Call Ctrl 1.1

User Guide

Call Ctrl

Call Manager
User Guide

Steve Wofford

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Introduction

Welcome to the user guide for Call Ctrl Call Manager for the Cisco and Linksys SPA IP Phones.

This guide explains how to utilize Call Ctrl and its core features, along with more advanced uses. This guide demonstrates everything required to operate the phone system to its fullest capacity and increase overall efficiency for Call Ctrl users.

Readers are encouraged to submit their feedback as we are always looking for improvement. Please send an email to CallCtrl.Support@uctrlit.com and let us know any comments or suggestions you may have.

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About

Call Ctrl Call Manager provides a streamlined business communications platform and increases overall productivity of its users. Call Ctrl allows users of Cisco and Linksys SPA IP Phones to better utilize their phone systems. This is done by providing Unified Communications (UC) and leveraging full phone functionality from desktop applications. Call Ctrl enables the user to communicate with added efficiency and accuracy by using additional resources made available on the user's computer, streamlining everyday applications into their phone system.

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Limitations

Supported Configurations

Currently Call Ctrl is fully supported when used in combination with the following SPA Series IP Phones:

SPA922	SPA525G	SPA504G
SPA942	SPA509G	SPA502G
SPA962	SPA508G	SPA501G

When Call Ctrl is used without the SPA9000, full support is available with some limitations. The SPA Phones have two primary methods types which Call Ctrl depends on:

〉 Control

Allows Call Ctrl to perform actions against the phone, such as: New Call, End Call, Hold, Transfer, etc.

〉 Status

This allows the phone to inform Call Ctrl of its status, such as: an Active or Ringing Call, Phone Details, Volume, etc.

When Call Ctrl is used outside the SPA9000, ONLY the CONTROL methods are available. Users have the same functionality when performing actions, but the phone will not receive the status of these actions when they are made. For example, users may make a call, but the Extension and Call instances will not reflect a call is being made in the Call Ctrl interface. This will simply require the users to use the phone display for status as opposed to Call Ctrl for determining what actions to perform and when. These limitations should not have a significant impact on the productivity Call Ctrl allows users, but simply a different approach to its utilization.

New Call Notification, Transfer and Conference are not available within Call Ctrl when the phones are not connected to the SPA9000.

This limitation is due to the firmware on the SPA Phones and is not related to Call Ctrl. When the firmware is released, Call Ctrl will support with little or no reconfiguration. The firmware expected availability time is expected within the first half of 2010.

For more information in using Call Ctrl with a stand-alone phone reference the following knowledgebase article for more information: Use Call Ctrl Outside SPA-9000.

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Supported Phone Numbers

The first release of Call Ctrl has been developed with focus on supporting United States and similar phone numbers and the English language. The following limitations are described in detail:

- **Language**

  The next release should have full localization support on an international level. The goal is to support any language the phone system supports.

- **Dial Plan**

  When using Call Ctrl outside the United States, the Dial Plan feature needs to be disabled. The Settings Wizard provides an option to disable the Dial Plan during Call Ctrl first use. Alternatively, this feature is easily enabled or disabled by selecting "Edit" from the Main Menu and un-checking "Enable Dial Plan". This also is required when dialing international numbers from the United States.

  When located within the United States, it is entirely up to the user whether to enable the Dial Plan or not. This setting may be dependent on the user's phone or PBX dial plan.

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Requirements

The follow requirements are needed to successfully install and operate Call Ctrl and its related technologies.

Minimum Windows Requirements

- Windows XP with Service Pack 3
- Windows Vista with Service Pack 1
- Windows 7

NOTE: Specific testing and verification was not performed on Windows Server 2003 or 2008; however, there should be little problems running Call Ctrl in these environments. Typically if .NET Framework 3.5 SP1 can be installed, Call Ctrl will perform. Currently Call Ctrl is supported on Windows 7, Windows Vista and Windows XP.

Minimum SPA IP Phone Requirements

The following requirements are needed to successfully use Call Ctrl with SPA IP Phones. It is recommended to update your phone to the latest firmware version.

- SPA922: SPA922 Product and Downloads
- SPA942: SPA942 Product and Downloads
- SPA962: SPA962 Product and Downloads
- SPA525G: SPA Phone Firmware and Tools
- SPA509G: SPA Phone Firmware and Tools
- SPA508G: SPA Phone Firmware and Tools
- SPA504G: SPA Phone Firmware and Tools
- SPA502G: SPA Phone Firmware and Tools
- SPA501G: SPA Phone Firmware and Tools

For SPA900 instructions: Updating the Firmware of SPA9XX Series IP Phones.

NOTE: For Call Ctrl to work properly the CTI must be enabled on the SPA Phones.

Minimum SPA 9000 Requirements

The following requirements are needed to successfully use Call Ctrl with the SPA 9000.

- SPA9000 Product and Downloads

NOTE: For Call Ctrl to work properly, the CTI must be enabled on the SPA9000.

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Installation

Overview

After phones and phone systems have been brought to the minimum supported level, Call Ctrl installation can take place. Call Ctrl has made installation and configuration as easy as possible.

Following installation, the configuration of most settings may be set by using an intuitive wizard that walks users through Call Ctrl configuration. More advanced configurations are available using the CallCtrl.config file which is located in the installation directory. Please see the Additional Information section for more information on what additional configuration options are available.

The following steps outline installing Call Ctrl within an environment.

1. Ensure Windows meets the minimum requirements. Update as necessary.
2. Ensure SPA 9000 meets the minimum requirements. Update as necessary.
3. Ensure SPA Phones meets the minimum requirements. Update as necessary.
4. Install Call Ctrl on user computers.
5. Configure Call Ctrl on user computers.
6. Install Outlook 2007 Add-In.

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Configuring Call Ctrl

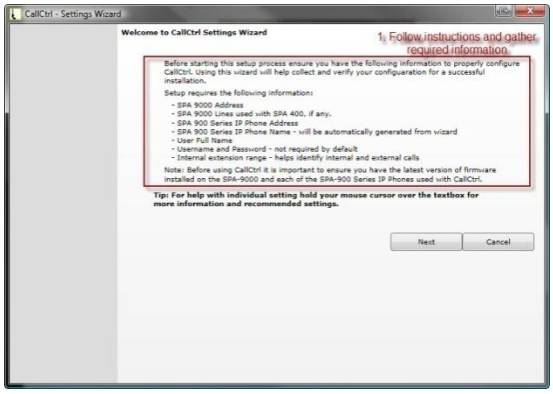
Once installed, configuring Call Ctrl is simplified by the Settings Wizard.

NOTE: The Settings Wizard may have slightly different depending on the version of Call Ctrl installed. This walkthrough should be used as a guide. The Settings Wizard will provide all necessary instructions and should take precedence.

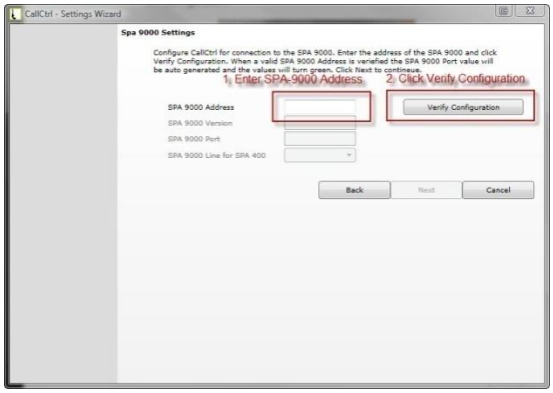
NOTE: The Call Ctrl setup creates a shortcut in the **Start Up** folder under all users. This means that when a users log into Windows, Call Ctrl will automatically launch.

To Install Call Ctrl:

1. Run the **CallCtrlSetup.msi** and follow the onscreen instructions. Recommended to accept all defaults.
2. Launch Call Ctrl from Start -> All Programs -> CTRL IT -> Call Ctrl
3. The **Call Ctrl Settings Wizard Welcome** screen will be displayed to the user on Call Ctrl's first use. Click **Next** to start Call Ctrl configuration.



4. In the **SPA9000 Settings** screen, enter the SPA9000 IP address or hostname and click **Verify Configuration**.



NOTE: If you receive **401 Not Authorized** disable the Admin password on the SPA9000.

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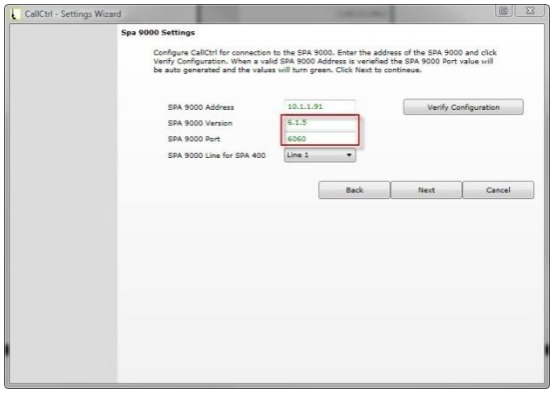
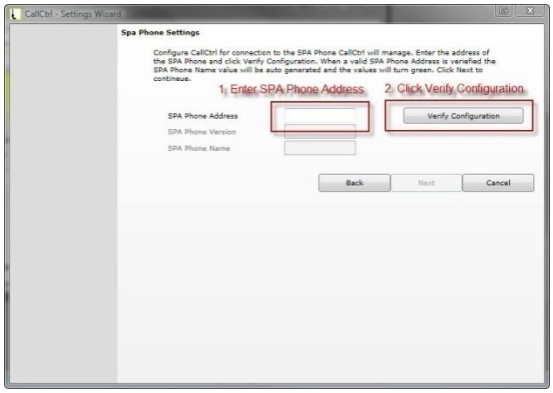
5. The above **SPA 9000 Settings** screen is an example of a successful verification. Note the textboxes for the SPA9000 Version and Port are **Green Text**. Unsupported firmware or other configuration error will be displayed in **Red Text**.

   After successful configuration and verification, select the SPA 9000 Line for which the SPA400 is configured. If your environment does not use the SPA400 select **None**. When complete click **Next**.



6. In the **SPA Phone Settings** screen enter the SPA IP Phone IP address or hostname and click **Verify Configuration**.



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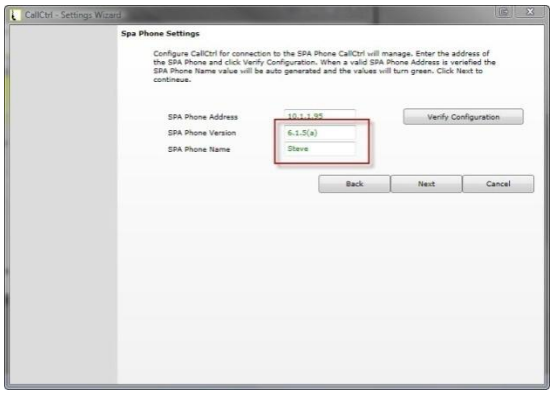
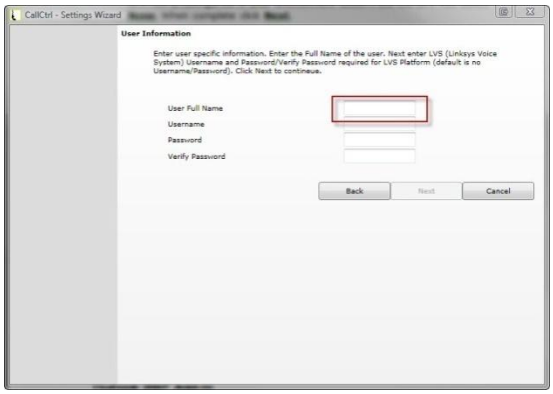
7. The **SPA Phone Settings** screen is an example of a successful verification. Note the textboxes for the SPA Phone Version and Name are **Green Text**. Unsupported firmware or other configuration error will be displayed in **Red Text**. After a successful configuration and verification click **Next**.



8. In the **User Information** screen enter **User Full Name**. Leave remaining fields blank.



NOTE: The **Username** and **Password** fields are not currently used nor supported. Future releases may require Call Ctrl to authenticate to the SPA Phone or other resources. Leaving the fields blank or entering information has no effect.

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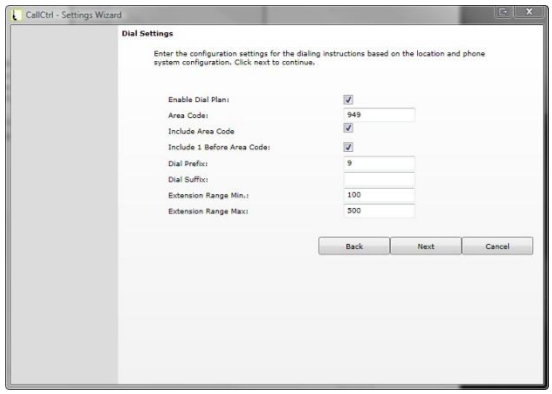
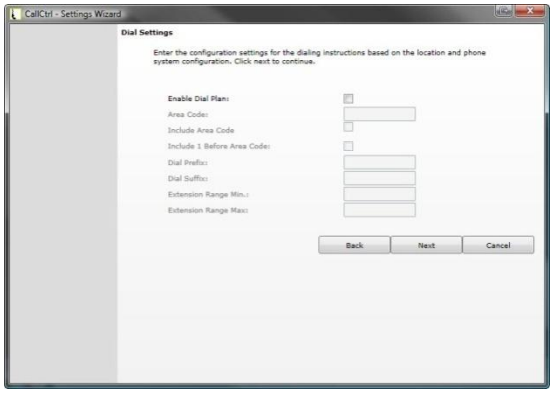
9. In the **Dial Plan** screen there are two choices which depend on your location and the dial plan settings for your phone and the phone system.

   〉 Enable **Dial Plan:** Checking the **Enable Dial Plan** (activates all related textboxes) will enable the Dial Plan according to the related setting under the checkbox. Make necessary settings and click **Next** to continue.

   NOTE: Please see knowledgebase article titled Configure Call Ctrl Dial for more information on the specifics of these settings.



   〉 Disable **Dial Plan**: Leaving the **Enable Dial Plan** checkbox unchecked (disables all related textboxes) will disable the Dial Plan. Click **Next** to continue.



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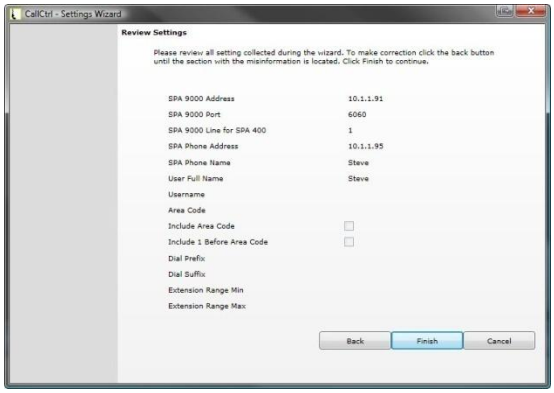
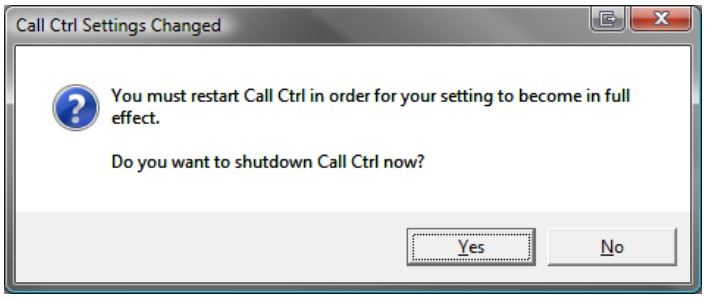
10. The **Review Settings** screen provides the opportunity to review all settings for accuracy. After reviewing click **Finish**.



11. An option to shutdown Call Ctrl will be presented. Click **Yes** to shutdown.



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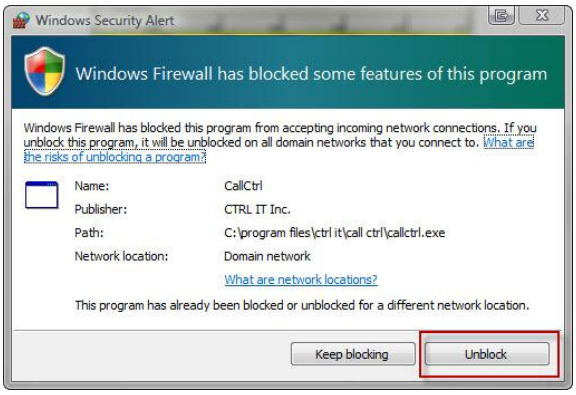
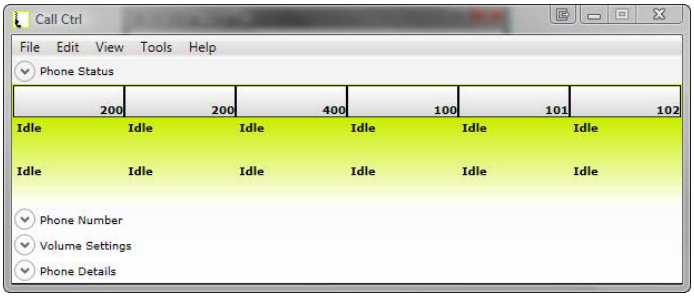
12. If Windows Firewall is enabled, a slight delay may be experienced when starting Call Ctrl for the first time. The following notification should be displayed. Click **Unblock** to allow Call Ctrl access to incoming network traffic.



NOTE: This example is from Windows Vista. The Windows XP window is very similar and requires the same action.

NOTE: For firewalls other than Windows Firewall or instructions on manually creating these policies, see knowledgebase article: **Required Firewall Configurations for CallCtrl**.

13. Start Call Ctrl again and ensure Call Ctrl is displaying the extension of the phone.



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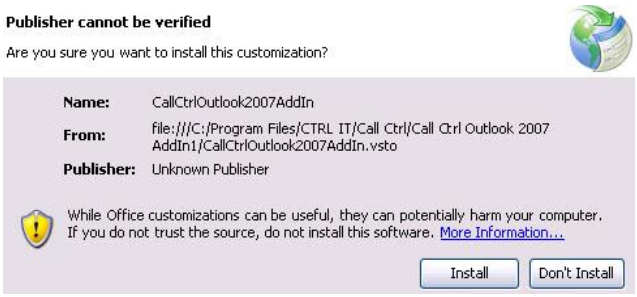
Outlook 2007 Add-In

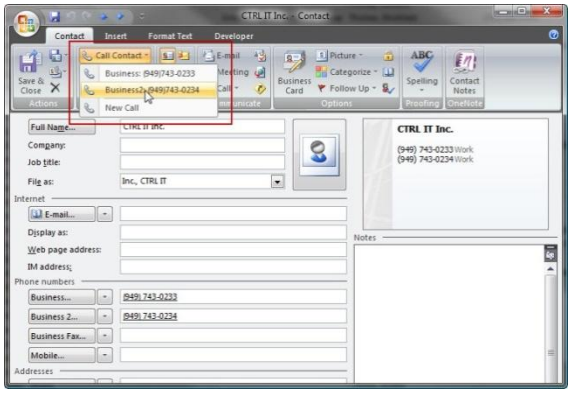
To install the Call Ctrl Outlook 2007 Add-In:

NOTE: Call Ctrl must be installed and properly configured before the Outlook 2007 Add-In can be installed.

1. Run the **CallCtrlOutlook2007AddInSetup.msi** and follow the on-screen instructions.
2. After the installation has completed, launch Outlook 2007.
3. When Outlook 2007 starts, there may be a security dialog displayed, depending on your Outlook security settings. If "Are you sure you want to install this customization?" is displayed, click Install on the Microsoft Office Customization Installer dialog.



4. Ensure Call Ctrl is running.
5. Within Outlook, navigate to the Contacts folder.
6. Open an existing Outlook Contact.
7. The following Call Ctrl container will exist within the Outlook Ribbon menu.



8. To dial, click the Call Contact drop down list and select the desired Contact's phone number.

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Licensing

Call Ctrl call manager is licensed to the serial number of the phone. After purchase, the license keys will be emailed immediately to the user. Unlicensed trial versions display a startup screen requesting a license. The license key which was emailed will need to be entered within the licensing startup screen. The license will be authenticated and register to the specific serial number of the SPA 900 IP Phone. The license may be used on multiple computers but the license will only work with the phone to which is was registered.

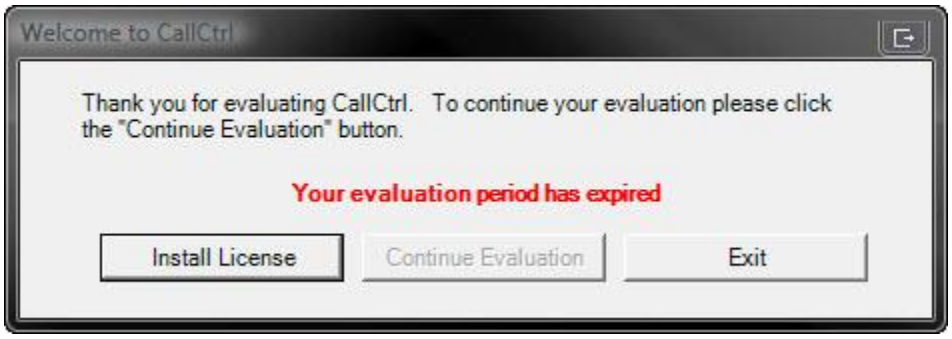
Trial Period

Call Ctrl is available to anyone who downloads the Call Ctrl software. Upon installation, a trial license is available for a period of 30 days. After this trial period expires, Call Ctrl will cease to function. When a valid license is purchased and installed, functionality may be restored. It is not required to reinstall Call Ctrl.

During the initial 30 days after installation, the following message will be displayed as Call Ctrl initiates, reflecting the number of trial days remaining.

The following message is displayed when the trial has expired and Call Ctrl will cease to function.

The only way to continue using Call Ctrl is to install a valid license.



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Ordering

For added convenience, ordering Call Ctrl licenses is available online. Most major credit cards are accepted. Licensing discounts may be available when ordering 5 or more licenses and when ordering 10 or more licenses. Please visit the web site for pricing and additional licensing information as these discounts may change.

To order Call Ctrl Licenses:

http://www.uctrlit.com/CallCtrl

NOTE: When ordering licenses from CTRL IT Inc. it is important when submitting an order to NOT use a "free" or anonymous email address. Addresses such as *@yahoo*, *@hotmail*, *@gmail*, etc. will be rejected AFTER the order is placed and will require the order to be placed again. This is a measure taken to prevent fraud and ensures the authenticity of the applications and licensing.

To contact a sales representative with ordering or sales questions, please submit an email to CallCtrl.Sales@uctrlit.com.

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Installation

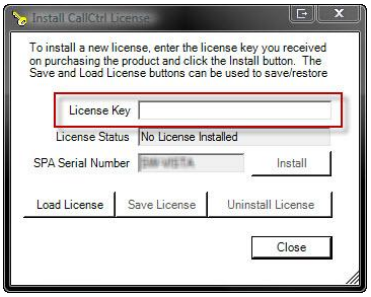
Upon order completion, the license will be emailed immediately to the email address entered with the order. For any questions or issues regarding receipt or installation of the licenses, please contact CallCtrl.Sales@uctrlit.com.

Purchased License

NOTE: Ensure Call Ctrl is configured to use the phone for which the new license will be associated with. Once a license is installed and authenticated to a phone, the license is permanently attached to that phone and cannot be removed.

1. Locate the 32 digit serial number in the email that is formatted as follows:
   XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX
2. Perform one of the following:
   - Open Call Ctrl. From the Main Menu select **Edit** and then **Licensing**.
   - From the trial startup notification, click **Install License**.

3. Copy and Paste the 32 digit serial number into **Install Call Ctrl Licensing** screen.



4. Click the **Install** button. The **License Status** should alternate between **Authenticating** and **Please wait...**
5. After successfully authenticating and **License Status** displays **License Installed**, click **Save License**. Select a destination to store the license file for future use on another computer, or for reinstallation purposes.

NOTE: If the following error message is received:

The number of installations allowed for this license key has been exceeded.

If the following error message is displayed, there was an attempt to install a license which has been authenticated and associated with another phone. Either configure Call Ctrl to use this phone or install a different license.

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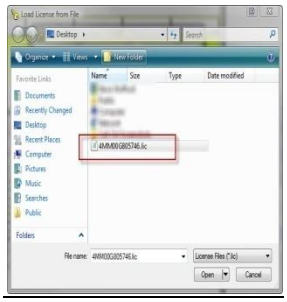
Saved License

This requires a previous license file to be saved. See **Save License**.

1. Open Call Ctrl. From the Main Menu select **Edit** and then **Licensing**.
2. From the **Install Call Ctrl License** click the **Load License** button.

3. From the **Load License From File** dialog box, select the license file that is associated with the phone to which Call Ctrl is currently configured and click **Open**.

   NOTE: The license file is typically named after the serial number of the phone it was authenticated under.



4. **License Status** should display **License Installed.** Click **Close** to exit the **Install Call Ctrl License** screen.

NOTE: If the following error message is received:

The number of installations allowed for this license key has been exceeded.

If the following error message is displayed, there was an attempt to install a license which has been authenticated and associated with another phone. Either configure Call Ctrl to use this phone or install a different license.

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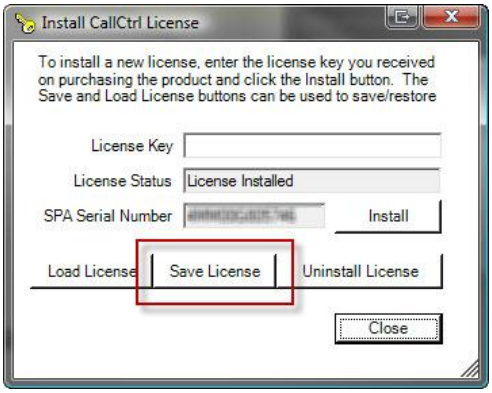
Manage

Call Ctrl assists in management of licensing resources. Licenses can be moved to new computers or saved for later use if the system crashes or needs to be restored. License files can be shared amongst different computers with certain limitations. Each license is limited to manage only the phone the license was originally authenticated to. The phone for which a license is authenticated to, can be managed by Call Ctrl from multiple computers. Licenses are associated to the phone, not the computer.

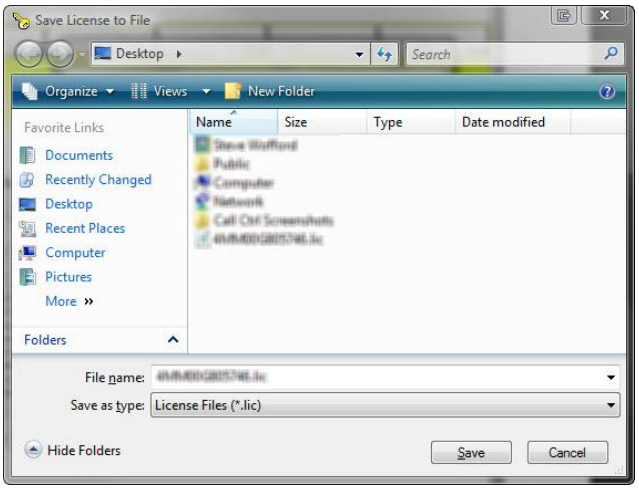
Save License

This requires a previous license file to be installed.

1. Open Call Ctrl. From the Main Menu select **Edit** and then **Licensing**.
2. From the **Install Call Ctrl License** click the **Save License** button.



3. From the **Save License to File** dialog navigate to a safe storage location and click the Save button.



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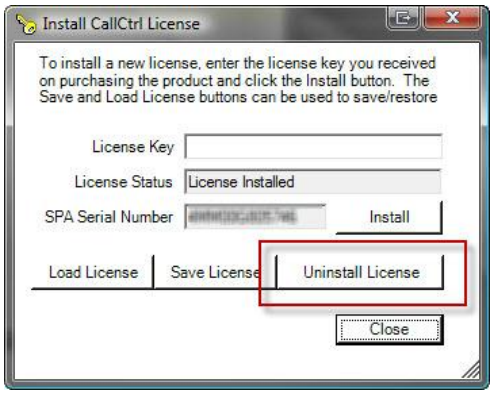
Uninstall License

This requires a previous license file to be installed. This feature may be used to manage another phone in the event a new license for another phone is required. This license can be a new purchased license or a saved license from a different phone.

To uninstall a license:

1. Open Call Ctrl. From the Main Menu select **Edit** and then **Licensing**.
2. From the **Install Call Ctrl License** click the **Uninstall License** button.



3. When finished, click **Close** or perform additional license management tasks.

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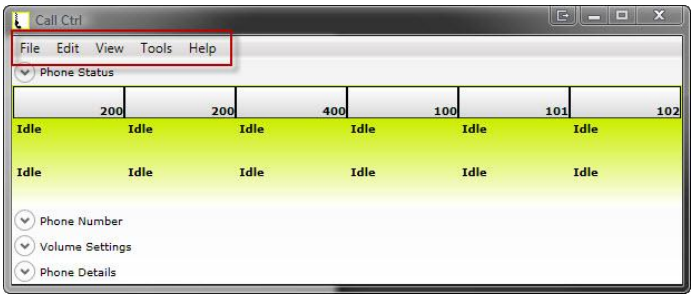
Interface Defined

Call Ctrl is comprised of eight (8) core areas. The different areas represent different user interactions and settings. The following section will describe each area and general usage. The next chapter will detail more concise instructions.

Main Menu

The top portion of a Call Ctrl window is the **Main Menu**. The menu is required to navigate different Call Ctrl windows.



〉 **File:** Exit provides an alternative way to close Call Ctrl.

〉 **Edit:** Allows configuration changes after initial Settings Wizard is completed. The following items are available:

- **Settings:** Provides many Call Ctrl settings for: SIP Settings, Dial Plan Settings and Speed Dial.

  Settings Wizard: This is the primary configuration tool used for Call Ctrl prior to being operated by the user. The Wizard will begin as Call Ctrl is activated for the first time.

- **Licensing:** Provides the necessary interface to properly license Call Ctrl.

〉 **Tools:** External management tools for SPA Phones and the SPA Phone System.

- **SPA Phone Configuration:** Allows users to manage their SPA Phone from within Call Ctrl.

- **SPA Phone Registration Status:** Allows users to check on the Registration status of Call Ctrl and other devices connected to the SPA-9000 Phone System.

〉 **Help:** Provides additional assistance.

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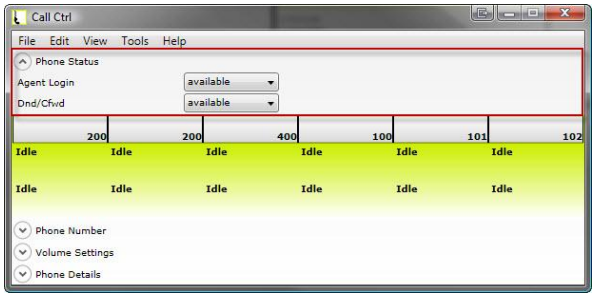
Phone Status

Phone status provides features which are typically global to the phone or the user and not tied to specific extension or call.



〉 **Agent Login**

User may log into applicable hunt groups from within Call Ctrl. Otherwise, the user is excluded from all hunt groups.

〉 **Do Not Disturb**

Prevents incoming calls from ringing the phone. If voice mail is configured for the ringing extension, the calls will be forwarded directly to voice mail. Otherwise, the caller will receive a busy signal.

〉 **Call Forward**

Redirects all incoming calls to a single number selected by the user.

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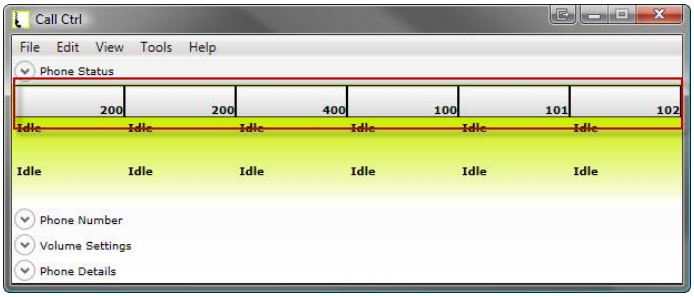
Extensions

The Extensions region within Call Ctrl displays the extension numbers of the phone along with the status of the calls.



〉 Extension Number

The extension numbers displayed will correspond to that of the phone which Call Ctrl is responsible for managing.

〉 Extension Status

These are animations displayed within Call Ctrl. The following Call states (covered next) are represented in Call Ctrl. The Calls text (Idle, Dialing, Connected, Proceeding Hold, etc.) are Call state information displayed below the Ext. Any of the following states may be listed as a status for an extension.

Idle

Dialing, Calling, Proceeding, Connected

Hold, Holding, Resuming (Flashing Green/Red)

Ringing, Answering (Flashing Green/White)

Invalid

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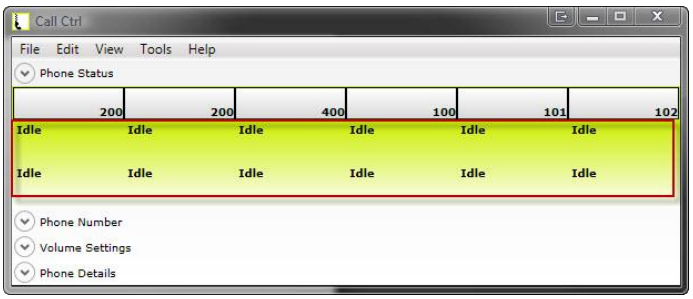
Calls

The Calls region within Call Ctrl is tasked with displaying the Call status. For each extension on the phone there will be two (2) call slots. For example, as demonstrated below, there are six (6) extensions which equates to twelve (12) call slots.



During a connected call, it will display the contact name as well as the phone number to which the call is connected. The phone number is always displayed; however, the contact name is only displayed when available from Caller ID for Incoming Calls or Outbound Calls originating from Call Ctrl.

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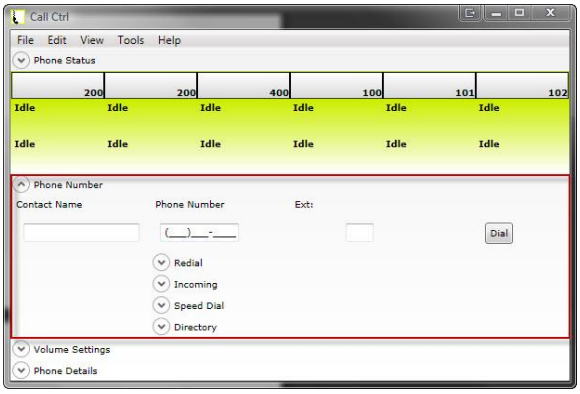
Phone Number

The central location for outbound calls will be made in this panel.



〉 **Manual**

Manual phone number entry grants Call Ctrl users the ability to dial calls manually, while also enabling the user to enter the contact name for the call.

- **Contact Name:** Optional textbox allows user to record recipient of calls made which allows for later retrieval or tracking.

- **Phone Number:** Phone number to dial. Textbox may have validation according to Dial Plan specified, which will indicate a valid phone number was entered.

- **Ext:** Used to call internal extensions or reference when making externals calls. Extension does not get passed to call for externals calls, solely for reference.

〉 **List box**

Allows quick and effective navigation to any phone number configured or used at any time within Call Ctrl. List box allows a simple click to dial.

- **Redial:** Record of all outbound calls while Call Ctrl is running.

- **Incoming:** Record of all incoming calls while Call Ctrl is running.

- **Speed Dial:** User-created list of pre-programmed phone numbers.

- **Directory:** Directory contact list located on phone system or shared Call Ctrl Directory.

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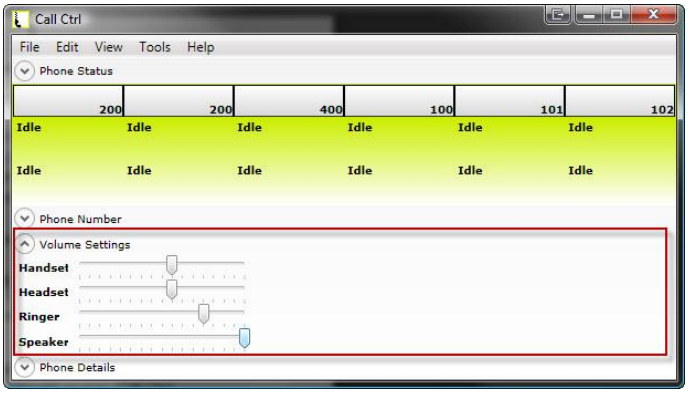
Volume Settings

Allows users to access and control volume settings of the phones. Users can simply drag the slider to the desired volume.



To disable view of the Volume Settings panel in interface:

1. From the Main Menu select View.
2. Uncheck **Volume Settings** from the menu item.

To enable view of the Volume Settings panel in interface:

1. From the Main Menu select View.
2. Check **Volume Settings** from the menu item.

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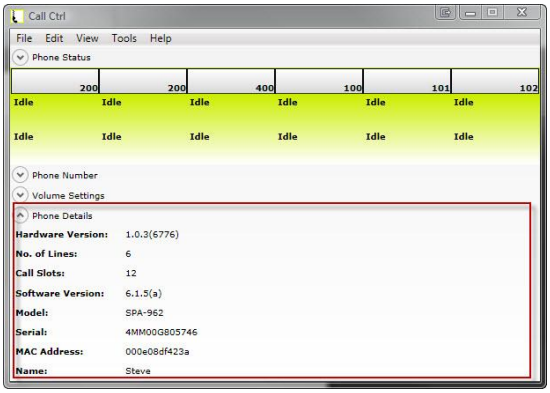
Phone Details

Phone Details is an integral portion of Call Ctrl; however, not pertinent for day-to-day operations. This feature may be disabled in the interface if necessary.



The following are some useful tips for using the Phone Details panel:

- Verify the phone is properly registered with Call Ctrl. When information is displayed, it indicates the phone has a successful connection.
- Allows administrators to check hardware and software levels to ensure proper maintenance or to check the minimum system requirements to use with Call Ctrl.
- Administrators can check MAC Address for troubleshooting network connectivity issues or assigning DHCP addresses.
- Match Call Ctrl license files by checking Serial number.

The Phone Details pane provides the following information and how they relate to Call Ctrl:

- **Hardware Version:** The version of the physical phone hardware.
- **Number of Lines:** The number of extensions available on the phone.
- **Call Slots:** The number of Lines/Extension X's 2.
- **Software Version:** Software or firmware versions running on phone.
- **Model:** Model number of phone.
- **Serial:** Serial number assigned to phone from Cisco and used to assign licenses for Call Ctrl.
- **MAC Address:** Ethernet MAC address.
- **Name:** The name the phone is registered as. Required by Call Ctrl to manage phone.

To disable view of the Phone Details panel in interface:

1. From the Main Menu select View.
2. Uncheck **Phone Details** from the menu item.

To enable view of the Phone Details panel in interface:

1. From the Main Menu select View.
2. Check **Phone Details** from the menu item.

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Tray Icon

When Call Ctrl is minimized, it is not displayed on the Windows Task Bar. Call Ctrl is minimized to the notification area near the clock on the bottom right of the screen.

The icon has two events depending on the click method performed:

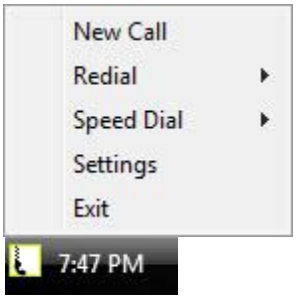
〉 **Double-Click**

Event launches Call Ctrl as the active window. Best choice when users wish to simply reopen Call Ctrl.

〉 **Right-Click**

Event opens a context-menu for the icon and the following menu items are available:

- **New Call:** The same as double-clicking the icon, which launches Call Ctrl as the active window.
- **Redial:** Displays redial list which matches the list box within Call Ctrl.
- **Speed Dial:** Displays pre-programmed Speed Dial numbers.
- **Settings:** Opens the Settings window.
- **Exit:** Closes Call Ctrl.



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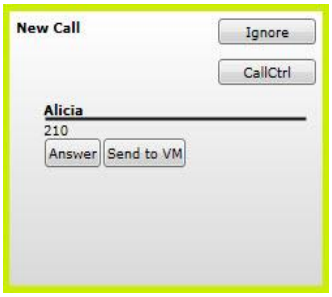
Notification Window

New Call Notification Window allows users to handle incoming calls without interrupting their current activities.



The New Call Notification Window lists the following options when being notified of a new call:

- **Answer Call**

  Function provides the user the ability to answer the call and send to the preferred audio device (headset/speaker). If a call is already active, it is put on hold and the new call is answered.

- **Send to VM**

  Function provides the user the option to send the call directly to the phone's voice mail account. This prevents ringing or beeping in the background when the user is on another call.

- **Launch Call Ctrl**

  When further actions need to be performed on the call, Call Ctrl may be launched, enabling the user to have control of additional actions that may be required but not available in the immediate Notification Window.

- **Ignore Call**

  When this option is chosen from the Notification Window, the calling party will hear a busy tone and will not be sent into voicemail.

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Using Call Ctrl

The following chapter illustrates how to perform many Call Ctrl actions. It was a design goal to make Call Ctrl as intuitive as possible. This manual provides the foundation for users to become efficient and productive with the help of Call Ctrl.

The following information is outlined as the previous chapter, Interface Defined.

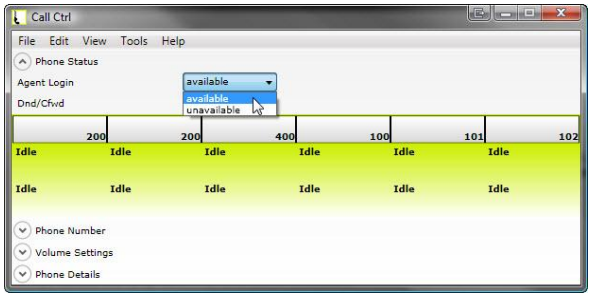
Phone Status

Agent Login

Call Ctrl allows users to control the availablity of the ACD agent. If the agent is **available**, the Spa 9000 will include the corresponding phone in all the applicable hunt groups defined. If the agent is **unavailable**, the Spa 9000 will exclude the phone from all applicable hunt groups.

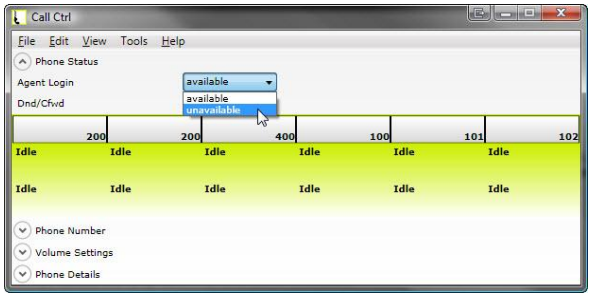
To set agent to **available**:

1. Expand Phone Status expansion panel and locate **Agent Login**.
2. Select the drop down list and select **available**.



To set agent to **unavailable**:

1. Expand Phone Status expansion panel and locate **Agent Login**.
2. Select the drop down list and select **unavailable**.



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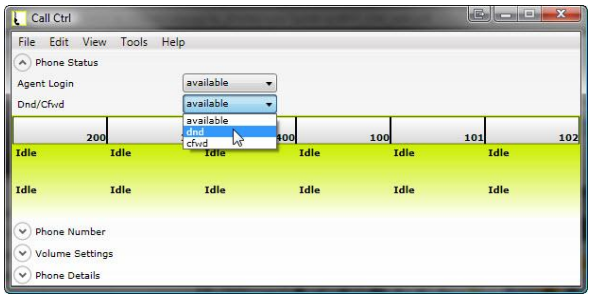
Do Not Disturb

Do Not Disturb (DND) feature prevents incoming calls from ringing, and immediately sends the caller to phone voice mail (when configured, otherwise the caller will hear a busy tone).

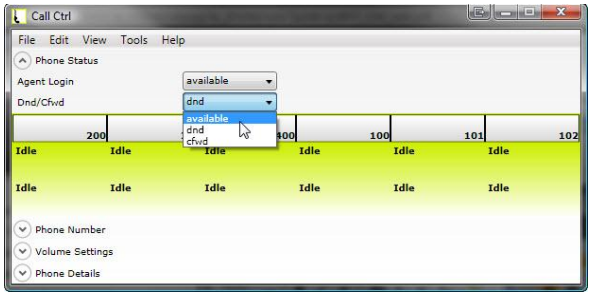
To Enable Do Not Disturb (DND):

1. Expand Phone Status expansion panel and locate **dnd/cfwd**.
2. Select the drop down list and select **dnd**.



To Disable Do Not Disturb (DND):

1. Expand Phone Status expansion panel and locate **dnd/cfwd**.
2. Select the drop down list and select **available**.



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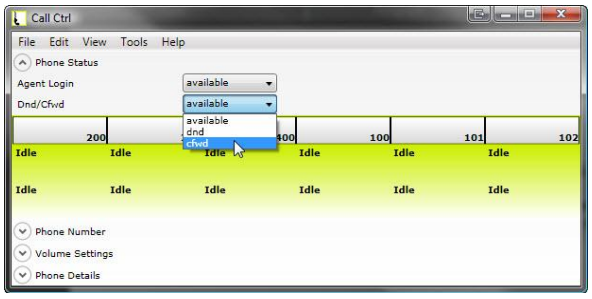
Call Forward (CFWD)

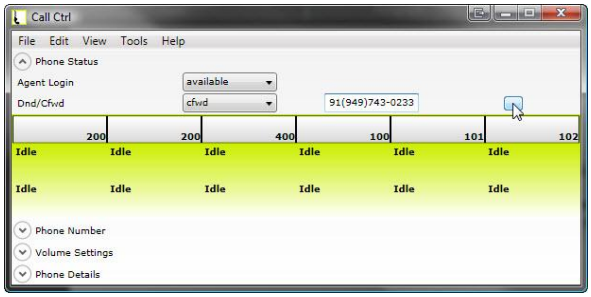
Call Ctrl allows users to configure their phone to forward all incoming calls to any phone number chosen.

To Enable Call Forward (CFWD):

1. Expand Phone Status expansion panel and locate **dnd/cfwd**.
2. Select the drop down list and select **cfwd**.

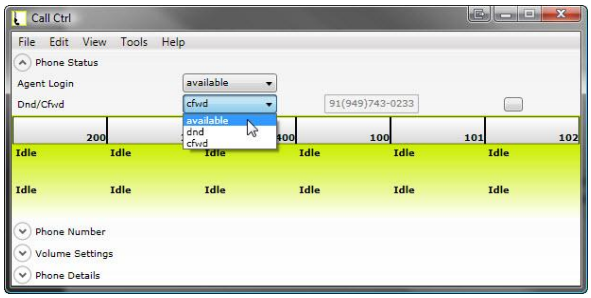


3. Enter a valid phone number in the text box and click the button to the immediate right-hand side of the text box.



To Disable Call Forward (CFWD):

1. Expand Phone Status expansion panel and locate **dnd/cfwd**.
2. Select the drop down list and select **available**.



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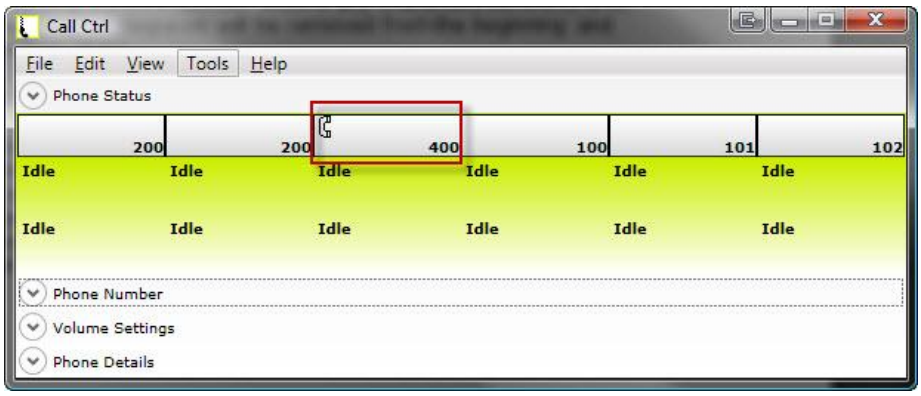
Extension

Setting Outbound Call Extension

Allows control of the extension a new call will be dialed from. By default, Extension 1 is always the primary outbound extension, as long as the extension is NOT in use. If Extension 1 is not available, the outbound call will originate from the next available extension. After each call, the outbound call extension is reset to the first available. This action mirrors that of the phone and does not allow a permanent selection of an outbound line and is reset after each call.

This feature is a simple way to allow a user to dial out of a different extension than the default Extension 1. By clicking the Extension box, Call Ctrl will set the default outgoing line for that specific call.



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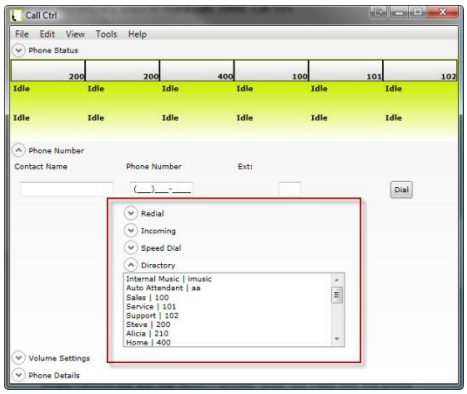
Outbound Call

There are five primary ways to make calls within Call Ctrl. Description of each method will be detailed in the following section.

List box

To utilize any of the following list boxes to make an outbound call:

1. Expand appropriate list box.
2. Select line item containing the contact or number to dial.
3. Click the Dial button to initiate the call.



The following types of list boxes exist depending on the origins of the contact and phone numbers.

〉 **Redial**

Any calls originating from Call Ctrl will be available for quick redial access.

〉 **Incoming**

All Inbound calls made to Call Ctrl will allow for easy call back. Also allows users to track and report on all calls missed or answered.

〉 **Speed Dial**

These are pre-programmed numbers of contacts specific to each Call Ctrl user.

〉 **Directory**

These are internal contacts on the same phone system. This contains the same contacts found on the Corporate Directory on the Spa Phones. This may also include a customizable shared directory.

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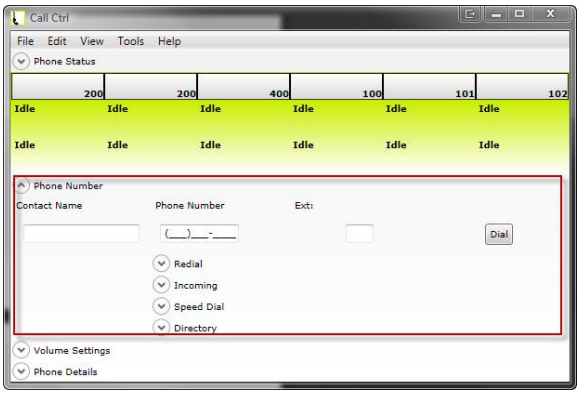
Manual Dial

To create a new call by manually entering the contacts information:

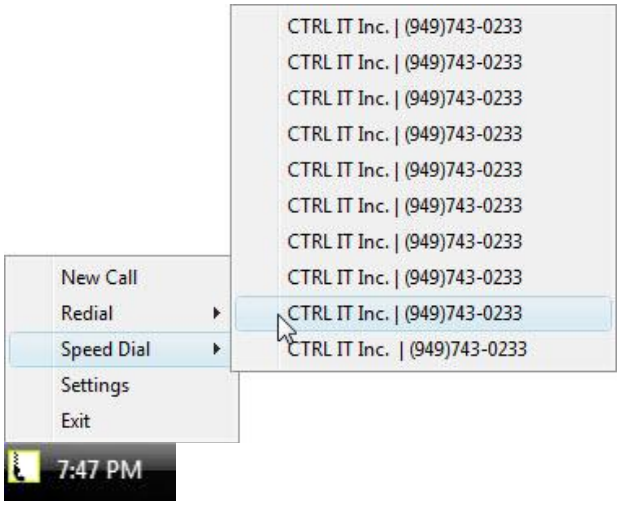
1. Enter the phone number for an external call or the extension for an internal call.
2. Optionally, the Contact Name may be entered which will locate the corresponding number to dial.
3. For external calls that require an extension, enter the contact's extension where indicated. Note that this simply records the extension, but does not enter the value into the phone until the call has been connected.



Tray Icon

The tray icon allows for quick access when Call Ctrl is minimized. To make a call using the tray icon:

1. When Call Ctrl is minimized to the notification area, right-click the icon.
2. Select either **Redial** or **Speed Dial**.
3. Select the contact and/or phone number to call.



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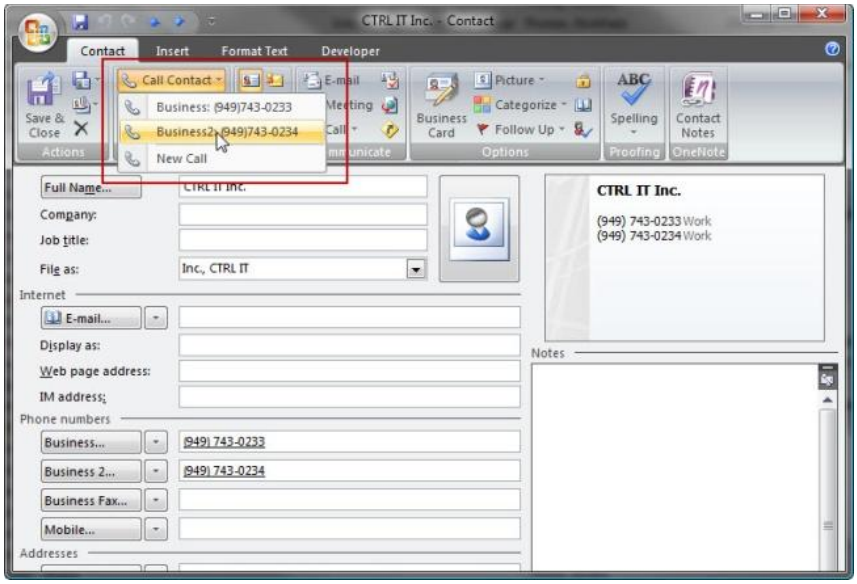
Outlook 2007

The Outlook 2007 Add-In allows users to call Outlook Contacts directly from the Outlook contact record. Making calls to Outlook contacts requires the installation of **Call Ctrl Outlook 2007 Add-In**. Call Ctrl must be running to make calls from Outlook.

To make a call from Outlook 2007:

1. Open Outlook 2007 and navigate to the Contact folder.
2. Open the contact to be called.
3. From the Call Ctrl container within the Outlook Ribbon, click the Call Contact drop down list.
4. Choose and then select the phone number to dial.
5. The call will be connected and Call Ctrl will become the active Window.



NOTE: The format of the extension value carried over from the Outlook contact is for reference only and is not passed to the active call. This feature requires that extension values be formatted as [**Ext:**]. Otherwise an exception may occur or the call will not be processed.

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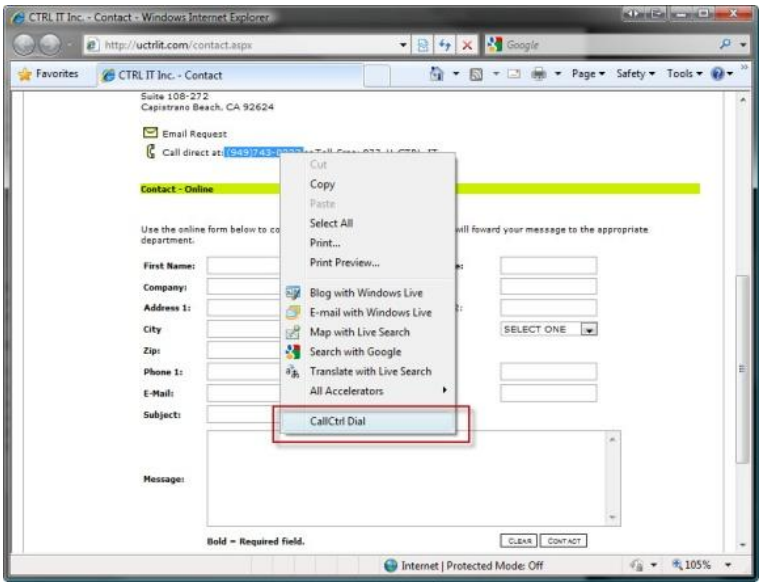
Internet Explorer

Call Ctrl has been integrated to make calling easier and available from applications used daily. Phone numbers listed on web pages are a click away. Please note only Internet Explorer version 7 and 8 are supported. Other versions may work, but have not been tested. Other browsers are not currently supported.

To make a call:

1. Highlight the phone number.
2. Right-click the phone number and select "CallCtrl Dial"
3. Call Ctrl will become the active Window.



NOTE: When selecting a phone number, ensure any characters before or after are not selected. Any white spaces will be removed from the beginning and end of the selection string.

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Clip Board Monitor

The Clip Board Monitor feature allows a phone call to be initiated from essentially any Windows based application where a text-based phone number can be copied and automatically dialed through Call Ctrl.

The Clip Board Monitor scans the Window's Clip Board for phone numbers when a text value is copied using the Windows Copy feature. When a text value is copied into the Clip Board a user-defined Regular Expression is used to check and determine if it is a phone number. If so, the text is then passed to Call Ctrl and a new phone call is initiated.

The only drawback to enabling this feature is that if there is a need to copy and paste a phone number for other uses, a call will be initiated. There are other programming methods to accomplish this feature, but reliability becomes an issue with most of the other methods. The Clip Board Monitor is by far the most reliable way of integrating Call Ctrl into essentially any Windows application.

To make a call using a hotkey:

1. Highlight the phone number text to dial using your mouse or keyboard.
2. Use the keystroke **CTRL + SHIFT + C** or alternatively you may right-click the value and select **Copy.**
3. The phone number will be sent to Call Ctrl and will be available on your preferred audio device (headset or speakerphone).

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Incoming Calls

Call Ctrl was developed to give users increased versatility when operating phones and the calls they receive. Call Ctrl streamlines call actions allowing for greater efficiency.

Notification Window

When the following notification window is displayed, the following actions should be followed to properly handle the incoming call:

1. Review the New Call and determine the action desired based on the caller information.
2. Click the appropriate button to perform the action.
3. If required, perform additional actions within Call Ctrl for the desired results.

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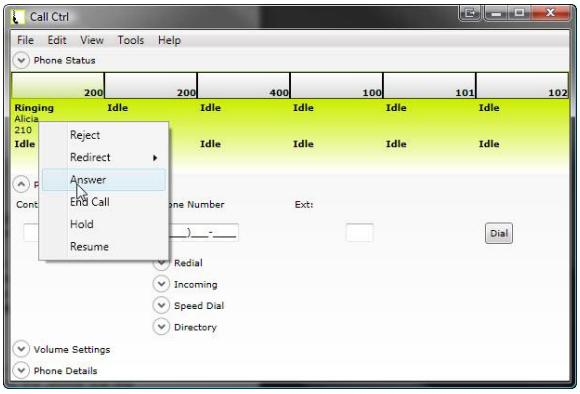
Answer

Answer the call and send to the preferred audio device (headset/speaker). If a call is already active, it is put on hold and the new call is answered.

To answer an incoming call:

1. Identify the ringing call to answer and right-click the call instance.
2. Select **Answer** from the context menu.
3. The call will be available on the Preferred Audio Device.



To change the Preferred Audio Device setting on the phone:

1. Press the **Setup** button.
2. Scroll down to **Preferences** and press the **Select** soft key.
3. Scroll down to **Preferred Audio Device** and press the **Edit** soft key.
4. Press the **Option** soft key until the desired setting in active.
5. Press the **OK** soft key.
6. Press the **Save** soft key.
7. Press the **Cancel** soft key to exit the **Setup** screen.

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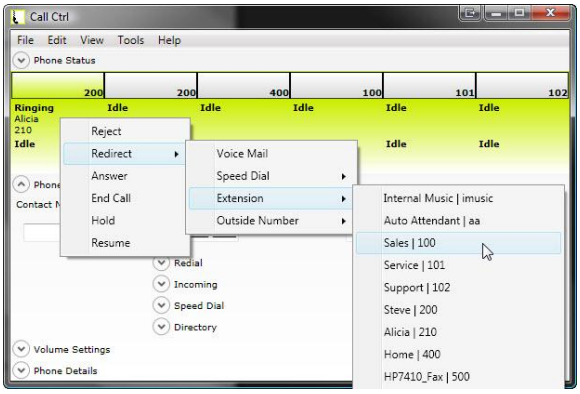
Redirect Extension

Forwards an incoming call to another user within the phone system directory. This feature is commonly referred to as a **Blind Transfer**.

To perform a transfer for a ringing incoming call:

1. Identify the ringing call to redirect and right-click the call instance.
2. Select **Redirect** and then select **Extension**.
3. Identify and select the extension to transfer the ringing call.

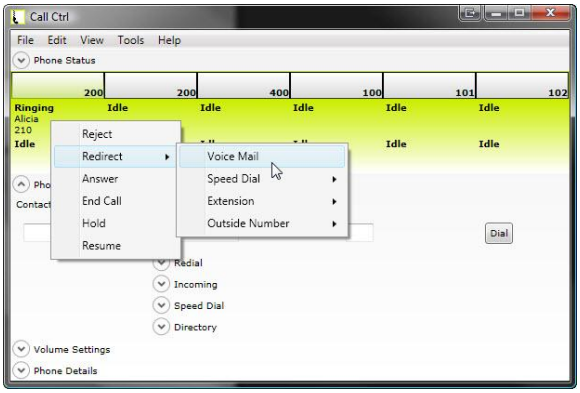


Redirect Voice Mail

Sends an incoming call directly to voice mail. This prevents the line ringing or, while on another call, a beeping in the background.

To redirect a ringing call to voice mail:

1. Identify the ringing call to redirect and right-click the call instance.
2. Select **Redirect** and then select **Voice Mail**.



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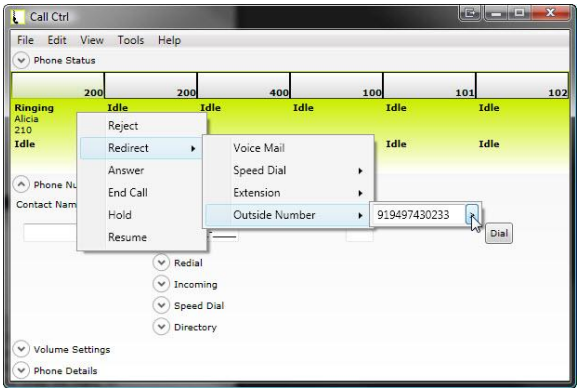
Redirect to Outside Number

Sends the incoming call to a number specified by the user. User needs to be aware that this option can be extensive. All steps must be completed while the line is ringing for action to take place.

To redirect a ringing call to an outside number:

1. Identify the ringing call to redirect and right-click the call instance.
2. Select **Redirect** and then select **Outside Number**.
3. Enter the destination for the incoming call to be transferred.
4. Click the button to the right of the text box to complete the transfer.



NOTE: The feature may require a bit of practice. The format to which the number will be entered depends on the Dial Plan setting for Call Ctrl and the phone's environment. The recommended approach to redirecting an incoming call is to use Redirect Speed Dial.

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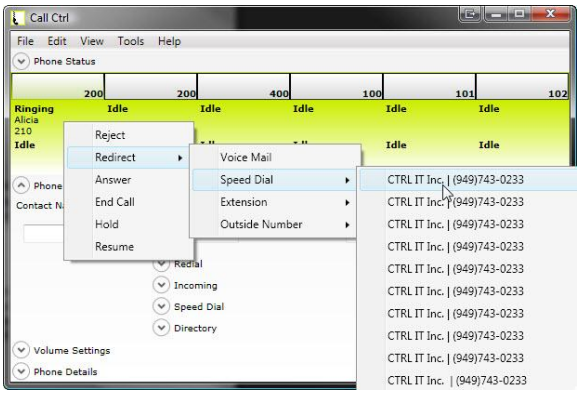
Redirect Speed Dial

This is the recommended approach to forward an incoming call to a phone number outside your phone system. This is much easier than forwarding to an outside number as the number is preprogrammed and requires limited action on the part of the user.

To redirect a ringing call to an outside number:

1. Identify the ringing call to redirect and right-click the call instance.
2. Select **Redirect** and then select **Speed Dial**.
3. Identify and select the Speed Dial entry to transfer the ringing call.

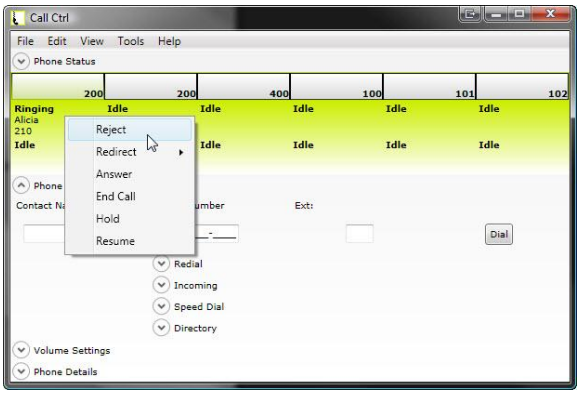


Reject

This allows the user to refuse the call. The caller will hear a busy tone and is not sent to voice mail or given any other options.

To reject a ringing call:

1. Identify the ringing call to reject and right-click the call instance.
2. Select **Reject**.



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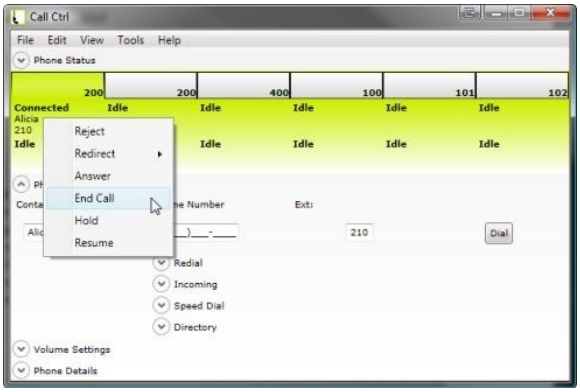
Active Calls

Handling active calls allows for the same functionality as the phone, but with added ease. The following actions can only be used when a call is in a **Connected** state. Otherwise the action will fail without event. By simply right-clicking the Call instance, the context menu will display a list of actions described below.

End Call

To end a call:

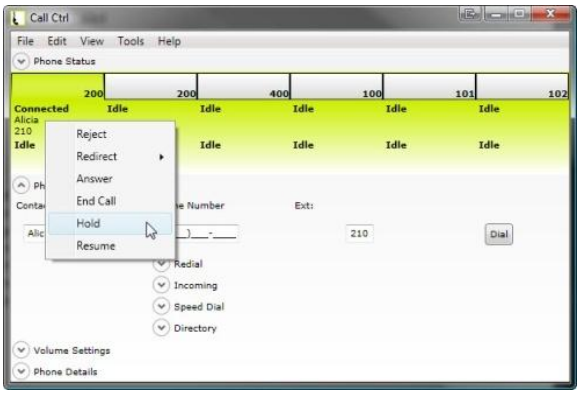
1. Identify the connected call to end and right-click the call instance.
2. Select **End Call**.



Hold

To place a connected call on Hold:

1. Identify the connected call to place on hold and right-click the call instance.
2. Select **Hold**.



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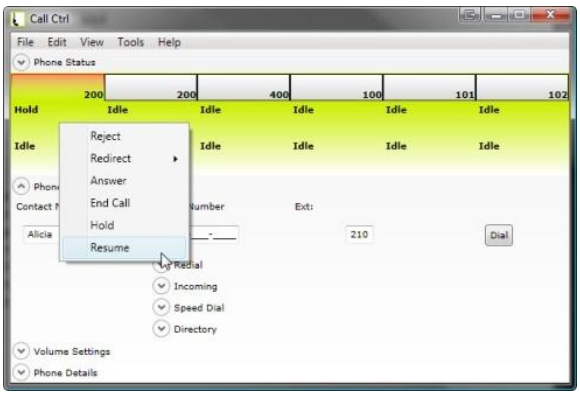
Resume

Allows a call placed on Hold to be resumed. To be used in conjunction with Hold.

To resume a call on hold:

1. Identify the hold call and right-click the call instance.
2. Select **Resume**.



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Transfer and Conference

To transfer or conference a call:

Prior to initiating a **Transfer** or **Conference** operation there must be a **Hold** call and a **Connected** call.

1. Place the call to **Transfer** or **Conference** on **Hold** by right-clicking the call instance and selecting **Hold**.
2. Initiate a new call or use an existing call and ensure it is in the **Connected** state.
3. Left-click that same call on Hold from step 1, holding the mouse button down and drag the call to a **Connected** call you wish to **Conference** or **Transfer**.

4. Drop the **Hold** Call on the **Connected** Call by releasing the left mouse button.

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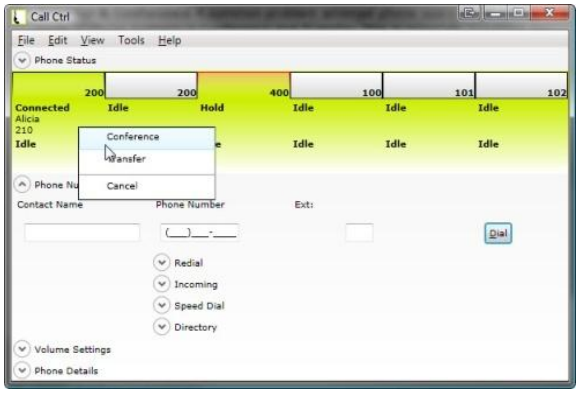
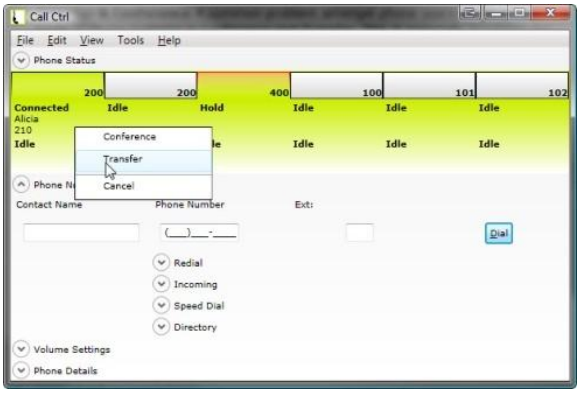
5. Select the **Conference** or **Transfer** from the popup:

   〉 **Conference** the **Hold** call to the **Connected** call will allow the user and the two calls to communicate 3-ways. The **Hold** call changes to **Connected** and the **Connected** call will stay connected.



   〉 **Transfer** the **Hold** call to the **Connected** call. This feature is commonly referred to as an **Attended Transfer**. The call drops and connects the caller (on hold) with the previously active (connected) caller.



Please keep in mind these key points:

Tip 1. Always Drag the Call which is in the **Hold** state.

Tip 2. Drag and Drop the call instance to **Conference** or **Transfer**.

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Additional Information

The following outlines the additional information and documentation available. For more information please visit www.uctrlit.com/support/knowledgebase

Knowledgebase Admin Guides

- Application and User Configuration Files
- Configure Call Ctrl Dial Plan
- Create a Shared Directory Between Multiple Users
- Create Additional Speed Dial Entries
- Debugging Call Ctrl and SIP Messages
- Defining Application and User Settings
- Installing the Call Ctrl Outlook 2007 Add-In
- Manage SPA Phone from Call Ctrl
- The License is not Valid for this SPA-900 Phone
- Troubleshooting Call Ctrl Outlook 2007 Add-In

NOTE: These titles are subject to change and are only an example of content available at the time of this writing.

External Resources

- CTRL IT Inc. - Call Ctrl Product and Ordering Information
  http://www.uctrlit.com/CallCtrl

- Cisco - Small Business Voice Systems (Linksys Business Series)
  http://www.cisco.com/en/US/products/ps10030/index.html

- Cisco - SPA9000 Voice System
  http://www.cisco.com/en/US/products/ps10031/index.html

- Cisco - Small Business IP Phones SPA 900 Series IP Phones
  http://www.cisco.com/en/US/products/ps10033/index.html

- Cisco - Cisco Small Business Pro SPA 500 Series IP Phones
  http://www.cisco.com/en/US/products/ps10499/index.html

- Cisco – Support Community fo r IP Phones
  https://www.myciscocommunity.com/community/smallbizsupport/voiceandconferencing/ipphones

- Cisco – Small Business Support Community for Small Business Voice Systems (Linksys Business Series)
  https://www.myciscocommunity.com/community/smallbizsupport/voiceandconferencing/voice

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