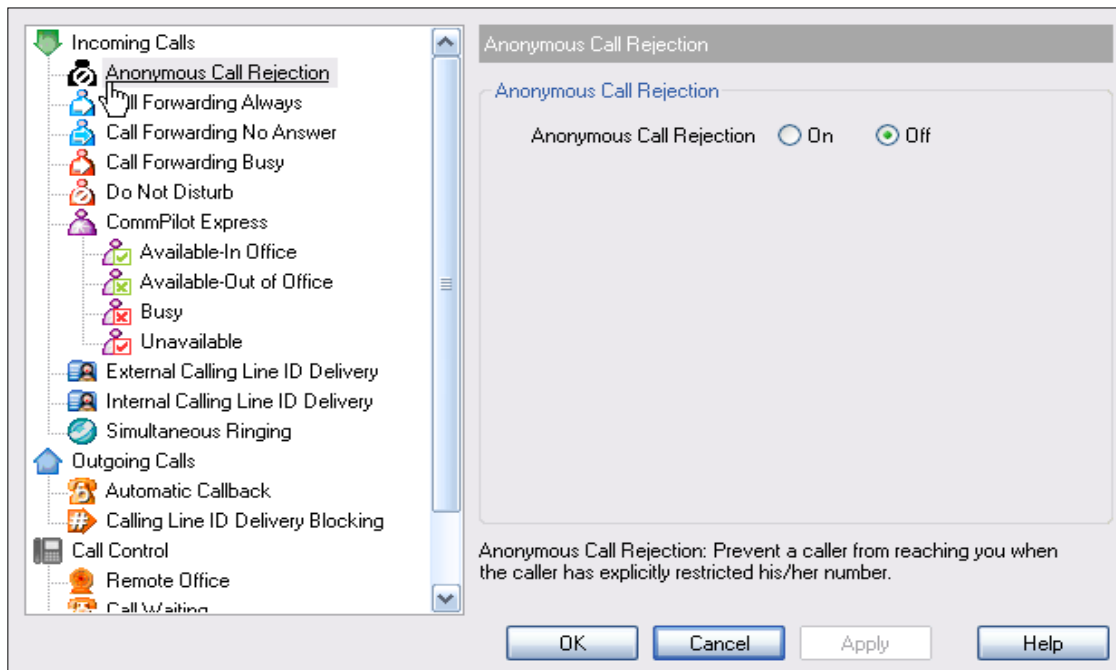
The About information is important in providing information for the purpose of technical support.

Operating the Feature


Details on configuring and managing features available in the Toolbar are contained with the relevant feature description in the WHC User Features Guide, available on the Document Centre.

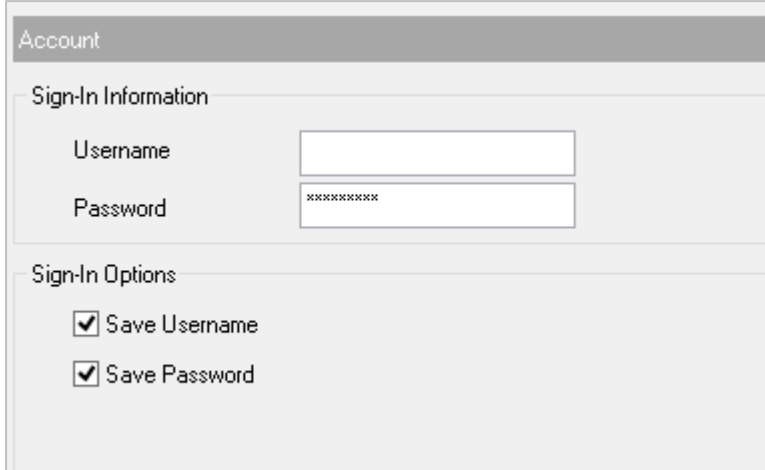
Feature Interaction

The Toolbar feature add-on interacts directly with the features listed in the left hand pane of the screenshot below. Any feature settings made here will update the Business Portal, and vice-a-versa.



Log In and Log Out

To log in manually, click the green **Login** button.  Alternatively you can configure this application to log in automatically when your PC starts up by placing tick boxes in the Sign-In Options.



The screenshot shows a form titled "Account" with two sections: "Sign-In Information" and "Sign-In Options".

Sign-In Information:

- Username: [Text input field]
- Password: [Text input field with masked characters "*****"]

Sign-In Options:

- Save Username
- Save Password

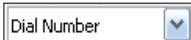
To log out, simply click Login again. 

This button displays the following states:

- A grey button indicates that you are not logged in.
- A green button shows that you are currently logged in.
- A disabled button shows that Toolbar is attempting to log you in.
- A red button indicates that your last login attempt failed.

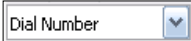
Making Calls

Dial from the Toolbar

In the *Dial Number* box, type the number you want to call  and the press ENTER.

Redial Number

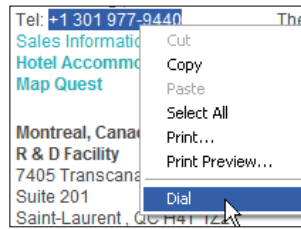
You can redial up to 10 previously dialed numbers.

- Click the arrow at the right-hand side of the *Dial Number* box. 
- On the *Dial Number* list, click the number you want to redial.
- Press ENTER.

Dial from Web Page (Internet Edition)

To dial from a webpage:

- Select a phone number
- Highlight and right-click the number.
- On the shortcut menu, click *Dial*.



Dial from E-mail (Outlook Edition)

You can dial a contact directly from Outlook, 2002 and 2003 editions. This feature is ***not*** supported in any later editions.

- Open an e-mail that contains the number you want to dial.
- Make sure the e-mail is either an open message or a preview in the HTML format.
- Highlight and right-click the number.
- On the shortcut menu, click *Dial*.

Dial from Contacts (Outlook Edition)

Toolbar from within Outlook, allows you to dial the *Business*, *Home*, or *Mobile* number of any Outlook contact.

- In the list of folders, click *Contacts*.
- From the *Contacts* list, select the contact you want to call.
- On the toolbar, click the arrow at the right-hand side of the *Dial Contact* list.
- Select the type of number to call (*Business*, *Home*, or *Mobile*).



Dial from Personal Directory

You can dial a contact directly from your Personal Directory, which takes the contacts from the Business Portal Personal Directory, by following these steps:

- On the Toolbar, click Personal Directory
- On the list that appears, click the desired phone number.

Dial from Group Directory

You can dial a contact directly from your Group Directory, which takes the contacts from the Business Portal Company and Group Directory, by following these steps:

- On the Toolbar, click *Group Directory*.
- On the list that appears, click the desired phone number.



Dial from Speed Dial Directory

You can dial a contact directly from your Speed Dial Directory by following these steps:

- On the Toolbar, click *Speed Dial*.
- On the list that appears, click the desired phone number.



Dial from Call History

You can dial a contact directly from your Call History by following these steps:

- On the Toolbar, click *Call History*.
- On the list that appears, click the desired phone number.



Dial from Search

You can dial a contact directly from Search by following these steps:

- In the *Search* box, type your search criteria or click the arrow at the right-hand side of the *Search* box and select a previous search from the list.
- Press ENTER and Toolbar displays the results of your search.
- Click the phone number you want to dial.


Receiving Calls

Call Notification

When you initiate or receive a call, Toolbar displays a notification window above the system tray, which includes the other party's identification from WHC or Outlook directories.




Answer Call

In the toolbar, click  Answer or click the *Call Notification* window.

Call Control


Blind Transfer

Calls can be blind transferred while active, held, or ringing in by:

- Call the destination number. This automatically puts the first party on hold if the first party is not already on hold.
- Click **Transfer**. 

Consultative Transfer

Calls can be transferred with consultation while active, held, or ringing in on your phone.


- Call the destination number. This puts the first party on hold.
- Wait until the called party accepts your call, and then click **Transfer**  to connect the parties.

End Call

You can end incoming and outgoing calls from the toolbar and from the *Call Notification* window.

Click  **End** on the toolbar or click **End Call**  in the *Call Notification* window.

Save vCard

To save the caller's phone number and personal information as a vCard in Outlook, in the Call Notification, click **Add vCard** 


Hold Call

- On the *Call Selector* list, select the call to hold.
- Click **Hold** . 


Unhold Call

- On the *Call Selector* list, select the held call.
- Click **Answer** . 

Initiate Conference

You can initiate a conference with two parties. All calls on the *Call Selector* list are added to the conference. 

- Click **Conference** .
- To add incoming or outgoing calls to the conference, click **Conference**.

- To drop a conference participant, select the participant's number on the *Call Selector* list and click **End.** 


Transfer Call to Voice Mail

You can transfer calls to your voice mail from the Toolbar and from the *Call Notification* window.

To transfer to voice mail, click **Transfer to Voice Mail**  either on the Toolbar or in the *Call Notification* window.

Retrieve Voice Mail

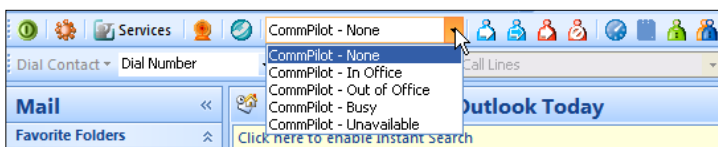
To listen to your voice mail:

- Make sure that you are not currently engaged in a call. No entries must be present on the Call Selector list.
- Click **Transfer to Voice Mail**  on the toolbar.

Set Your CommPilot Express Profile

CommPilot Express allows you to manage your calls based on your schedule using four configurable profiles: *In Office*, *Out of Office*, *Busy*, and *Unavailable*.

- Select a profile from the *CommPilot* drop-down list on the toolbar.
- To disable all profiles, select *CommPilot – None*.




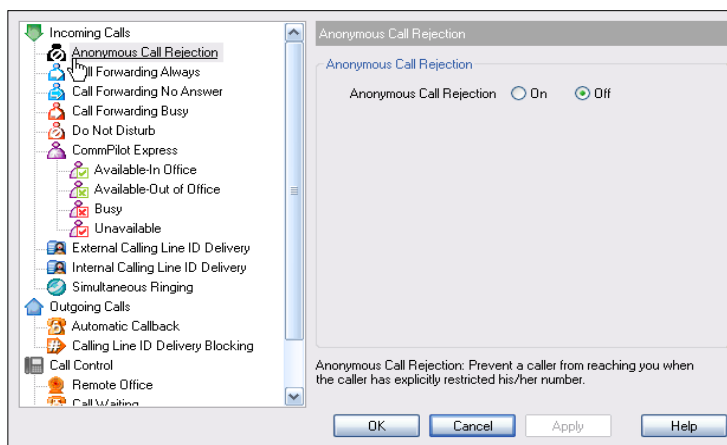
Service Settings

Change Services Settings

The *Services* dialog allows you to easily change your service settings for telephony services, such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting.







NOTE: Only the services you have assigned to you will be accessible and configurable.

- On the toolbar, click  **Services**.
- On the left-hand side of the *Services* window, select the tab of the service you want to configure.
- On the right-hand side, select or fill out required information.




Access Services Settings from the Toolbar

Frequently-used services are represented on the toolbar by their own buttons for easy access:

- Call Forwarding Always 
- Call Forwarding No Answer 
- Call Forwarding Busy 
- Do Not Disturb 
- Remote Office 
- Simultaneous Ringing 



By clicking a button, you can set the corresponding service on or off.

Call Selector

The *Call Selector*  is a drop-down list that shows current calls and lets you pick the call you want to perform the action on, but does not switch the call.

Directories

The following directories are available to you from the Assistant–Enterprise Toolbar:

- Group Directory  integrates the Company and Group contacts from the Business Portal.
- Call History allows you to view your missed calls, received calls, and dialed calls.
- Speed Dial contains your speed dial entries. 
- The Toolbar links list contains
- URLs preconfigured by your service provider. Select an item from
- the list to navigate to that page.

Product Support & Fault Handling

Please refer to the WHC T2R Fault Management - Business Zone User Guide, available on the document centre, to review the steps needed to raise a fault.

Pricing

The Toolbar is inclusive within the Fixed User and Mobile User License pack and is not charged separately.

All pricing is available from within the WHC Pricing charge books which are provided at the point of contract signature, and available to download from the WHC document centre. If you are unable to locate these then please raise a P4 support ticket.



The information in this publication was correct at time of going to print. We may make minor alterations to the specifications of products which do not affect their performance, and may vary prices and delivery charges.

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