



Alteva Assistant Enterprise Toolbar User Guide



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Welcome

The Alteva Assistant Enterprise Toolbar is a carrier class lightweight desktop communication management tool for everyday users of Microsoft® Outlook®, Internet Explorer/Firefox and Alteva Assistant Enterprise soft switch platform.

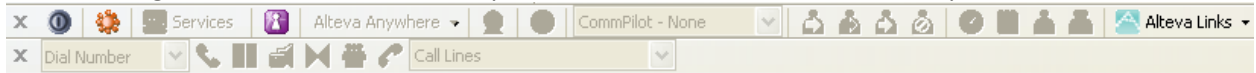
Getting Started

After you have installed the Alteva Assistant Enterprise Toolbar, reading the following topics will help users get used to the available features and functionalities:

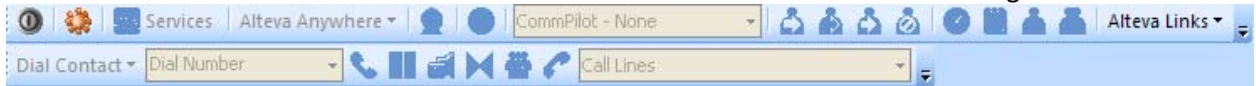
First Use


The toolbar has to be configured before its first time use. Once configured, users can use Assistant Enterprise Toolbar without any more reconfiguration, as indicated in the section entitled Subsequent Use.

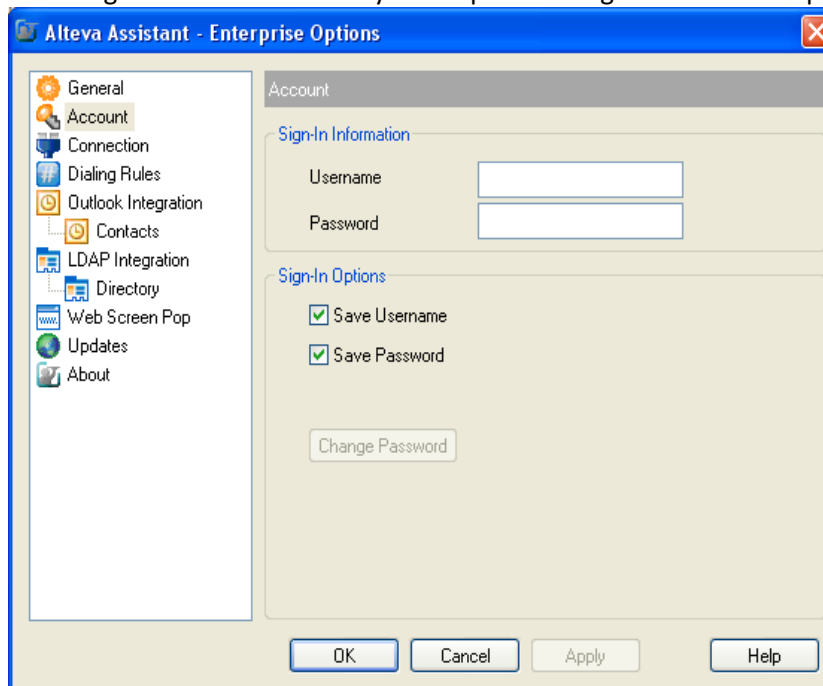
Before configuration, the Assistant Enterprise Toolbar for Microsoft Internet Explorer looks like:



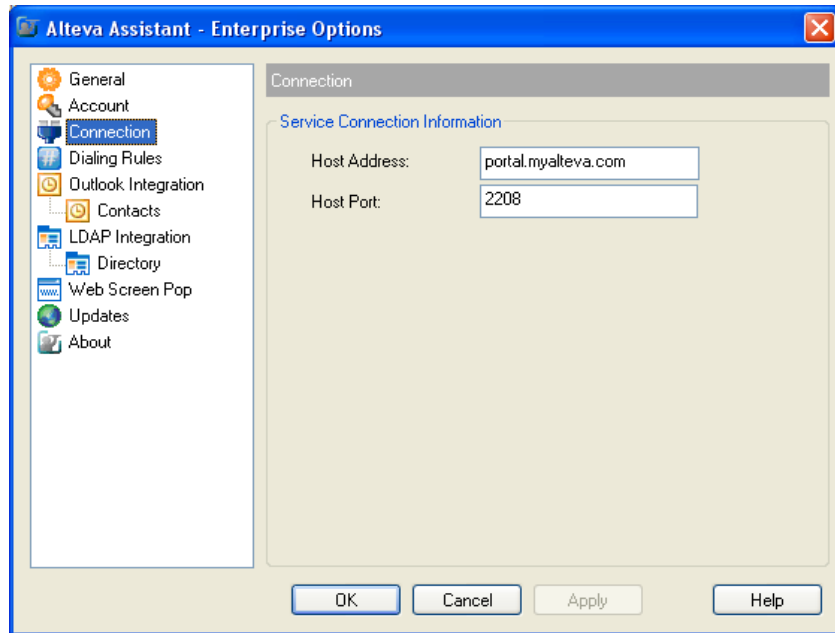
Below is a screen shot of the Microsoft Outlook version's of the toolbar before configuration.



1. Click on the **OPTIONS** button  in the toolbar
2. Assistant Enterprise Toolbar will prompt for username and password as show below. Use the same username and password used to login into individual user portal.
3. The **Save Username** and **Save Password** fields are by default checked. If they are not checked please click on the checkboxes to save your username and password. This is advised as it will save time entering user credentials every time upon starting of the toolbar application.

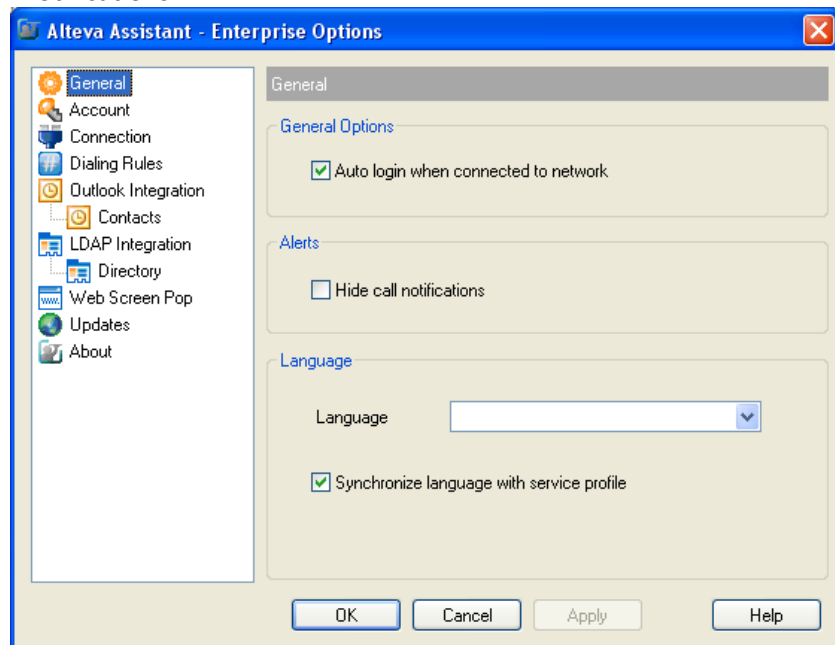


- Click on the **CONNECTION** tab and make sure the **Host Address** and **Host Port** information is already present in the boxes. If not please enter the server URL and port number for the server. This information is available from your system administrator or service provider.



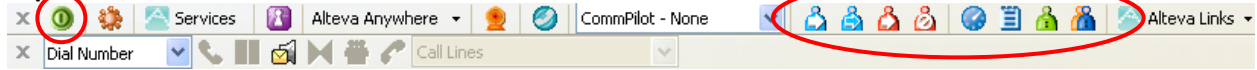
NOTE: If your web traffic is proxied, enter the details in the "Proxy Connection Settings" region of the 'CONNECTION' tab. The particulars are available from your network administrator. The proxy is **only** used for silent upgrade checking, and is in no way related to the server connection.

- Click on the **GENERAL** tab
- Make sure that the **AUTO LOGIN WHEN CONNECTED TO NETWORK** is checked. to enable Assistant Enterprise Toolbar to connect to the server when a network connection is available
- If you don't intend to see the call notifications for incoming and outgoing calls, check the option "Hide call Notifications"

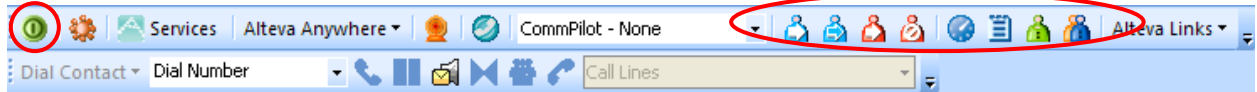


- Click **OK** to save your settings and exit the dialog. This will log you into the toolbar application and the first time login screen shot is shown below for both IE and outlook.

Explorer




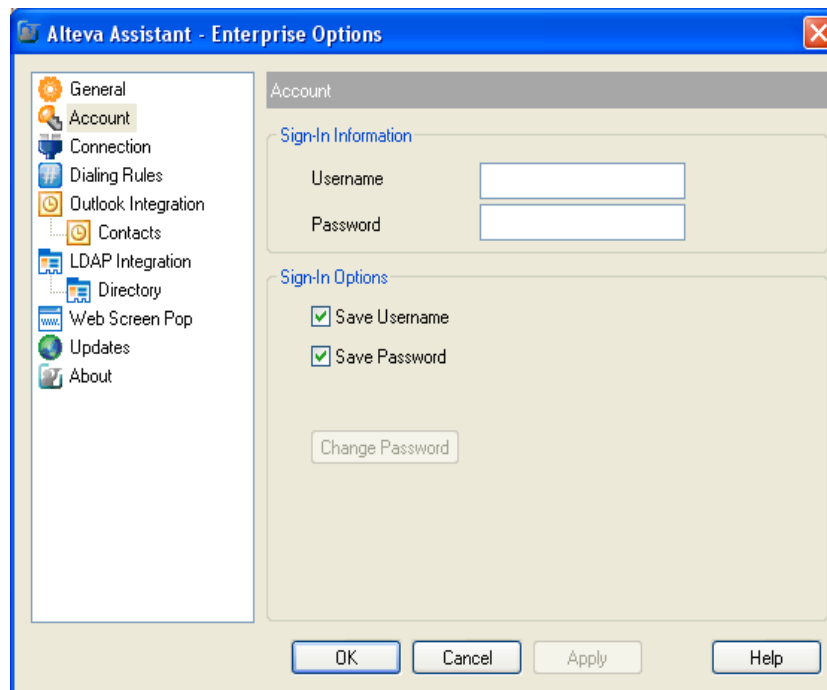
Outlook




Subsequent Use

If you have chosen to check the boxes 7 above, then the Toolbar will automatically be active when you launch either Internet Explorer or Outlook. If you have not chosen to check the boxes, follow the directions below for subsequent use.

- To connect to the server, click the login button  on the Assistant Enterprise Toolbar.
- If you did not check the **SAVE USERNAME** and **SAVE PASSWORD** options, you will be prompted for those parameters again



- Enter your Username and Password, then Click **OK** to exit the dialog
- Click the login button  to connect to the service

The Assistant Enterprise Toolbar

Successful login to Assistant Enterprise Toolbar will enable the various functions. The toolbar is actually divided into 2 separately movable toolbars. Each toolbar functions as described below. The Explorer toolbar is unique from the Outlook Toolbar, but they share most functionality.

- **Shared Functionality**
- **Explorer Functionality**
- **Outlook Functionality**

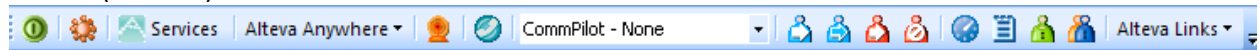
Toolbar(Explorer)



Toolbar2(Explorer)



Toolbar(Outlook)

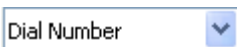






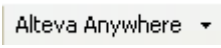
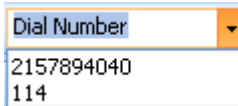



Toolbar2(Outlook)

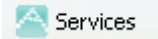


Shared Functionality

The Explorer and the Outlook toolbars share the functionality described below.

- Dial Number 
- Answer 
- Hold 
- Voice Mail Transfer 
- Transfer 
- N-Way Conference 
- End 
- Alteva Anywhere 
- Active Call Management 
- Options 

- Services



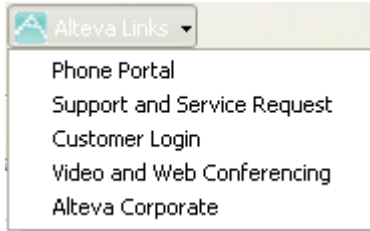
- Remote Office



- Shortcuts



- Links



Dial Number



The Dial Number drop-down list enables you to dial a previously-dialed number directly, or specify the number you want to call. To place a call:

1. Enter the number into the designated box, or select a previously entered number by clicking on the drop down arrow.
2. Press the **ENTER** key on your keyboard to place the call.

NOTE: The Dial Other drop down remembers only the last 10 dialed numbers.

Answer

With the Assistant Enterprise Toolbar you can answer calls by clicking the Answer toggle button. The answer button is only enabled when you have a call coming in, or on hold. The button can be used for answering an incoming call, or taking a call off hold.

Hold

With the Assistant Enterprise Toolbar you can hold a call by clicking the Hold toggle button.

Dial Voicemail/Voicemail transfer

With the Assistant Enterprise Toolbar you can dial voicemail, or transfer an active call to voicemail by clicking the Voicemail toggle button.

Transfer

With the Assistant Enterprise Toolbar you can transfer a call by entering a new number in the 'Dial Number' field and then clicking the Transfer toggle button. If you wish to speak to the recipient before transferring, wait till the recipient picks the call and then press the transfer button.

N-Way Conference

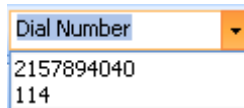
With the Assistant Enterprise Toolbar you can initiate a N-way conference (minimum of 2 parties and a maximum of 31 parties) by clicking the toggle button. The N-Way Conference toggle button is only enabled when the currently logged in user has exactly 2 calls in either active or held states.

End

With the Assistant Enterprise Toolbar you can end a call by clicking the End toggle button.

Alteva Anywhere

With the Assistant Enterprise Toolbar, you can enable the anywhere functionality which will allow you to answer and make outbound calls from your cell/landline phone and seamlessly transfer calls between your desk and cell phone



Active Call Management

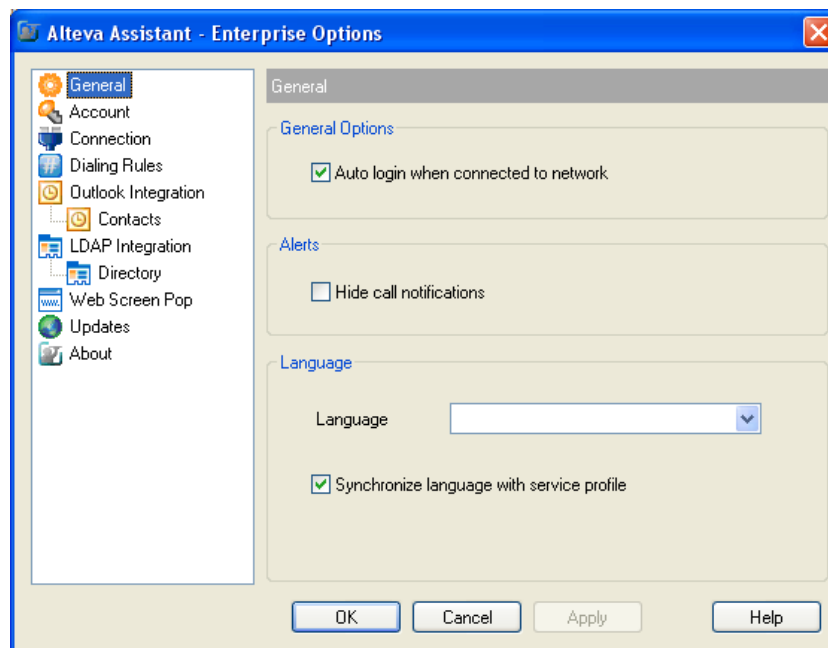
With the Assistant Enterprise Toolbar you can manage active calls by picking them from the drop down list

Options

The Options window allows you to add/modify the user and server settings for connecting Assistant Enterprise Toolbar to your service provider. This window is divided into six tabs.

- **General**
- **Accounts**
- **Connection**
- **Outlook Integration**
- **Dialing Rules**
- **About**

General



Check the **AUTO LOGIN WHEN CONNECTED TO NETWORK** to automatically connect to the Assistant Enterprise Toolbar server when it detects a network connection.

Accounts

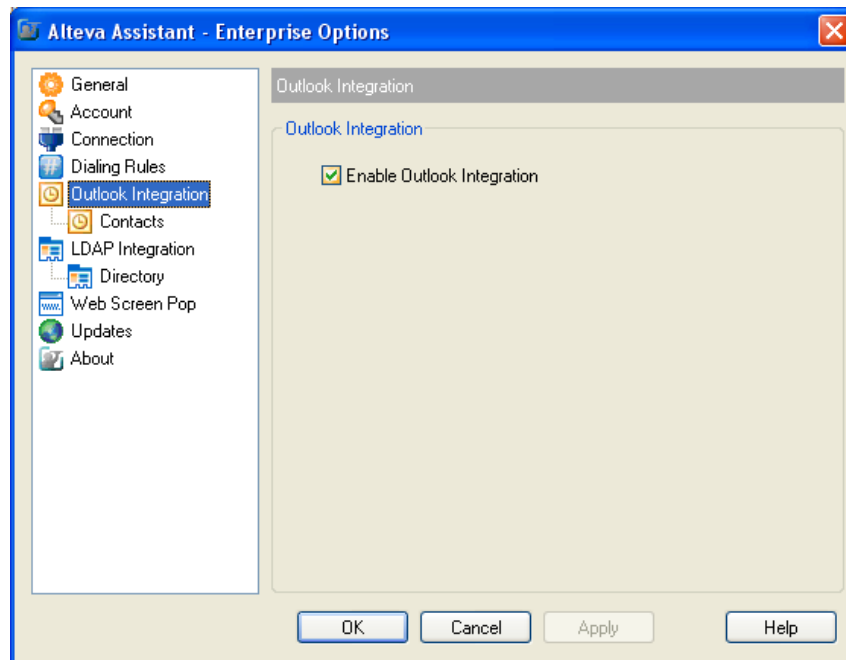
The Accounts tab shows/captures the information needed to connect to your service provider. Using this tab is explained above in the 'First Use' and 'Subsequent Use' section.

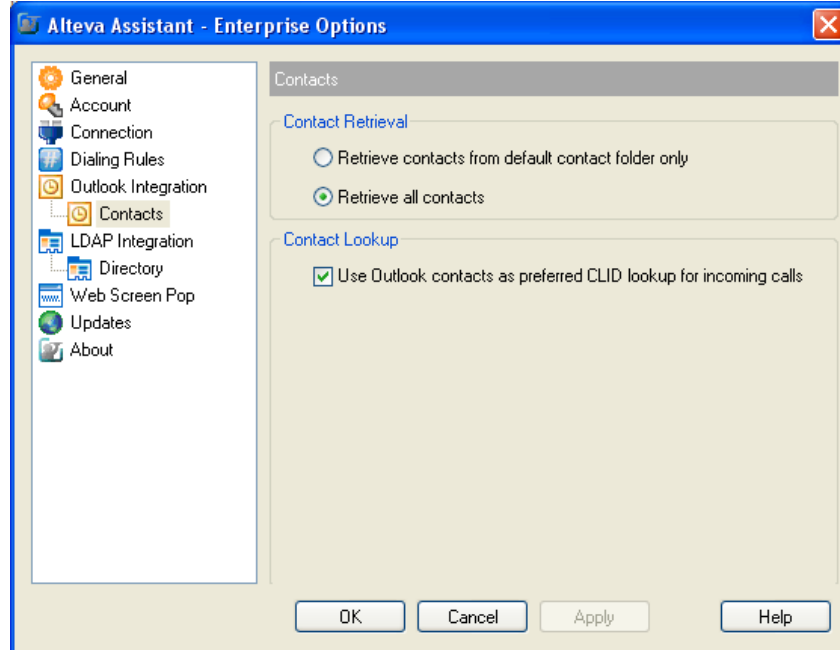
Connection

The Connection tab displays the information required to connect to your service provider. Using this tab is explained above in the 'First Use' section.

Outlook Integration

Outlook Integration through Assistant Enterprise Toolbar provides contact management for end-users





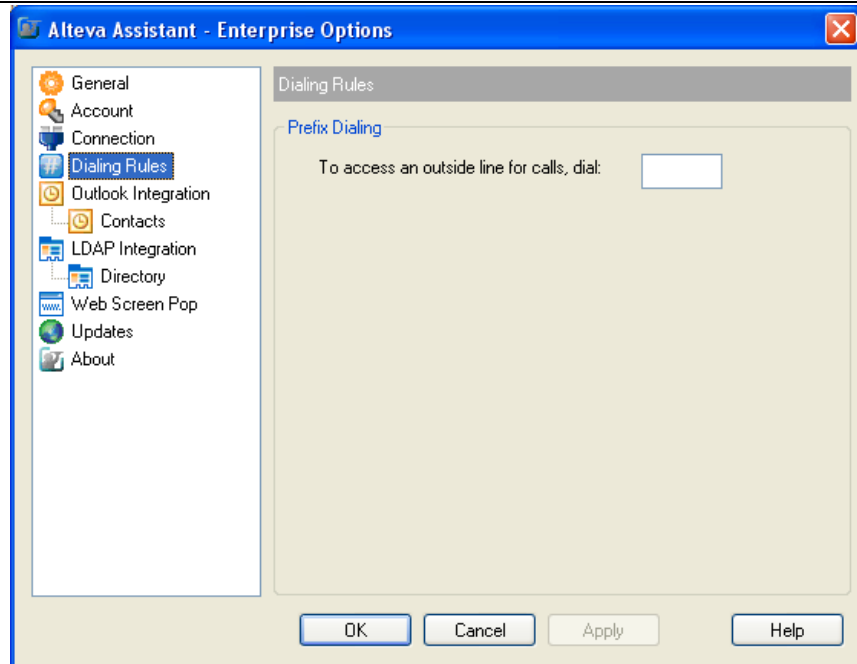
Check the **RETRIEVE CONTACTS FROM DEFAULT CONTACT FOLDER ONLY** option if you would like Assistant Enterprise Toolbar to attempt to resolve an unknown number through *your* Outlook contact repository.

Check the **RETRIEVE ALL CONTACTS** option if you would like Assistant Enterprise Toolbar to attempt to resolve an unknown number through *ALL* Outlook contact repositories (including company public contact folders) NOTE: This can slow down the lookup process.

Check the **USE OUTLOOK AS PREFERRED CLID LOOKUP FOR INCOMING CALLS** option if you would like Assistant Enterprise Toolbar to attempt to resolve an unknown number through your Outlook contact repository.

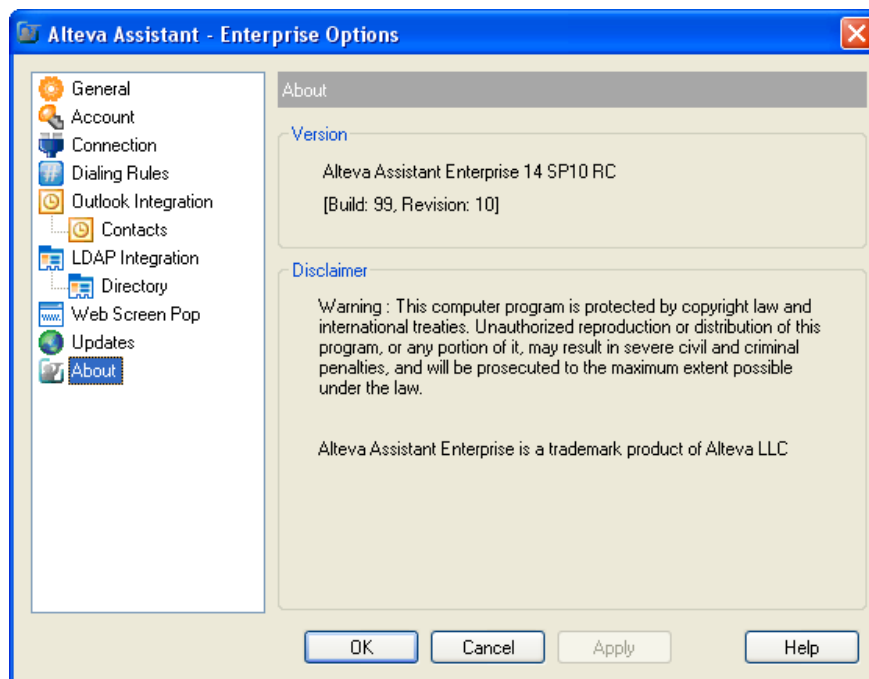
Dialing Rules

Dialing Rules allows you to specify the prefix number used to dial external numbers. If entered, this number is pre-pended to dialed numbers that span more than 6 digits. Up to 5 digits can be entered as a prefix for outgoing calls. The valid characters are numbers 0 to 9, and '+'. However, the '+' can only be the first character.



About

The About tab displays the version, copyright notices and product disclaimers associated with the Toolbars. It is useful in assisting support representatives from your service provider




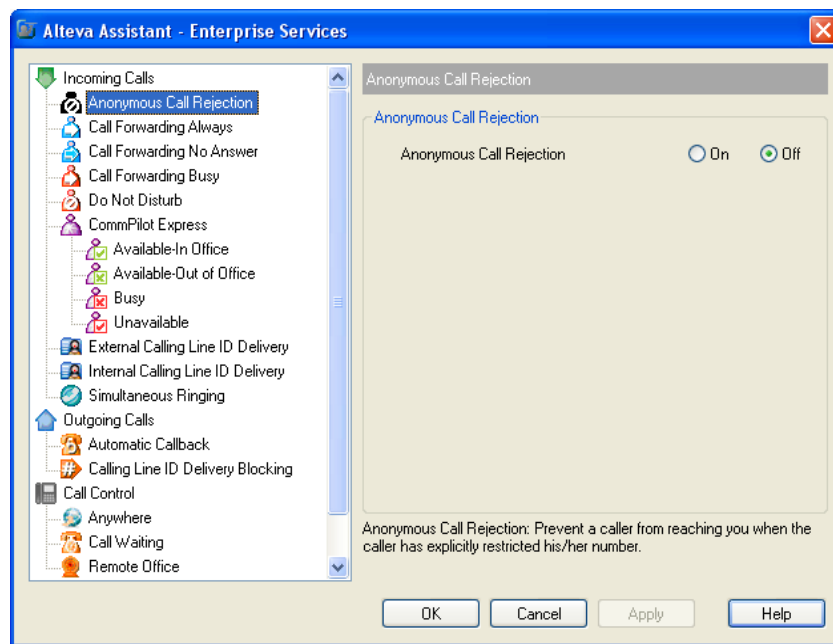
Services Services

The Services window allows users to enable/disable Assistant Enterprise Toolbar's advanced features.

- **Anonymous Call Rejection**
- **Call Forwarding Always**
- **Call Forwarding No Answer**
- **Call Forwarding Busy**
- **Do Not Disturb**
- **CommPilot Express**
- **External Calling Line ID Delivery**
- **Internal Calling Line ID Delivery**
- **Simultaneous Ringing**
- **Automatic Callback**
- **Calling Line ID Delivery Blocking**
- **Alteva Anywhere**
- **Call Waiting**
- **Remote Office**
- **Voice Management**




Anonymous Call Rejection

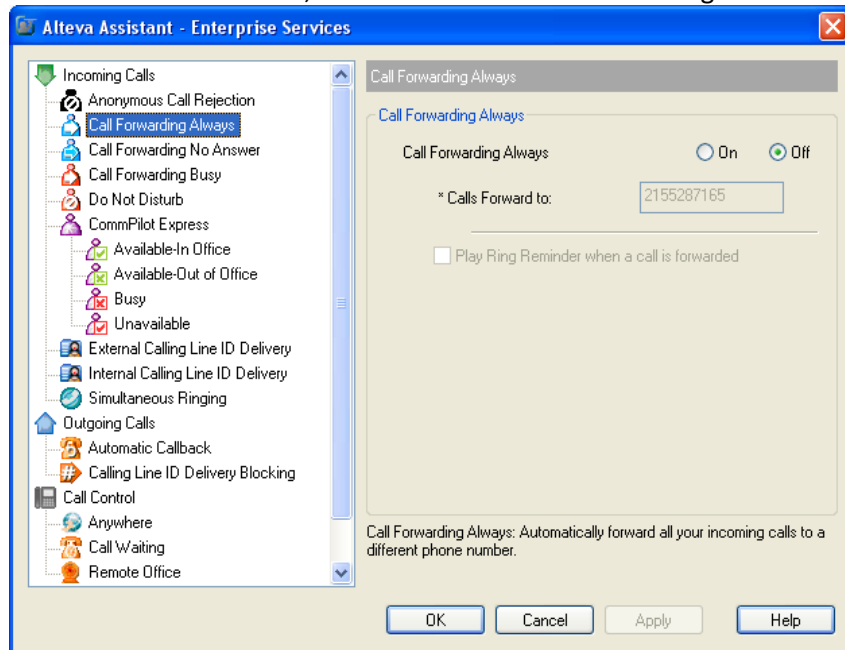
This option enables Assistant Enterprise Toolbar to reject anonymous calls. The settings can be changed via the  Services button in the Assistant Enterprise Toolbar.






Call Forwarding Always

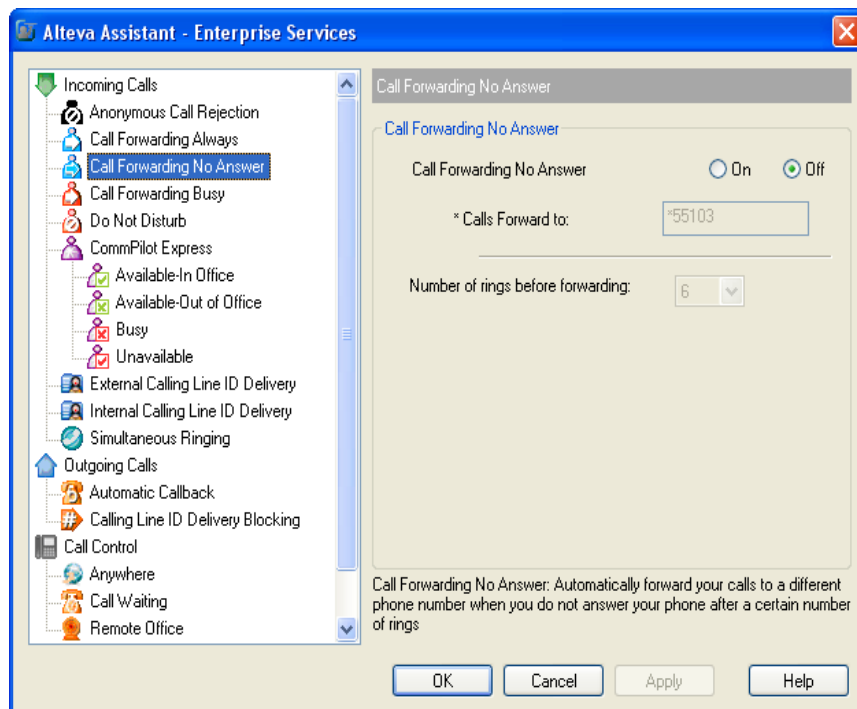
This option enables Assistant Enterprise Toolbar to forward all incoming calls to a specified phone number. A reminder ring can also be played to alert the user to the call-forwarding option being

selected. The settings can be changed via the  Services button in the Assistant Enterprise Toolbar. When this service is activated, the  icon in the toolbar changes to .

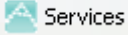




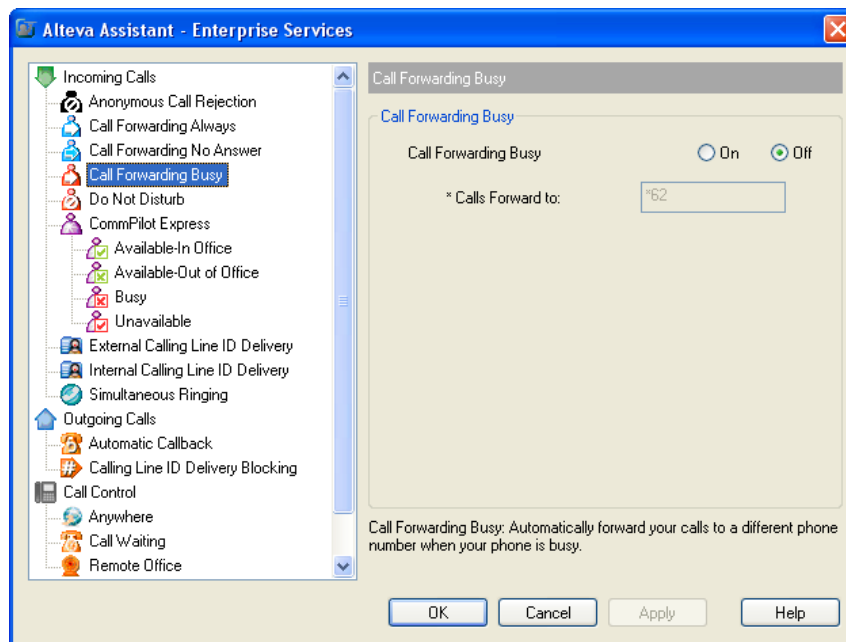
Call Forwarding No Answer

This option enables Assistant Enterprise Toolbar to forward all incoming calls to a specified phone number when your phone is not answered after the selected number of rings. The settings can be changed via the  Services button in the Assistant Enterprise Toolbar. When this service is activated, the  icon in the toolbar changes to .

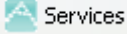




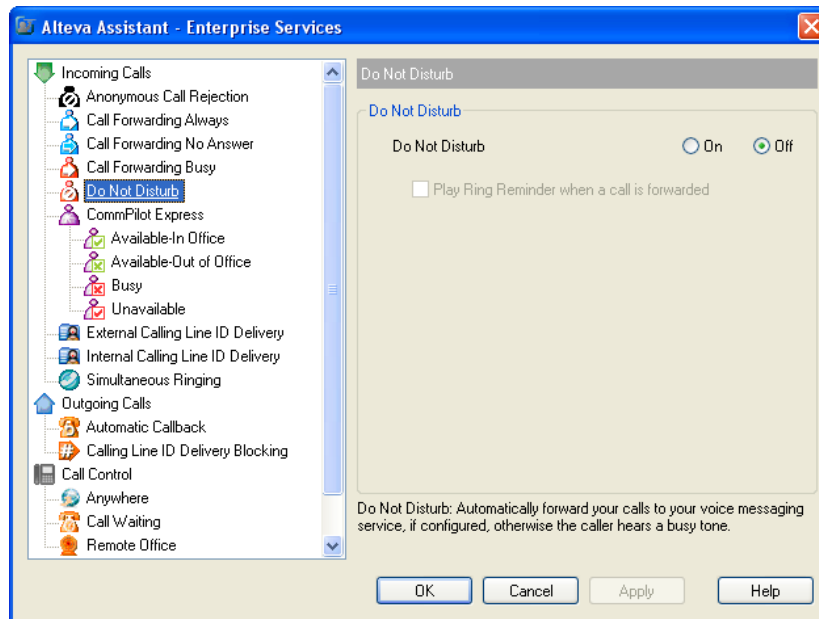
Call Forwarding Busy

This option enables Assistant Enterprise Toolbar to forward all incoming calls to a specified phone number when all the lines on the phone are in use. The settings can be changed via the  button in the Assistant Enterprise Toolbar. When this service is activated, the  icon in the toolbar changes to .



Do Not Disturb

This feature allows all incoming calls to be forwarded to a voice messaging service, and notification of the user when this occurs, if desired. The settings can be changed via the  button in the Assistant Enterprise Toolbar. When this service is activated, the  icon in the toolbar changes to .



Web Express

Web Express provides the ability to configure and manage inbound call flows. Web Express allows you to configure up to four profiles to control inbound calls. These profiles are analogous to cellular phone profiles. Even when you're off-site you can still manage your profiles on the web or on the phone.

With Web Express, you can work efficiently without unnecessary interruption and manage calls based on your schedule.

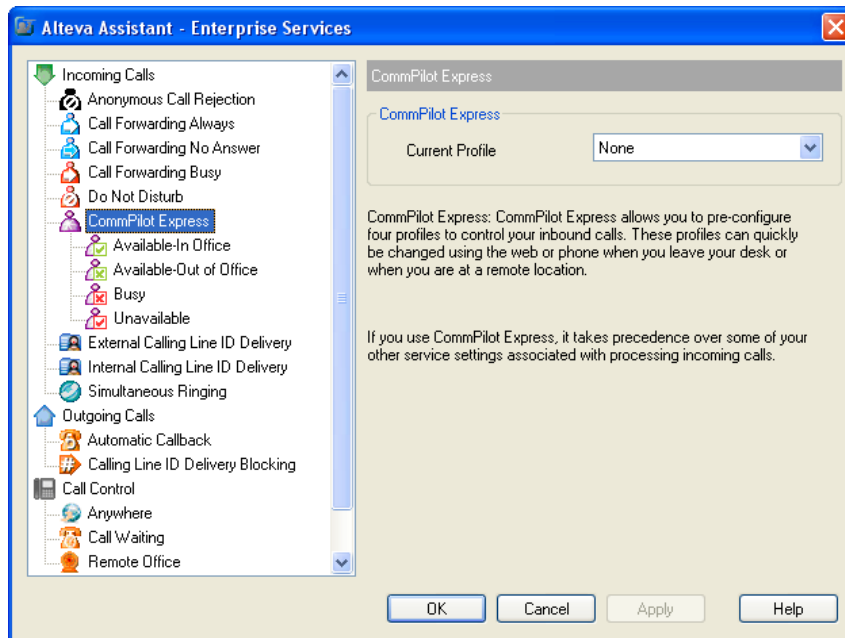
IMPORTANT NOTE: *You should not configure other services, such as Call Notify, Call Forwarding, or Simultaneous Ring if you use Web Express.*

The profiles available are:

- None
- Available – In Office
- Available – Out of Office
- Busy
- Unavailable

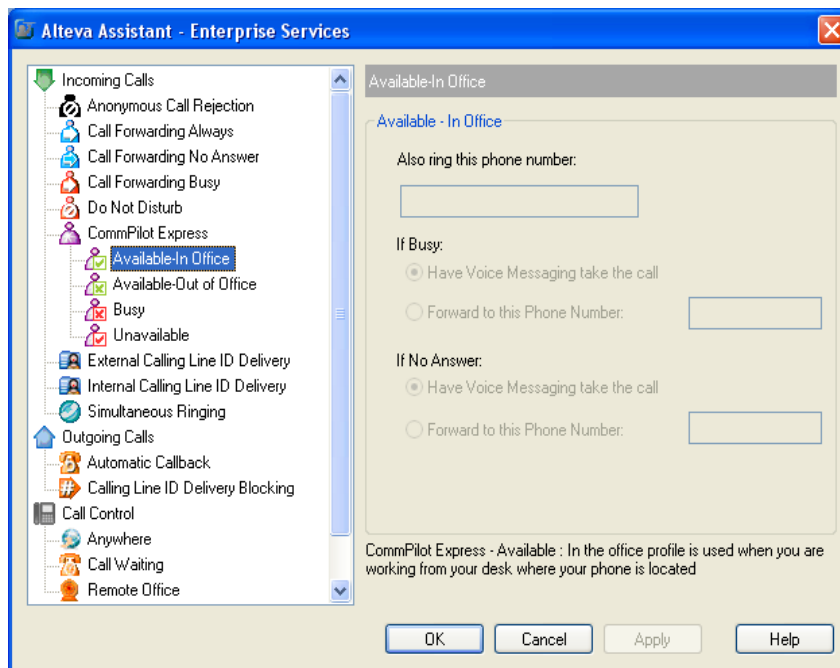
Web Express (CommPilot Express): None

Selecting this option will not use any of Web Call Manager's profiles. Any other services that may be activated will be used to handle incoming calls.



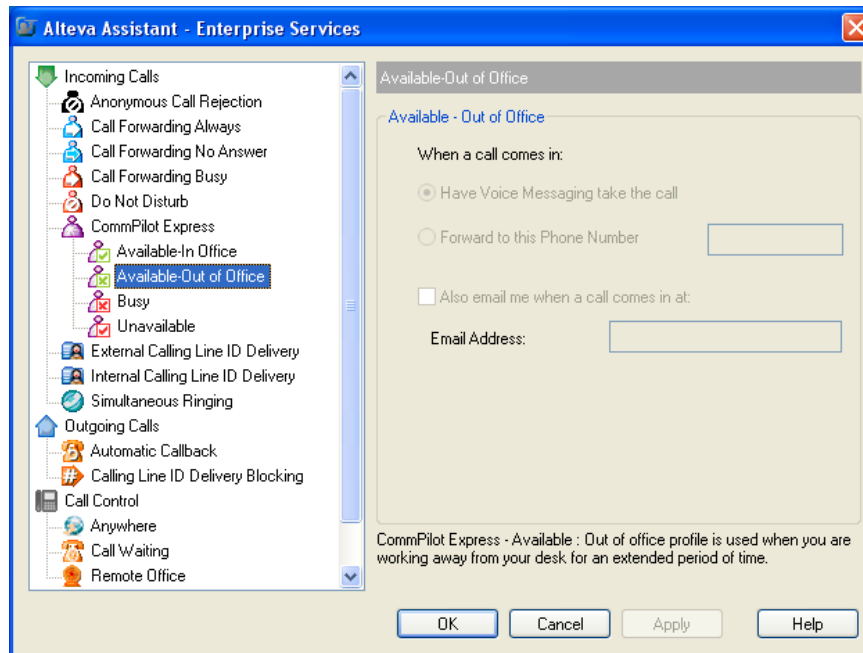
Web Express (CommPilot Express): Available in Office

This profile provides the facility to indicate how calls are handled when the user is located in the office. The user can enable incoming calls to ring at additional phones, and setup voice messaging to take calls.



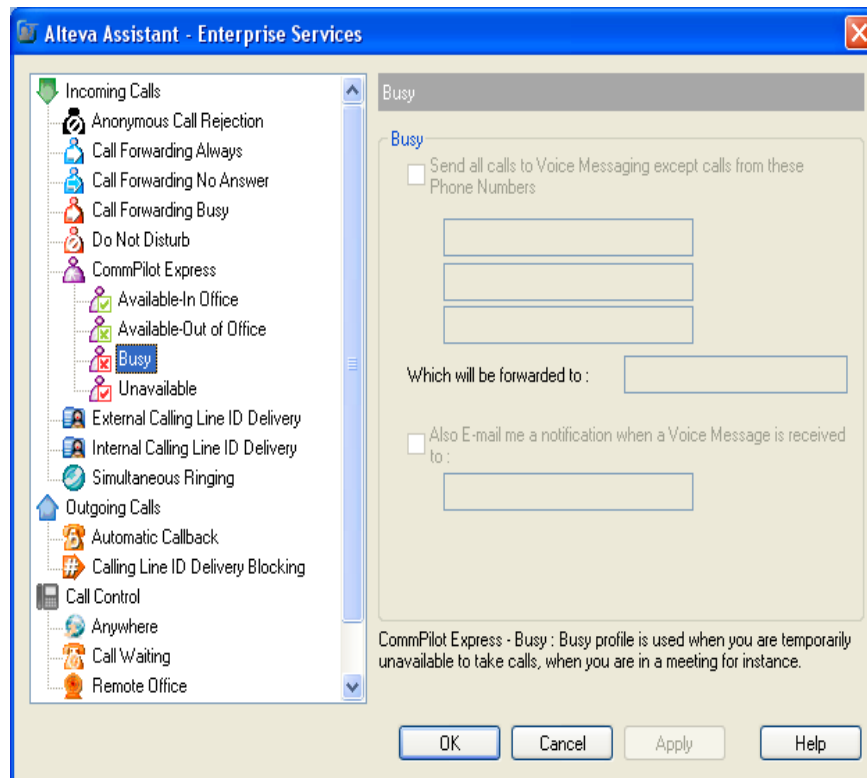
Web Express (CommPilot Express): Out of Office

This profile enables the user to dictate how calls are handled when he/she is out of the office, but available to receive calls. Calls can be forwarded to different phones, and notification e-mails can be sent.



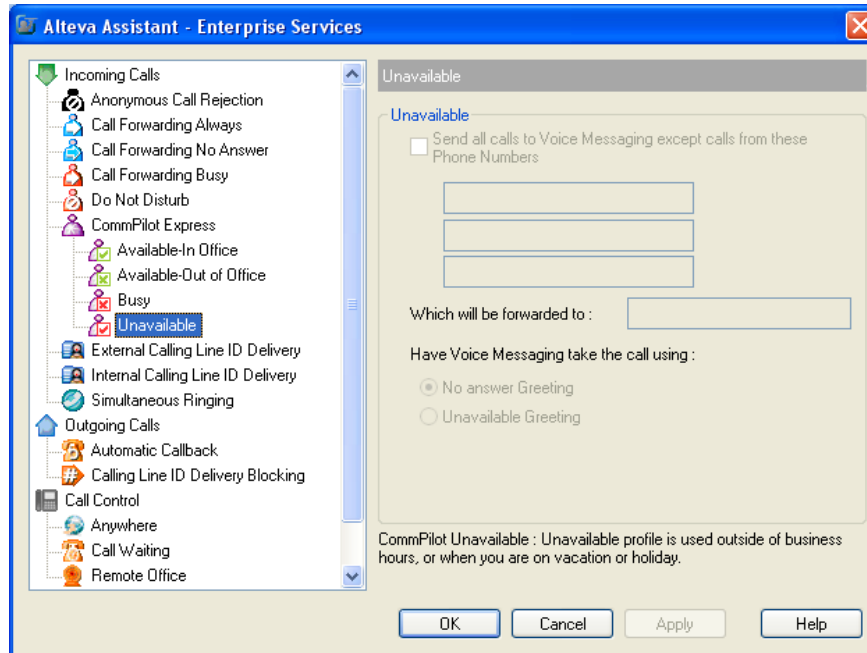
Web Express (CommPilot Express): Busy

With this profile users can indicate how calls are to be handled when they are busy. Calls from selected numbers can be forwarded, calls can be sent to Voice Messaging, and an e-mail notification can be sent when a call is received.



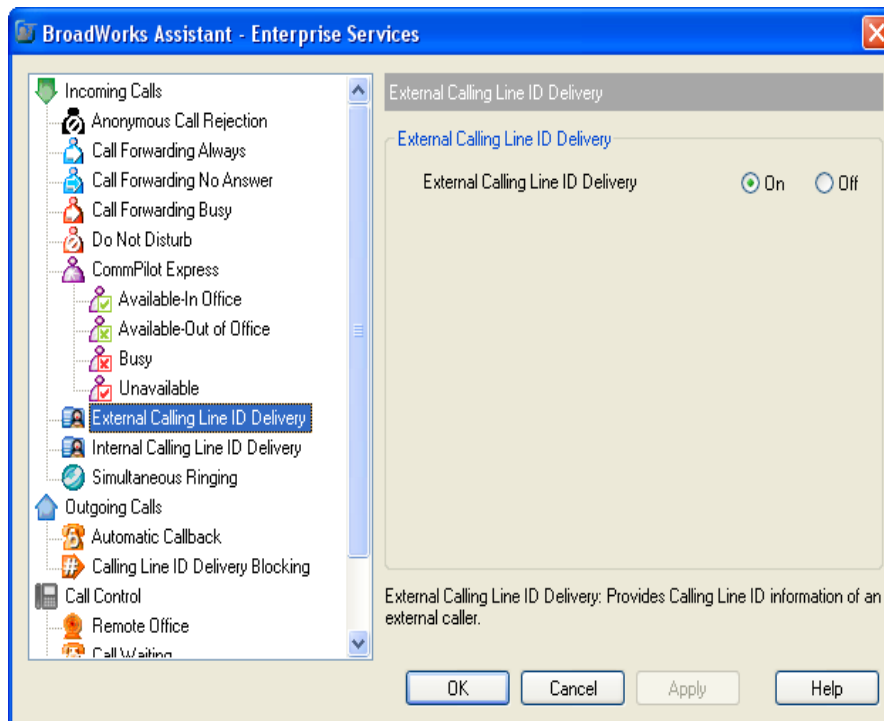
Web Express (CommPilot Express): Unavailable

This profile enables users to specify how calls are handled when they are not available. For example when you are on vacation calls from selected numbers can be forwarded, and users can specify a Voice Messaging greeting to be heard by all callers.



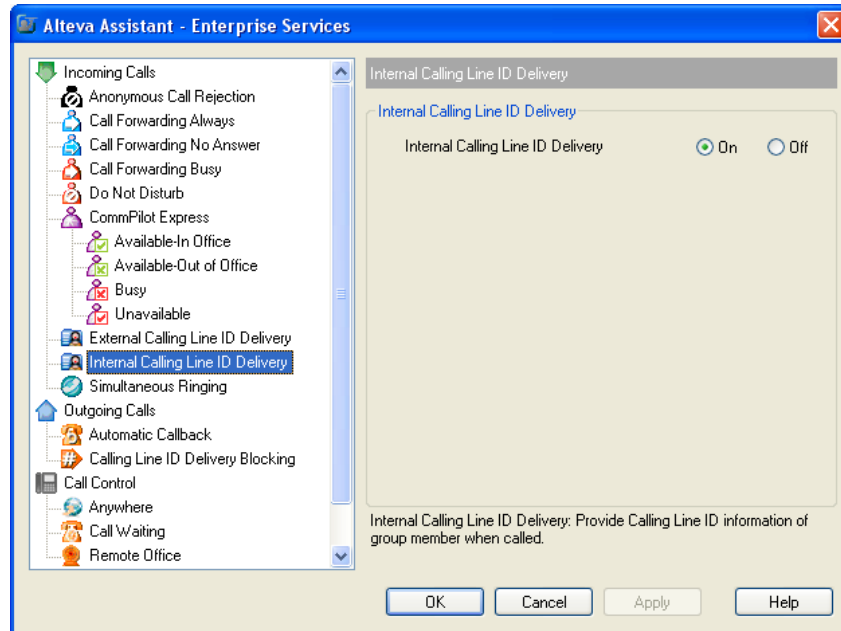
External Calling Line ID Delivery

This feature allows the user to view incoming call line ID information for external numbers.



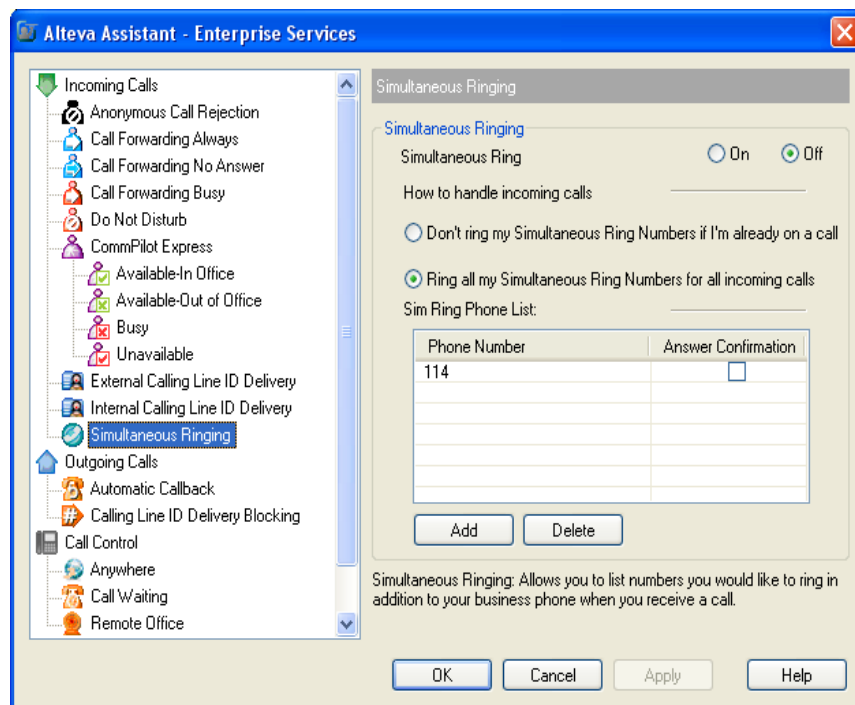
Internal Calling Line ID Delivery

This feature allows the user to view incoming call line ID information for group member numbers.



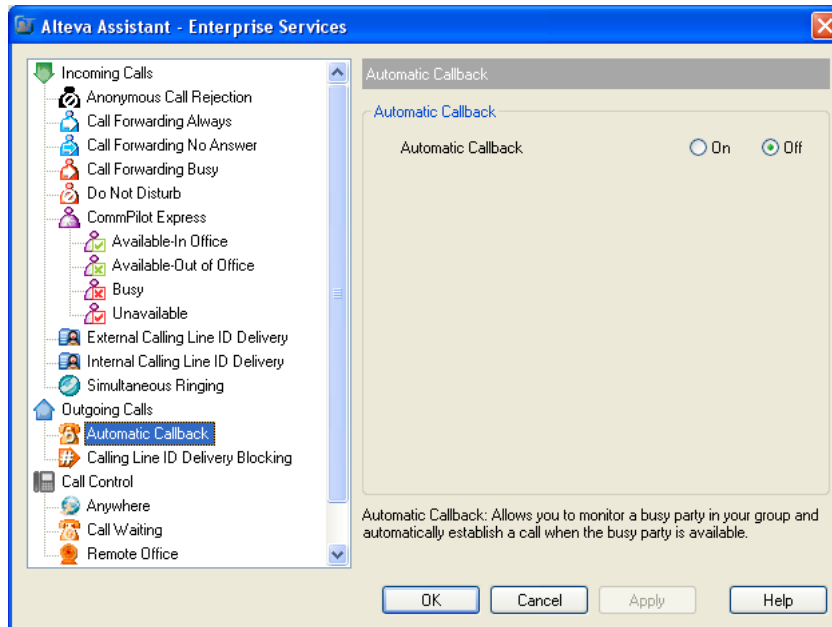
Simultaneous Ringing

This feature enables Assistant Enterprise Toolbar to alert other phones when incoming calls are received. The user has the option of disabling this service during calls.



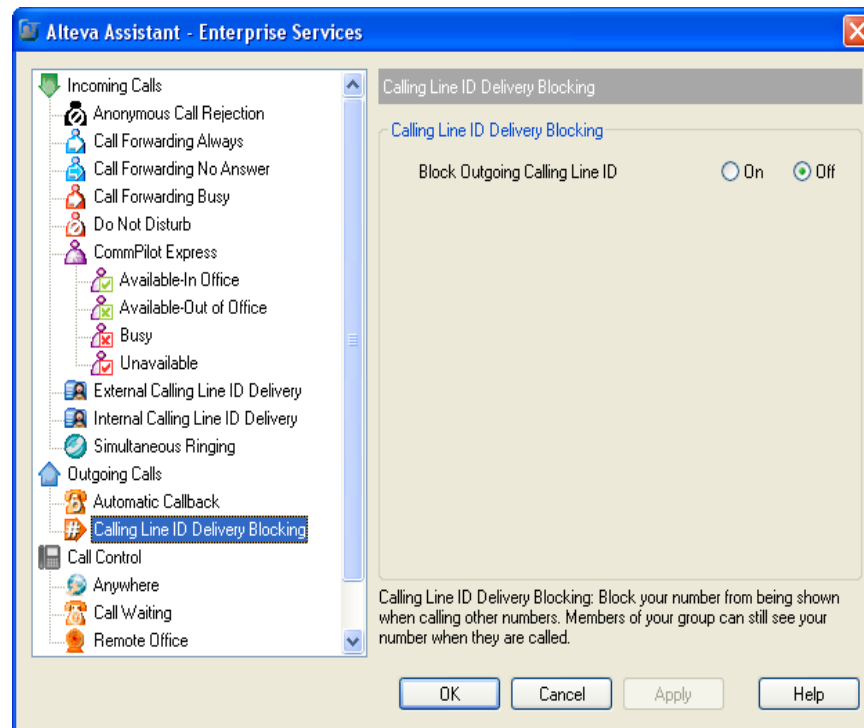
Automatic Callback

This feature allows a toolbar user to monitor a busy party in your group and automatically establish a call when the busy party is available.



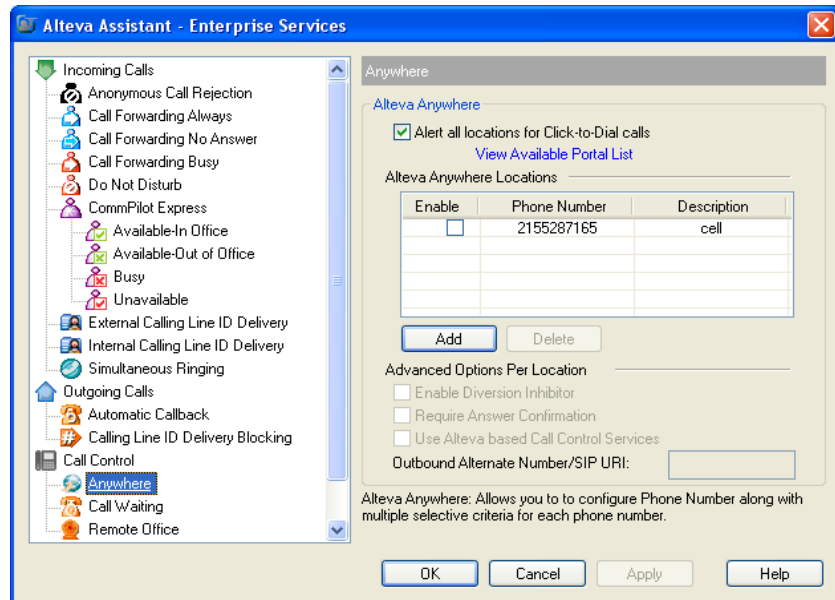
Calling Line ID Delivery Blocking

This feature allows a toolbar user block the delivery of their calling line id on outbound calls.



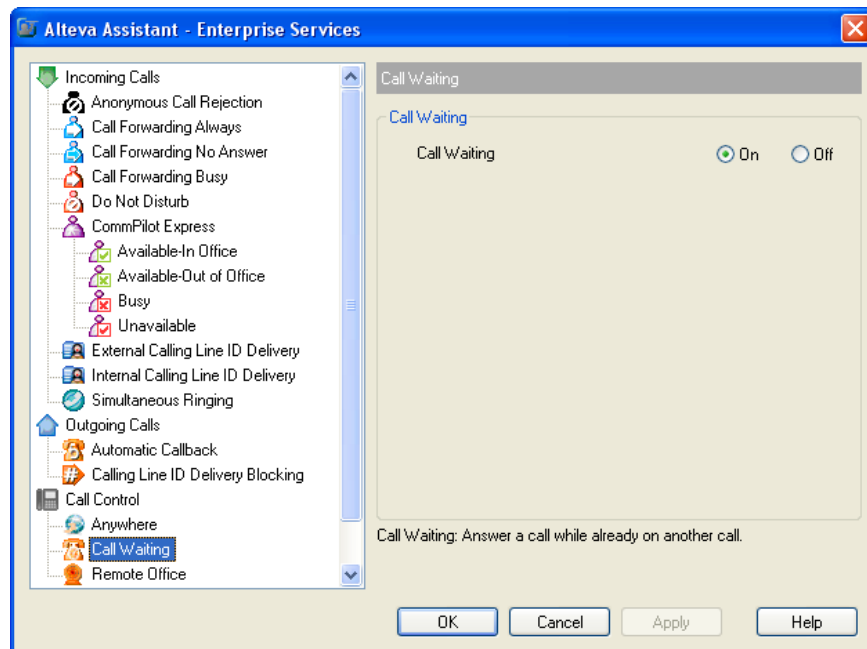
Alteva Anywhere

This feature allows users to make and receive calls from any device, at any location with only one phone number, one dial plan, one voicemail box and a unified set of features.



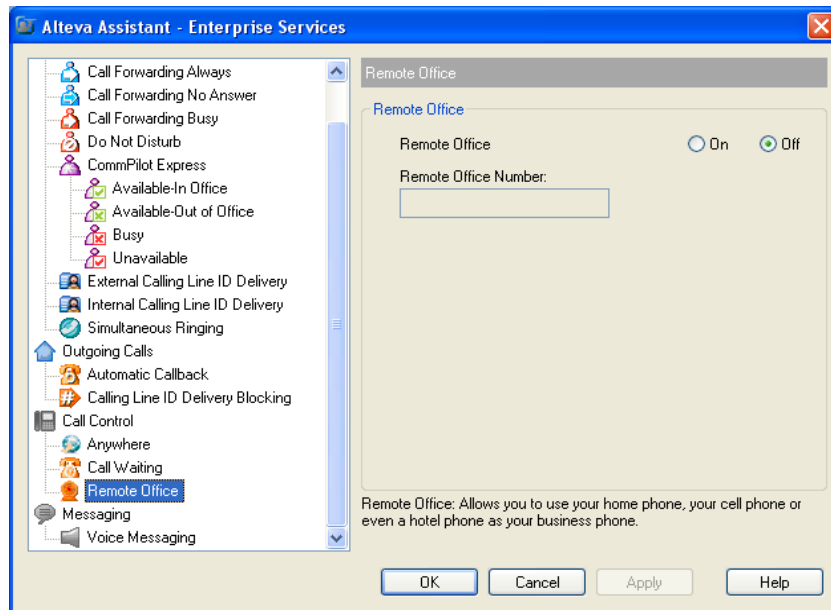
Call Waiting

This feature allows a toolbar user to answer a call while they are on a currently call.



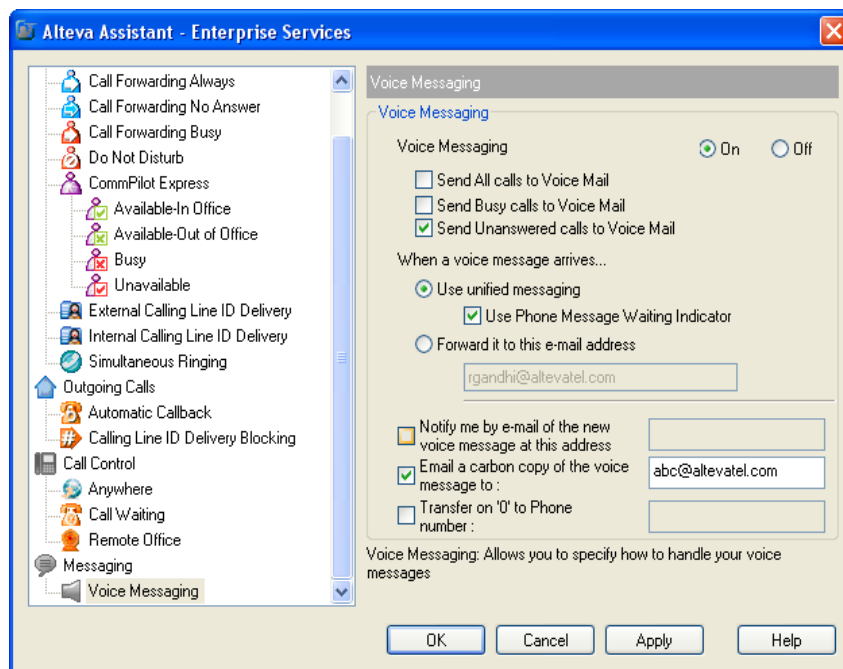
Remote Office

This feature allows the use of another phone instead of the normal business phone



Voice Management

Assistant Enterprise Toolbar Voice Management allows users to specify how voice messages are handled. Unified messaging allows voice messages to be captured and forwarded to a particular address. The Phone Message Waiting Indicator is a visual reminder on the phone that a message has been recorded. Furthermore, e-mail notifications can be made of the recorded voice message.



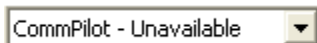
Shortcuts



The shortcuts available in the toolbar provide quick access to parameters which would otherwise have to be accessed through the Assistant Enterprise Toolbar Service Settings. Shortcuts include:

- **Web Express**
- **Call Forward Always**
- **Call Forward No Answer**
- **Call Forward Busy**
- **Do Not Disturb**
- **Speed Dial**
- **Call History**
- **Directories**

Web Express (CommPilot Express)



By using the Web Express dropdown list, you can quickly select any of the Web Express profiles described in the 'Services' section above. Profiles include:

- **None**
- **Available – In Office**
- **Available – Out of Office**
- **Busy**
- **Unavailable**

Call Forward Always

This activates the Call Forward Always feature as described above in the 'Services' section.

Call Forward No Answer

This activates the Call Forward No Answer feature as described above in the 'Services' section.

Call Forward Busy

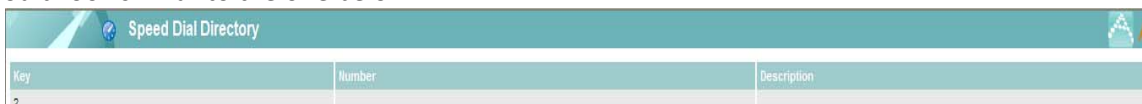
This activates the Call Forward Busy feature as described above in the 'Services' section.

Do Not Disturb

This activates the Do Not Disturb feature as described above in the 'Services' section.

Speed Dial

When you click on the Speed Dial icon, you should see a screen load in the main pane. The screen should look similar to the one below.



Key	Number	Description
2		

Click on any of the numbers in your Speed Dial list to place a call.

Call History

The Call History feature of Assistant Enterprise Toolbar allows users to view their call history in reverse chronological order. Calls included are:

- Missed Calls
- Dialed Calls
- Received Calls

When you click the Call History button in the toolbar, you should see a screen load in the main pane. The screen should look similar to the one below.





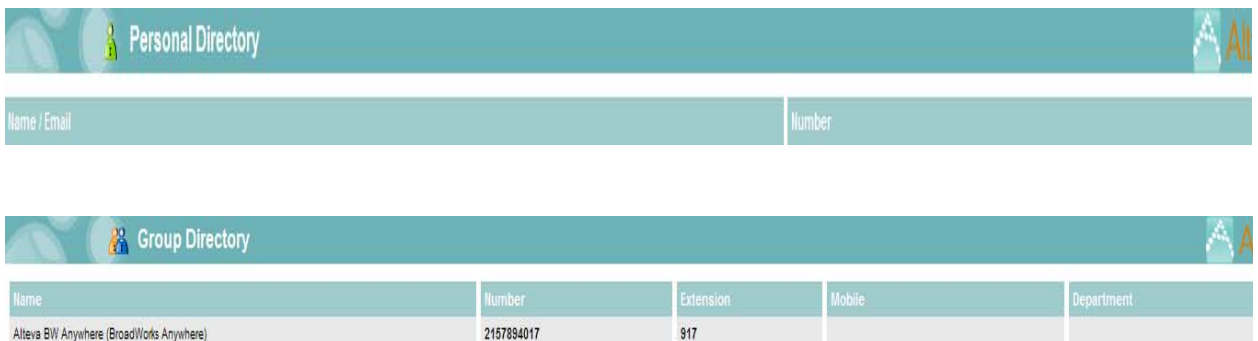
Click on any of the numbers in your Call History list to place a call.

Directories

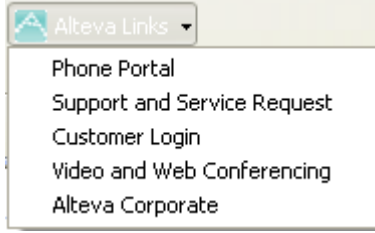
Assistant Enterprise Toolbar supports two types of server-based phone directories:

- Personal Directory
- Group Directory

Click on the  button in the toolbar to access your Personal Directory, and on the  button to access your Group Directory. When you click on a Directory button in the toolbar, you should see a screen load in the main pane. The screen will look similar to the one below.



Click on any of the numbers in your Directory list to place a call.



Links

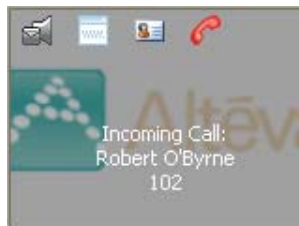
The drop list allows Assistant Enterprise Toolbar users to access links to other Services. Services currently include:

- Phone Portal
- Support and service request
- Video and web conferencing

Receiving a Call

Assistant Enterprise Toolbar displays a call notification window on top of the system tray when you receive a call. If more than one call is received, the call notification windows stack on top of one-another. These windows automatically close 5 seconds after they emerge. This window gives you 3 options:

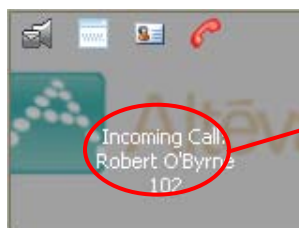
- Answer
- Transfer to Voice-mail
- End



Answer

You can answer an incoming call by:

- Picking up your handset
- Clicking on the popup notification **if** you have an Advanced Call Control (ACC) compliant phone.

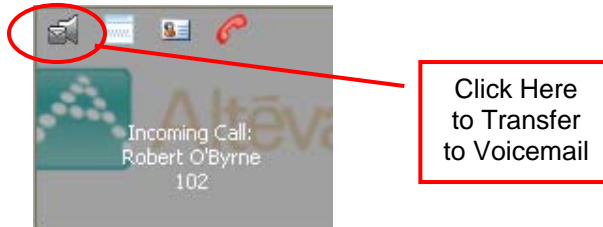


Click Here
to Answer

NOTE: *If more than one call is received, the call notification windows stack on top of one-another. You can answer these calls by first making a selection between these 2 calls and then picking up your handset / clicking on the notification.*

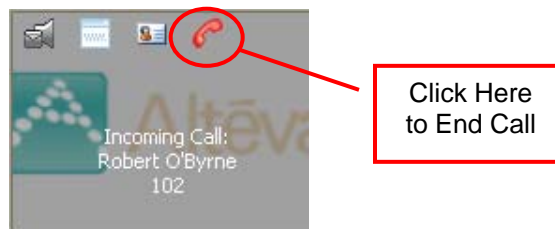
Transfer to Voice-mail

An incoming call can be redirected to your voice mailbox with a single click.



Terminating a Call

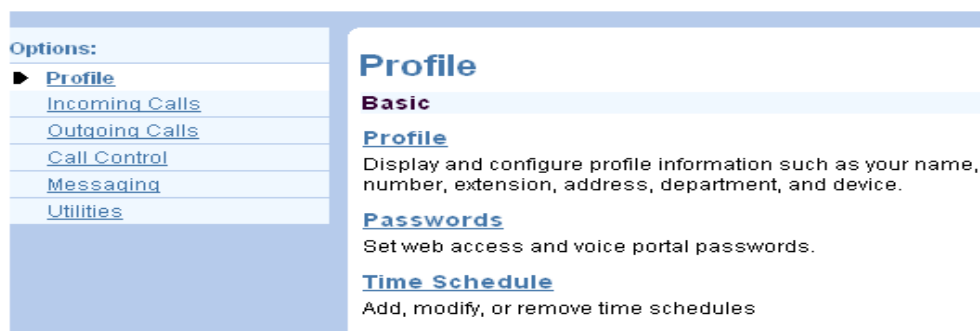
Incoming and outgoing calls can be terminated easily with a single click



Explorer Functionality

Web Portal Login

By pressing the Portal Login button on the Assistant Enterprise Toolbar you can automatically log into the Alteva Web Portal. When you use the Portal Login button, you will see the following Portal Home Page:



Dialing from a Web Page

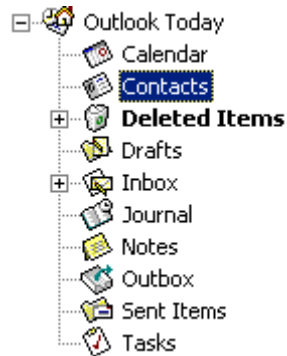
To dial a phone number from a web page, perform the following steps:

- Select the phone number displayed on a webpage.
- Right-click over the selected phone number and select **DIAL**.

Outlook Functionality

Dialing from Outlook Contacts

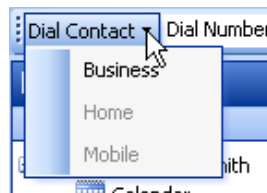
1. Open Outlook and click on the "Contacts" item in the Folder list.



2. Select the contact you wish to call from the contact list.

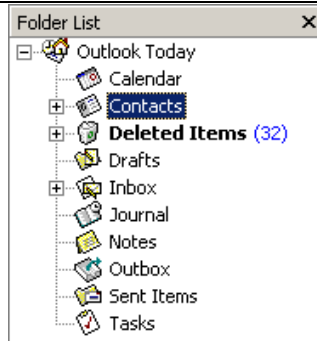


3. Use the **DIAL CONTACT** pull down list from the Assistant Enterprise Toolbar to select the contact phone number you wish to dial.



Dialing from a vCard

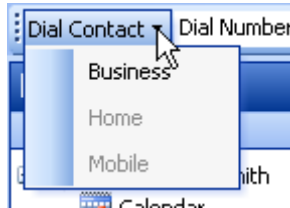
1. Click on the 'Contacts' entry in the folder list.



2. Double-click the entry for the desired contact. The vCard / Contact dialog should appear.



4. Use the **DIAL CONTACT** pull down list from the Contact item to select the contact phone number you wish to dial.



Troubleshooting Assistant Enterprise Toolbar

This section presents three common scenarios to further ease the use of Assistant Enterprise Toolbar.

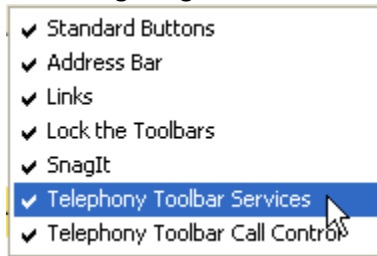
1. When starting Outlook or Internet Explorer, Assistant Enterprise Toolbar is not visible
2. Assistant Enterprise Toolbar is visible in Internet Explorer but not in Outlook
3. When logging in, Assistant Enterprise Toolbar displays a dialog box indicating that I have not been licensed to use it.

If your problem persists please contact your Service Provider.

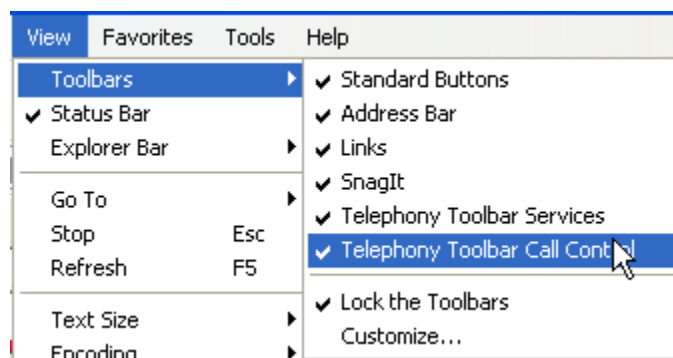
Scenario 1:

When starting Outlook or Internet Explorer, Assistant Enterprise Toolbar is not visible.

1. Right click on the toolbars region in Outlook and/or Internet Explorer. Upon doing so a menu should appear, similar to the following image.



2. Select **ASSISTANT ENTERPRISE TOOLBAR SERVICES** and the Services toolbar should appear immediately.
3. Select **ASSISTANT ENTERPRISE TOOLBAR CALL CONTROL** and the Call Control toolbar should appear immediately.
4. Another method is to select the View > Toolbars menu in Outlook or Internet Explorer.

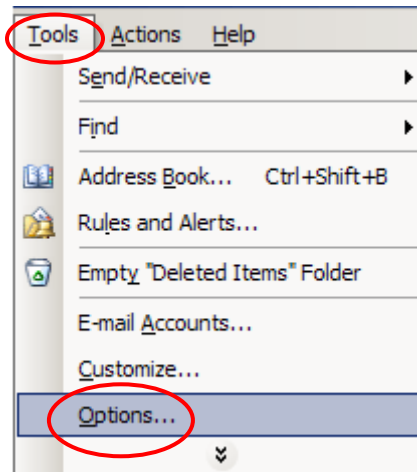


Scenario 2:

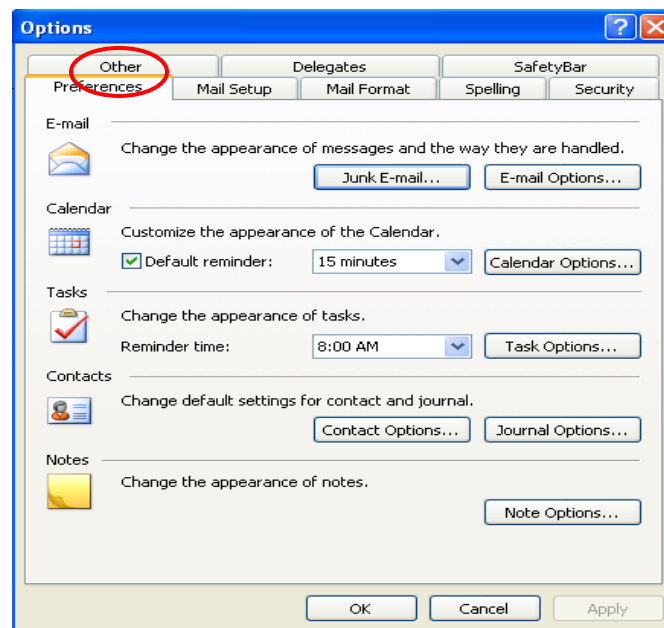
Assistant Enterprise Toolbar is visible in Internet Explorer but not in Outlook

This occurs when Assistant Enterprise Toolbar is successfully installed for both Internet Explorer and Outlook, but right-clicking to view the toolbar in Outlook yields no Assistant Enterprise Toolbar option.

1. Select **TOOLS > OPTIONS** from the Outlook menu



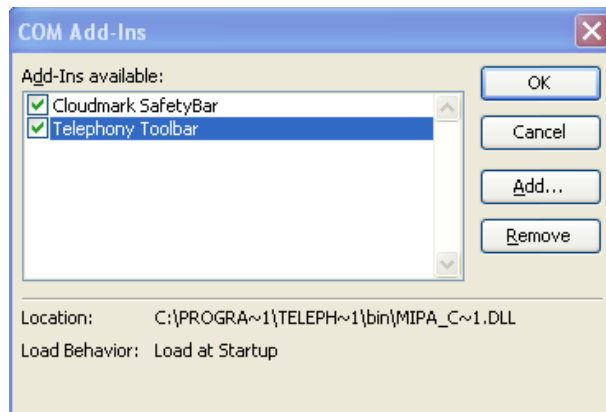
2. Click on the **OTHER** tab and then press the **ADVANCED OPTIONS** button.



3. Press the **COM ADD-INS** button

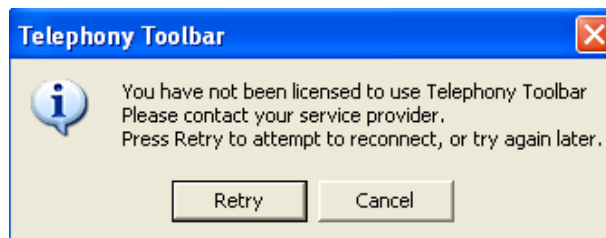


- Click **ADD** then select 'TELEPH~1\bin\MIPA_C~1.DLL' from the bin directory in the Assistant Enterprise Toolbar install directory. After doing so the following dialog should be visible.



Scenario 3:

When logging in, Assistant Enterprise Toolbar displays a dialog box indicating that I have not been licensed to use it.



This error indicates that your Service Provider has not added the Assistant Enterprise Toolbar Client License to your list of services. Contact your Service Provider to activate the Assistant Enterprise Toolbar for your account