

# **CTI Data Connector Office Edition**

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## **CTI Data Connector Office Edition**

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*by Mirage Computer Systems GmbH*

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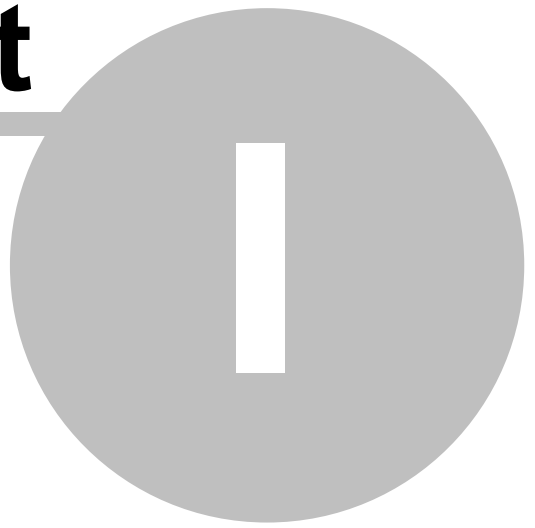
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# 1 Using this tutorial

This tutorial is an easy way to learn how to use CTI Data Connector Office Edition. It is designed for all office workers who want to benefit from Computer Telephony integration.

While completing these lessons, you will learn how to make an outgoing call, use the phone book or make the necessary configuration settings for your PBX system.

Part I explains the basics for using CTI Data Connector Office Edition features, including how to make calls, receive calls or how to make personal configuration settings. Part II provides hands-on experience for using additional features like expert settings or database configuration.

The Online Tutorial will be updated also after its release. In case you do not have Internet access, you can select the Offline version<sup>63</sup> in the Configuration Wizard.



Use the buttons in the upper right corner to browse through the online help.

## **Print this tutorial**

The Online Tutorial is also available as a PDF document.

You can print this tutorial - click on the link to download PDF file

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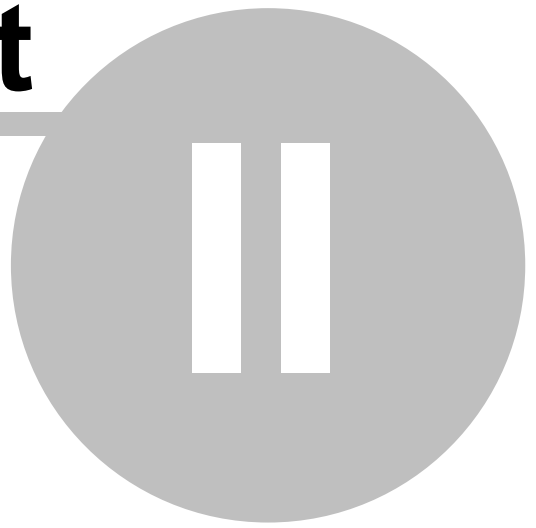
[www.cti-data-connector.com](http://www.cti-data-connector.com)

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**Part**

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## 2 Software Update

You will find up-to-date information around CTI Data Connector Office Edition at [www.cti-data-connector.com](http://www.cti-data-connector.com) , or just choose Menu ?, **Software Service**.

Check regularly for release updates of CTI Data Connector Office Edition.

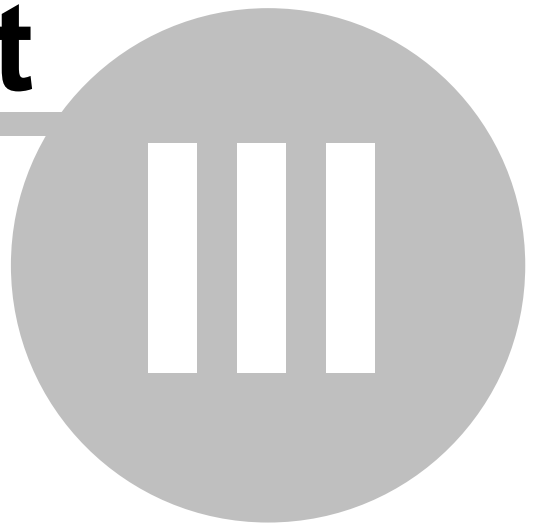
You will find your current version number in the menu ?, **About CTI Data Connector Office Edition**. The latest main release number is **2.3.1.3**

A complete modification history of the latest updates can be found here

**Display Modification History**

**Part**

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## 3 Part I - learning the basics

### 3.1 About Part I

CTI Data Connector Office Edition is an application which responds to **incoming** and **outgoing** calls in background mode. The only precondition for your PC / telephone system is a TAPI interface<sup>[113]</sup>. CTI Data Connector Office Edition supports both a First Party solution (a phone is connected via serial interface or USB to the PC) and a Third Party solution (CTI Server).

CTI Data Connector Office Edition can be configured individually for every PC and is available with different options. Therefore you may not be able to use specific functions although they are described here.

Before you start using CTI Data Connector Office Edition you have to set the configurations for the telephone system and the database(s). Normally, this is done during the installation. It is essential to make some basic configuration settings which are described in the chapter Minimum Configuration<sup>[17]</sup>.

**Part**

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**IV**

## 4 Introduction

### 4.1 Start the Application

CTI Data Connector Office Edition is either started automatically with the operating system or you start it within the program manager group **CTI Data Connector - Office Edition** . After starting the program you will find an icon in the taskbar (notification area, down to the right near the date and time display).



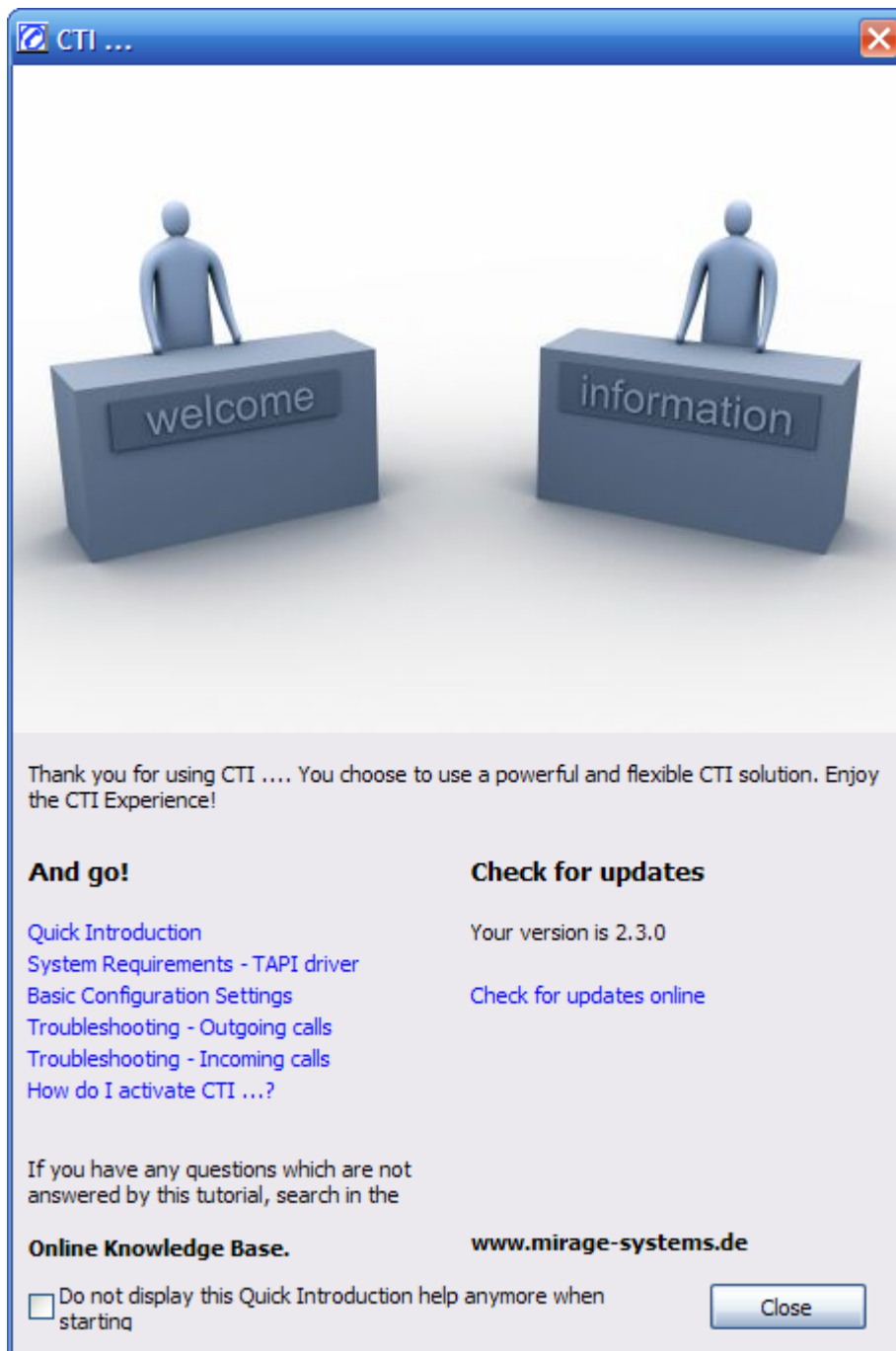
CTI Data Connector Office Edition is ready and will respond to incoming and outgoing calls. The icon in the taskbar will respond to clicks made with the **left** and **right mouse button**. For details see chapter taskbar - Control Basic Functions <sup>19</sup>.

### 4.2 Welcome Screen

By default, the Welcome Screen is opened after each program start. This screen provides you with:

- Links to most popular FAQ to get started
- Link to Online Knowledge Base
- Link to updates

The screen can be deactivated by checking *Do not display this Quick Introduction help anymore when starting* and activated again in the Configuration Wizard, Display Quick Introduction Help <sup>63</sup>.



## 4.3 Minimum Configuration Settings

During installation, the Configuration Wizard<sup>[53]</sup> was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- TAPI device driver<sup>[55]</sup> - it is delivered by the telephone manufacturer. See also: System requirements - TAPI driver<sup>[113]</sup>

- Prefix for external calls<sup>[69]</sup> and the minimum length<sup>[69]</sup> of a phone number indicating an external call
- Button Dialing Rules<sup>[70]</sup> - configures country settings and area code. See also special configuration for US / Canada<sup>[71]</sup>
- Button Folder<sup>[75]</sup> - Select Microsoft Outlook™ contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon<sup>[19]</sup>, option Configuration Wizard<sup>[53]</sup>.



### See also

Where do I find the TAPI driver?<sup>[114]</sup>  
System requirements - TAPI driver<sup>[113]</sup>

## 4.4 Taskbar - Control Basic Functions

After the program start, the taskbar (notification area, down to the right near the date and time) will display the icon



CTI Data Connector Office Edition is ready and will respond to incoming and outgoing calls.

You can control basic functions via the icon  :

- with a **single** click on the **right mouse button** you select options such as redialing or service programs
- with a **single** click on the **left mouse button** you operate phone functions (pick up call, hold, transfer<sup>[49]</sup>, hang up)
- with a **double** click on the left or right mouse button you start the CTI Data Connector Office Edition control centre<sup>[21]</sup>

During the signaling of a call by the Desktop Notification<sup>[35]</sup> the control via the taskbar icon will not be available.

If a call is missed<sup>[46]</sup> the icon turns to red - 

### **Hovering above icon with the mouse pointer**

If you hover above the icon with the mouse pointer, the message CTI Data Connector Office Edition - 0 call(s) will appear. The amount of incoming and outgoing calls during the last restart will be displayed.

The options in detail:

- Blue Icon - Left Mouse Click<sup>[19]</sup>
- Blue Icon - Right Mouse Click<sup>[20]</sup>
- Red Icon - Left Mouse Click<sup>[20]</sup>
- Red Icon - Right Mouse Click<sup>[21]</sup>

### 4.4.1 Blue Icon - Left Mouse Click

#### **Single left mouse click on the icon**

This function will be only available **during an active call** and is designed for phoning

with a headset. The individual options will be displayed depending on the status of the call.

- **When ringing:** Answer, reject or transfer<sup>[49]</sup> call
- **When the call is active:** Hold, transfer<sup>[49]</sup> or disconnect call. If the call is on hold, you will have these options: Answer or Disconnect

### **Double left mouse click on the icon**

The control centre<sup>[21]</sup> will be displayed where you can carry out further actions such as searching for an address.

## **4.4.2 Blue Icon - Right Mouse Click**

### **Single right mouse click on the icon**

Here you can choose from different options. Depending on the configuration it is possible that not all options will be available:

- Open CTI Data Connector Office Edition - Starts the control centre<sup>[21]</sup>
- 
- Redialing - redials the phone number used last
  - Dial from Clipboard<sup>[32]</sup> - searches in the clipboard (CTRL+C) for a phone number and dials
  - Quick Dialing<sup>[33]</sup> - opens the dialog for quick dialing
  - Call History<sup>[34]</sup> (incoming calls) - opens the dialog for missed calls
  - Search address and dial - goes straight ahead to the phone book<sup>[27]</sup> for searching an address
- 
- Format phone numbers - starts the service program for formatting the phone numbers
  - Configuration Wizard - starts the Configuration Wizard<sup>[53]</sup>
  - Error protocol - displays the error log<sup>[84]</sup>
  - Show License Information<sup>[81]</sup> - displays the license information
  - Help - opens this tutorial - the type of the help system (Online / Offline<sup>[63]</sup>) can be set in the configuration wizard
- 
- Quit - Terminates CTI Data Connector Office Edition

## **4.4.3 Red Icon - Left Mouse Click**

A double mouse click on the red icon opens the Call History<sup>[34]</sup> for missed calls<sup>[46]</sup>.

#### 4.4.4 Red Icon - Right Mouse Click

The same options like the blue icon<sup>[20]</sup> offers are available.

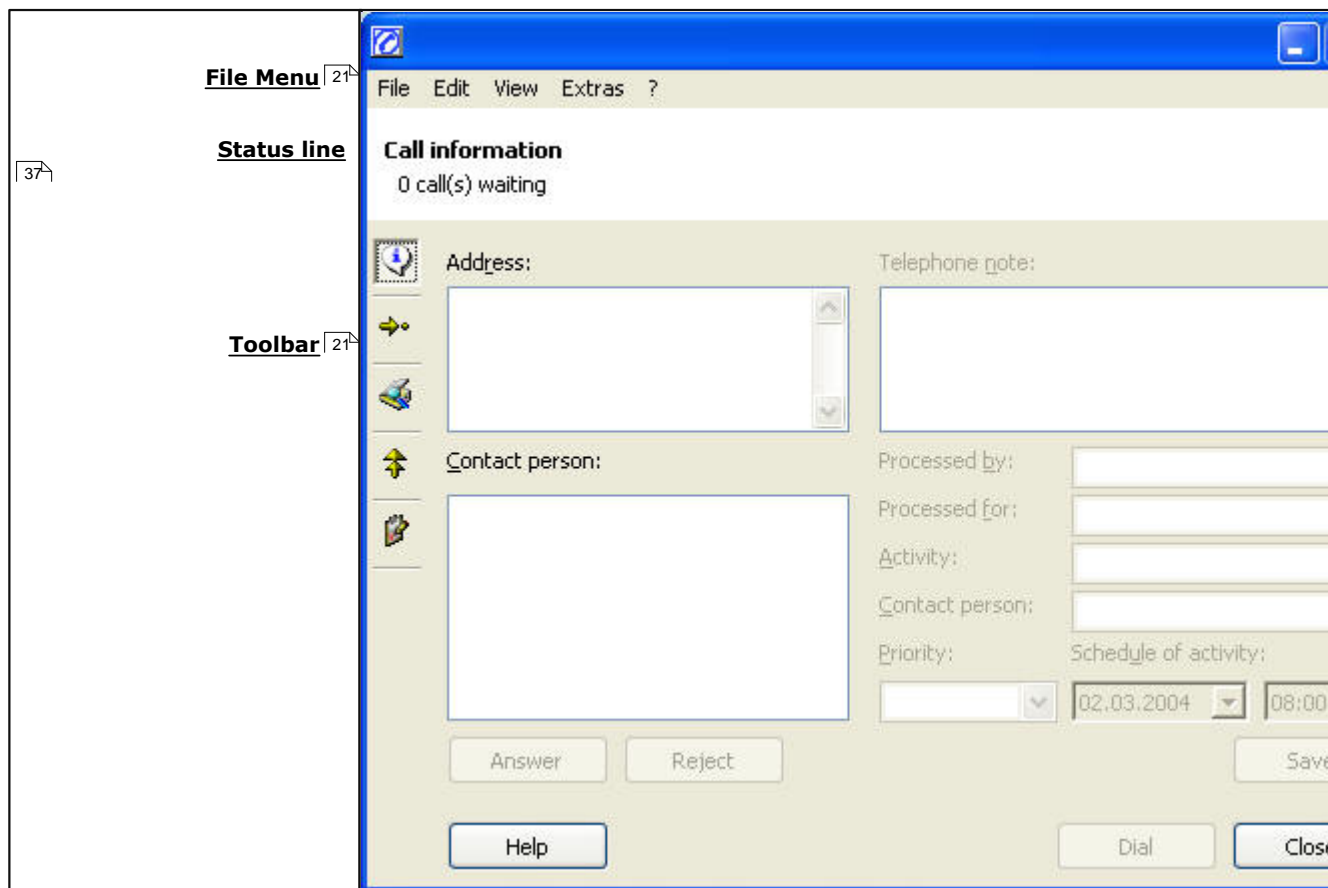
### 4.5 First Steps

After starting<sup>[16]</sup> CTI Data Connector Office Edition you can access all functions via the icon in the taskbar<sup>[19]</sup>.

To practice, try to make an outgoing call using the Hotkey<sup>[29]</sup>, which should work with all applications.

### 4.6 Navigation within the Control Centre

Nearly all functions can be accessed via the file menu, the toolbar<sup>[21]</sup> or by clicking on the right mouse button above the Icon in the taskbar.



## Overview over the File Menu

File
<ul style="list-style-type: none"><li>• <b>Close:</b> Closes the program window, but does not terminate the application</li><li>•</li><li>• <b>Quit:</b> Terminates CTI Data Connector Office Edition</li></ul>
Edit
<ul style="list-style-type: none"><li>• <b>Cut:</b> Deletes the selected text and copies it to the clipboard</li><li>• <b>Copy:</b> Copies the selected text to the clipboard</li><li>• <b>Paste:</b> Pastes the contents of the clipboard into the selected field</li><li>• <b>Delete:</b> Deletes the selected text</li><li>• <b>Quick dialing:</b> Displays a submenu of the quick dialing list <a href="#">[33]</a> (only available within quick dialing)</li><li>• <b>List:</b> Displays a submenu of the redialing list <a href="#">[32]</a> or caller list <a href="#">[34]</a> (only available within these lists)</li><li>• <b>Search:</b> Displays the phone book <a href="#">[27]</a> for searching for an address</li></ul>
View
<ul style="list-style-type: none"><li>• <b>Call information:</b> displays call information <a href="#">[37]</a></li><li>• <b>Phone and Quick dialing:</b> Displays the phone and the quick dialing list <a href="#">[33]</a> for outgoing calls</li><li>• <b>Phone book:</b> Displays the phone book <a href="#">[27]</a> for searching for an address</li><li>• <b>Redialing list (outgoing calls):</b> Displays the redialing list <a href="#">[32]</a></li><li>• <b>Call History (outgoing calls):</b> Displays the call history <a href="#">[34]</a></li></ul>
Extras
<ul style="list-style-type: none"><li>• <b>Licence Viewer:</b> Displays the purchased licenses <a href="#">[81]</a> and allows to type in Activation Keys for adding new licenses</li><li>• <b>Format phone numbers:</b> Activates the function for formatting the phone numbers</li><li>• <b>Configuration Wizard:</b> Starts the Configuration Wizard <a href="#">[53]</a></li><li>• <b>Error protocol:</b> Displays a log <a href="#">[84]</a> of the last system messages</li><li>• <b>Always on top:</b> Defines whether the control centre of CTI Data Connector Office Edition will always in the foreground when a call is coming in (the window will cover any other applications and you cannot switch to them) or whether the control centre will pop up and you can switch to other applications</li></ul>
?

- **Help:** Displays **context-sensitive** help information (help for the currently displayed screen)
- **Contents:** Displays this tutorial
- **CTI Data Connector Office Edition on the Web:** Displays the internet page of CTI Data Connector Office Edition
- **Software Service:** Checks for new Updates<sup>[12]</sup>
- **%OEMNAME%> on the Web:** Displays the website of Mirage Computer Systems GmbH
- **About CTI Data Connector Office Edition:** Displays version information about the installed application

## 4.7 Simulator

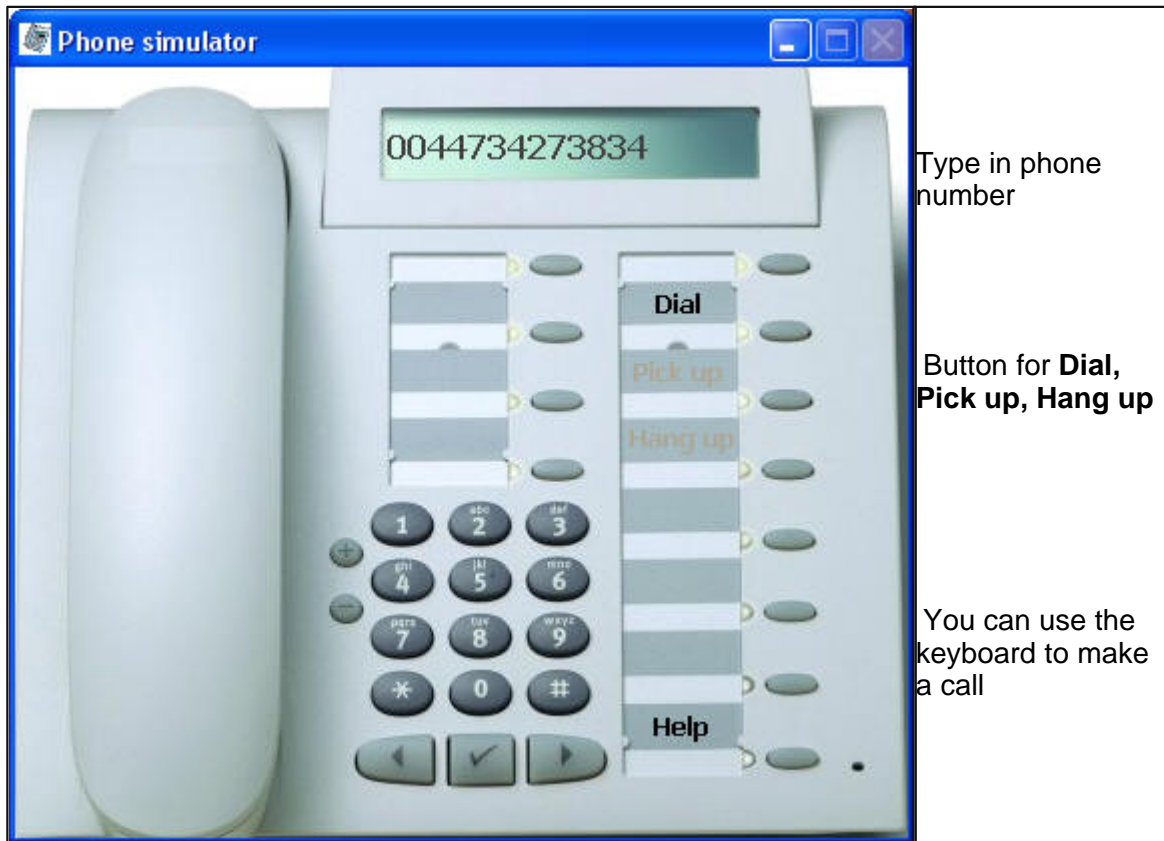
If you have no TAPI-enabled phone available and you want to test CTI Data Connector Office Edition, you can use the simulator which works like a regular telephone.

### Activating the Simulator

Start the Configuration Wizard<sup>[53]</sup> and choose the page where you can select your telephony service provider<sup>[54]</sup>. Choose **<Telephone Simulator>**. When you start CTI Data Connector Office Edition, the simulator will be started automatically.

### Working with the Simulator

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.



### **Simulating an incoming call**

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button **Dial**
- CTI Data Connector Office Edition performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

### **Simulating an outgoing call**

- Search in the phone book<sup>[27]</sup> of CTI Data Connector Office Edition for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by highlighting a phone number<sup>[29]</sup> and pressing the configured Hotkey<sup>[56]</sup>.
- CTI Data Connector Office Edition displays the dialled address
- Establish the call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

**Part**

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## 5 Make Phone Calls

### 5.1 Outgoing Calls

CTI Data Connector Office Edition provides multiple options to make an outgoing call dependent on the application your are using. The option Dial with an Hotkey<sup>[29]</sup> should work in any application.

All available options are:

- Dial using the Phone book<sup>[27]</sup>
- Dial using a Hotkey<sup>[29]</sup>
- Dial within the Browser<sup>[30]</sup>
- Dial with a Hyperlink<sup>[31]</sup>
- Dial using the Clipboard<sup>[32]</sup>
- Redialing list<sup>[32]</sup> (outgoing calls)
- Redial<sup>[33]</sup> using the last called phone number
- Quick dialing<sup>[33]</sup>
- Dial using a Phone Pad<sup>[33]</sup>
- Dial using Call History List<sup>[34]</sup> (incoming calls)
- Dial using the telephone set<sup>[35]</sup> - the dialled address will be displayed<sup>[35]</sup>

#### 5.1.1 Format of a Telephone Number

CTI Data Connector does not care whether phone numbers are stored unstructured or include special characters. It is only important that the numbers comply with the international phone number format. Telephone numbers can be stored as follows:

- 02089481345
- +44(0)2089481345
- 0044(0)2089481345
- 004402089481345 - this is not a valid phone number but would be formatted correctly
- 636.477.8702
- +1636.477.8702

After the country code the number 0 should be surrounded by brackets or be omitted. If the number 0 is not surrounded by brackets, then CTI Data Connector Office Edition uses the dialing settings stored in windows to either truncate the 0 or leave the 0 (e.g. for Italy).

#### Example

- 004402089481345 would result in 00442089481345
- 003902089481345 would result in 003902089481345

## 5.1.2 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check Troubleshooting - Outgoing calls<sup>[132]</sup>.

### Configuration Settings

- Select correct TAPI driver<sup>[55]</sup>
- PBX Configuration<sup>[69]</sup>
- Dialing Rules<sup>[70]</sup> - for US / Canada check additional settings<sup>[71]</sup>
- TAPI Configuration - Prefix Outgoing Calls<sup>[60]</sup>
- TAPI Configuration - Provider Postfix<sup>[61]</sup>
- TAPI Configuration - Ignore Fake Number<sup>[61]</sup>
- Dial via Hotkey<sup>[29]</sup> - configure<sup>[56]</sup> Hotkey and activate this option<sup>[54]</sup>
- Dial within Browser<sup>[30]</sup> - activate this option<sup>[54]</sup>
- Dial with a Hyperlink<sup>[31]</sup> - activate this option<sup>[54]</sup>


If **internal** numbers are not dialled correct, check:

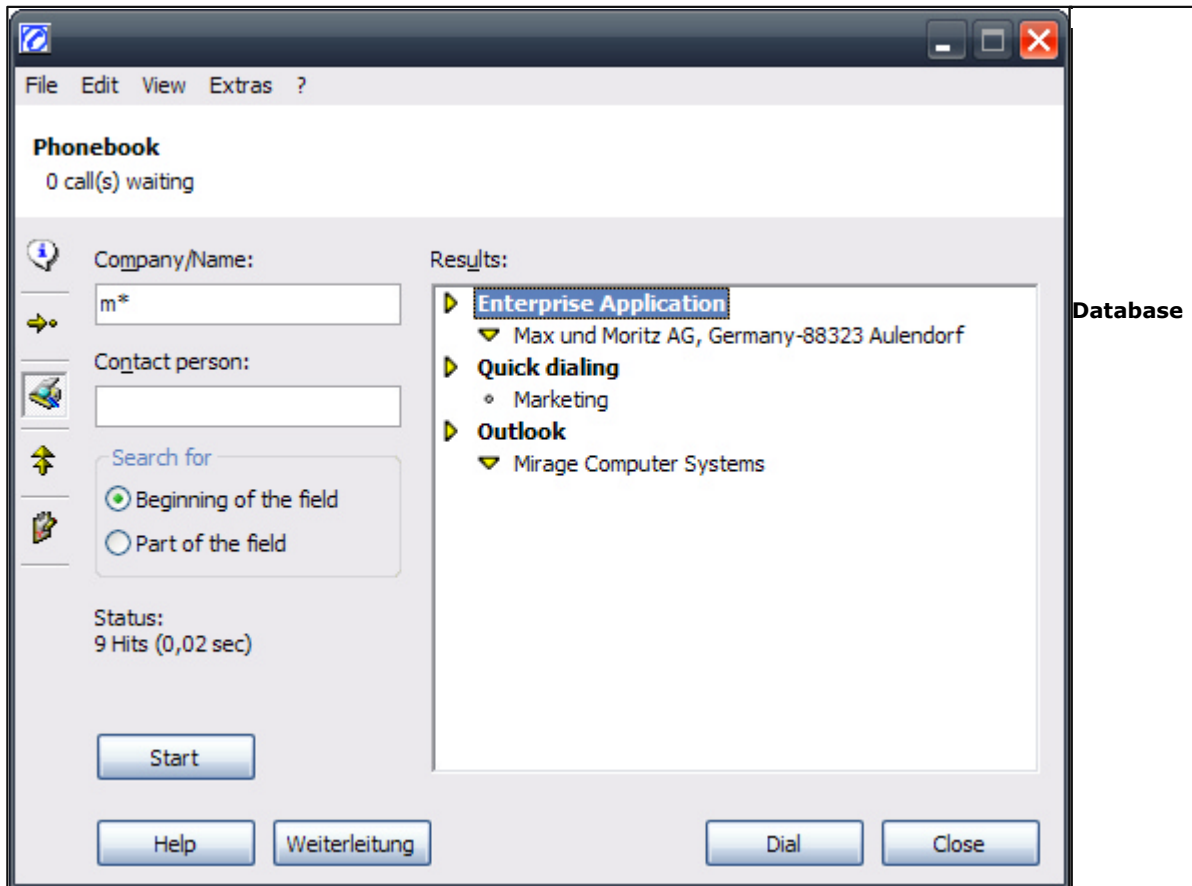
- TAPI Configuration - Prefix internal number<sup>[61]</sup>
- Minimum length<sup>[69]</sup> of phone number indicating an external call

## 5.1.3 Dial with the Phone Book

Here you can search for addresses stored in Microsoft Outlook™ by company name or contact person.

To open the phone book either:

- Right click on the phone icon, select **search address and dial** or
- Right click on the phone icon, select **Open CTI Data Connector Office Edition** and then the symbol 



### **Searching**

Type the search criterion in the field *Company/Name* or *Contact Person* and press the key ENTER or press the button Start.

Example: **M** searches for all company names beginning with the letter M

**i** The field *Contact Person* only supports search by last name

### **Search Option**

- *Beginning of the field* means that the searched address must start with the search criterion. All letters after the search criterion are ignored (the same as searching with \*search criterion\*)
- *Part of the field* means that the search criterion must be a part of a company name/ name. This is corresponding to a search with \*search criterion\*. Searching for Taylor with this option is the same as searching for \*Taylor\* and will result in finding all companies comprising the word Taylor within the company name.

### **Displaying the search result**

All addresses matching the search criterion will be displayed in the window on the right. The list is sorted by the database(s) where the addresses are stored.

Click on the icon  to display **all contact persons**.

### ***Dialing***


To start dialing just click on the contact person. With a **double click** or **right mouse button click** all phone numbers of this contact person will be displayed. Click on a phone number to dial.

The phone number of the main office (phone number retrieved from main account) is always displayed in addition followed by the designation (*main*).

Note: Not available when the address is retrieved from Microsoft Outlook™.

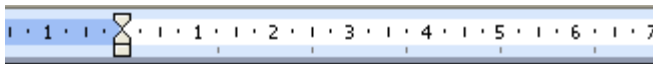
The menu item **Enter number** allows to type in an individual phone number.

#### **5.1.4 Dial with a Hotkey**

In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the configuration settings . **The default value is the key F10.**

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.



United Whiskey Distilleries Ltd  
Freemont Tower  
3 Perkins Bridge  
Windsor  
SL44QQ  
United Kingdom

Phone: **++44734273833**

### **See also**

Troubleshooting - Hotkey is not working 

Configuration - Hotkey to dial with a highlighted phone number<sup>[56]</sup>  
Configuration - Activate dialing via Hotkey<sup>[54]</sup>

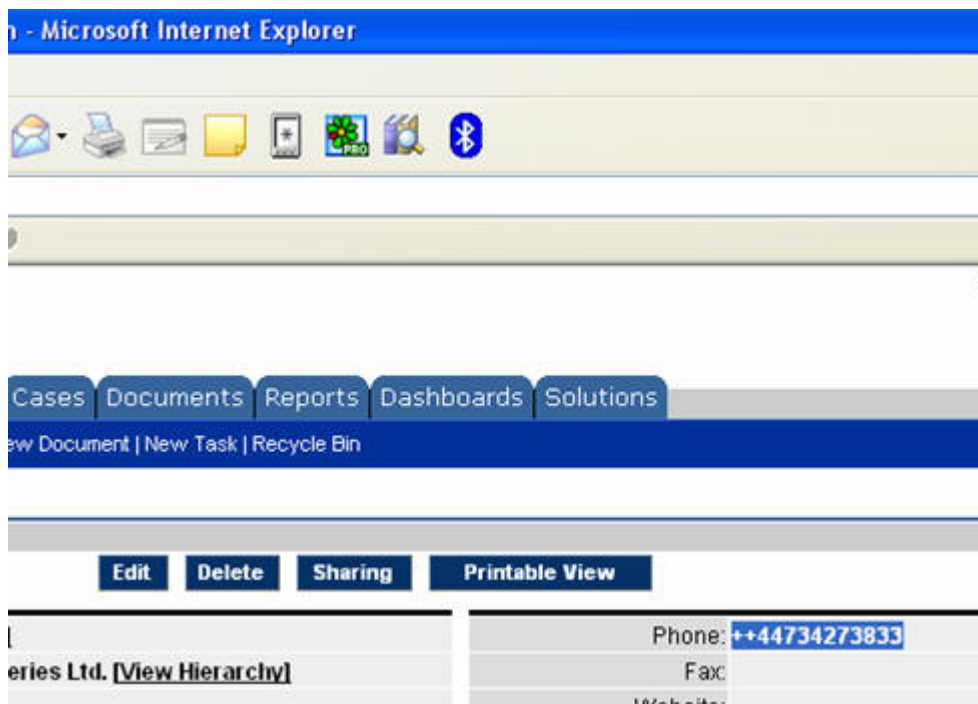
### 5.1.5 Dial within the Browser


Within an Browser any phone number can be **highlighted** and dialled with 2 different options.

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button. You can dial:

- Using the **right mouse button**. The option **Dial with CTI Data Connector Office Edition** will be displayed
- Using a Hotkey<sup>[29]</sup>

In the example below a phone number has been highlighted within a browser application. It can be dialled using the Hotkey or right mouse click, **Dial with CTI Data Connector Office Edition**. You have to activate *Dialing within Browser* and *Dialing via Hotkey* within the configuration settings<sup>[54]</sup>.



 Dialing with right mouse button is available only in the **Internet Explorer**

### **See also**

Enable dialing within Browser 

## **5.1.6 Dial with a Hyperlink**

You can dial with a Hyperlink in Browser applications. To use this functionality, the application has to be modified. Dialing via Hyperlink allows to dial just with a click.

To dial via an hyperlink in a Browser based application, just insert the following command in your application:


```
<a href="callto://phonenummer">phonenummer</a>
```

where phonenummer has to be replaced by the real phone number like


```
<a href="callto://+4970054885342">+4970054885342</a>
```


It is displayed on the screen as follows: [+4970054885342](tel:+4970054885342)

To enable dialing via hyperlink open the Configuration Wizard and check *Activate dialing via Hyperlink* .

 This function is available in all Browsers (e.g. Internet Explorer or Firefox).

### **See also**


Enable Dial with a Hyperlink 

Troubleshooting - Dial with a Hyperlink is not working 

Configuration - Application used for dialing with Hyperlink 


### 5.1.7 Dial with the Clipboard

CTI Data Connector Office Edition is able to analyze the clipboard contents and to extract a phone number.


If you copy a phone number using **CTRL+C / Edit Copy** into the clipboard, you can dial the number by clicking on the icon in the taskbar  with the right mouse button and selecting the option dial from clipboard. CTI Data Connector Office Edition will analyze the clipboard contents and dial the first phone number found.

#### **See also**


Troubleshooting - Hotkey is not working 


Configuration - Hotkey to dial phone number from the clipboard 

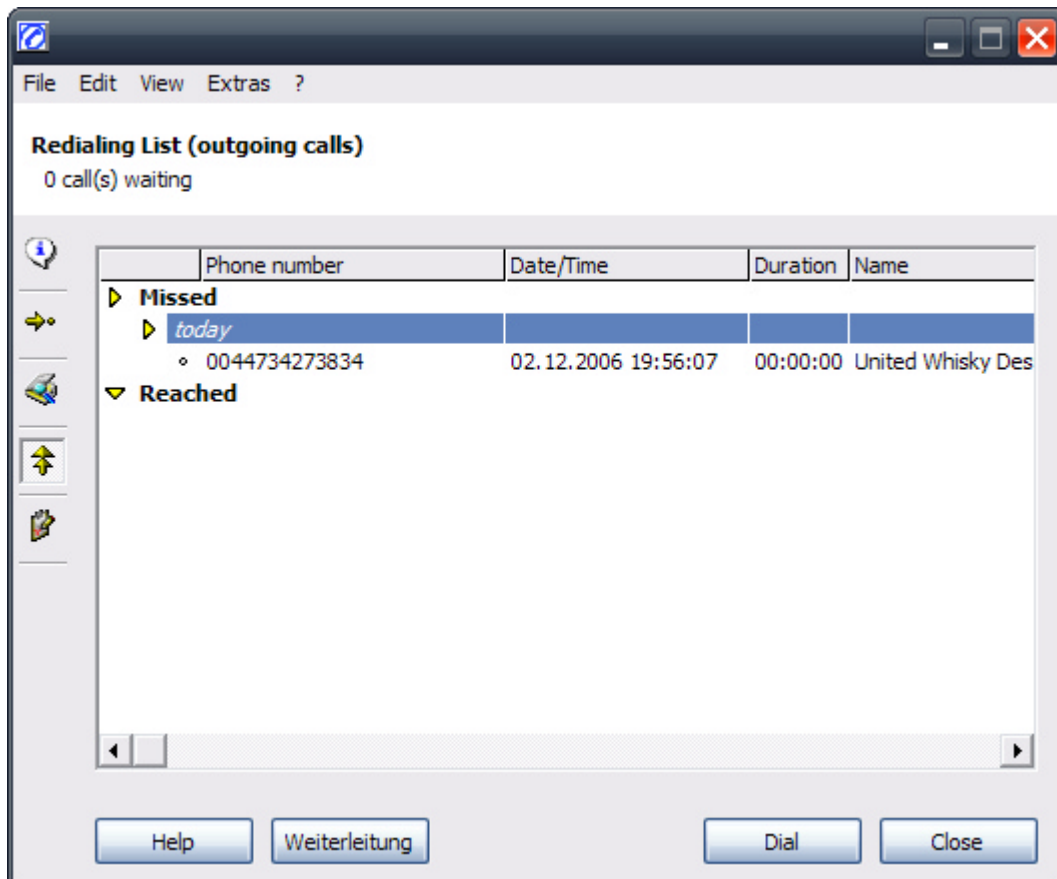
### 5.1.8 Dial using Redialing list (outgoing calls)

You can redial the phone **number used last** via the taskbar , right mouse button, option: *Redialing*. All other phone numbers from outgoing calls are displayed in the redialing list and can be used there for redialing.

All **outgoing calls** - firstly grouped by **Missed / Reached**, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button *Dial*. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer** entry to Quick dialing list (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list. 

The number of entries can be set in the configuration . Once the configured number is reached, the oldest entry will be deleted.



### 5.1.9 Redial - using last called phone number

This option is only accessible with a right mouse click on the icon, option **Redialing**. It dials the phone number last used.

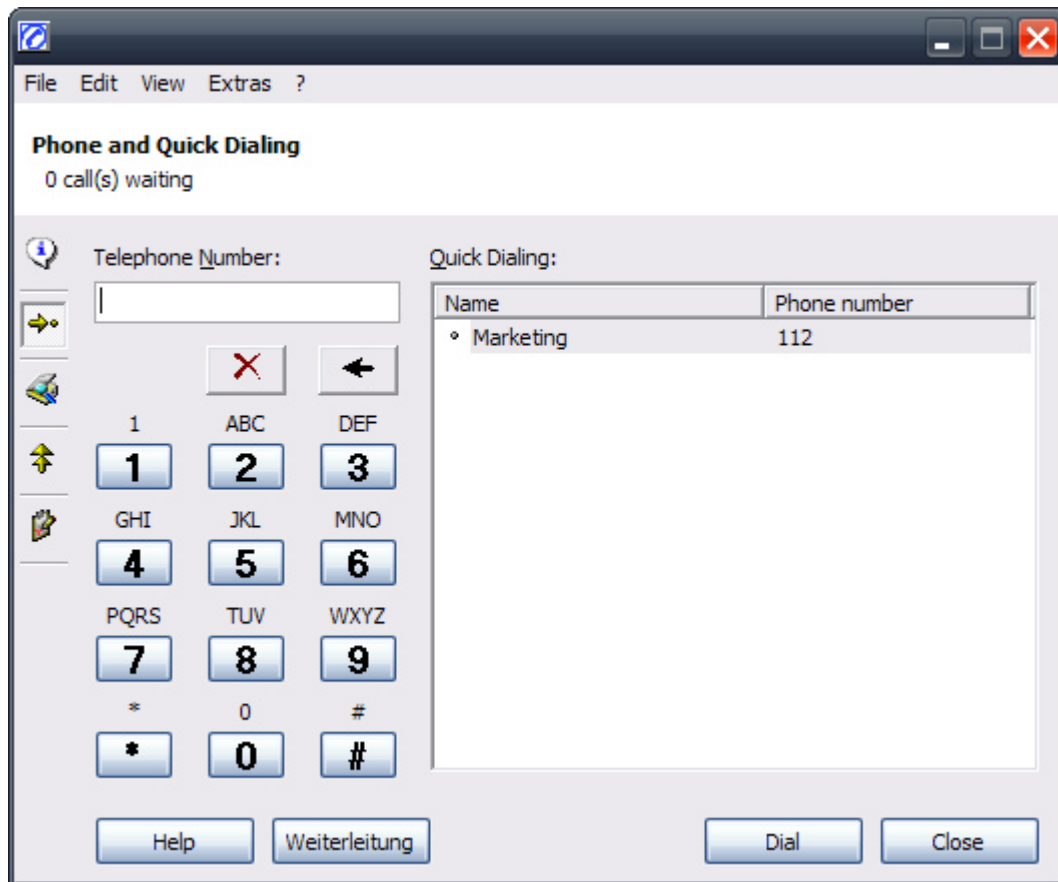
### 5.1.10 Quick Dialing and Phone Keypad

You can type in a phone number in the field **Telephone Number** and dial. Vanity numbers via the keypad are supported (Vanity = dialing with letters - e.g. Hotline = 4685463)

Additionally, you can store any numbers for quick (speed) dialing specifying a name and phone number. By clicking on an entry or pressing the button **DIAL** the number will be dialled. You can add, rename, edit, delete an entry with the menu **Edit -> Quick dialing** or with a **right mouse button** click.

Phone numbers for the Quick Dialing list can be copied from:

- Redialing list<sup>[32]</sup> (outgoing calls)
- Call History list<sup>[34]</sup> (incoming calls)

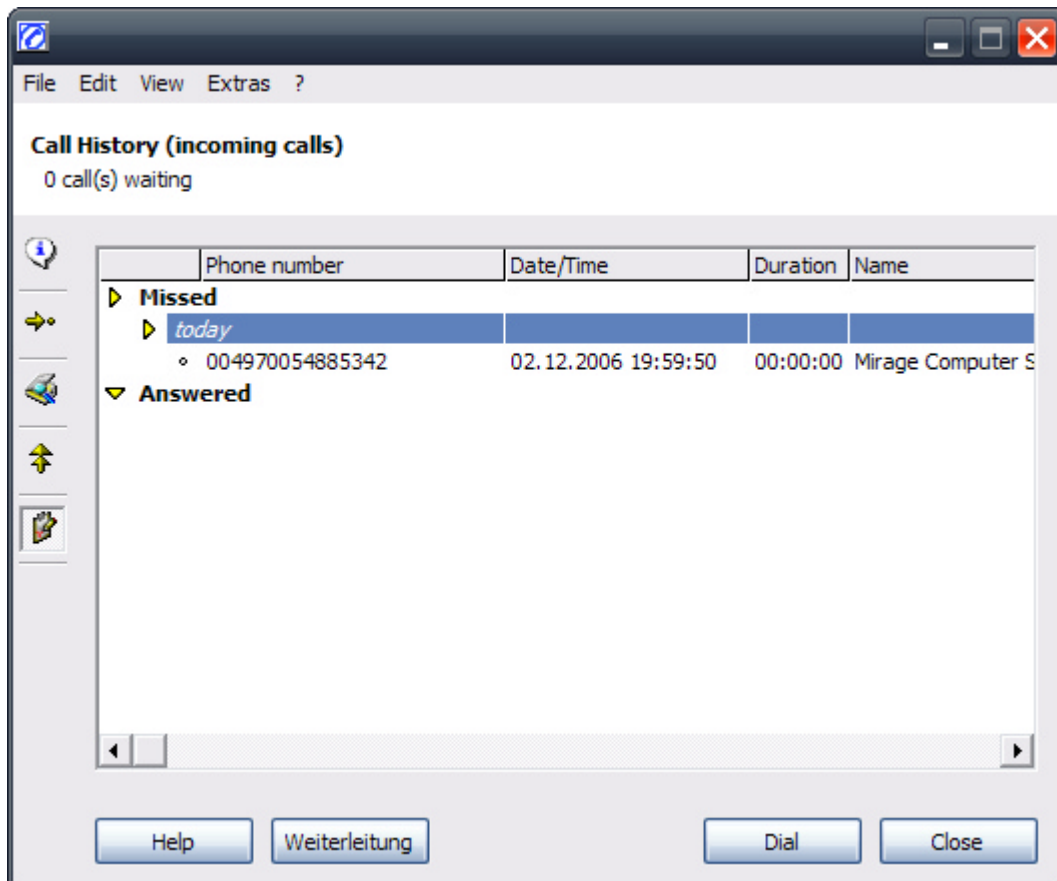


### 5.1.11 Dial using Call History list (incoming calls)

All **incoming calls** - firstly grouped by **Missed /Answered** calls, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button **Dial**. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer entry to Quick dialing list** (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.<sup>[33]</sup>

The number of entries can be set in the configuration<sup>[67]</sup>. Once the configured number is reached, the oldest entry will be deleted.



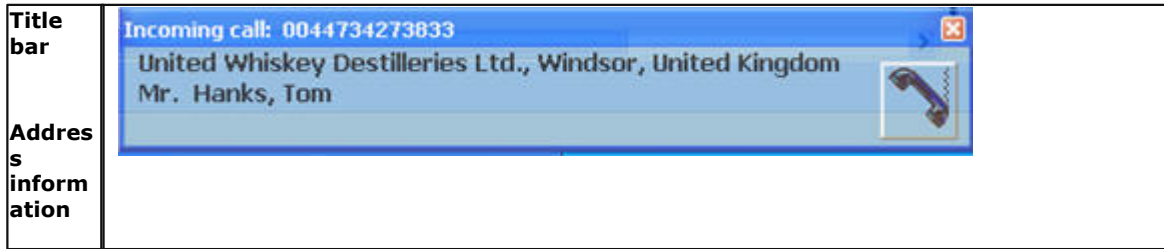
### 5.1.12 Dial with the Telephone Set

You can dial with your telephone set just as you have done previously. CTI Data Connector Office Edition will recognize this dial automatically displaying the address with the contact person you are calling either within the Desktop Notification<sup>[35]</sup> window or the caller information<sup>[37]</sup> box.

### 5.1.13 Signal Call with Desktop Notification

Depending on the configuration<sup>[78]</sup>, an incoming or outgoing call will be **faded in down to the right in a transparent window (Desktop Notification)** or the screen with the call information<sup>[37]</sup> will be displayed.

If you have chosen to use *Desktop Notification*, a **transparent window** with the address information will be displayed - always and independently from the application you are currently using.



The phone number and the information whether it is an incoming or outgoing call will be displayed in the title bar.


The address information includes

- company name, city, country
- name of the contact person

If it is not possible to identify a contact person; the company name will be displayed.

If you **click on the Desktop Notification with the cursor**, the screen with the caller information<sup>[37]</sup> will be opened. Depending on the configuration the customer file in an application can be opened. In case the address is an address stored in Microsoft Outlook, the contact folder in Outlook will be opened.

As long as the mouse pointer is atop of the window, the Desktop Notification will not be closed. It will fade out automatically after the time interval<sup>[78]</sup> specified in the configuration settings has been lapsed.

By clicking on the symbol  the call will be answered. This is necessary when using a headset or a hands-free set.

#### Note

When you use Windows 98, the Desktop Notification screen cannot be displayed transparently due to limitations of Windows 98.

#### **See also**

Configuration Call Notification<sup>[78]</sup>

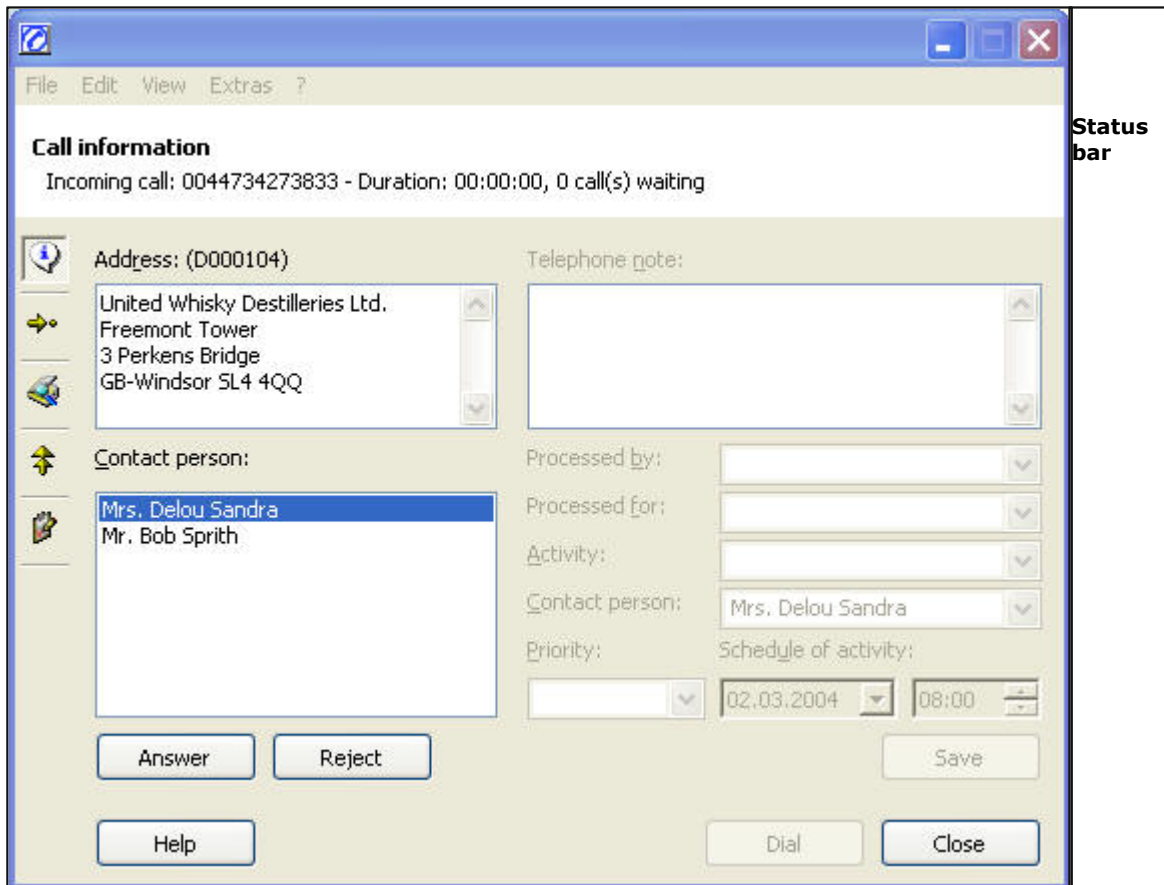
### 5.1.14 Signal Call with Call Details

This screen will be displayed (depending on the configuration <sup>78</sup> settings) automatically when a call is made. Otherwise it can be opened either by:

- Right mouse click on the phone icon - **Open CTI Data Connector Office Edition** during an active call
- Left mouse double click on the phone icon if there is no active call

select 

The **status bar** provides additional call information. Possible messages include: *Incoming or outgoing call, call active and call completed* followed by the phone number. In addition, the duration of the actual call will be displayed in the format of *hours:minutes:seconds*. If another call is coming in while you are phoning, this call will be signalled with the message: *1 call(s) waiting*



Call information  
Incoming call: 0044734273833 - Duration: 00:00:00, 0 call(s) waiting

Address: (D000104)  
United Whisky Distilleries Ltd.  
Freemont Tower  
3 Perkens Bridge  
GB-Windsor SL4 4QQ

Telephone note:

Contact person:  
Mrs. Delou Sandra  
Mr. Bob Sprith

Processed by:  
Processed for:  
Activity:  
Contact person: Mrs. Delou Sandra  
Priority:  
Schedule of activity: 02.03.2004 08:00

Answer Reject Save  
Help Dial Close

Status bar

The label of the buttons can change depending on the call status. During an incoming call you can answer the call by pressing the button **Answer** (or by picking up the receiver). Press the button **Reject** to reject a call. An active call can be set on hold by pressing the button **Hold** (only visible when the call is active). You can go back to the call by pressing the button **Answer**. With the button **Complete** (only visible when the call is active) you disconnect the active call or you can be transferred by pressing the button

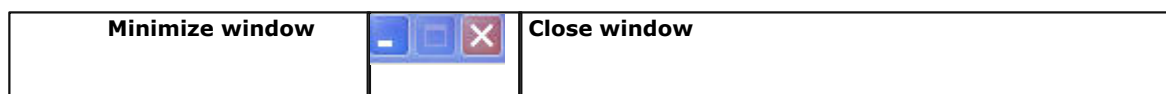
**Transfer Call**  49.

The following information will be displayed:

- **Address:** Customer number, address information 1 and 2, street, country code, zip code and city
- **Contact person:** A selection of the contact persons associated with the address or only one contact person, if the phone number could be linked directly to that contact person. If supported by the database, the form of address and title will be displayed, otherwise only the first and last name.

**Minimizing the screen**

If you want to switch to another program without ending the call documentation, just minimize the window.



If you select the symbol for **Close window** or click on the button **Close**, the call documentation will be terminated. The call itself will not be terminated by closing the window.

**See also**


Configuration Call Notification  78

**5.1.15 Telephone Note and Activities**

This option is only available during an active call and if configured. This feature needs another application to store the phone note.

Depending on the selected database a phone note and activity can be stored. If the address is stored in Microsoft Outlook™, the phone note will be stored in the **Journal** and the follow-up will be stored under **Tasks**.

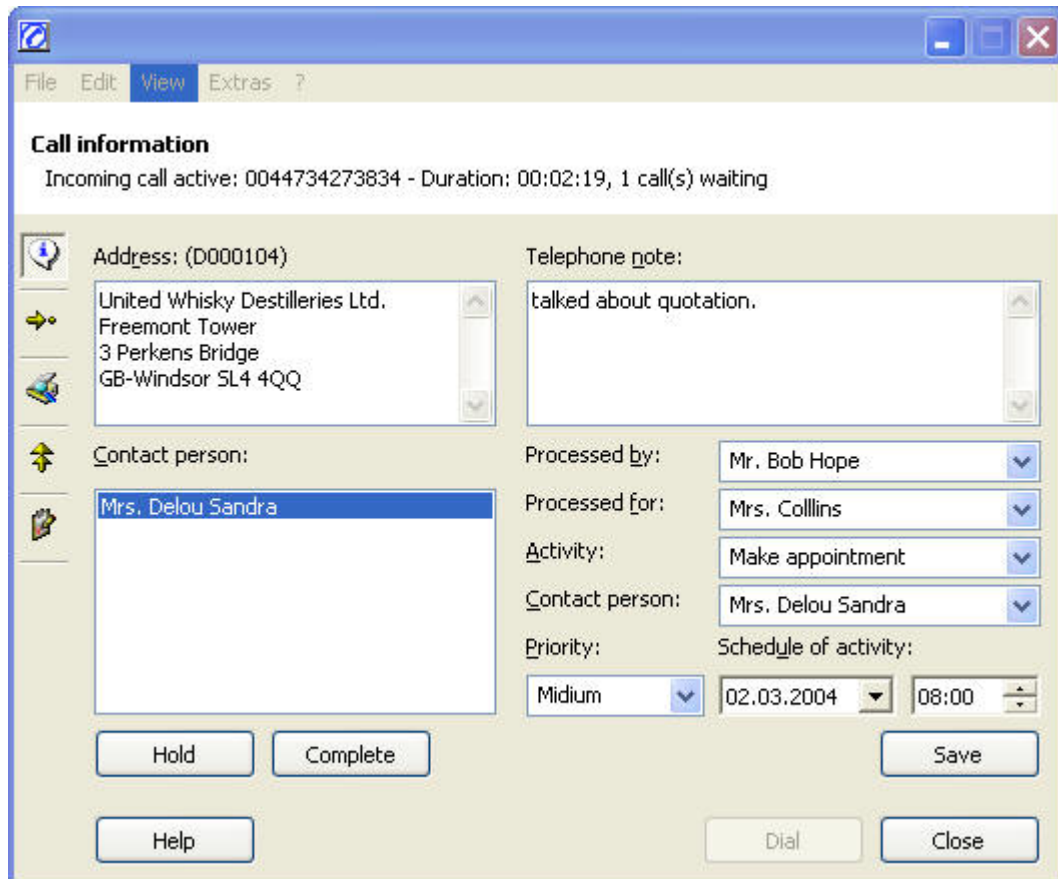
You can type in the following information as phone note and follow-up:

- **Telephone note:** A free text which is stored for the phone call in your database
- **Created by:** Author of the telephone note
- **Assigned to:** Who is responsible for the note/follow-up?
- **Activity:** A selection of actions in a self-learning list-box. The last 10 entered actions will be displayed
- **Contact person:** The contact person of the call  37 is set as the default value but can be changed. The name is stored with the activity
- **Priority:** The priority for the follow-up
- **Due date / time:** Date and Time for the follow-up

## Save

The button **Save** will save the phone note and activities. The data is also saved when the screen is closed.

If the database has more than one client (address is related to several clients), the client can be selected before storing the phone note.



The screenshot shows a software window titled "Call information" with a menu bar (File, Edit, View, Extras, ?). The window displays the following information and controls:

- Call information:** Incoming call active: 0044734273834 - Duration: 00:02:19, 1 call(s) waiting
- Address:** (D000104)  
United Whisky Distilleries Ltd.  
Freemont Tower  
3 Perkens Bridge  
GB-Windsor SL4 4QQ
- Telephone note:** talked about quotation.
- Contact person:** Mrs. Delou Sandra
- Processed by:** Mr. Bob Hope
- Processed for:** Mrs. Collins
- Activity:** Make appointment
- Contact person:** Mrs. Delou Sandra
- Priority:** Midium
- Schedule of activity:** 02.03.2004 08:00

Buttons at the bottom include: Hold, Complete, Save, Help, Dial, and Close.

## 5.2 Incoming Calls

CTI Data Connector Office Edition offers a sophisticated caller identification. To use this feature, you need to configure at least one Microsoft Outlook / Exchange <sup>75</sup> contact folder.

### 5.2.1 How does the caller identification work?

The precondition for the caller identification is the **transmission of the phone number**. Suppressed phone numbers are treated as anonymous calls.

The identification of the phone number is a complex procedure but ensures a high recognition rate.

### **Formatting the phone number**

Normally, phone numbers are stored unstructured (e.g. +1, 001, +1(0)444 and any special characters). The format of the phone number must comply with the international standard format [26] for telephone numbers.

CTI Data Connector Office Edition will convert all phone numbers into an international standard format - see Formatting of Phone Numbers.

### **Analyse and format phone numbers of incoming calls**

The phone number of an incoming call will be extended with the country code, while special prefixes and characters from the phone system will be removed - see configuration settings PBX Configuration [69] and Configuration Caller Identification [73].

If the phone call is a local call and the area code has not been transmitted, an area code will be automatically added - see Dialing Rules. [70]

For internal calls, the main number can be added - see Prefix for internal numbers [61].

### **Identifying an address**

#### **Search step 1**

The phone number, modified as described above, will be used for searching to obtain a 100% hit in the first database. If there is an exact match for a contact person or company address, the search will be terminated and the address with the contact person will be displayed within the Desktop Notification [35].

If there is no exact match in the first database, the search will be extended to other databases, Microsoft Outlook™ [75] or the phone book of the PBX [74] (if configured).

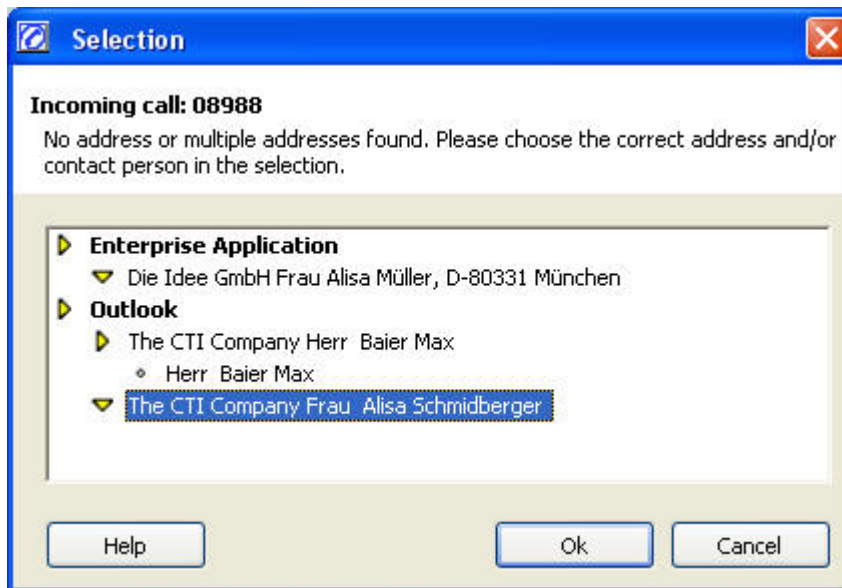
#### **Search step 2**

The phone number will be truncated beginning at the rightmost digit (see configuration details [74]). If there is an exact match for a company address, the search will be terminated and the **address with all contact persons** will be displayed.

If there is no exact match, the search will be extended to Microsoft Outlook™ [75] or the phone book of the PBX [74] (if configured).

#### **Search step 3**

If several addresses are found in the second search step, a selection windows will be displayed where you can select the correct address (only if the option Suppress multiple hits due to identical phone numbers [74] is **not** configured).



Press the button *Ok*, to select a company address or contact person or press the button *Cancel* to proceed without selecting an address for this call.

If the Desktop Notification<sup>[35]</sup> for incoming calls is activated, there will be a message displayed in the notification window stating that the caller could not be identified. By clicking on the notification window, the above described selection screen will appear.

#### Search step 4

If no matching address can be found, the message **< no address identified >** will be displayed.

### 5.2.2 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check Troubleshooting - Incoming calls<sup>[135]</sup>.

#### Address information used for caller identification

- Configured Microsoft Outlook<sup>[75]</sup> contact folders
- Configured Database
- Addresses stored in the PBX system<sup>[74]</sup>

#### Configuration Settings

- Select correct TAPI driver<sup>[55]</sup>
- Configuration Caller Identification<sup>[73]</sup>
- TAPI Configuration - truncate incoming phone number at<sup>[61]</sup>
- TAPI Configuration - Prefix incoming call<sup>[60]</sup>
- TAPI Configuration - Don't signal updated phone number during a call<sup>[62]</sup>

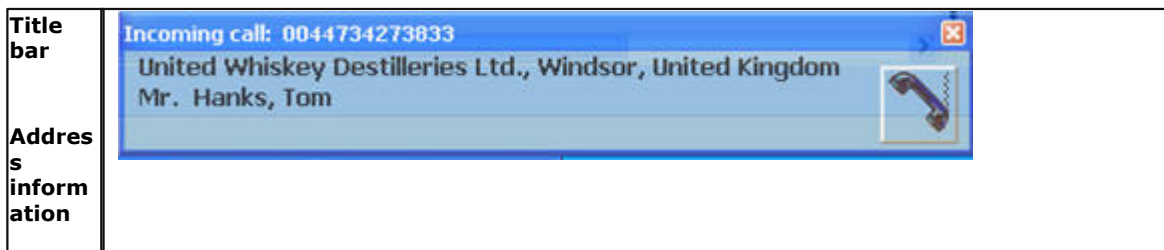
If **internal** numbers are not identified correct, check:

- TAPI Configuration - Prefix internal number<sup>[61]</sup>
- Minimum length<sup>[69]</sup> of phone number indicating an external call

### 5.2.3 Signal Call with Desktop Notification

Depending on the configuration<sup>[78]</sup>, an incoming or outgoing call will be **faded in down to the right in a transparent window (*Desktop Notification*)** or the screen with the call information<sup>[37]</sup> will be displayed.

If you have chosen to use *Desktop Notification*, a **transparent window** with the address information will be displayed - always and independently from the application you are currently using.



The phone number and the information whether it is an incoming or outgoing call will be displayed in the title bar.


The address information includes

- company name, city, country
- name of the contact person

If it is not possible to identify a contact person; the company name will be displayed.

If you **click on the Desktop Notification with the cursor**, the screen with the caller information<sup>[37]</sup> will be opened. Depending on the configuration the customer file in an application can be opened. In case the address is an address stored in Microsoft Outlook, the contact folder in Outlook will be opened.

As long as the mouse pointer is atop of the window, the Desktop Notification will not be closed. It will fade out automatically after the time interval<sup>[78]</sup> specified in the configuration settings has been lapsed.

By clicking on the symbol  the call will be answered. This is necessary when using a headset or a hands-free set.


#### Note

When you use Windows 98, the Desktop Notification screen cannot be displayed transparently due to limitations of Windows 98.

### See also

Configuration Call Notification 

## 5.2.4 Signal Call with Call Details

This screen will be displayed (depending on the configuration ) settings) automatically when a call is made. Otherwise it can be opened either by:

- Right mouse click on the phone icon - **Open CTI Data Connector Office Edition** during an active call
- Left mouse double click on the phone icon if there is no active call

select 

The **status bar** provides additional call information. Possible messages include: *Incoming* or *outgoing call*, *call active* and *call completed* followed by the phone number. In addition, the duration of the actual call will be displayed in the format of *hours:minutes:seconds*. If another call is coming in while you are phoning, this call will be signalled with the message: *1 call(s) waiting*

**Call information**  
Incoming call: 0044734273833 - Duration: 00:00:00, 0 call(s) waiting

Address: (D000104)  
United Whisky Distilleries Ltd.  
Freemont Tower  
3 Perkens Bridge  
GB-Windsor SL4 4QQ

Telephone note:

Contact person:  
Mrs. Delou Sandra  
Mr. Bob Sprith

Processed by: [dropdown]  
Processed for: [dropdown]  
Activity: [dropdown]  
Contact person: Mrs. Delou Sandra [dropdown]  
Priority: [dropdown] Schedule of activity: 02.03.2004 08:00

Buttons: Answer, Reject, Save, Help, Dial, Close

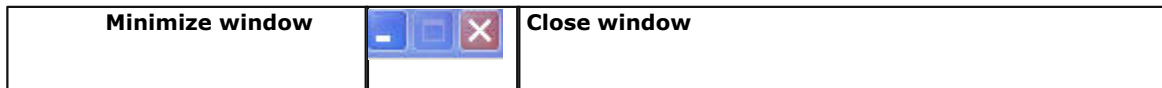
The label of the buttons can change depending on the call status. During an incoming call you can answer the call by pressing the button **Answer** (or by picking up the receiver). Press the button **Reject** to reject a call. An active call can be set on hold by pressing the button **Hold** (only visible when the call is active). You can go back to the call by pressing the button **Answer**. With the button **Complete** (only visible when the call is active) you disconnect the active call or you can be transferred by pressing the button **Transfer Call** <sup>49</sup>.

The following information will be displayed:

- **Address:** Customer number, address information 1 and 2, street, country code, zip code and city
- **Contact person:** A selection of the contact persons associated with the address or only one contact person, if the phone number could be linked directly to that contact person. If supported by the database, the form of address and title will be displayed, otherwise only the first and last name.

### **Minimizing the screen**

If you want to switch to another program without ending the call documentation, just minimize the window.



If you select the symbol for **Close window** or click on the button **Close**, the call documentation will be terminated. The call itself will not be terminated by closing the window.

### **See also**


Configuration Call Notification 

## **5.2.5 Telephone Note and Activities**

This option is only available during an active call and if configured. This feature needs another application to store the phone note.

Depending on the selected database a phone note and activity can be stored. If the address is stored in Microsoft Outlook™, the phone note will be stored in the **Journal** and the follow-up will be stored under **Tasks**.

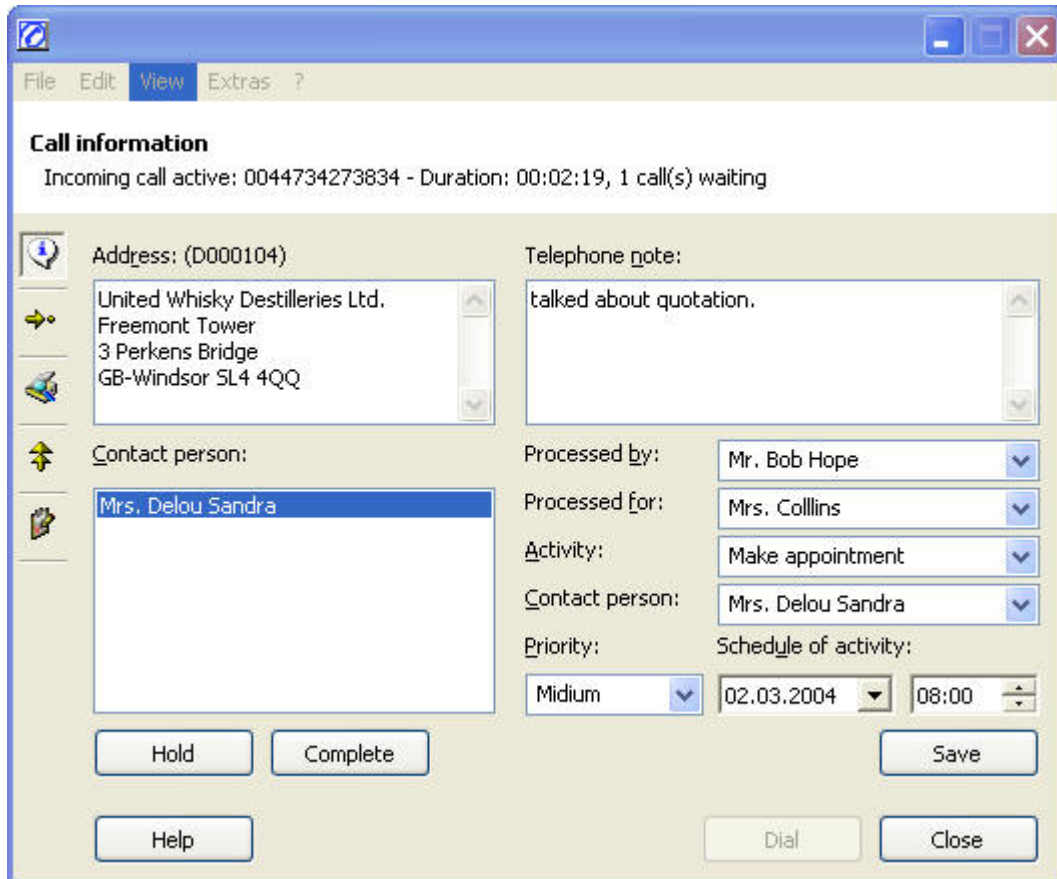
You can type in the following information as phone note and follow-up:

- **Telephone note:** A free text which is stored for the phone call in your database
- **Created by:** Author of the telephone note
- **Assigned to:** Who is responsible for the note/follow-up?
- **Activity:** A selection of actions in a self-learning list-box. The last 10 entered actions will be displayed
- **Contact person:** The contact person of the call  is set as the default value but can be changed. The name is stored with the activity
- **Priority:** The priority for the follow-up
- **Due date / time:** Date and Time for the follow-up


### **Save**



The button **Save** will save the phone note and activities. The data is also saved when the screen is closed.



If the database has more than one client (address is related to several clients), the client can be selected before storing the phone note.




### 5.2.6 Missed Calls (red icon)

If a call is missed, the phone icon turns red . You can now:

- Left mouse double click on the icon to directly open the dialog for missed calls 
- Right mouse click on the icon, select Call History  (incoming calls) - opens the dialog for missed calls

After opening the Call History , the icon color turns back to blue .

 Anonymous calls are not signalled as missed calls.

## 5.3 Call Lists

Mirage Computer Systems GmbH provides call lists for each PC. Calls can be saved only if the PC is turned on.

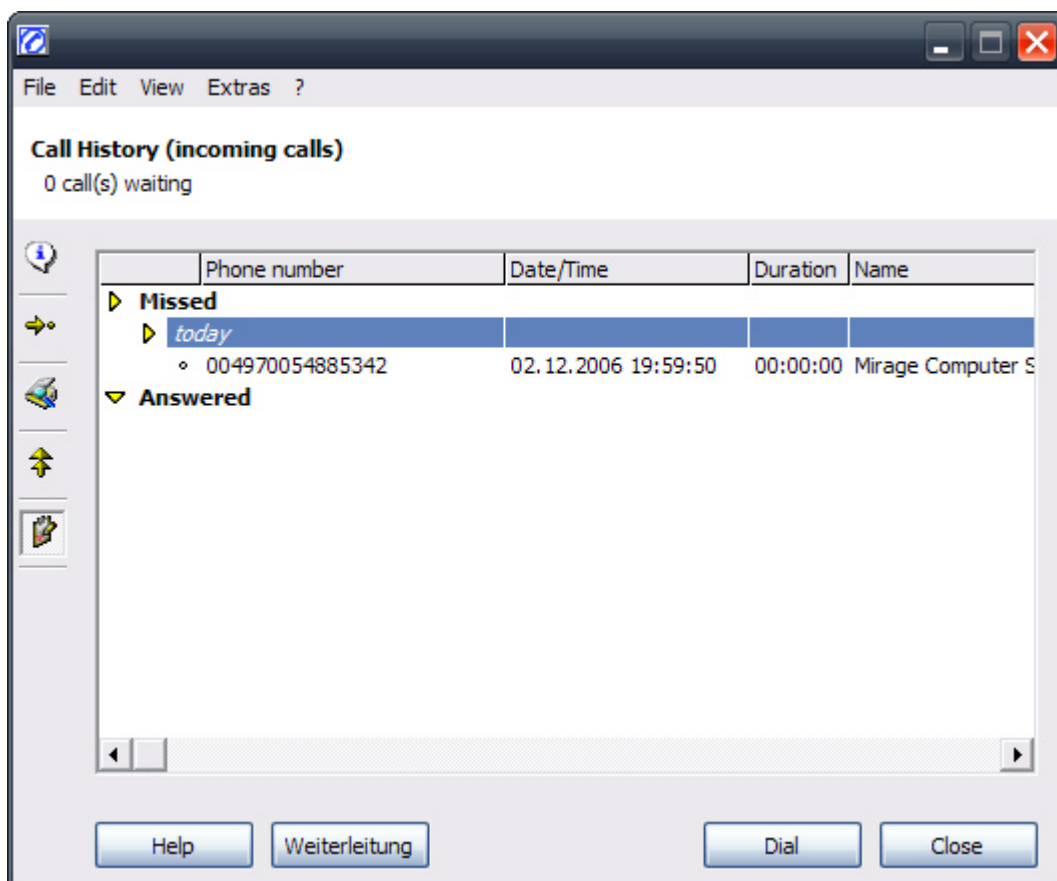
- Call History<sup>[34]</sup> (incoming calls)
- Redialing List<sup>[32]</sup> (outgoing calls)

### 5.3.1 Call History (incoming calls)

All **incoming calls** - firstly grouped by **Missed /Answered** calls, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button **Dial**. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer entry to Quick dialing list** (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.<sup>[33]</sup>

The number of entries can be set in the configuration<sup>[67]</sup>. Once the configured number is reached, the oldest entry will be deleted.



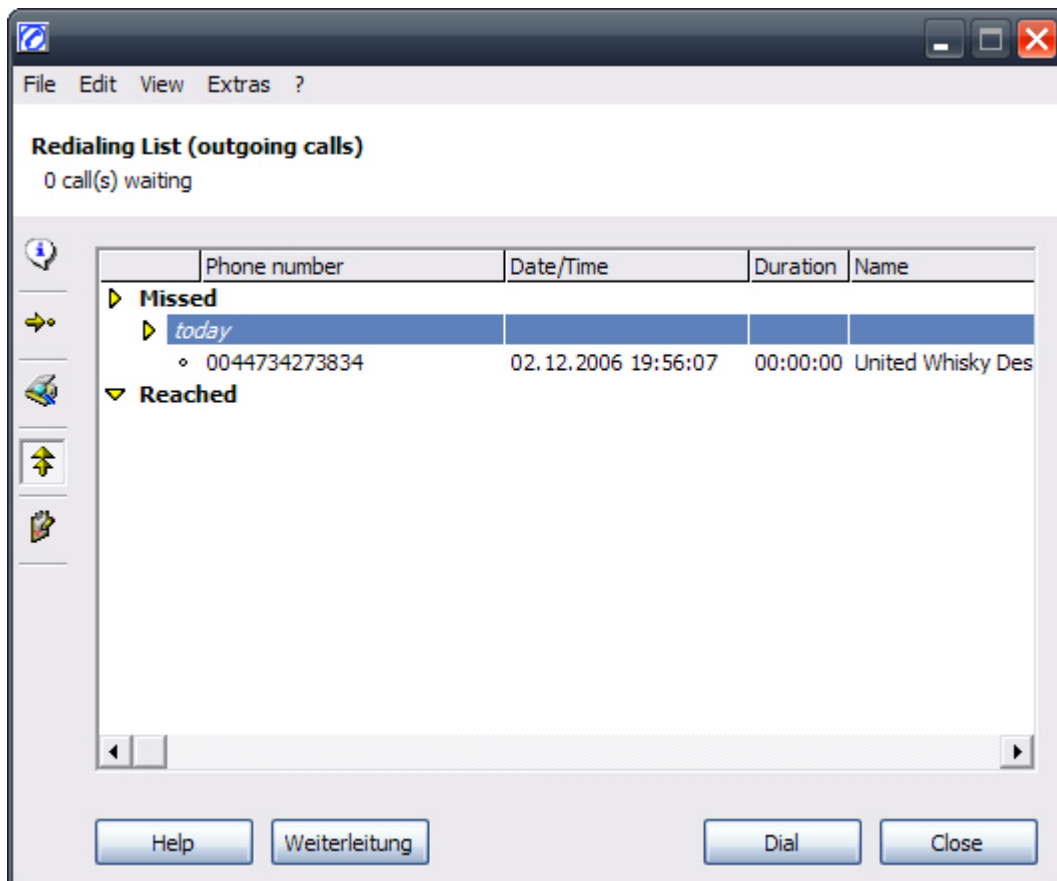
### 5.3.2 Redialing List (outgoing calls)

You can redial the phone **number used last** via the taskbar<sup>[19]</sup>, right mouse button, option: *Redialing*. All other phone numbers from outgoing calls are displayed in the redialing list and can be used there for redialing.

All **outgoing calls** - firstly grouped by **Missed / Reached**, then sorted by date - are displayed here.

A selected entry in the list is picked for dialing by a double click or by clicking on the button *Dial*. Press the key *Delete* to delete an entry. Use the **Edit Menu -> Transfer** entry to Quick dialing list (or use right mouse click *transfer entry* to Quick dialing list) to copy the entry to your personal Quick dialing list.<sup>[33]</sup>

The number of entries can be set in the configuration<sup>[66]</sup>. Once the configured number is reached, the oldest entry will be deleted.



## 5.4 Transfer a Call

Call Transfer allows to transfer a call from your phone to any other phone. This feature is only available during an **active** call.

A call transfer is a mechanism that enables a user to relocate an **active** call to another telephone by using the *call transfer* button and dialing the required location. The transferred call is either **announced** or unannounced (**blind transfer**).

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

On the other hand, an unannounced (**blind**) transfer is self-explanatory: it is transferred without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.


Both options (announced and blind) are supported by CTI Data Connector Office Edition **but not by all TAPI drivers**. If a TAPI driver does not support the transfer feature, this option will not be available in CTI Data Connector Office Edition.

 The way how this feature works in detail depends on the PBX and TAPI driver.

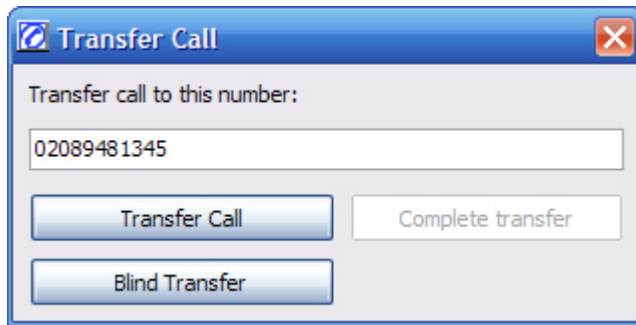
### 5.4.1 Announced Transfer

If the transferred call is **announced**, the desired party/extension is notified of the impending transfer. This is done by putting the caller on hold and dialing the desired party/extension; they are then notified and, if they choose to accept the call, it is transferred over to them.

During an active call you can either

- **Left** click on the phone icon and select *Transfer Call* or
- Use the *Transfer Call* button within the Control Centre 

A new screen appears. Type in the number to which the call should be transferred and press the button **Transfer Call**.



You then have 2 options:

- Press **Back to Active Call** to talk again with the caller or
- Press **Complete Transfer** to transfer the call to the desired party


### See also

Blind Transfer  50

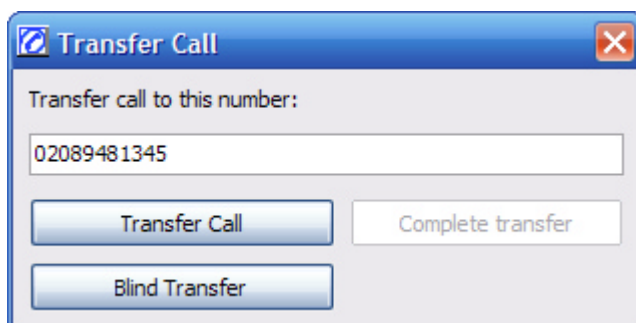
## 5.4.2 Blind Transfer

A **blind transfer** is a call without notifying the desired party/extension of the impending call. It is simply transferred to their line typing in the phone number and terminating the call.

During an active call you can either

- **Left** click on the phone icon and select *Transfer Call* or
- Use the *Transfer Call* button within the Control Centre  21

A new screen appears. Type in the number to which the call should be transferred and press **Blind Transfer**. The call is transferred to the desired party.



***See also***

Announced Transfer 

**Part**


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**VI**



## 6 Configuration Wizard

### 6.1 Introduction










The Configuration Wizard of CTI Data Connector Office Edition offers several steps for making configuration settings. You can navigate through the pages with the buttons **Next** and **Back**. To apply the new settings, the program for formatting phone numbers will be automatically started on the local PC.

The Configuration Wizard can have **different options and steps depending on the installation**. The maximum is 6 steps and an introduction page. Note that this description may differ from your installation. It is mandatory to configure the minimum configuration .

#### **How to start the Configuration Wizard?**

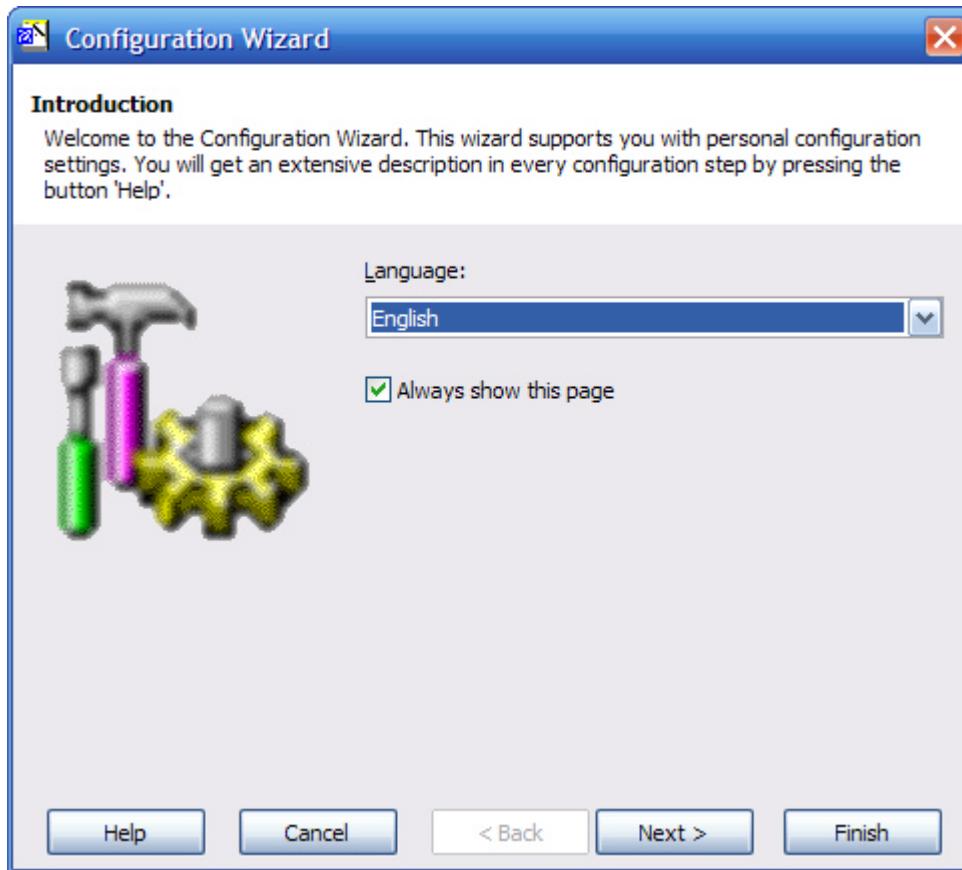
Start the Configuration Wizard by clicking on the icon in the taskbar  with the right mouse button and select the option **Configuration Wizard** or select the menu *Extras - Configuration Wizard* in the control centre .

#### **Overview of all configuration steps**

- Introduction - Select the language  for CTI Data Connector Office Edition
- Configuration of the TAPI device driver , Hotkeys , Expert Settings  and Browser Dialing 
- Configuration of the PBX  and Caller Identification 
- Configuration of Microsoft Outlook™ 
- Configuration Call Notification 

## 6.2 Select Language

You can select the language for the application. If you want to skip this screen in the future, deselect *Always show this page*.

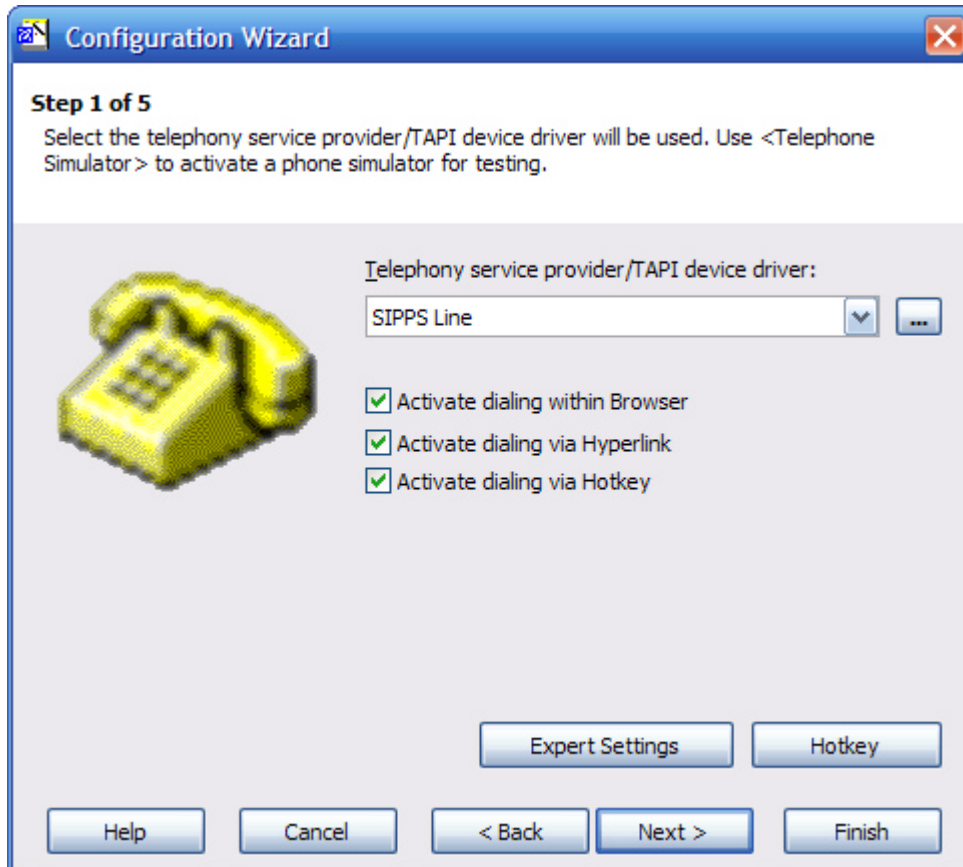


## 6.3 TAPI device driver , Hotkey, Expert Settings, Browser Dialling

Here you can configure the TAPI driver<sup>[55]</sup> and the dialing options which should be activated.


- Activate dialing within a Browser<sup>[58]</sup>
- Activate dialing via Hyperlink<sup>[58]</sup>
- Activate dialing via Hotkey<sup>[56]</sup>

If available, the dialog for Expert Settings<sup>[58]</sup> can be started.

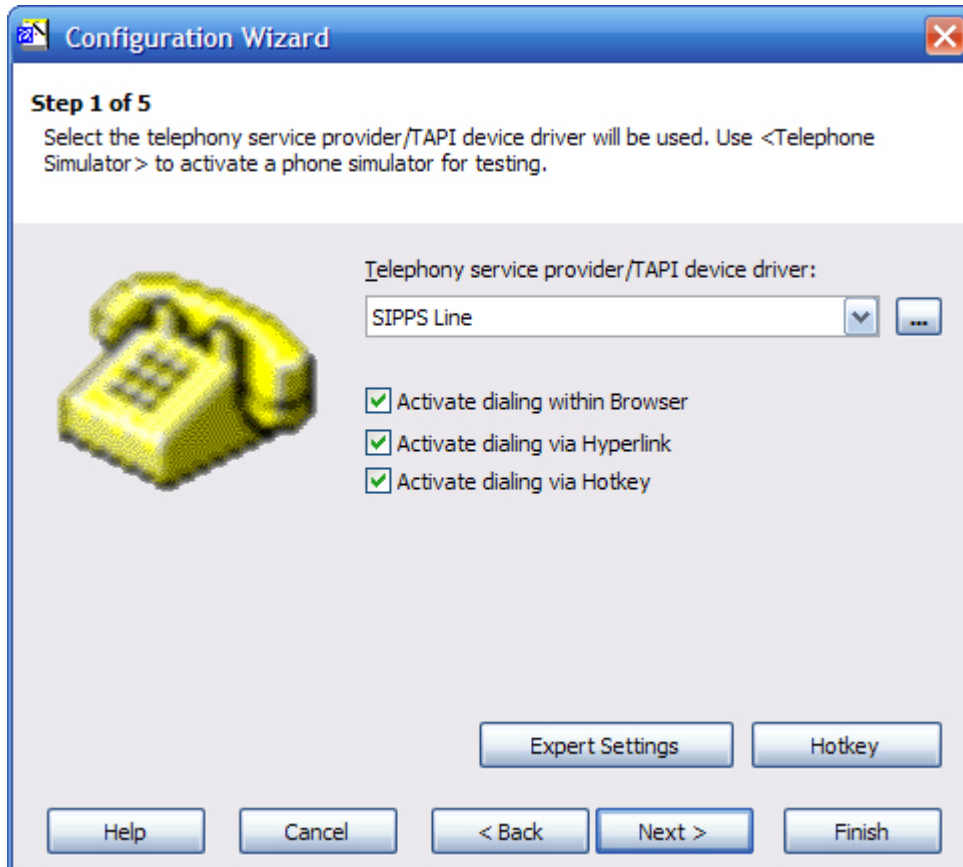


### 6.3.1 TAPI Driver

Select the TAPI device driver for incoming and outgoing calls from the list box. See details for TAPI - Where do I find the TAPI driver?<sup>[114]</sup>

With the button  a window can be opened where all functions supported by the TAPI driver will be shown.

With the driver <**Telephone Simulator**> CTI Data Connector Office Edition can be tested with a phone simulator<sup>[23]</sup> if no TAPI enabled phone is available.



### **See also**

Where do I find this screen? [\[54\]](#)

System Requirements [\[113\]](#) TAPI driver

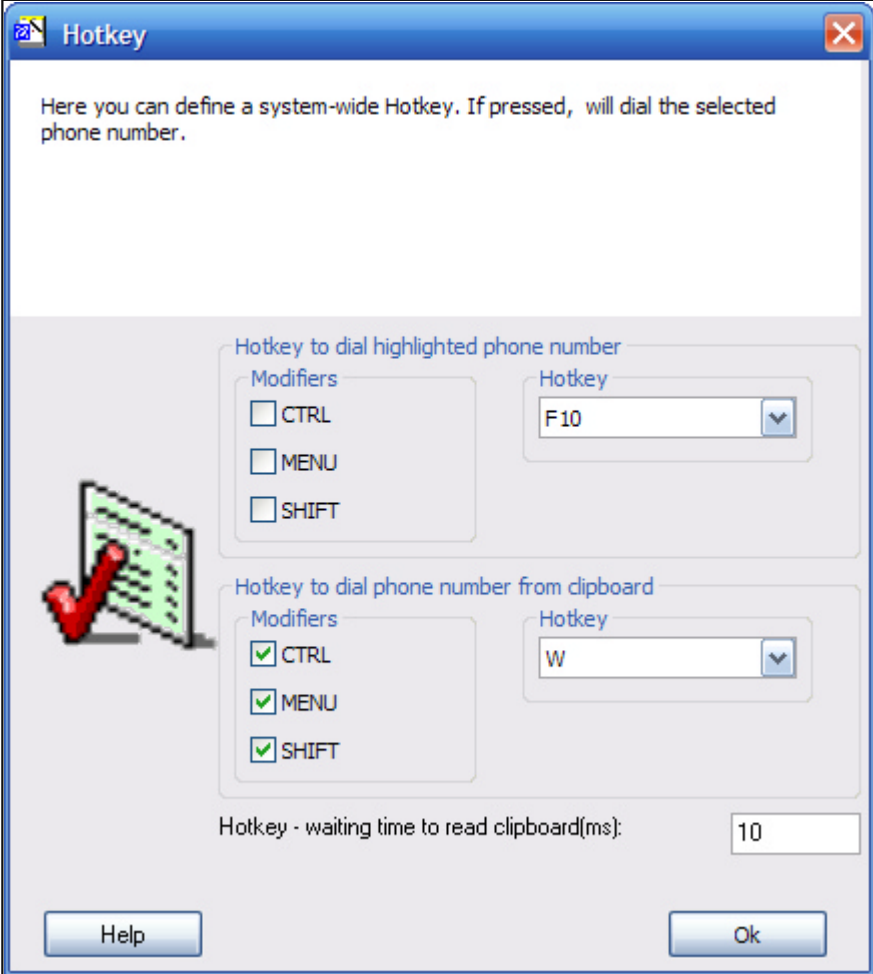
Where do I find the TAPI driver? [\[114\]](#)

## **6.3.2 Configure Hotkeys**

Hotkeys are used to dial with a shortcut from any application. You first have to select Activate dialing via Hotkey [\[54\]](#) before it can be used. Press the button *Hotkey* for configuration.

### **Hotkey to dial highlighted phone number**

This Hotkey allows to dial by highlighting a phone number and press the Hotkey. For details see Dial with a Hotkey [\[29\]](#). The default value is **F10**.



You can choose any key combination (e.g. CTRL + ALT + F10) for outgoing calls. You should select a combination that is not used by other programs.

### **Hotkey to dial phone number from the clipboard**

This Hotkey allows to dial a phone number which is stored in the clipboard. For details see Dial with the Clipboard<sup>32</sup>. The default value is CTRL + MENU + SHIFT + W to make sure that other programs are not affected. If you use this functionality change the default to a value which:

- is not used by other programs
- which can be accessed easily - e.g. CTRL+C = Copy value to clipboard - CTRL + D = dial (note: CTRL D could be used by other applications for the delete function)

### **Hotkey - waiting time to read clipboard**

If the Hotkey<sup>29</sup> for dialing is not working, then either the Hotkey is already in use (change Hotkey) or other applications like the Office clipboard manager are blocking the clipboard. The Hotkey copies the phone number into the clipboard and therefore needs access to the clipboard. Increase the waiting time before information of the clipboard will be read. The time is specified in a thousandth part of a second. Default time is 10 = 1 hundredth part of a second. The maximum value is 98.

**See also**

Where do I find this screen? [54](#)  
Troubleshooting - Hotkey is not working [135](#)  
Dial with the Clipboard [32](#)  
Dial with a Hotkey [29](#)

**6.3.3 Configure dial options for Browser**

There are 2 Browser options which can be enabled.

**Activate dialing within Browser**

This option allows to dial via right mouse click within the Browser. For details see Dial within the Browser [30](#).



Dial with right mouse button is available only in the Internet Explorer

**Activate dialing via Hyperlink**

This option allows to dial via Hyperlink. For details see Dial with a Hyperlink [31](#).

Dialing via Hotkey [56](#) is also working within a Browser.


**See also**

Where do I find this screen? [54](#)  
Troubleshooting - Dial with a Hyperlink is not working [134](#)  
Configuration - Application used for dialing with Hyperlink [56](#)

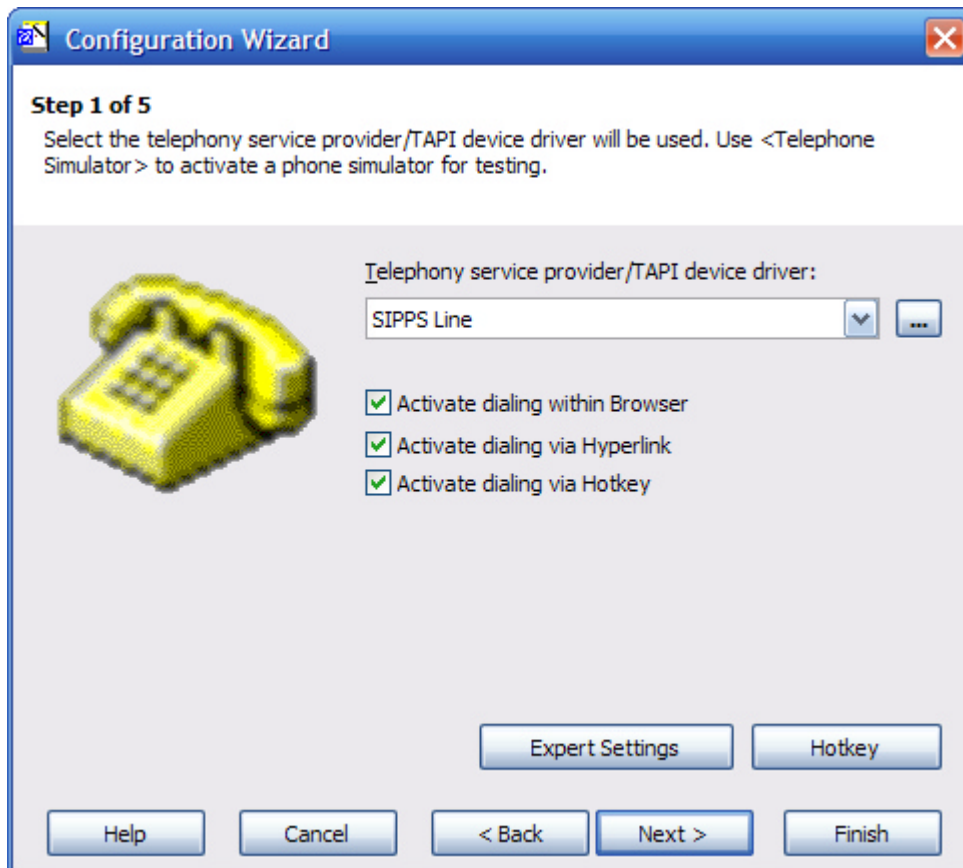
**6.4 Expert Settings**

CTI Data Connector Office Edition allows to configure a lot of additional settings which have an impact on:

- Handling of a call
- Provide a workaround for TAPI driver issues
- Handling of the development interface to other applications
- and other specific settings

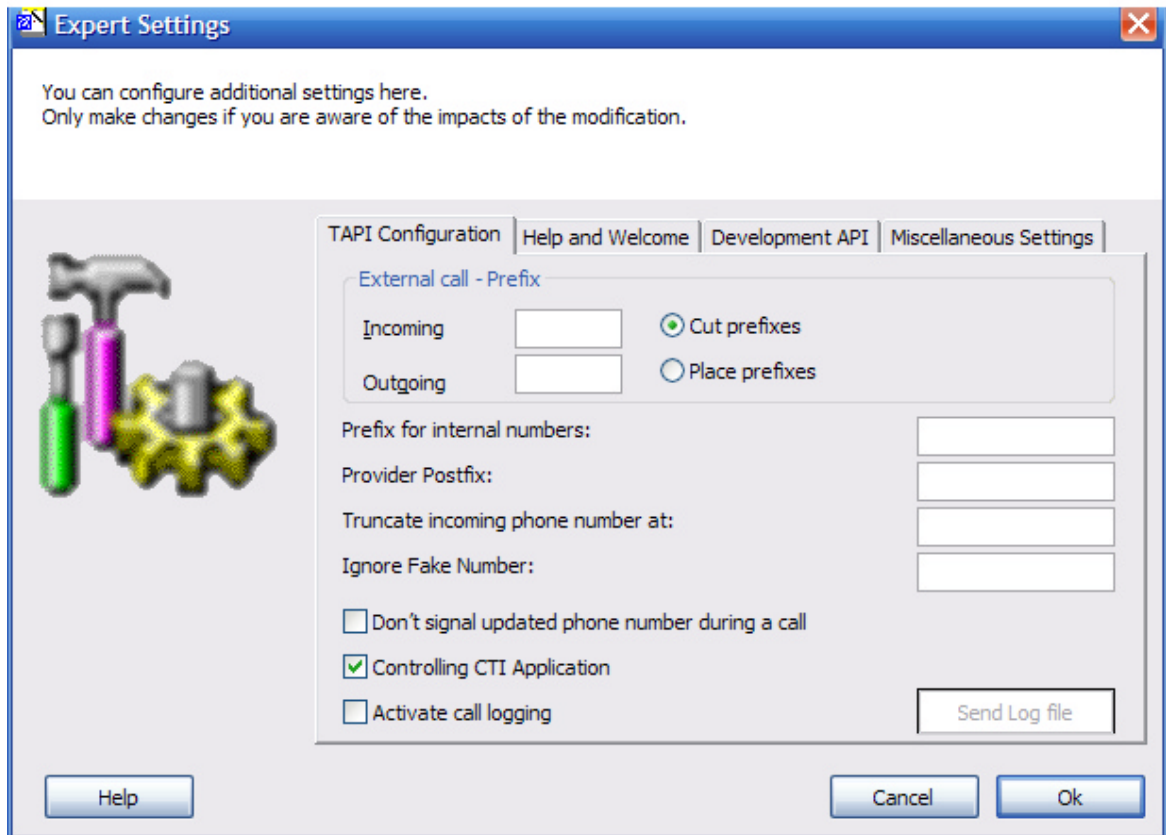
 Only experienced users should change these settings

Depending on the system configuration, this option can be disabled. Otherwise press the button *Expert Settings* in Step 1 of the Configuration Wizard.



### 6.4.1 TAPI Configuration

The following settings have an impact on the TAPI interface or call handling.



#### External call - Prefix

If the TAPI driver adds a prefix for an external call, this prefix can be removed. Otherwise prefixes can be added before the number is dialed.


##### Example

The phone number 0734273830 is signalled as **00**734273830. In this case the prefix 0 has to be removed to allow a correct caller identification.

If the TAPI driver signals the incoming phone number **without a leading 0**, then configure: Place prefix, Incoming.

##### Example

The phone number 0734273830 is signalled as 734273830. In this case the prefix 0 has to be added for incoming calls to allow a correct caller identification.

 By default, the prefix to get an outside line is added as *Outgoing*, *cut prefix* to automatically remove the prefix after dialing.

### **Prefix for internal numbers**

This function allows to place a prefix **in front of** an internal number. It is not used for dialling - only for **incoming and outgoing caller identification**.

#### Example

For all employees the complete phone number is stored in the database, e.g. 07342/7383-12. For an incoming call, only the extension number is signalled, e.g. 12. In order to find the name of the calling person, the prefix 7383 has to be added. Additionally, CTI Data Connector Office Edition adds the area code, configured in the country settings<sup>54</sup>.

Configure **7383** for the prefix which will firstly create the number 738312 and then will add the area code. This results in the new number 07342738312 which will allow to identify the caller.

### **Provider Postfix**

This function allows to add a postfix **at the end** of a phone number for **outgoing calls**.

#### Example

IP providers often require a # at the end of the phone number to dial the number instantly.

Configure # for the postfix which would dial 07342738312#

### **Truncate incoming phone number at:**

This option is needed with IP phones and a TAPI driver which passes the phone number with IP information.

#### Example

The phone number is passed as 0734273830@myprovider.com. This option allows to truncate all characters after the specified character - e.g. @.

### **Ignore Fake Number**


Some TAPI drivers firstly send a special number for **outgoing calls** and then the correct phone numbers. To allow for the special number being treated as a fake number being ignored, configure the fake number.

#### Example

The TAPI driver firstly sends 879 and then the correct phone number.

Configure **879** as the fake number.


### **Don't signal updated phone number during a call**

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard), the new phone number will be updated by default in the Desktop Notification . The update can be suppressed by checking this option.


### **Controlling CTI Application**

If an application uses the windows dialer, CTI Data Connector Office Edition can be configured to handle all requests that go to the windows dialer. This allows to use the call logic for outgoing calls of CTI Data Connector Office Edition .

### **Activate call logging**

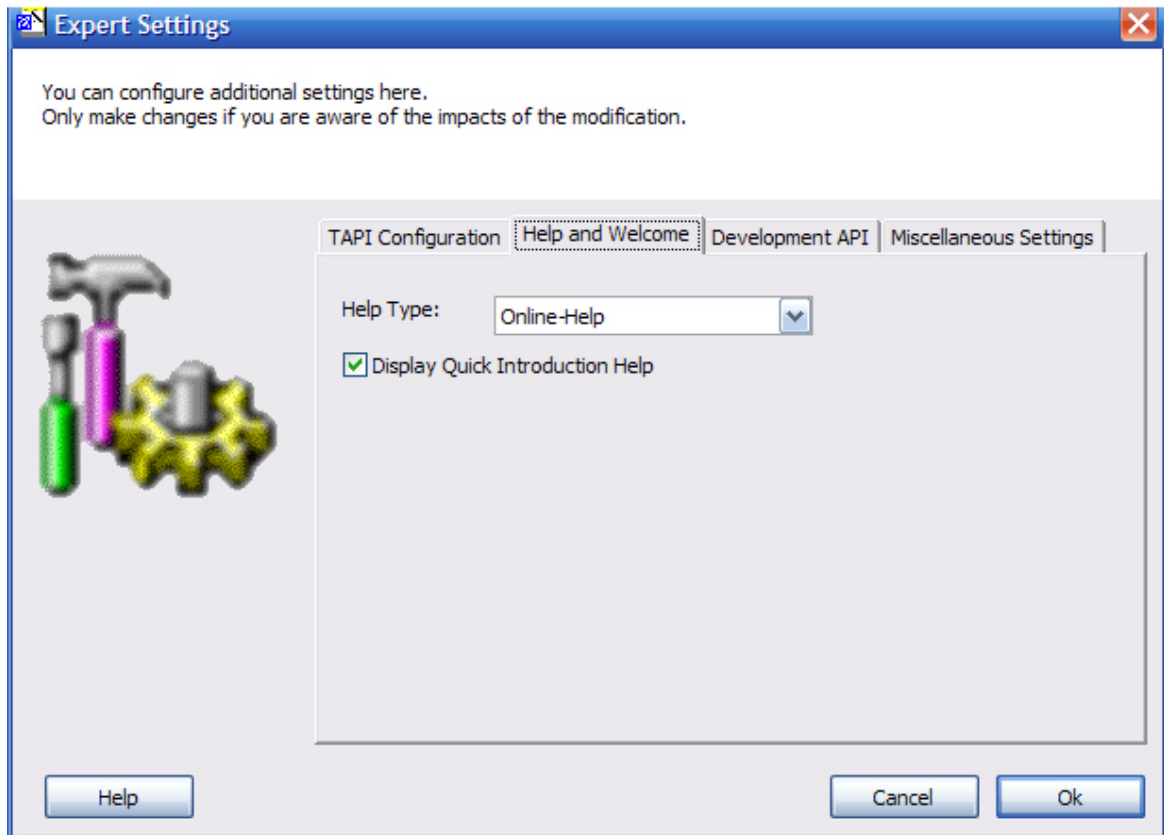
This configuration is intended for service purposes. It logs the events of the TAPI device driver. See Troubleshooting - sending a log file how to send a log file  to support.

### ***See also***

Where do I find this screen? 

## 6.4.2 Help and Welcome

The following settings allow for configuring help options.



### **Help Type**

2 different types of help is offered


- Online Help - this is the most up-to-date help (updated even after program release). It is recommended using this help
- Offline Help - this help program is stored on the local hard disk drive and can be used, if no Internet connection is available

 The offline help works with Windows XP SP2 / Vista only with a single user installation

### **Display Quick Introduction Help**

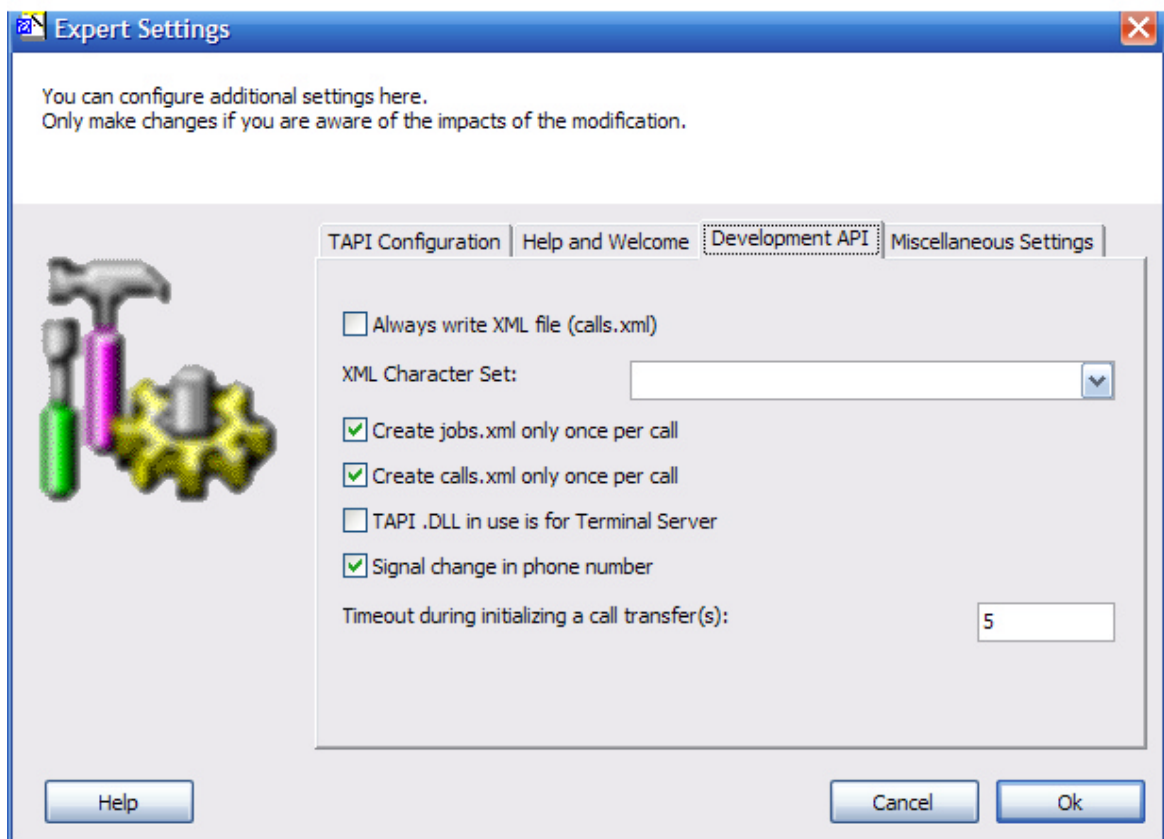
Check this option to have the Welcome Screen  displayed during each program start.

### See also


Where do I find this screen?  58

### 6.4.3 Development API

These settings have an impact on the development API using the calls.xml and jobs.xml file to handle phone events.



#### **Always write XML file (calls.xml)**

The default option specifies that a call is passed to an external program only after clicking on the Desktop Notification  window. This option allows to always pass the caller data via the calls.xml file independently from clicking on the Desktop Notification.

#### **XML Character Set**

The character set for the calls.xml and jobs.xml file can be changed. This is necessary in order to pass caller data stored with different character set. Default is UTF-8.

### Example



The address data is stored in the database with Greek characters. In order to pass the address data it is necessary to change the default character set.

 The character set of the Desktop Notification  cannot be changed.

### **Create jobs.xml only once per call**

If checked, the jobs.xml will be created only once per call. Otherwise the file will be created each time the Save button is pressed.


### **Create calls.xml only once per call**

If checked, the calls.xml will be created only once per call. Otherwise the file will be created for each TAPI event like ring, hold, terminate, provided that the user clicks **once** on the Desktop Notification . See also: Always write XML file (calls.xml) .


### **TAPI .DLL in use is for Terminal Server**

Special TAPI.DLL - requires Software Development Kit for Terminal Server.


### **Signal change in phone number**

Using this option will signal in the calls.xml file, if the phone number has changed **during a call**. This event can happen when a call is redirected. See also: Don't signal updated phone number during a call .

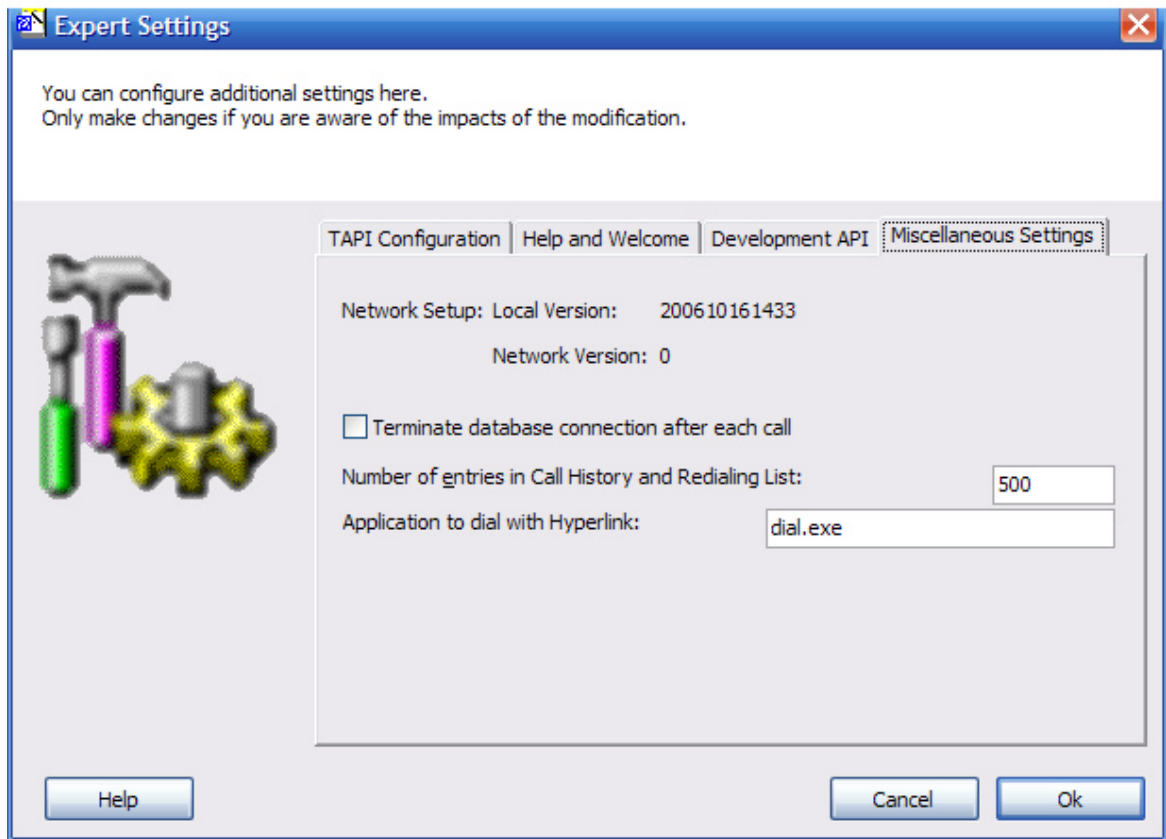
### **Timeout during initializing a call transfer**

This switch is used for the option Transfer a Call . It is the waiting time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds.

### **See also**


Where do I find this screen? .

### 6.4.4 Miscellaneous Settings



#### **Terminate database connection after each call**

If an Access database is used in a network environment and not all PCs shut down CTI Data Connector Office Edition during night, this database can never be backed up because it is always in use. Use this option to allow for back-up or compression of a database.

 Depending on the usage of the database this option may significantly slow down the performance.

**Never use this option on the server and never in combination with an SQL database.**

#### **Number of entries in Call History and Redialing list**

Define the number of entries in the redialing list <sup>32</sup> and call history list <sup>34</sup>.

### **Application to dial with Hyperlink**

Defines the executable which is used by Windows **callto:** command - see [Dial with a Hyperlink](#)<sup>[31]</sup>.

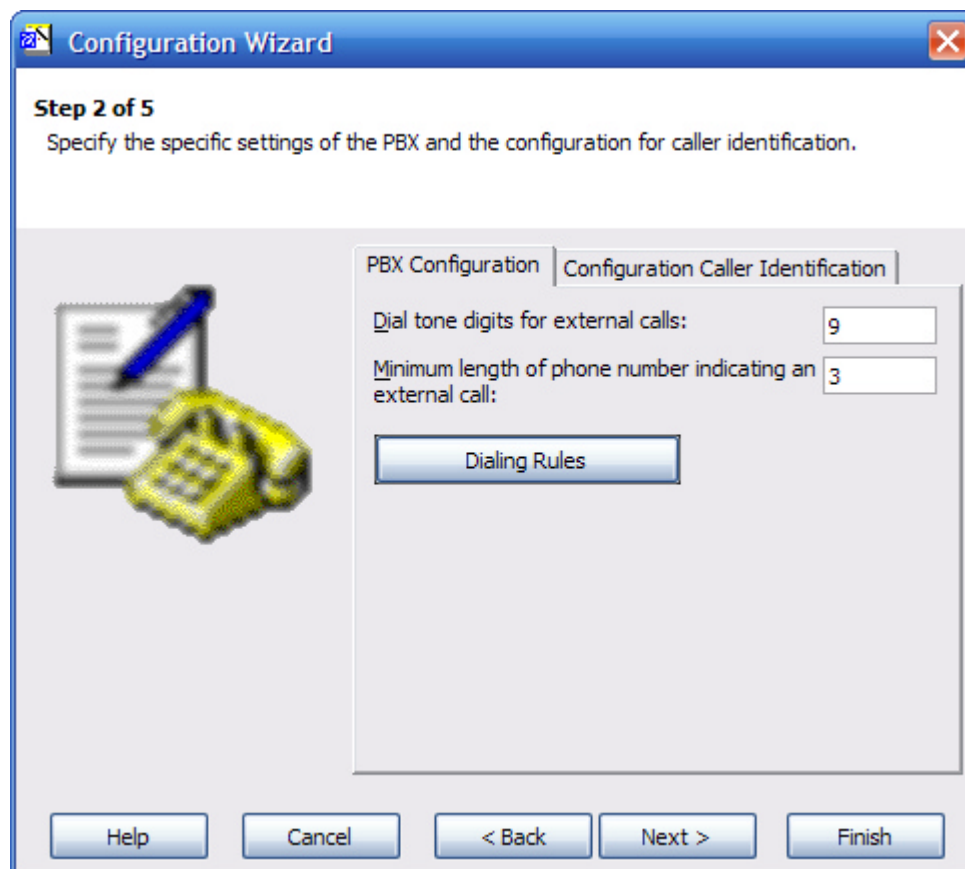
This command may be used by other applications like Skype. If CTI Data Connector Office Edition should use this functionality, disable in Skype: **callto:** links in other applications. The default value for CTI Data Connector Office Edition is **dial.exe**.

### **See also**


Where do I find this screen?<sup>[58]</sup>


## **6.5 Configuration of the PBX and Caller Identification**


This screen allows to specify PBX specific settings and how to handle caller identification.




**See also**

PBX Configuration 

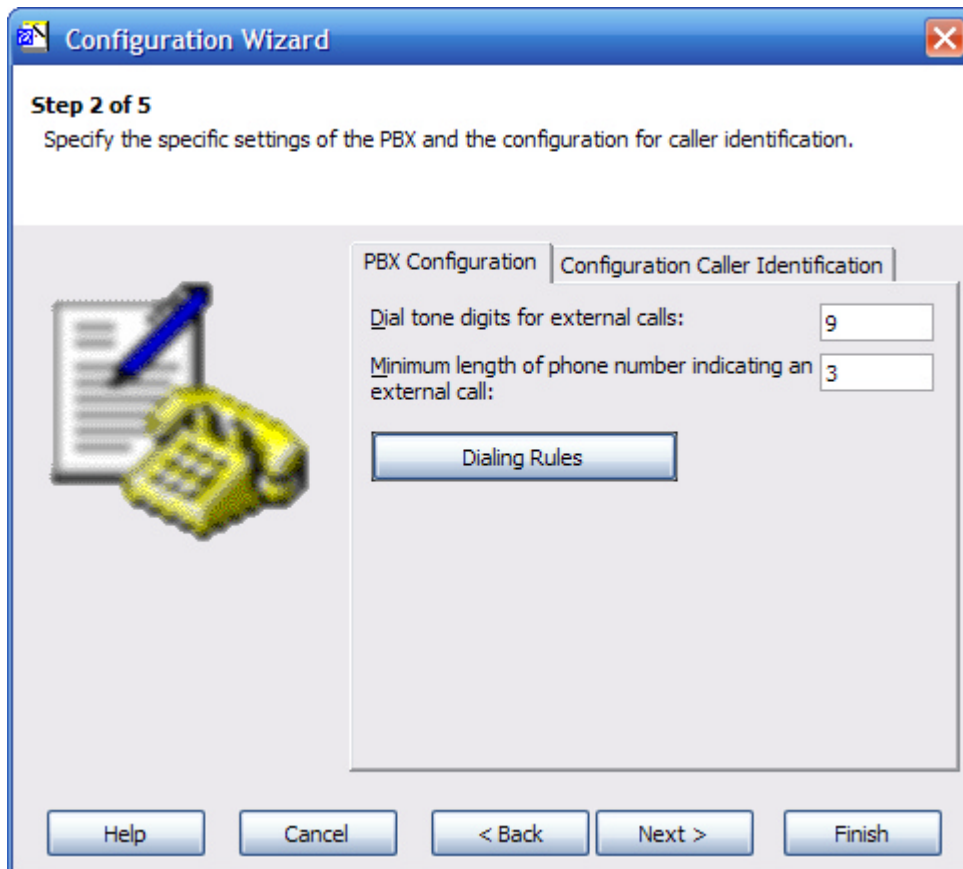
Dialing Rules 

Dialing Rules for US / Canada 

Configuration Caller Identification 

### 6.5.1 PBX Configuration

Basic Configuration settings for handling outgoing calls and PBX specific functions.



#### **Dial tone digits for external calls**

Specify the digit which is necessary to get an outside line for external calls, e.g. 0 or 9. This prefix is added automatically for external calls. Also see dialing Rules [70](#) for extended configuration.

#### **Minimum length of phone number indication an external call**

For distinguishing between internal and external calls type in the maximum length of the internal phone number + 1 (Example: The internal phone numbers are 0 to 99; an external number would be defined by using 3 digits).

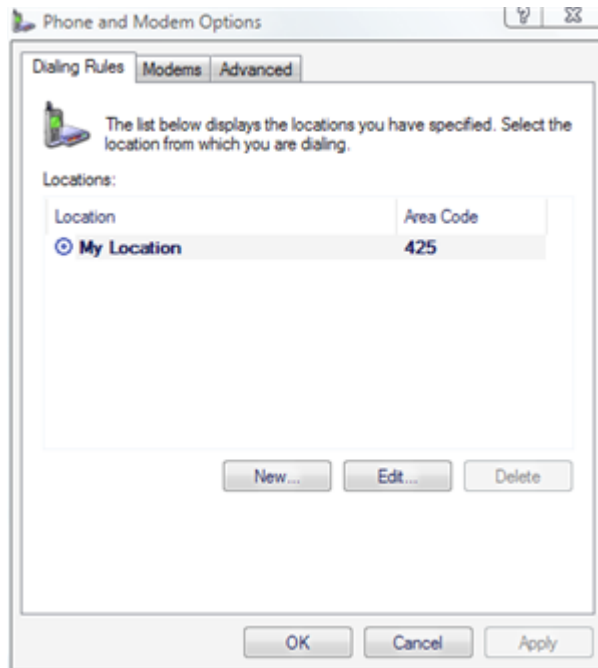
#### **See also**

Dialing Rules [70](#)

Dialing Rules for US / Canada 

### 6.5.1.1 Dialing Rules

With the button **dialing Rules** the country settings and area code settings can be modified. It is important to configure the correct **area code and country code**.



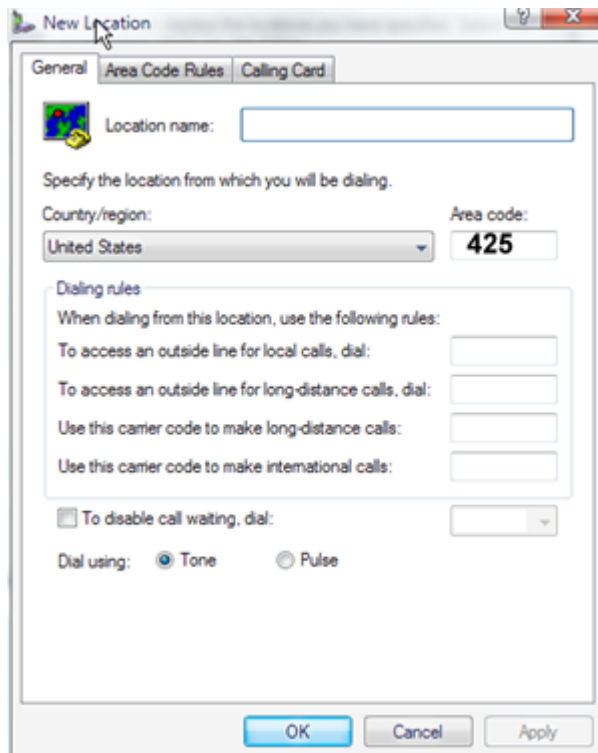
Outside US / Canada it is sufficient to add the country/ region and the area code **without the leading 0**. Never add a dialing rule because rules like prefixes are covered within CTI Data Connector Office Edition settings.

#### Example


Area Code: 425- never use **0425** for area code as 0 is part of the dialing rule which is automatically retrieved from the country settings.

For **US / Canada** see special considerations for dialing rules .

**Outside US / Canada:** Press the button *Edit*: Select your **Country/Region** and Area Code without the leading 0 or 1. The fields Outside Line for local calls, long-distance calls, carrier code for long-distance calls and international calls **must be empty**.



### See also

Where do I find this screen? 

#### 6.5.1.2 Dialing Rules for US / Canada

As there are different dialing rules for local and long distance calls in the USA, these rules have to be defined within CTI Data Connector Office Edition **AND** the Windows dialing rules.

##### Example

Your local area code is 214. To dial an outside line you firstly have to dial 9. In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Let us assume 469 and 972 should be treated as a local call.

CTI Data Connector Office Edition has to dial:

- 9.214.415.9160
- 9.469.415.9160
- 9.972.415.9160

and for long distance calls

- 91 407-398-6913

### **Configuration within CTI Data Connector Office Edition**

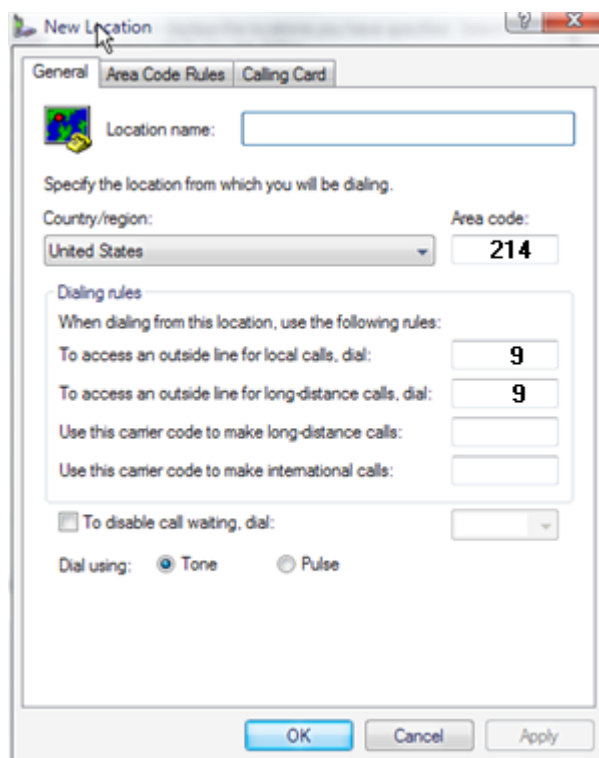
Set Dial tone digits for external calls  to 9

### **Configuration within Windows**

Press the button *dialing Rules*, or within Windows select Open Phone and Modem Options by clicking the **Start** button, clicking **Control Panel** and then clicking **Phone and Modem Options**.

#### TAB - General

Configure: Area code: 214; outside line for local calls: 9; outside line for long distance calls: 9




#### TAB - Area Code rules

In some places, some prefixes within an area code are considered local calls, and other prefixes within the same area code are considered long distance. Use this tab to specify those relationships and the rules for dialing those numbers.


In the New Area Code Rule dialog box, specify how certain phone numbers in the same

or other area codes need to be dialed. Include all the prefixes to be used for this area code.

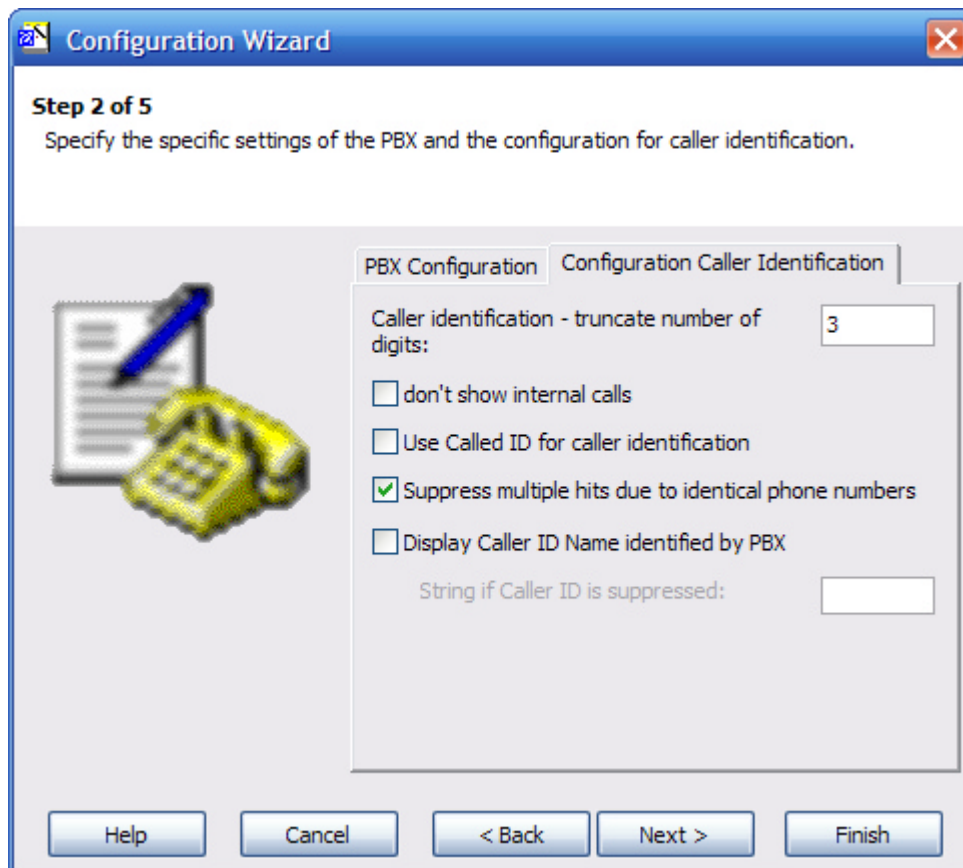
- Leave the field Dial empty
- Check: *Include the area code*.

 CTI Data Connector Office Edition supports the dialing rules only, if Country/Region is set to United States or Canada.

### See also

Where do I find this screen? 

## 6.5.2 Configuration Caller Identification



The screenshot shows a Windows-style dialog box titled "Configuration Wizard" with a close button (X) in the top right corner. The dialog is at "Step 2 of 5" and contains the instruction: "Specify the specific settings of the PBX and the configuration for caller identification." On the left side, there is an icon of a yellow telephone handset next to a document with a blue pen. The main area has two tabs: "PBX Configuration" and "Configuration Caller Identification", with the latter being selected. Under the "Configuration Caller Identification" tab, there are several settings:

- "Caller identification - truncate number of digits:" followed by a text box containing the number "3".
- A checkbox labeled "don't show internal calls" which is unchecked.
- A checkbox labeled "Use Called ID for caller identification" which is unchecked.
- A checked checkbox labeled "Suppress multiple hits due to identical phone numbers".
- A checkbox labeled "Display Caller ID Name identified by PBX" which is unchecked.
- "String if Caller ID is suppressed:" followed by an empty text box.

At the bottom of the dialog, there are five buttons: "Help", "Cancel", "< Back", "Next >", and "Finish".

### **Caller identification - truncate number of digits**

CTI Data Connector Office Edition can truncate a phone number until a phone number with a direct match is found.

#### Example

Incoming number: 0044734273**833**. This number is not associated with a contact person, but the number of the main office with 0044734273-0 is stored. After 3 digits having been truncated, the number of the main office will be found. If this logic is not needed, type in 0. The default value is 3.

#### US or Canada

This option must be 0 because extensions can not be dialled directly.

### **Don't show internal calls**

If selected, the caller information  for **internal calls will not be displayed**. For distinguishing between internal and external calls, the value in the field Minimum length of phone number indicating an external call  will be used.

### **Use Called ID for caller identification**

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number that was called (Called ID) is to be used, select this option.

#### Example

You provide a phone service for 10 companies and you offer a line for each company. Whenever a phone comes in, the number that was called (line for company 1 to 10) including the company name is to be displayed.

### **Suppress multiple hits due to identical phone numbers**


If records are stored multiple times (the same phone number is stored multiple times), CTI Data Connector Office Edition will always display multiple addresses and cannot open a caller record or Outlook contact. If the option *Suppress multiple hits due to identical phone numbers* is selected, always only one suitable record will be displayed.

### **Display Caller ID identified by PBX**

If your PBX has an own phone directory, CTI Data Connector Office Edition can display the name of the caller in the Desktop Notification  passed by the PBX, if no address is found in a database or Outlook .


The option: *String if caller ID is suppressed* should be the character string which is sent by the PBX for suppressed caller IDs, e.g. \*\*\*. Instead of displaying \*\*\* the Desktop Notification is not displayed.

### **See also**


Where do I find this screen? 

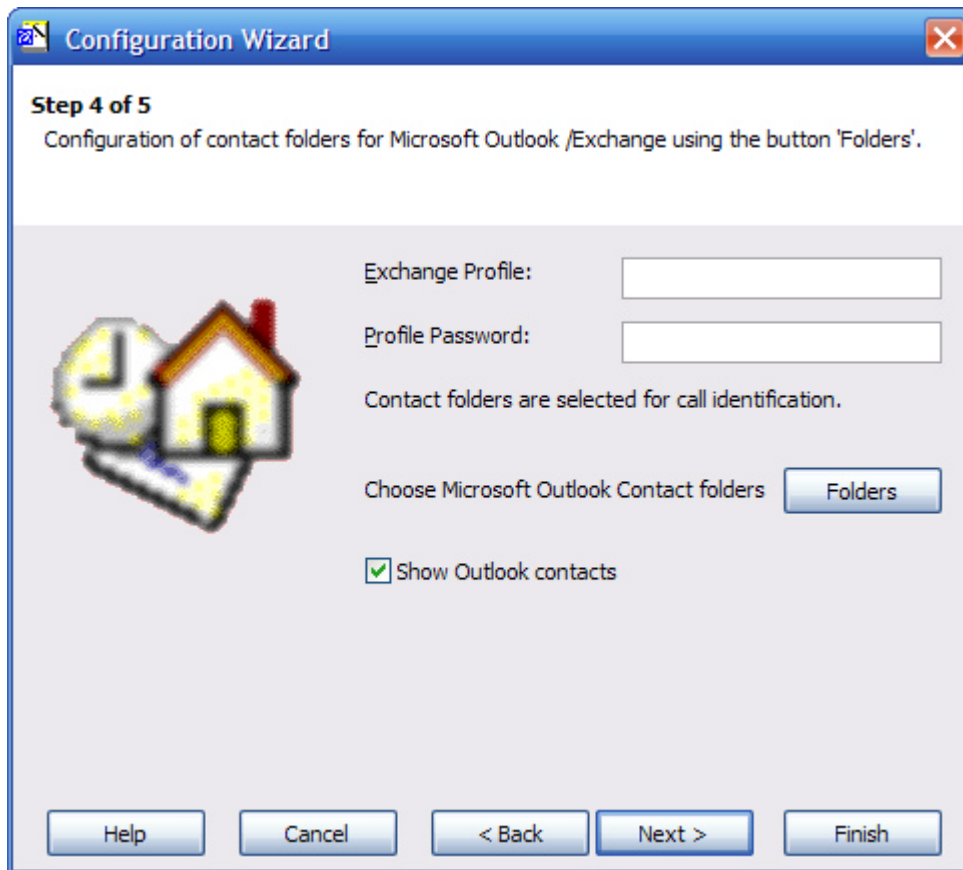
## **6.6 Configure Microsoft Outlook / Exchange**

Here you can configure CTI Data Connector Office Edition for using Microsoft Outlook™ for caller identification. This works both with a local Outlook database and with Exchange databases. The configuration refers the Outlook **contact folder**. As Outlook can use only one (Exchange) profile at a time, you can additionally specify the Exchange profile name and the password. Otherwise the profile used last will be applied.

You have to select *Show Outlook contacts* to display the caller's address after clicking on the Desktop Notification  window.

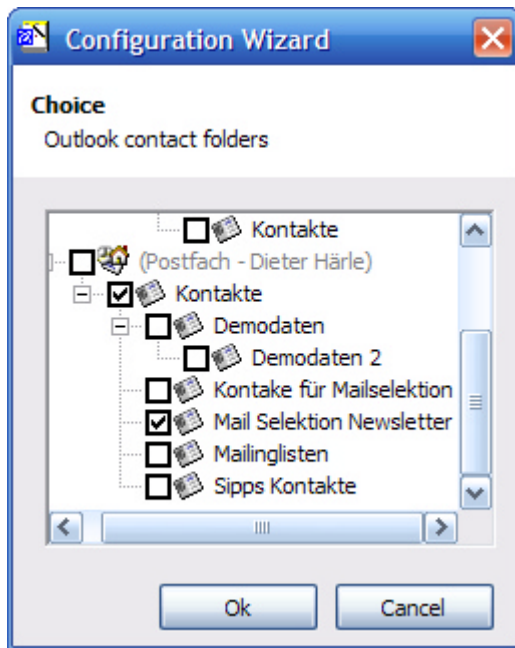
Press the button **Folders** to select one or more contact folders.

 If there are remote Exchange folders, it may take up to a few minutes until the screen to select the folders will appear.



### Select folders

You can select one or multiple folders to use for caller identification.



## 6.7 Configuration Call Notification

The call notification options of CTI Data Connector Office Edition can be configured for incoming and outgoing calls.



### **Signaling call with call details**


You can select whether the call detail information<sup>[37]</sup> of CTI Data Connector Office Edition will be displayed / not displayed for incoming or outgoing calls. It can be displayed when the phone rings or when the phone is answered (picking up the receiver).

**i** If you use another application to display the caller data, disable *Display call identification*.

### **Signaling call with Desktop Notification**

Incoming or outgoing calls can be signalled first within a transparent Desktop Notification screen<sup>[35]</sup>. This is called *Desktop Notification*. The time how long this screen is displayed can be defined in seconds. The transparency can be set up with a throttle button. Click *Preview* to get an idea how the window will look like.

If you have enabled Desktop Notification, the Desktop Notification will be **displayed first**. Only if you click on the notification window, the screen with the call detail information<sup>[37]</sup> will pop up.

 If you disable Desktop Notification, the call will be instantly signalled to an external application.

### **See also**

Signal call with Desktop Notification<sup>[35]</sup>

Signal call with call details<sup>[37]</sup>

**Part**

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**VII**

## 7 Service Programmes

### 7.1 Show License Information

To display the license information, either

- right click on the icon in the taskbar <sup>[19]</sup> - select **Show License Information**

or

- select within the Control Centre <sup>[21]</sup>, Menu **Extras, Show License Information**

This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

#### **Number of licenses**

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See *Deactivate a License* <sup>[121]</sup> how to deactivate one single computer.

- Number of Computers / PCs which have a license
- Demoversion <sup>[118]</sup> - if omitted it is a full version or time-limited full version
- Valid until (time limitation) - if omitted it is a non time-limited version
- Web Activation <sup>[105]</sup> - either done or required

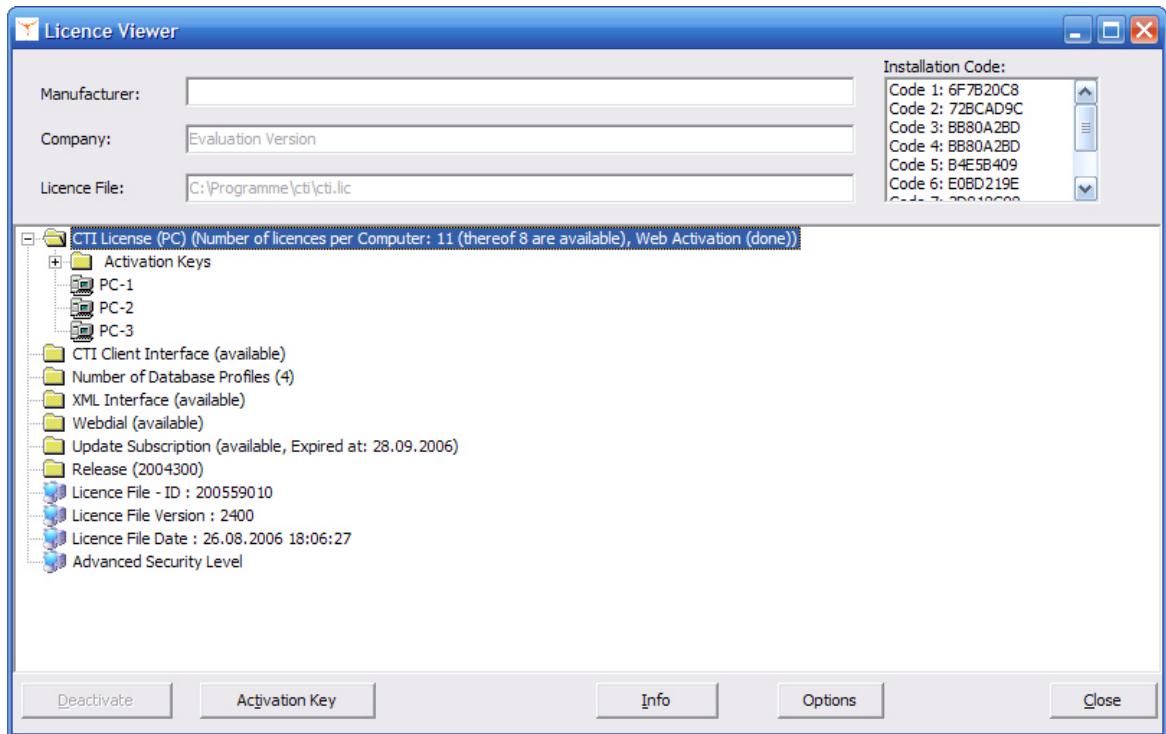
#### **Update Subscription**

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter software update <sup>[12]</sup> about how to download updates.

- Available / Not available
- Time limitation - the date when the update subscription expires

#### **Release Number**

- Internal release information



## 7.2 Apply Activation Key


An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

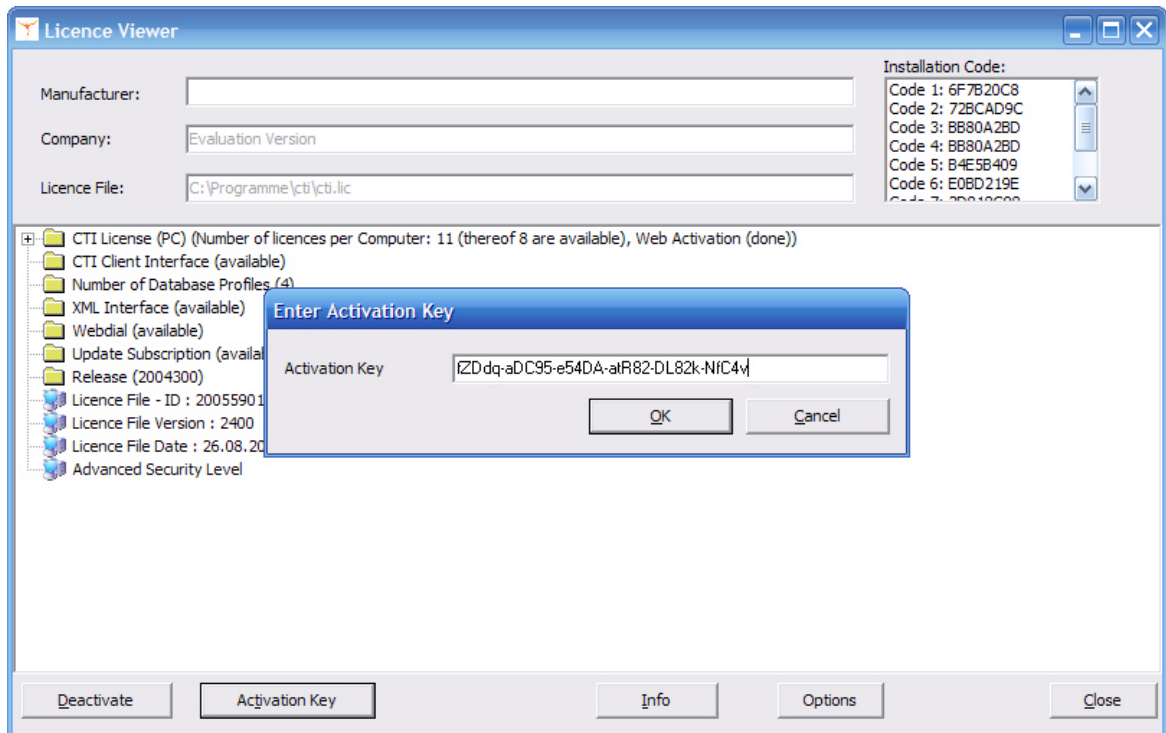
**fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v**

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen *Show License Information* <sup>81</sup>.


- Start screen *Show License Information* <sup>81</sup>
- Select button *Activation Key*
- Paste the key from the clipboard with CTRL+V

 It is possible to validate the Activation Key online. In this case an Internet connection is necessary.



### 7.3 Format Phone Numbers on the Server

A Server Setup is necessary to format the phone numbers of enterprise databases. When using Microsoft Outlook™ the formatting is done on the local PC.

CTI Data Connector Office Edition has to be installed on the server with the program **SetupServer.exe**. Start the program setupserver.exe on the  **server** (never on the workstation). This installs all necessary components and creates a program group *CTI Data Connector - Office Edition* with the entry **CTI Data Connector Office Edition Format Phone Numbers**. Start this program to format the phone numbers manually in order to check if it is working.

You can start a cyclical formatting of phone numbers on the server. We recommend doing this during the night. Ideally you use the Task manager of the server operating system (Control Panel, Scheduled Tasks). To start the task use the following command:

**cdcoeSTARTER.EXE -R**

Alternatively you can use the timer function of CTI Data Connector Office Edition. The applications will reside in the memory of the server, while the memory is freed, if the windows task manager is used.

### **Possible Parameters**

**-R:** The program starts, formats the phone numbers and terminates

**-Thh:mm:** Starts as a "Server". The phone numbers are formatted at the specified time (e.g.: -T08:00 = 8 o'clock)

**-Mn:** Starts as a "Server". The phone numbers are formatted after the specified time interval (e.g.: M180 = 180 minutes)

### ***See also***

Network Installation - general information<sup>[90]</sup>  
Formatting of Phone Numbers

## **7.4 Error Protocol**

In case of failing to access a database an error protocol will be written. You can display it by clicking on the icon in the taskbar<sup>[19]</sup> with the right mouse button and selecting the option **Error protocol** or selecting the menu **Extras - error protocol** in the control centre<sup>[21]</sup>.

The error protocol will be deleted with every start of CTI Data Connector Office Edition.

There is a log file for error tracking with the TAPI device driver - see configuration settings<sup>[62]</sup>.

## **7.5 Phone Simulator**

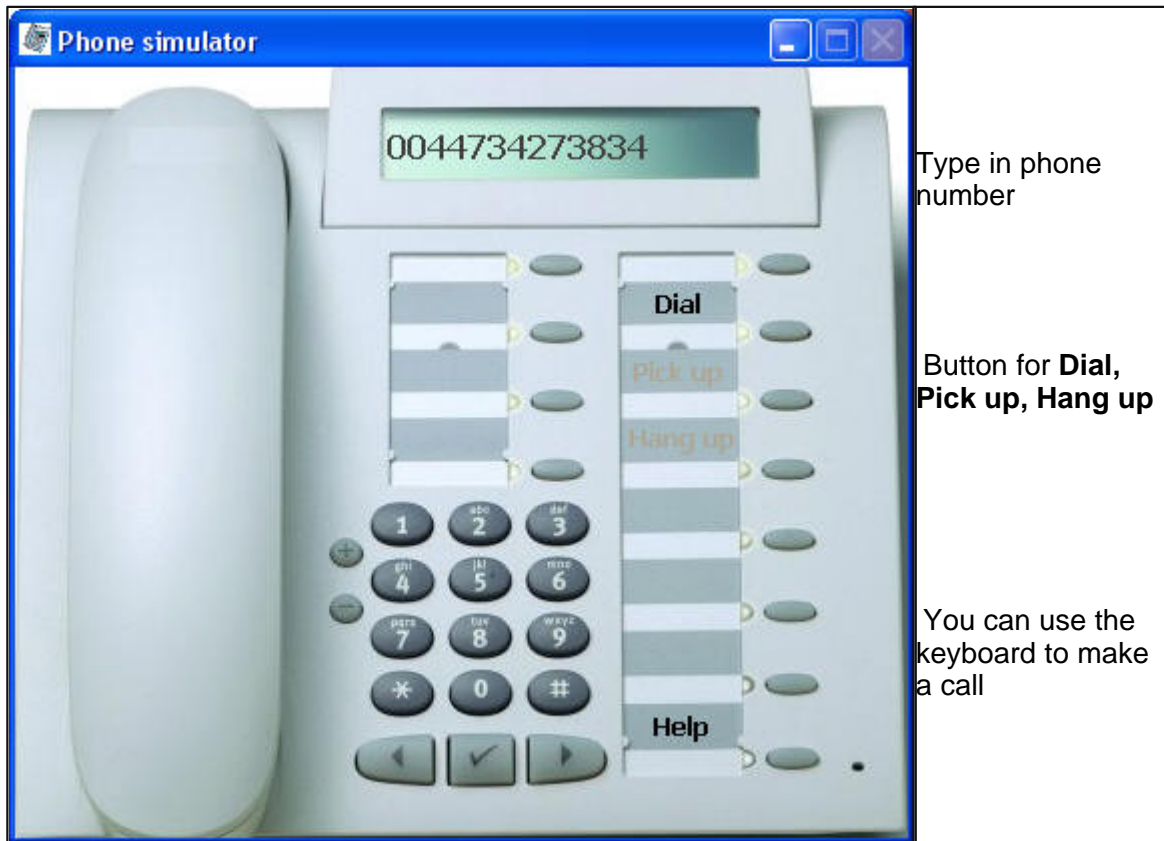
If you have no TAPI-enabled phone available and you want to test CTI Data Connector Office Edition, you can use the simulator which works like a regular telephone.

### **Activating the Simulator**

Start the Configuration Wizard<sup>[53]</sup> and choose the page where you can select your telephony service provider<sup>[54]</sup>. Choose **<Telephone Simulator>**. When you start CTI Data Connector Office Edition, the simulator will be started automatically.

### **Working with the Simulator**

The telephone simulator acts like a normal telephone with which you can make outgoing calls and accept incoming calls.



### **Simulating an incoming call**

- Type in a phone number (without country code and special characters) in the display. You can alternatively use the keyboard to type in the number.
- Press the button **Dial**
- CTI Data Connector Office Edition performs the caller identification and signals the incoming call
- Accept the incoming call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

### **Simulating an outgoing call**

- Search in the phone book<sup>[27]</sup> of CTI Data Connector Office Edition for an address or a contact person and dial by double-clicking on the phone number. You can dial alternatively by highlighting a phone number<sup>[29]</sup> and pressing the configured Hotkey<sup>[56]</sup>.
- CTI Data Connector Office Edition displays the dialled address
- Establish the call by pressing the button **Pick up**
- You can disconnect the call by pressing the button **Hang up**

**Part**



## 8 Installation

CTI Data Connector Office Edition supports single user<sup>[87]</sup> and network installation<sup>[90]</sup>. The network installation offers a centralized handling of the configuration settings, updates and license information.

A network installation is recommended with more than 3 PCs.

- Single User Installation<sup>[87]</sup>
- Network Installation<sup>[90]</sup>
- Activate Product<sup>[105]</sup>
- Installation FAQ<sup>[113]</sup>

### 8.1 Single User Installation

The installation consists of 3 steps:

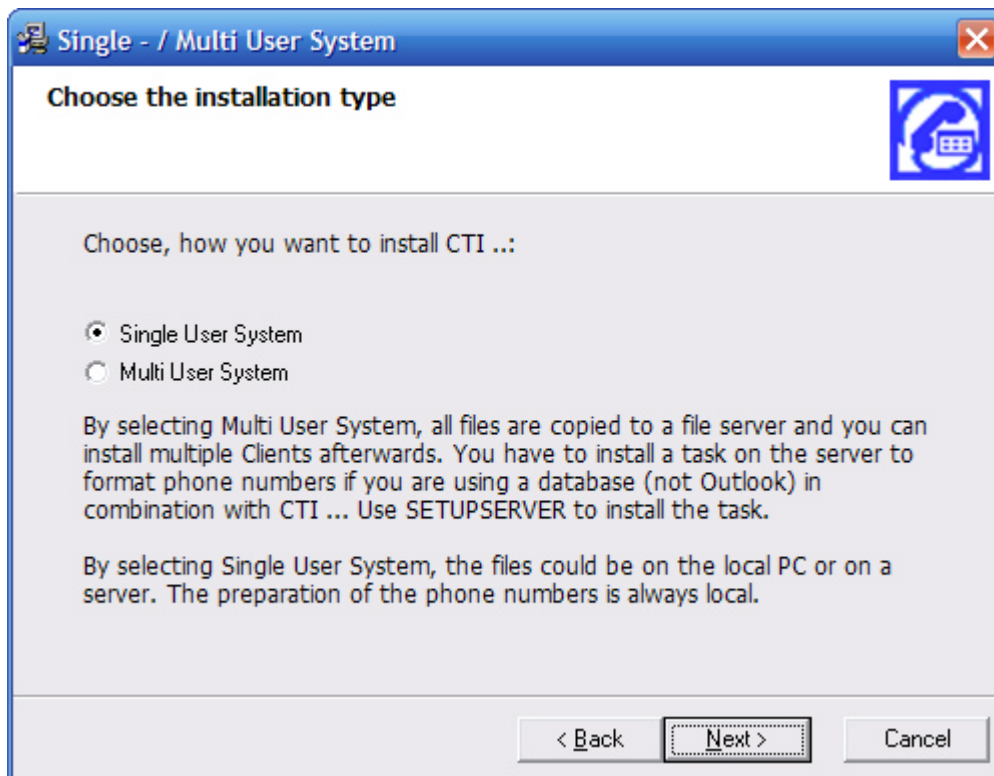
Install the application on the local PC<sup>[87]</sup>

- Minimum Configuration Settings<sup>[17]</sup>
- Activate Product<sup>[105]</sup>

 Each PC needs a Serial Number<sup>[107]</sup> to activate the software

#### 8.1.1 Install the application on the local PC

You can select during the installation whether you want to install a *Single User* or *Multi User system*. Select **Single User System**.




### **Necessary Rights**

During installation DLLs are registered. The user who installs the application needs a right to register DLLs.


The user who runs the application needs the following rights on the installation folder:

- Files **cdcoe.xml** and **cdcoe.lic**: read and write access
- All other files: read access

### ***See also***

Single User Installation - general information 

## **8.1.2 Minimum Configuration Settings**

During installation, the Configuration Wizard  was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- TAPI device driver<sup>[55]</sup> - it is delivered by the telephone manufacturer. See also: System requirements - TAPI driver<sup>[113]</sup>
- Prefix for external calls<sup>[69]</sup> and the minimum length<sup>[69]</sup> of a phone number indicating an external call
- Button Dialing Rules<sup>[70]</sup> - configures country settings and area code. See also special configuration for US / Canada<sup>[71]</sup>
- Button Folder<sup>[75]</sup> - Select Microsoft Outlook™ contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon<sup>[19]</sup>, option Configuration Wizard<sup>[53]</sup>.



### See also


Where do I find the TAPI driver?<sup>[114]</sup>  
System requirements - TAPI driver<sup>[113]</sup>


## 8.2 Network Installation

Perform the following steps for network installation.

Install all files on the server<sup>[90]</sup>

- Server Setup<sup>[83]</sup> and configuration for formatting the phone numbers on the server
- Workstation Setup<sup>[92]</sup>
- Distribute Client Setup<sup>[93]</sup> to all PCs
- Activate Product<sup>[105]</sup>

 The network installation can be started from any workstation.

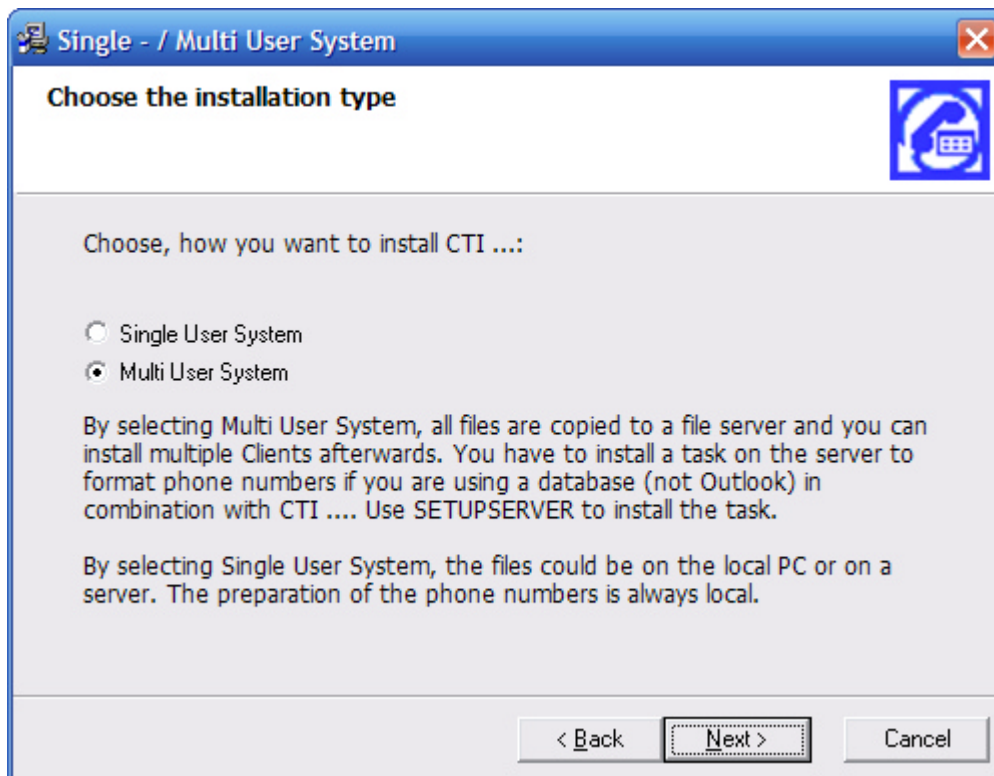
 Only one Serial Number is needed. The Serial Number includes the number of PCs which can be installed.

### 8.2.1 Install all files on the server

You can select during the installation whether you want to install a *Single User* or *Multi User system*. Select **Multi User System** to for a network installation.


The setup just copies the files to the server. This allows having all files installed on one folder. Each workstation uses these files.

The installation can be started from any workstation.




You have to give **full read and write access for all users** to the installation folder.

### See also

Network Installation - general information 

## 8.2.2 Server Setup

A Server Setup is necessary to format the phone numbers of enterprise databases. When using Microsoft Outlook™ the formatting is done on the local PC.

CTI Data Connector Office Edition has to be installed on the server with the program **SetupServer.exe**. Start the program `setupserver.exe` on the  **server** (never on the workstation). This installs all necessary components and creates a program group *CTI Data Connector - Office Edition* with the entry **CTI Data Connector Office Edition Format Phone Numbers**. Start this program to format the phone numbers manually in order to check if it is working.

You can start a cyclical formatting of phone numbers on the server. We recommend doing this during the night. Ideally you use the Task manager of the server operating

system (Control Panel, Scheduled Tasks). To start the task use the following command:

### **cdcoeSTARTER.EXE -R**

Alternatively you can use the timer function of CTI Data Connector Office Edition. The applications will reside in the memory of the server, while the memory is freed, if the windows task manager is used.


### **Possible Parameters**

**-R:** The program starts, formats the phone numbers and terminates

**-Thh:mm:** Starts as a "Server". The phone numbers are formatted at the specified time (e.g.: -T08:00 = 8 o'clock)


**-Mn:** Starts as a "Server". The phone numbers are formatted after the specified time interval (e.g.: M180 = 180 minutes)


### ***See also***

Network Installation - general information   
Formatting of Phone Numbers

## **8.2.3 Workstation Setup**

To install a workstation (client PC) perform the following steps:

- Open the installation folder on the server - default folder is ...programs\CTI Data Connector Office Edition
- Start **Setup.exe**
- Make the Minimum Configuration Settings  - use the **button Help** to get detail information about the configuration options



All settings which have been defined by the administrator are automatically applied. For details see: Distribute Client Setup .

### **Necessary Rights**


During installation DLLs are registered. The user who installs the application needs a right to register DLLs.

The user who runs the application needs the following rights on the installation folder on the server:

- Files **cdcoe.xml** and **cdcoe.lic**: read and write access
- All other files: read access


 Each PC (not user) needs a CTI license .

### **See also**

Network Installation - general information .

## **8.2.4 Distribute Client Setup**

It is possible to export the configuration settings of one PC and distribute it to all PCs. We recommend the following procedure:

- Install one Client
- Go through all configuration settings using the Configuration Wizard .
- Test outgoing and incoming calls
- If everything is working fine, export the settings of this PC

### **Export the configuration settings**

- Open the installation folder on the server - default folder is ...programs\CTI Data Connector Office Edition
- **Quit** CTI Data Connector Office Edition
- Start the program - **ExportSettings.exe**. This will create a file **cdcoeconfg.bak** with all the settings of this PC. You can now delete settings if you do not want to export all settings
- Copy now **cdcoeconfg.bak** to **cdcoeconfg.dat**
- When a Client starts CTI Data Connector Office Edition, it will automatically apply the settings reading the file **cdcoeconfg.dat**

 **All personal settings of all workstations will be overwritten.**

### **How is this feature working?**

The file *cdcoeconfg.dat* is a text file and consists of 2 sections:

- **[ClientConfigExt]** which has a copy of all settings of the PC
- **[ClientConfig]** which has a version number

During each program start, the file *cdcoeconfg.dat* is read. It is checked whether the version number stored in the registry of the PC is smaller than the version number stored in the section **[ClientConfig]**. If yes, the settings of the *cdcoeconfg.dat* will be applied and the version number will be updated in the local registry. This ensures that the Client PC can configure personal settings afterwards.

**[ClientConfigExt]**

DailyRefresh=0  
Language=2000

.....

**[ClientConfig]**

Version=200610251440

You find a detail description of each criteria in the following chapter [cdcoeconfig.dat - node \[ClientConfigExt\]](#) and [cdcoeconfig.dat - node \[ClientConfig\]](#)

**See also**

Network Installation - general information [\[90\]](#)

**8.2.4.1 cdcoeconfig.dat - node [ClientConfigExt]**

Enter topic text here.

**8.2.4.1.1 CallerIDOwnerTel**

Enter topic text here.

**8.2.4.1.2 CallToEXE**

Defines the executable which is used by Windows **callto:** command - see configuration Application to dial with [Hyperlink \[67\]](#) and Dial with a [Hyperlink \[31\]](#).

Value range

Any executable name

Default value: Dial.exe

**8.2.4.1.3 ClipboardWaitTime**

Time how long the [Hotkey \[29\]](#) function waits until the clipboard is accessed. The time is given in a thousandth part of a second - see configuration [Hotkey Settings \[57\]](#)

Value range

1-98

Default value: 10 (hundredth part of a second)

#### 8.2.4.1.4 DailyRefresh

Only active in **single user** installation environment. Defines, if the formatting of the phone numbers is done daily or not.

Value range

0 = false

1 = true

Default value: 0

#### 8.2.4.1.5 DialDirectory

#### 8.2.4.1.6 DialViaFile

Enables to option to dial via an XML file. See configuration, Configuration for special system requirements.

Value range

0 = false

1 = true

Default value: 0

#### 8.2.4.1.7 DisplayCallerIDPBX

Option to use the name stored in a PBX directory or local phone for caller identification if supported by the TAPI driver - see configuration Display CallerID identified by PBX<sup>74</sup>.

Value range

0 = No

1 = Yes

Default value: 0

**See also**

EmptyCallerIDPBX<sup>96</sup>

## 8.2.4.1.8 DontRemoveCallWhenNumChanged

If a phone number changes during a call (e.g. because the call was redirected from the main switchboard) then the new phone number is updated by default in the Desktop Notification<sup>[35]</sup>. The update can be suppressed by checking this option - see configuration Don't signal updated phone number during a call<sup>[62]</sup>

Value range

0 = No

1 = Yes

Default value: 0

## 8.2.4.1.9 DontShowInternal

Configuration setting to signal internal calls or not. See configuration, Configuration caller identification<sup>[73]</sup>.

Value range

0 = No - displays internal calls

1 = Yes - does not display internal calls

Default value: 0

## 8.2.4.1.10 EmptyCallerIDPBX

String character string, which is sent by the PBX for suppressed caller IDs, e.g. \*\*\*. Instead of displaying \*\*\* the Desktop Notification is not displayed - see configuration String if Caller ID is suppressed<sup>[74]</sup>.

Value range

Any character

Default value: Empty

**See also**DisplayCallerIDPBX<sup>[96]</sup>

## 8.2.4.1.11 ExchangePWD

Encrypted password if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange.<sup>[75]</sup>

## 8.2.4.1.12 ExchangeUID

UID for Profile, if an Exchange profile is configured - see configuration, Configure Microsoft Outlook / Exchange.<sup>[75]</sup>

## 8.2.4.1.13 ExternalDigit

Dial tone digits for an external call - see configuration, PBX Configuration<sup>[69]</sup>.

Default value: Empty

## 8.2.4.1.14 ExternalMinLen

Minimum length of phone number indication an external call - see configuration, PBX Configuration<sup>[69]</sup>.

Default value: Empty

## 8.2.4.1.15 FadelInbound

Enable / Disable Desktop Notification<sup>[78]</sup> window for **incoming calls**. See configuration, Configuration Call Notification<sup>[78]</sup>.

Value range

0 = false

1 = true

Default value: 1

## 8.2.4.1.16 FadelIntens

Regulates the transparency of the Desktop Notification<sup>[78]</sup>. See configuration, Configuration Call Notification<sup>[78]</sup>.

Value range

0-255

Default value: 180

## 8.2.4.1.17 FadeOutbound

Enable / Disable Desktop Notification<sup>[78]</sup> window for **outgoing calls**. See configuration, Configuration Call Notification<sup>[78]</sup>.



Value range

0 = false

1 = true

Default value: 1

## 8.2.4.1.18 FadeTime


Duration in seconds for Desktop Notification . See configuration, Configuration Call Notification .

Value range

0 -99

Default value: 10

## 8.2.4.1.19 FindLikeChecks

Caller identification - truncate number of digits. See configuration, Configuration caller identification .

Value range

0 - 4

Default value: 3

## 8.2.4.1.20 FormatNumbers

## 8.2.4.1.21 HelpType

Define the type of help (online or offline) - see Help and Welcome .

Value range

0 = Online

1 = Offline

Default value: 0

## 8.2.4.1.22 HotKey


Hotkey in coded Format. See configuration, Configure Hotkey .

Value range

see configuration screen

Default value: 121 (F10)

#### 8.2.4.1.23 HotKeyEnabled

Enable / Disable the use of an Hotkey. See configuration, Activate Dialing via Hotkey 

Value range

0 = false

1 = true


Default value: 1

#### 8.2.4.1.24 HotKeyModifier

#### 8.2.4.1.25 Iconwithoutclient

This feature can only be use with the Development SDK.

#### 8.2.4.1.26 IncomingCutPostfix


This option is needed with IP phones and a TAPI driver, which passes the phone number with IP information. See configuration - Truncate incoming phone number at 

Value range

Any character


Default value: Empty

#### 8.2.4.1.27 InternalNumberPrefix

Prefix for internal number - see TAPI configuration 

Default value: Empty

#### 8.2.4.1.28 IPProviderPostfix

Postfix which is added at the end of a phone number for outgoing calls - see TAPI configuration 

Default value: Empty

#### 8.2.4.1.29 Language

A lot of configuration settings can be made language specific. A language identifier (number) is used to specify a language.

Value range

1000 = German

2000 = English

4000 = Italian

Default value: 2000

The language can be configured by each user in the Configuration Wizard, introduction screen [53](#).

#### 8.2.4.1.30 LastsForceSession

#### 8.2.4.1.31 LastsForceUrl

#### 8.2.4.1.32 LastUser

This feature can only be use with the Development SDK.

#### 8.2.4.1.33 ListEntries

Number of entries in Call History and Redialing list. See configuration, Miscellaneous Settings [66](#).

##### Value range

0 - 1000

Default value: 500

#### 8.2.4.1.34 LogTapi

Enable / Disable call logging . See configuration, TAPI configuration [62](#)

##### Value range

0 = false

1 = true

Default value: 1

#### 8.2.4.1.35 NoPermanentConnect

Disable permanent connection to an Access database - see configuration Miscellaneous Settings [66](#)

##### Value range

0 = No

1 = Yes

Default value: 0



Never use this option on the server

## 8.2.4.1.36 OpenOutlookContact

Enable / Disable to open an Outlook contact if the caller data is stored in MS-Outlook .  
See configuration, Configure Microsoft Outlook / Exchange.<sup>[75]</sup>

Value range

0 = false

1 = true

Default value: 1

## 8.2.4.1.37 PresetIn

Enter topic text here.

## 8.2.4.1.38 PresetMode

Enter topic text here.

## 8.2.4.1.39 PresetOut

Enter topic text here.

## 8.2.4.1.40 RaiseNumberChangedEvents

Using this option would signal in the calls.xml file, if the phone number has changed during a call - see configuration - development API<sup>[65]</sup>.

Value range

0 = No

1 = Yes

Default value: 1

## 8.2.4.1.41 RegisterRequest

Handle calls from Windows dialer - see Controlling CTI Application<sup>[62]</sup>

Value range

0 = No

1 = Yes

Default value: 1

## 8.2.4.1.42 SaveCallOnlyOnce

If yes, the calls.xml is created only once per call. Otherwise the file is created for each TAPI event like ring, hold, terminate - see configuration development API<sup>[65]</sup>.

Value range

0 = No

1 = Yes

Default value: 1

## 8.2.4.1.43 SaveJobOnlyOnce

If checked, the jobs.xml is created only once per call. Otherwise the file is created each time the Save button is pressed - see configuration development API [65](#).

Value range

0 = No

1 = Yes

Default value: 1

## 8.2.4.1.44 SetupTransferTimeout

This switch is used by the ActiveX integration option in the case a call is transferred. It is a wait time in seconds until the PBX responds to the event. The default value is 5 seconds, maximum is 60 seconds - see configuration Timeout during initializing a call transfer [65](#).

Value range

1-60 (seconds)

Default value: 5

## 8.2.4.1.45 sforce.Data Source

Enter topic text here.

## 8.2.4.1.46 sforce.Jet OLEDB:Database Password

Enter topic text here.

## 8.2.4.1.47 sforce.Jet OLEDB:System Database

Enter topic text here.

## 8.2.4.1.48 sforce.Provider

Enter topic text here.

## 8.2.4.1.49 SFORCE.PWD

Enter topic text here.

## 8.2.4.1.50 SFORCE.UID

Enter topic text here.

## 8.2.4.1.51 sforcePassword

Enter topic text here.

## 8.2.4.1.52 sforceUser

Enter topic text here.

## 8.2.4.1.53 ShowConfirm

Enter topic text here.

## 8.2.4.1.54 ShowInbound

Enter topic text here.

## 8.2.4.1.55 ShowInboundMode

Enter topic text here.

## 8.2.4.1.56 ShowIntro

Enter topic text here.


## 8.2.4.1.57 ShowOutbound

Enter topic text here.

## 8.2.4.1.58 ShowOutboundMode

Enter topic text here.

## 8.2.4.1.59 ShowQuickStart

Display Welcome Screen - see Help and Welcome 

Value range

0 = No

1 = Yes

Default value: 1

## 8.2.4.1.60 Simulate

Enter topic text here.

## 8.2.4.1.61 SuppMultiHits

Enter topic text here.

## 8.2.4.1.62 SwitchExtension

Enter topic text here.

## 8.2.4.1.63 TAPIDriverFakeNumber

A fake number which is ignored for outgoing calls - see TAPI configuration [\[61\]](#)

Default value: Empty

## 8.2.4.1.64 TapiLine

Enter topic text here.

## 8.2.4.1.65 TapiLineName

Enter topic text here.

## 8.2.4.1.66 TSTapi

Defines, if a TAPI.DLL for Terminal server is used - see configuration - development API [\[65\]](#)

Value range

0 = No

1 = Yes

Default value: 0

## 8.2.4.1.67 UseCallTo

Enter topic text here.

## 8.2.4.1.68 WebDial

Enter topic text here.

## 8.2.4.1.69 WindowsDialer

Enter topic text here.

## 8.2.4.1.70 WizWasStarted

Enter topic text here.

## 8.2.4.1.71 WriteXMLAlways

Used when communication to an external program using calls.xml. Always write this file even if the user does not click on the Desktop Notification [\[35\]](#) window - see development API [\[64\]](#)

Value range

0 = No

1 = Yes

Default value: 0

#### 8.2.4.1.72 XMLDirectory

Enter topic text here.

#### 8.2.4.1.73 XMLEncoding

Enter topic text here.

### 8.2.4.2 cdcoeconfig.dat - node [ClientConfig]

#### 8.2.4.2.1 Version

Enter topic text here.

#### 8.2.4.2.2 MaxVersion

Enter topic text here.

## 8.3 Activate Product

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see [Buy Serial Number](#)<sup>[107]</sup>.

You do not have to reinstall the version and you can directly activate it if:


- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

- The version you have installed has the same version number like the version you bought - see [How can I check my version number?](#)<sup>[140]</sup>

### **What happens during activation?**

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector Office Edition. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector Office Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

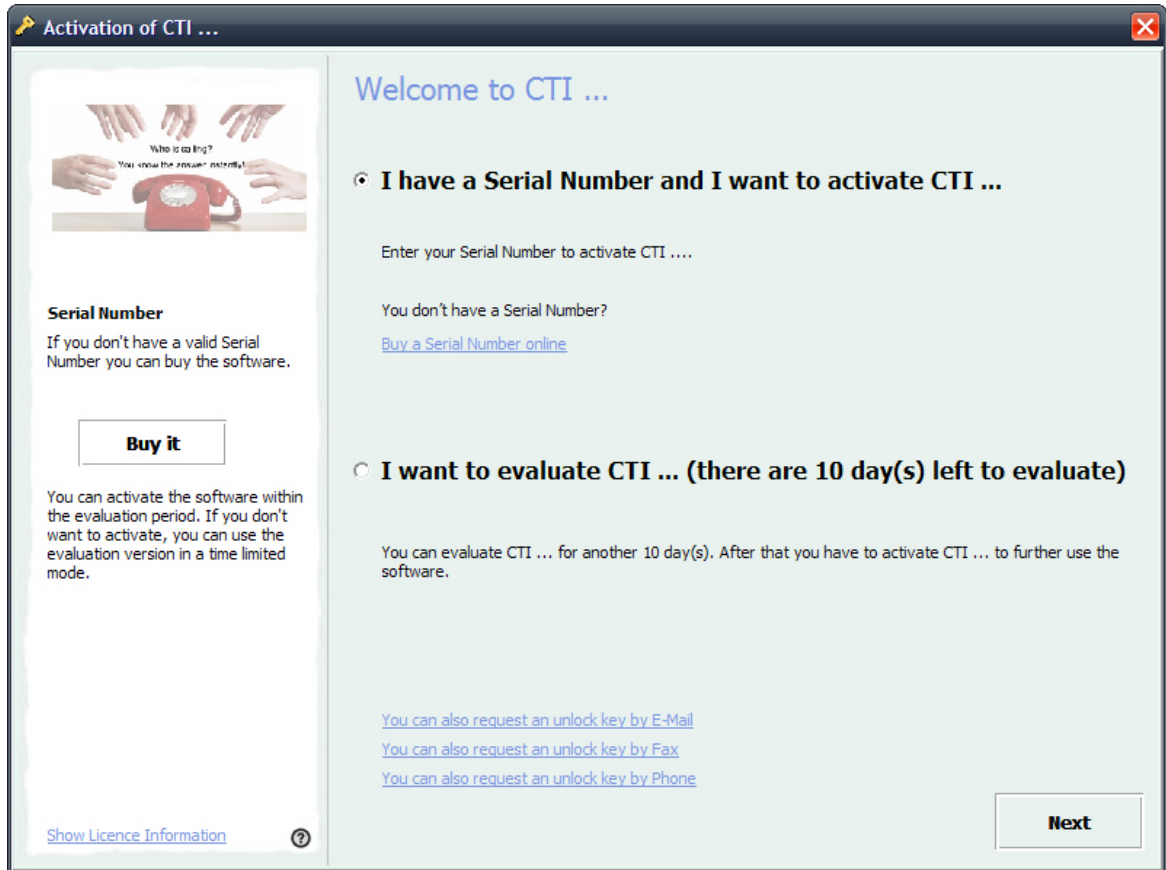
 The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

## **Select Activation Method**

On the first screen, either choose:

- *I have a Serial Number and I want to activate CTI Data Connector Office Edition. This will trigger the Online Activation<sup>[107]</sup>. This is the recommended activation method and should be used if an Internet connection is available*
- *You can also request an unlock key by E-Mail. This will trigger the E-Mail Activation<sup>[109]</sup>*

(note: the screen you see could be slightly different)



## **See also**

Buy Serial Number<sup>[107]</sup>

Online Activation<sup>[107]</sup>

E-Mail Activation<sup>[107]</sup>

Reinstall Software<sup>[112]</sup>

Your CTI Data Connector Office Edition License<sup>[118]</sup>

### 8.3.1 Buy Serial Number

The Serial Number is your **proof of purchase**. It is unique and will look like this:

**dO8uc-G1iC9-jOGeA-BqgEX-U71ID-0V1VX**

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

For a network version, the Serial Number also includes the number of network licenses.

#### **Buy Serial Number**

If you do not have a valid serial number, click on the Link ***Buy a Serial Number online***


#### **Activate CTI Data Connector Office Edition**

Activate the product Online<sup>[107]</sup> or by E-Mail<sup>[109]</sup>.


### 8.3.2 Online Activation

The Online Activation needs the Serial Number<sup>[107]</sup>, company name and your e-mail address. Press the button **Next**. Then the licence will be verified online and activated. If the Activation is successful, the screen *Activation finished*<sup>[111]</sup> is displayed.

No additional step will be required. CTI Data Connector Office Edition can now be used on this PC / Server.

 Backup your Serial Number. You will need it for a reinstallation.<sup>[112]</sup>

Activation of CTI ...



**Serial Number**  
If you don't have a valid Serial Number you can buy the software.

**Buy it**

Please enter all information that is requested in order to start the activation process.

[Show Licence Information](#) ?

### Online Activation

Enter Serial Number

[You can not find your Serial Number?](#)

Enter Name/Company

Enter your E-Mail Address

[You can also request an unlock key by E-Mail](#)  
[You can also request an unlock key by Fax](#)  
[You can also request an unlock key by Phone](#)

**Back** **Next**

### 8.3.3 E-Mail Activation

The E-Mail Activation needs the Serial Number<sup>107</sup>, company name and your e-mail address.

Activation of CTI ...

Who is calling?  
You know the answer - instantly!

**Serial Number**  
If you don't have a valid Serial Number you can buy the software.

**Buy it**

Please enter all information that is requested in order to start the activation process.

[Show Licence Information](#) ?

### Request Unlock Key by E-Mail

Enter Serial Number  
31DEM-5CP93-9E4II-3tE8X-fQD5k-6314s  
[You can not find your Serial Number?](#)

Enter Name/Company  
Tom Hanks

Enter your E-Mail Address  
tom.hanks@smartinc.com

Your entered registration information will be sent to the Activation Center. You will receive an E-Mail containing information to unlock this software.

[Request Unlock Key by E-Mail - send E-Mail](#)

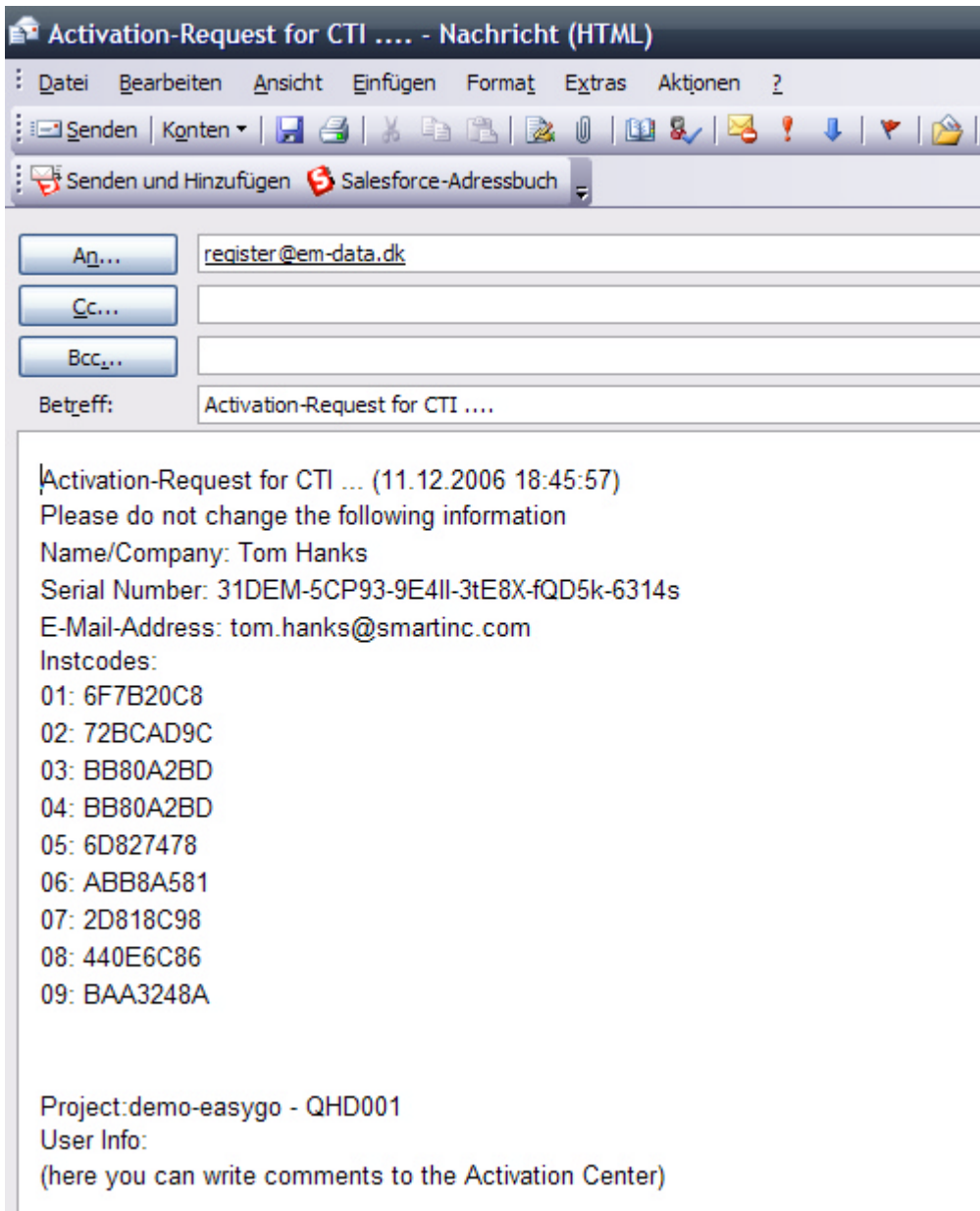
[You can also activate the software online](#)  
[You can also request an unlock key by Fax](#)  
[You can also request an unlock key by Phone](#)

**Back** **Next**

*E-Mail Activation*

#### **Request Unlock Key**

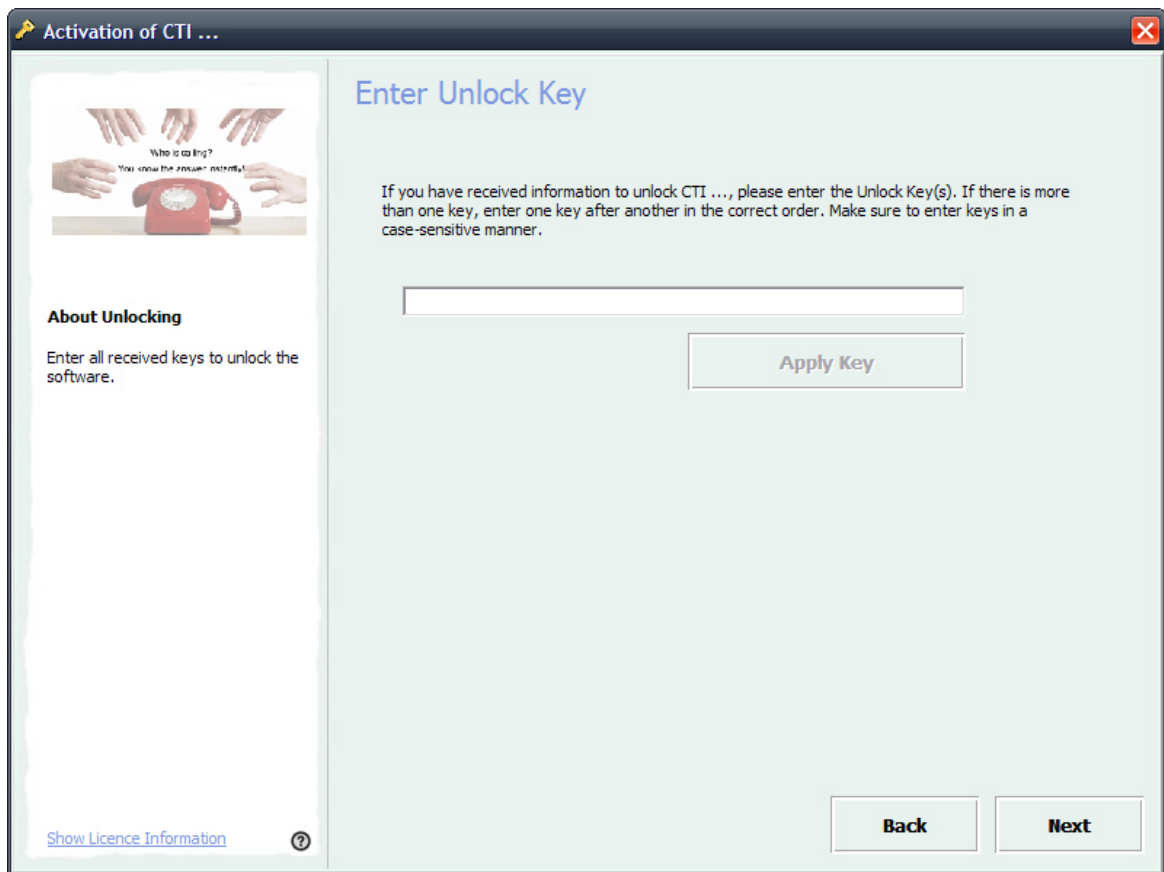
After filling out the screen, select: **Request Unlock Key by E-Mail - send E-Mail**. This will open your default E-Mail client. An e-mail with the hardware IDs and licence information will be created. Press **send** to send the e-mail to our activation center. You will get an **Unlock Key** back within 2-3 business days.




*E-Mail Activation - send E-Mail*

### **Enter Unlock Key**

After requesting the Unlock Key by fax, the screen shown below will appear during each start of the program. Type in the Unlock Key you got back by e-mail or fax. Press the button *Next*. If the Activation is successful, the screen *Activation finished*<sup>[111]</sup> is displayed.

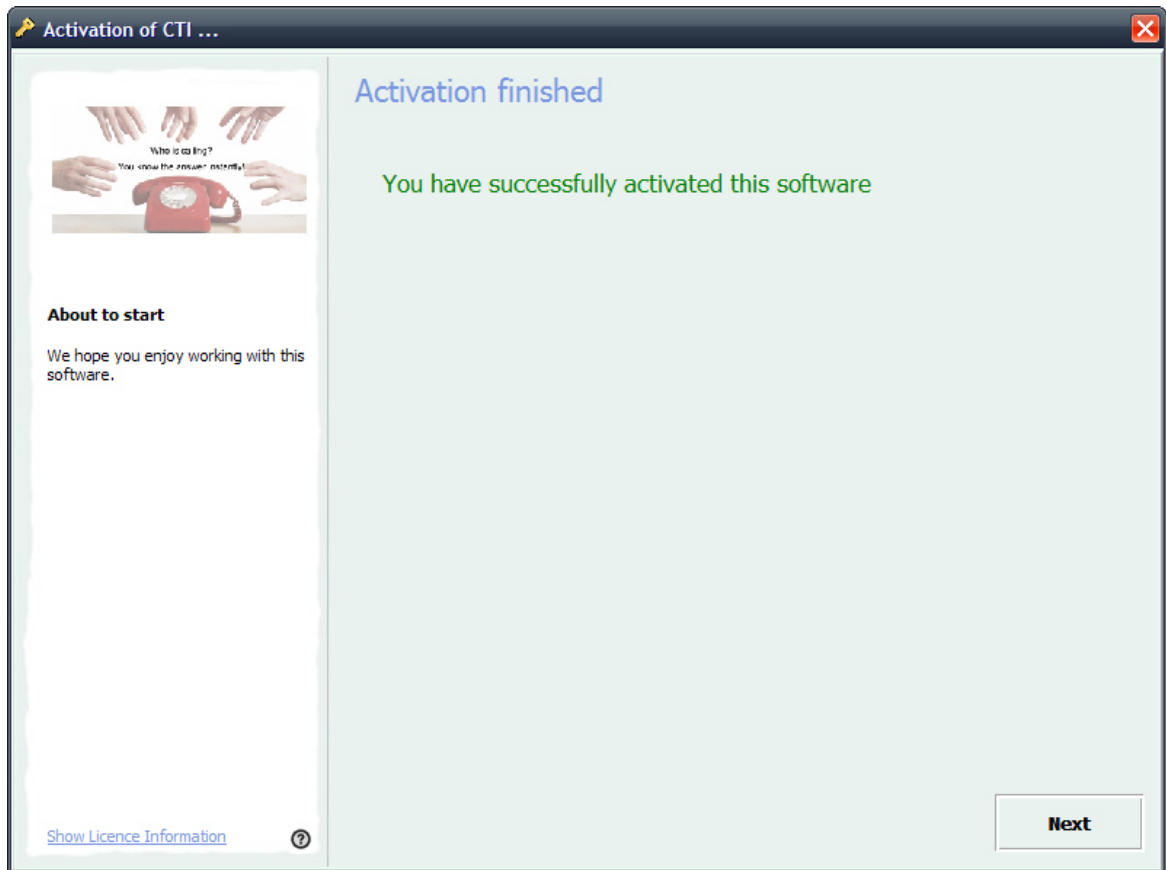


Enter Unlock Key

 Backup your Serial Number. You will need it for a reinstallation<sup>112</sup>.

### 8.3.4 Activation finished

Either after the Online Activation<sup>107</sup> screen or after entering the Unlock Key<sup>110</sup>, the final screen appears to signal that the activation was successful. Press the button *Next* to complete the activation process to get the screen **Activation finished**.



### 8.3.5 Reinstall Software

You can reinstall the application **on the same PC / Server** as often as you like. First uninstall CTI Data Connector Office Edition, delete the complete **installation folder**, then reinstall the application - see How do I activate CTI Data Connector Office Edition?

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#### **See also**

Installation  87

## 8.4 Installation FAQ

This chapter introduces **Frequently Asked Questions** around the installation process.

- System Requirements - TAPI driver<sup>[113]</sup>
- Where do I find the TAPI driver?<sup>[114]</sup>
- How do I activate CTI Data Connector Office Edition?<sup>[105]</sup>

### 8.4.1 System Requirements - TAPI driver

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x** is mandatory. See details for TAPI - Where do I find the TAPI driver?<sup>[114]</sup>

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

Analogue phones without a PBX can use an adapter [www.way2call.com](http://www.way2call.com) .  
ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

SIP phones which offer TAPI support are Lancom (<http://www.lancom-systems.com> VOIP Client), Sipps (Ahead) [www.sipps.de](http://www.sipps.de) and Xten (Counterpath) [www.xten.de](http://www.xten.de) .

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact [Support@mirage-systems.de](mailto:Support@mirage-systems.de) if you do have the TAPI driver installed and CTI Data Connector Office Edition has problems with making an outgoing call or receiving incoming calls.

Windows NT to Windows XP SP2 is supported. Every Windows System (especially NT) needs the latest service pack. CTI Data Connector Office Edition can be installed on a server, but this is not mandatory.

#### **See also**

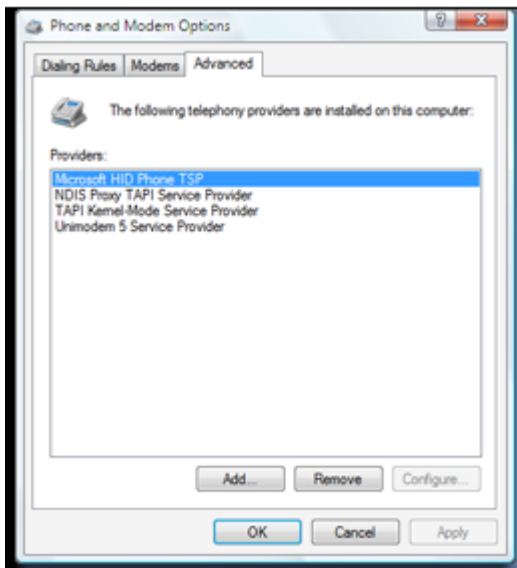
Configure<sup>[55]</sup> the TAPI driver within CTI Data Connector Office Edition  
Where do I find the TAPI driver?<sup>[114]</sup>

### 8.4.2 Where do I find the TAPI driver?

**Telephony Application Programming Interface (TAPI)** is a development interface for CIT applications. Applications using TAPI need a **TAPI driver**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB **advanced**



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.

#### **See also**

System Requirements<sup>113</sup> TAPI driver  
Configure<sup>55</sup> the TAPI driver within CTI Data Connector Office Edition

### 8.4.3 How do I activate CTI Data Connector Office Edition?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see Buy Serial Number [107](#).

You do not have to reinstall the version and you can directly activate it if:


- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

- The version you have installed has the same version number like the version you bought - see How can I check my version number? [140](#)

#### **What happens during activation?**

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector Office Edition. The Serial Number cannot be used twice.** After the activation is done, CTI Data Connector Office Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

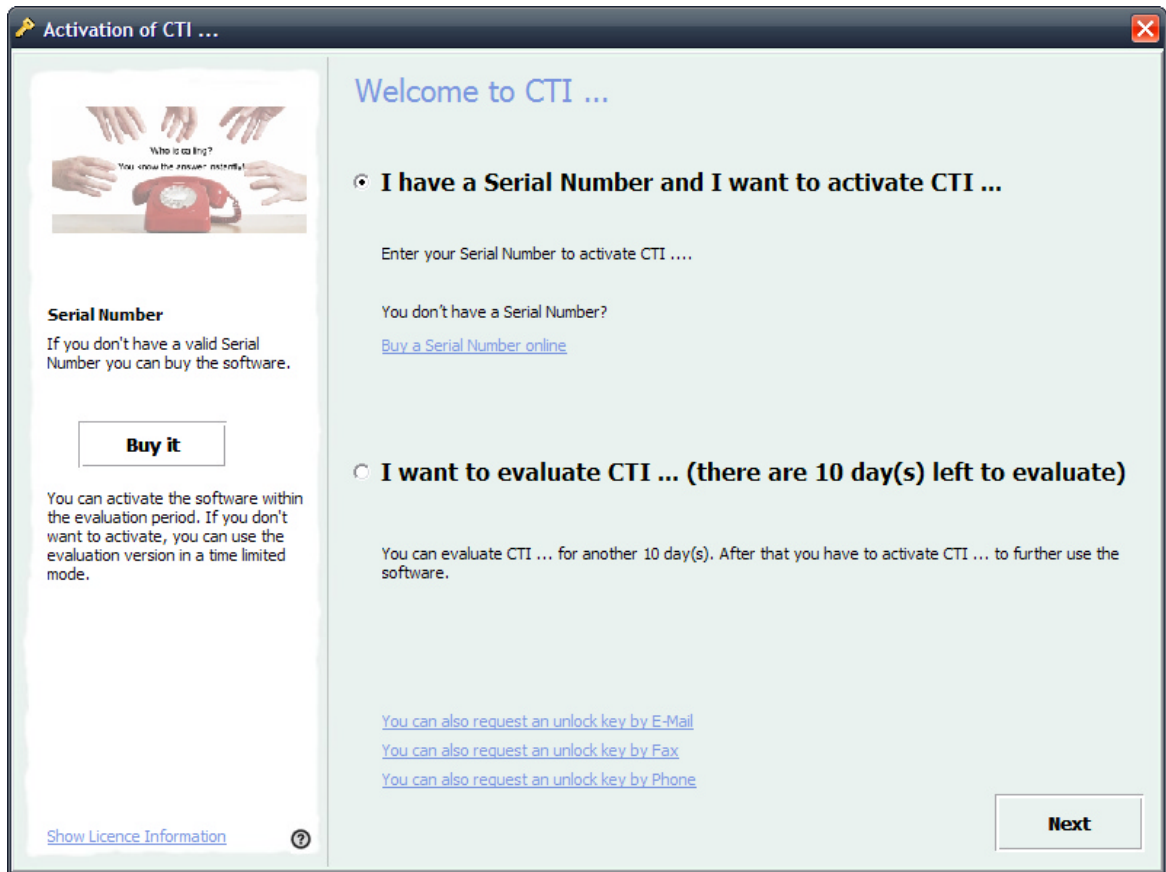
 The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

#### **Select Activation Method**

On the first screen, either choose:

- *I have a Serial Number and I want to activate CTI Data Connector Office Edition.* This will trigger the Online Activation [107](#). This is the recommended activation method and should be used if an Internet connection is available
- *You can also request an unlock key by E-Mail.* This will trigger the E-Mail Activation [109](#)

(note: the screen you see could be slightly different)



### See also

Buy Serial Number <sup>107</sup>

Online Activation <sup>107</sup>

E-Mail Activation <sup>107</sup>

Reinstall Software <sup>112</sup>

Your CTI Data Connector Office Edition License <sup>118</sup>

**Part**

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**IX**

## 9 Part II - Enhanced Features

These lessons explain Mirage Computer Systems GmbH features. It is mainly for administrators. After completing them, you will have experience with these tasks:

- License Information - chapter Your Mirage Computer Systems GmbH License [118](#)
- How TOs and FAQ [127](#)
- Advanced Network Configuration
- 

### 9.1 Your CTI Data Connector Office Edition License

CTI Data Connector Office Edition comes with an own licence file - **cdcoe.lic**. The licence is a licence **PER PC / COMPUTER**. Copy Protection is turned on after activation. We recommend backing up the licence file and all Activation Keys [82](#) you got.

- You have to activate the product before you can use it without the restrictions of the demo version [118](#) - see How do I activate CTI Data Connector Office Edition [105](#)
- Find out more about your licence in the chapter - Show License Information [81](#)
- See License Agreement [123](#) for details of usage.

#### *See also*

Demoverision [118](#)  
Browse your License Information [81](#)  
Apply Activation Key [82](#)  
Deactivate a License [121](#)  
License Agreement [123](#)

#### 9.1.1 Demoverision


The Demoverision has the following restrictions:

- Limited by days - normally 15 days

All other parts of the application are fully functional

### 9.1.2 Show License Information

To display the license information, either


- right click on the icon in the taskbar  - select **Show License Information**



or

- select within the Control Centre , Menu **Extras**, **Show License Information**


This will open the Licence Viewer where you can view the licenses you have acquired, the number of users/computers who can use the licence and whether a licence has a time limitation or not.

#### Number of licenses

The folder **CTI License** displays the maximum number of licenses and the number of licenses which are available. If you click on the + sign, all computers using a license will be displayed. See *Deactivate a License*  how to deactivate one single computer.

- Number of Computers / PCs which have a license
- Demoversion  - if omitted it is a full version or time-limited full version
- Valid until (time limitation) - if omitted it is a non time-limited version
- Web Activation  - either done or required

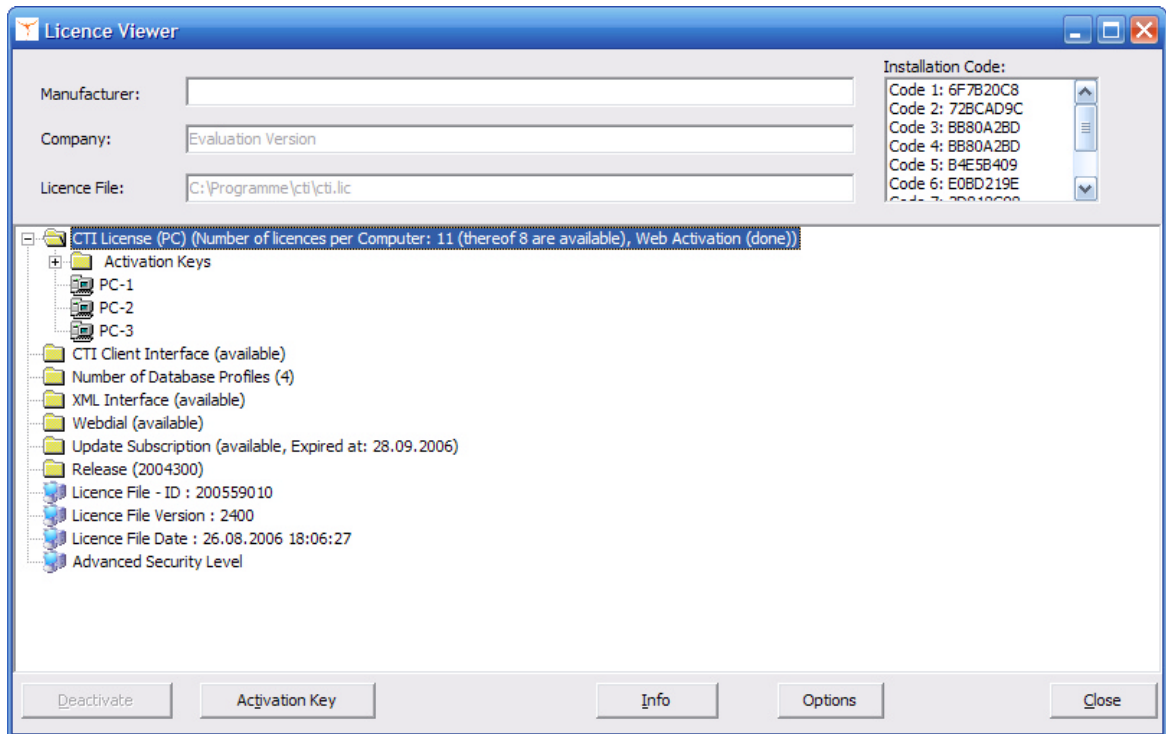
#### Update Subscription

The update subscription entitles you to install the latest updates as long as it has not expired. See chapter software update  about how to download updates.

- Available / Not available
- Time limitation - the date when the update subscription expires

#### Release Number

- Internal release information





### 9.1.3 Apply Activation Key


An Activation Key is used to modify the license information (e.g. increase number of licenses). All Activation Keys are unique and have the same format like:

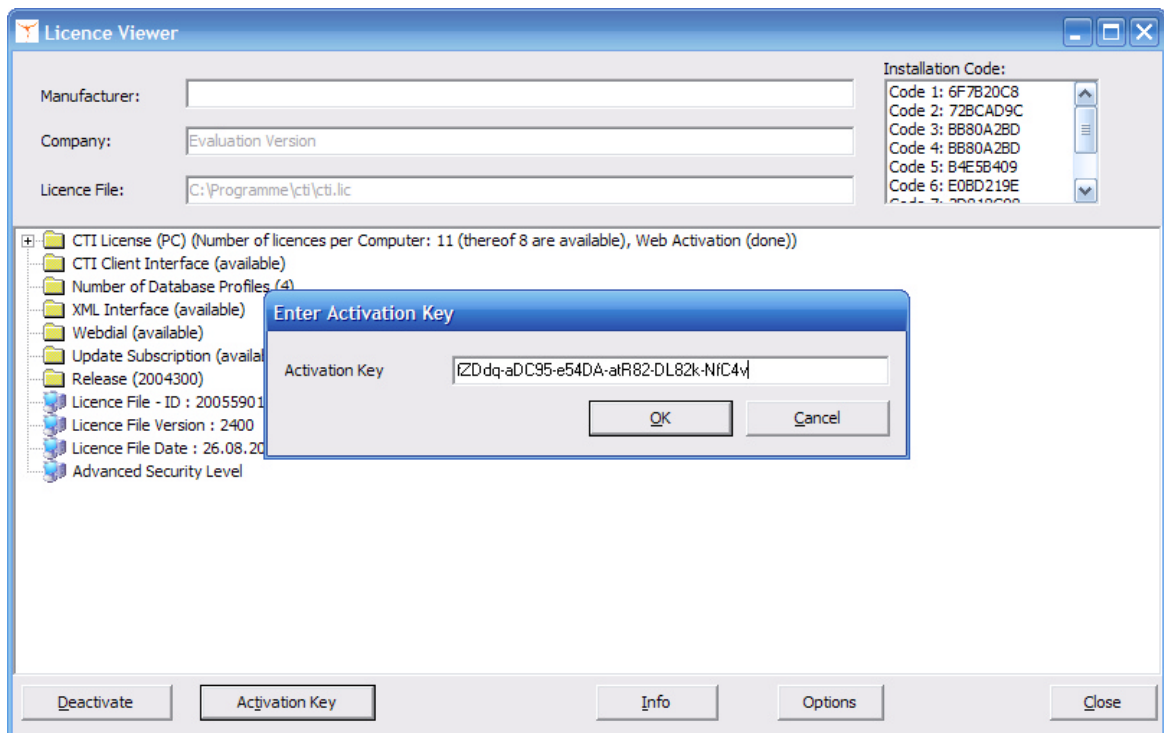
**fZDdq-aDC95-e54DA-atR82-DL82k-NfC4v**

There are 6 blocks each with 5 characters. The blocks are separated by a hyphen for better readability.

If you got an Activation Key via E-Mail or Fax, you can enter the key within the screen *Show License Information* .


- Start screen *Show License Information* 
- Select button *Activation Key*
- Paste the key from the clipboard with CTRL+V

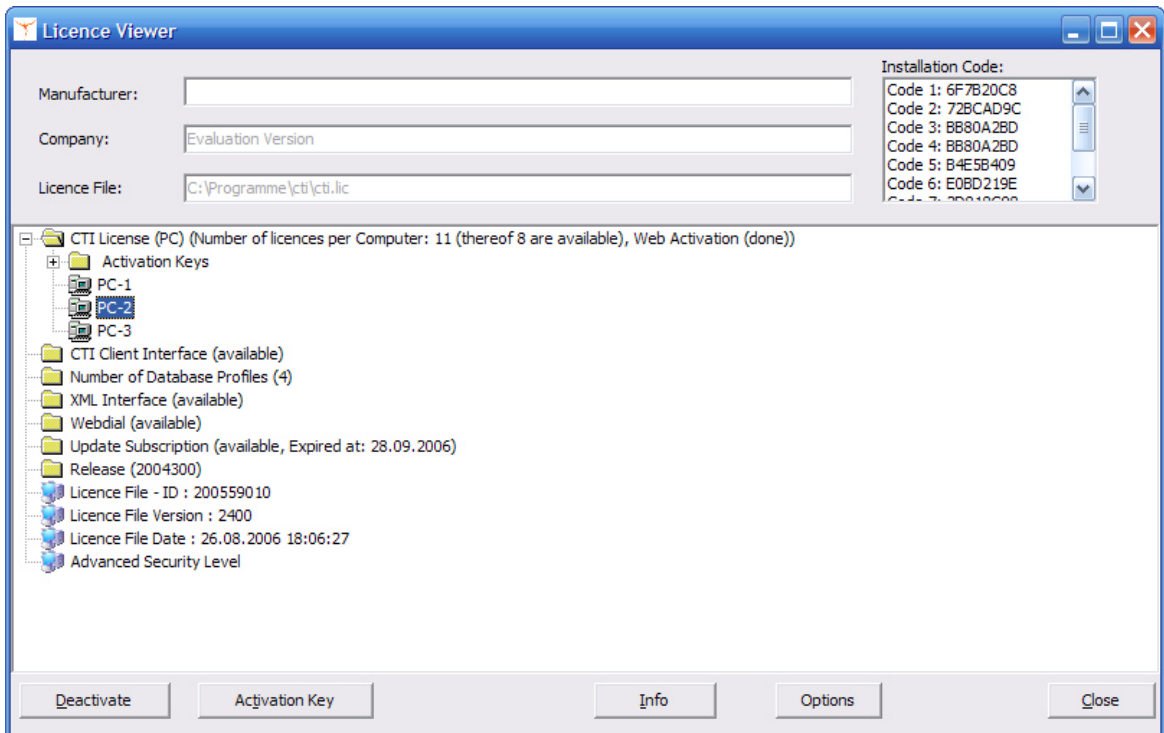
 It is possible to validate the Activation Key online. In this case an Internet connection is necessary.



### 9.1.4 Deactivate a License

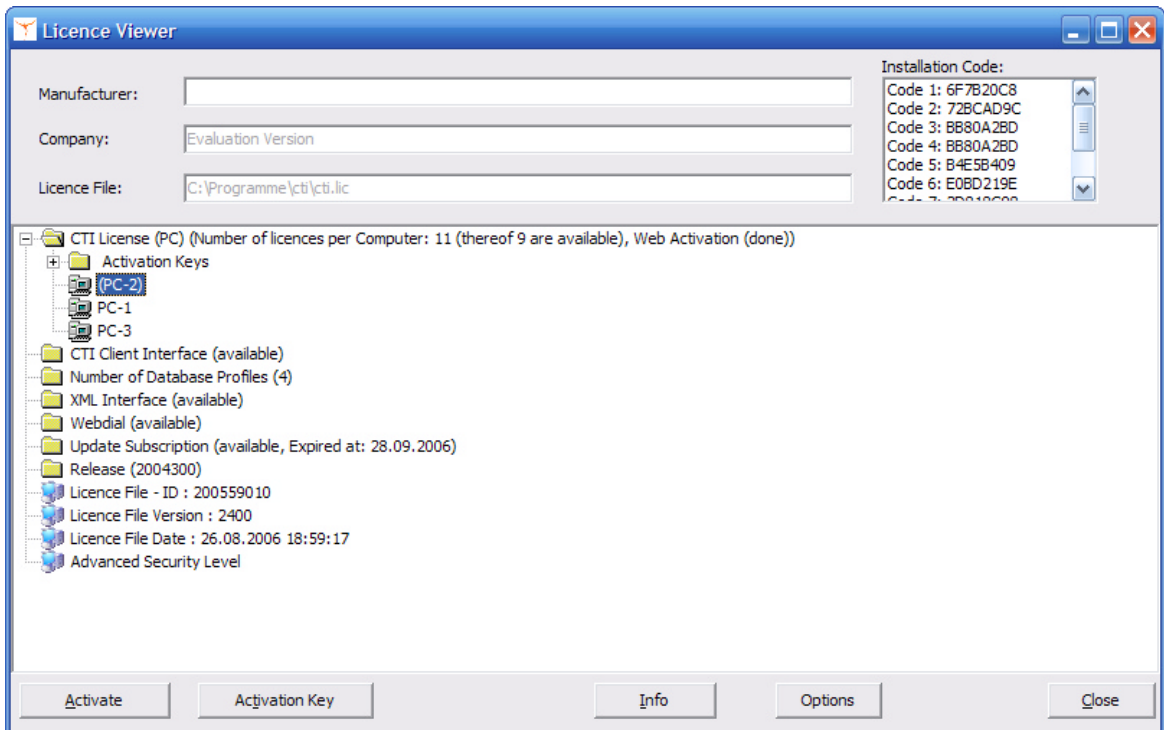
If a PC does not further need the license of CTI Data Connector Office Edition, its license can be deactivated. The license can then be used by another PC.

- Start screen *Show License Information* 
- Click on the + sign before *CTI License*, then select the PC the license of which should be deactivated
- Press the button *Deactivate*. The name of the PC will be displayed in brackets - e.g. (PC-2)



### **Reactivate a license**

The license can be activated again by selecting the deactivated PC and then pressing the button *Activate*.



## 9.1.5 License Agreement

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Date: 01.08.2003  
LA-DE-01082003

## 9.2 How TOs and FAQ

This chapter introduces Frequently Asked Questions as well as tips and tricks.

### 9.2.1 How can I print this Tutorial

#### Print this tutorial

The Online Tutorial is also available as a PDF document.

You can print this tutorial - click on the link to download PDF file

### 9.2.2 How do I activate CTI Data Connector Office Edition?

During the trial period, the activation screen appears with each start of the program. You need a Serial Number for activating the product - see Buy Serial Number<sup>[107]</sup>.

You do not have to reinstall the version and you can directly activate it if:

- You have installed the trial version as a single user version and you bought a single user version
- You have installed the trial version as a network version and you bought a network version

and

- The version you have installed has the same version number like the version you bought - see How can I check my version number?<sup>[140]</sup>

#### What happens during activation?

The activation process will connect the licence to the PC or Server. **Use the Serial Number only on the PC / Server you want to use CTI Data Connector Office Edition. The Serial Number cannot be used twice.** After the activation is done, CTI Data

Connector Office Edition will run only on this PC / Server. Your hardware data, Serial Number, name, e-mail address and some program-specific data is transferred to our activation center. No other data stored on your PC will be transmitted.

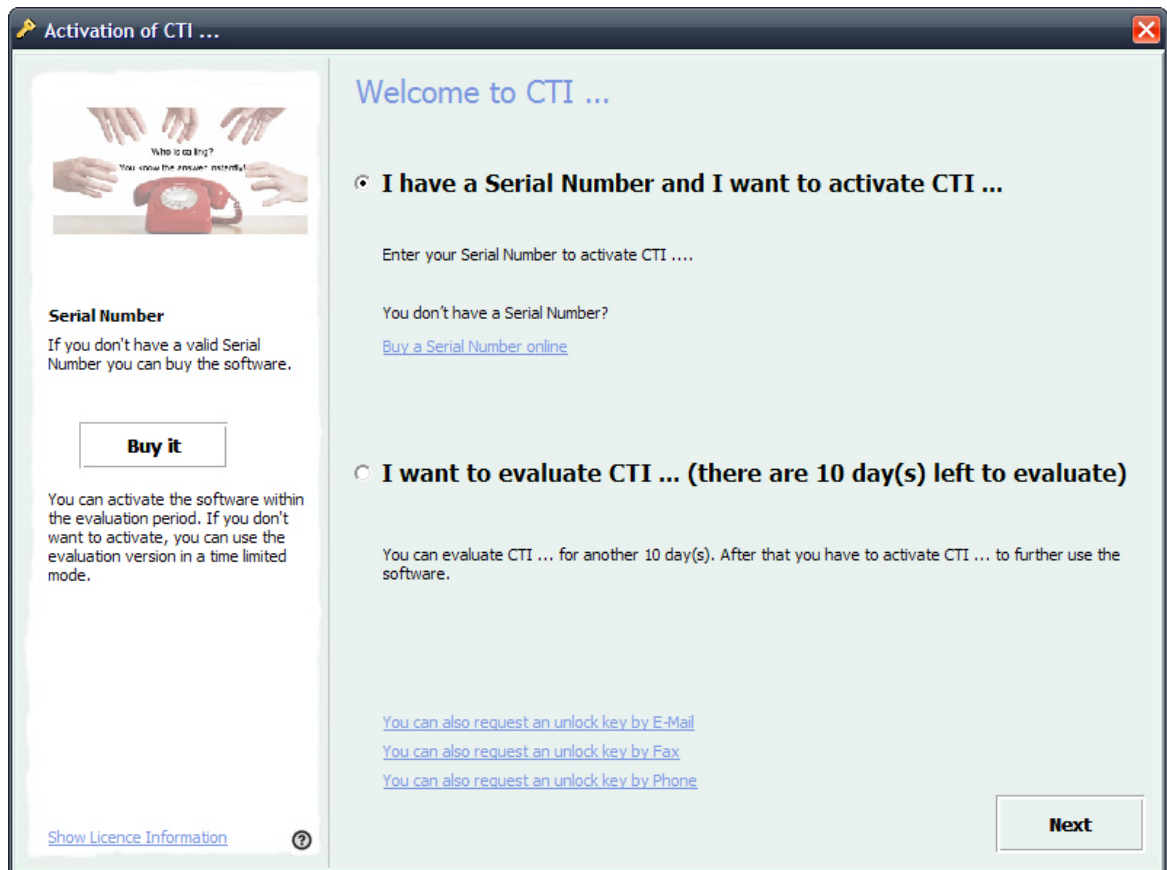
**i** The activation process can be done from any PC, even if you have a network version (starting the activation process on the server is not possible)

### **Select Activation Method**

On the first screen, either choose:

- *I have a Serial Number and I want to activate CTI Data Connector Office Edition.* This will trigger the Online Activation<sup>107</sup>. This is the recommended activation method and should be used if an Internet connection is available
- *You can also request an unlock key by E-Mail.* This will trigger the E-Mail Activation<sup>109</sup>

(note: the screen you see could be slightly different)



**See also**

Buy Serial Number <sup>[107]</sup>  
Online Activation <sup>[107]</sup>  
E-Mail Activation <sup>[107]</sup>  
Reinstall Software <sup>[112]</sup>  
Your CTI Data Connector Office Edition License <sup>[118]</sup>

### 9.2.3 System Requirements - TAPI driver

To communicate with a phone system, either a CTI server (Third Party Solution) or the connection of the phone set to the PC (First Party Solution) is supported. For both systems a **TAPI driver 2.x** is mandatory. See details for TAPI - Where do I find the TAPI driver? <sup>[114]</sup>

If you are using a modem, we strongly recommend switching to a phone set connected to the PC (via USB/serial), because the TAPI drivers of modems often do offer only basic functions or do not function at all.

Analogue phones without a PBX can use an adapter [www.way2call.com](http://www.way2call.com) .  
ISDN phones without a PBX are available with an inbuilt TAPI driver.

VOIP systems like Cisco Call Manager, Avaya, Swyx or Innovaphone normally have a TAPI driver included.

SIP phones which offer TAPI support are Lancom (<http://www.lancom-systems.com> VOIP Client), Sipps (Ahead) [www.sipps.de](http://www.sipps.de) and Xten (Counterpath) [www.xten.de](http://www.xten.de) .

Please check firstly with your phone vendor about which solution meets your requirements and how you can install and configure the TAPI driver. You can contact [Support@mirage-systems.de](mailto:Support@mirage-systems.de) if you do have the TAPI driver installed and CTI Data Connector Office Edition has problems with making an outgoing call or receiving incoming calls.

Windows NT to Windows XP SP2 is supported. Every Windows System (especially NT) needs the latest service pack. CTI Data Connector Office Edition can be installed on a server, but this is not mandatory.

#### **See also**

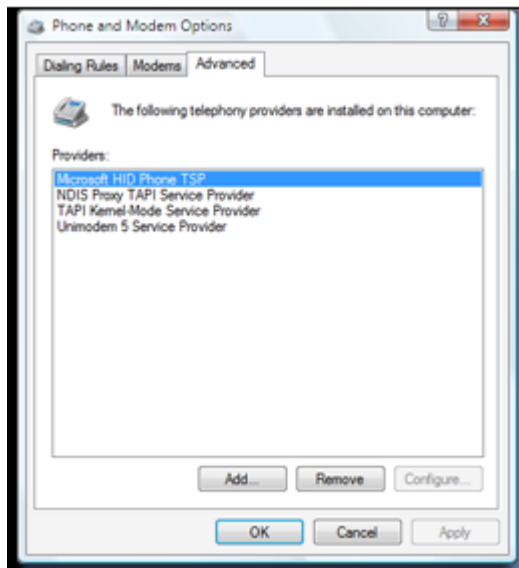
Configure <sup>[55]</sup> the TAPI driver within CTI Data Connector Office Edition  
Where do I find the TAPI driver? <sup>[114]</sup>

## 9.2.4 Where do I find the TAPI driver?

**Telephony Application Programming Interface (TAPI)** is a development interface for CIT applications. Applications using TAPI need a **TAPI driver**. This TAPI driver has to be delivered by the **phone manufacturer**. As this driver is always device-dependent, it is not possible to use a generic driver which is supplied with the operating system. The driver often has the name of the manufacturer or the phone system, sometimes in combination with the extension number.

To check whether a TAPI driver is installed, do the following (Instructions for Windows XP).

- Start, Control Panel
- Phone and Modem options
- TAB **advanced**



There are a lot of drivers which come with Windows like *NDIS Proxy TAPI Service Provider*. Search for a driver with the name of the **PBX, PBX vendor or your direct line**. If this driver is missing, you probably do not have the correct TAPI driver for your PBX.

### See also

System Requirements<sup>113</sup> TAPI driver  
Configure<sup>55</sup> the TAPI driver within CTI Data Connector Office Edition

## 9.2.5 Minimum Configuration Settings

During installation, the Configuration Wizard<sup>[53]</sup> was already started. You can define a lot of individual configuration settings there. The following settings **have to be defined** to guarantee a basic functionality.

- TAPI device driver<sup>[55]</sup> - it is delivered by the telephone manufacturer. See also: System requirements - TAPI driver<sup>[113]</sup>
- Prefix for external calls<sup>[69]</sup> and the minimum length<sup>[69]</sup> of a phone number indicating an external call
- Button Dialing Rules<sup>[70]</sup> - configures country settings and area code. See also special configuration for US / Canada<sup>[71]</sup>
- Button Folder<sup>[75]</sup> - Select Microsoft Outlook™ contact folder for caller identification

Just by setting this minimum configuration you will be able to make outgoing calls and to identify incoming calls. The Configuration Wizard can be started any time by **right** click on the icon<sup>[19]</sup>, option Configuration Wizard<sup>[53]</sup>.



**See also**

Where do I find the TAPI driver? [114](#)  
System requirements - TAPI driver [113](#)

## 9.2.6 Troubleshooting - Outgoing calls

If outgoing calls do not always or never work, then first perform the following checks:

- Necessary configuration settings for outgoing calls [27](#)
- Outgoing call - never possible [133](#)
- Outgoing call - dials wrong number / prefix [133](#)
- Outgoing call - Dial with Hyperlink not working [134](#)
- Outgoing call - Postfix like # necessary [134](#)
- Outgoing call - problem with Internal Number [135](#)
- Outgoing call - Hotkey is not working [135](#)

If the problem cannot be located, CTI Data Connector Office Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see [How do I send a log file? 138](#)

### 9.2.6.1 Necessary configuration settings for outgoing calls

Below find a list of configuration settings which have an impact on outgoing calls. If outgoing calls are not working, check these settings and also check [Troubleshooting - Outgoing calls 132](#).

#### Configuration Settings

- Select correct TAPI driver [55](#)
- PBX Configuration [69](#)
- Dialing Rules [70](#) - for US / Canada check additional settings [71](#)
- TAPI Configuration - Prefix Outgoing Calls [60](#)
- TAPI Configuration - Provider Postfix [61](#)
- TAPI Configuration - Ignore Fake Number [61](#)
- Dial via Hotkey [29](#) - configure [56](#) Hotkey and activate this option [54](#)
- Dial within Browser [30](#) - activate this option [54](#)
- Dial with a Hyperlink [31](#) - activate this option [54](#)

If **internal** numbers are not dialled correct, check:

- TAPI Configuration - Prefix internal number [61](#)

- Minimum length<sup>[69]</sup> of phone number indicating an external call

### 9.2.6.2 Outgoing Call - never possible

If you are not able to make an outgoing call, perform the following checks:

- Start the Configuration Wizard<sup>[53]</sup>
- Browse to the page where you can select the TAPI driver<sup>[55]</sup> and select the correct TAPI driver. See also Where do I find the TAPI driver?<sup>[114]</sup>
- Press button *Finish*
- Select Quick dialing<sup>[33]</sup>
- Type in a phone number and select *Dial*

If the number is dialed but with a **wrong prefix** (a wrong number is placed in front or numbers are missing), check solution Outgoing Call - wrong Prefix<sup>[133]</sup>.

If dialing works with Quick dialing but you can not dial with a Hotkey<sup>[29]</sup>, change the Hotkey<sup>[56]</sup> within the Configuration Wizard.

If dialing still does not work, send us a log file<sup>[138]</sup>.

### 9.2.6.3 Outgoing Call - wrong Prefix

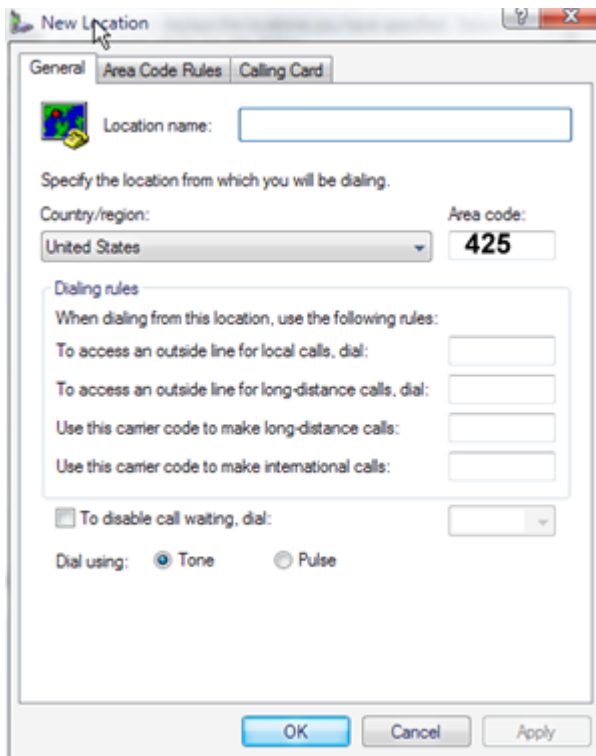
If outgoing calls are working, but the **prefix is wrong** (a wrong number is placed in front or numbers are missing) **or the number has a wrong format**, perform the following checks:

- Start the Configuration Wizard<sup>[53]</sup>
- Browse to the page PBX Configuration<sup>[69]</sup>
- Select button dialing Rules<sup>[70]</sup>
- Select your location and press *Edit*
- The Country/Region setting is important. Select your **country** and enter the Area code **without** any prefix like 0 or 1
- DO NOT use dialing rules - they are only supported for US / Canada - see dialing Rules for US / Canada<sup>[71]</sup>
- Check the Dial tone digits for external calls<sup>[69]</sup>. This is the number to get an outside line, normally 0 or 9.
- Enter the Minimum length of phone number indicating an external call<sup>[69]</sup>. If the maximum INTERNAL phone number has a length of 3 digits, you have to enter 4 here
- Activate the Desktop Notification<sup>[78]</sup> for **outgoing** calls to get each call signaled
- Press button *Finish*
- Select Quick dialing<sup>[33]</sup>
- Type in a phone number and select *Dial*

If the number is dialed correctly but **no caller data is displayed**, try to cut a prefix for an outside line, e.g. 9 or 0. This can be configured within Expert Settings, TAPI configuration<sup>[60]</sup>. Do also check the option Ignore Fake Numbers<sup>[61]</sup>.

If the number is still wrong, try other settings.

If dialing still does not work, send us a log file [138](#).



#### 9.2.6.4 Outgoing Call - Dial with Hyperlink not working

Dialing with an hyperlink is supported in all Browsers. You have to activate this function within the Configuration Wizard - see Configure dial options for Browsers [58](#). Make sure that you have disabled the feature in Skype. See also: *Expert Settings, Miscellaneous Settings, Application to dial with Hyperlink* [67](#).

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

```
<a href="callto://phonenumber">Click to Dial</a>
```

where phonenumber has to be replaced with the real phone number like

```
<a href="callto://+4970054885342">Click to Dial</a>
```

#### 9.2.6.5 Outgoing Call - Postfix like # necessary

If a character like # has to be added **after** each phone number (postfix), configure this option in Expert Settings, TAPI Driver. [61](#)

### 9.2.6.6 Outgoing Call - problem with Internal Number

Check the following configuration settings:

- Minimum length of phone number indication an external call<sup>[69]</sup> - this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window<sup>[78]</sup> for **outgoing** calls to get each call signaled
- The configuration option: Don't show internal calls<sup>[73]</sup> must be **unchecked** to trace the call in the Desktop Notification window
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in Prefix for Internal Numbers<sup>[61]</sup> how to add the company number and area code

### 9.2.6.7 Outgoing Call - Hotkey is not working

If you try to dial with a Hotkey<sup>[29]</sup>, and nothing happens, perform the following checks:

Firstly check if you can dial with the Quick dialing<sup>[33]</sup> option. If this is also not possible (the phone does not dial anything), check Outgoing Call - never possible<sup>[133]</sup>.

If the phone dials, the Hotkey settings have to be modified:

- Try a Hotkey which is not used like CTRL+SHIFT+F10 - change the Hotkey here<sup>[56]</sup>
- Especially in case the Hotkey is sometimes working and sometimes not, increase the Clipboard waiting time in increments of 10 - change the waiting time here<sup>[57]</sup>

## 9.2.7 Troubleshooting - Incoming calls

If incoming calls do not always or never work, firstly perform the following checks:

- Necessary configuration settings for caller identification<sup>[41]</sup>
- Incoming call - never signalled<sup>[136]</sup>
- Incoming call - wrong prefix<sup>[137]</sup>
- Incoming call - Caller Identification not working<sup>[137]</sup>
- Incoming call - use address data stored in PBX<sup>[137]</sup>
- Incoming call - problem with Internal Number<sup>[138]</sup>

If the problem cannot be located, CTI Data Connector Office Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file - see How do I send a log file?<sup>[138]</sup>

### 9.2.7.1 Necessary configuration settings for caller identification

Below is a list of configuration settings which have an impact on the caller identification. If the caller identification is not working, check these settings and also check [Troubleshooting - Incoming calls](#)<sup>[135]</sup>.

#### Address information used for caller identification

- Configured Microsoft Outlook<sup>[75]</sup> contact folders
- Configured Database
- Addresses stored in the PBX system<sup>[74]</sup>

#### Configuration Settings

- Select correct TAPI driver<sup>[55]</sup>
- Configuration Caller Identification<sup>[73]</sup>
- TAPI Configuration - truncate incoming phone number at<sup>[61]</sup>
- TAPI Configuration - Prefix incoming call<sup>[60]</sup>
- TAPI Configuration - Don't signal updated phone number during a call<sup>[62]</sup>

If **internal** numbers are not identified correct, check:

- TAPI Configuration - Prefix internal number<sup>[61]</sup>
- Minimum length<sup>[69]</sup> of phone number indicating an external call

### 9.2.7.2 Incoming Call - never signalled

If an incoming call is **never** signalled, perform the following checks:

- Start the Configuration Wizard<sup>[53]</sup>
- Browse to the page where you can select the TAPI driver<sup>[55]</sup> and select the correct TAPI driver. See also [Where do I find the TAPI driver?](#)<sup>[114]</sup>
- Activate the Desktop Notification window<sup>[78]</sup> for incoming calls to get each call signalled
- Press button *Finish*
- Call with your mobile phone and make sure that you **do not suppress the phone number** from your mobile

If the number is signalled but with a **wrong prefix**, check the solution [Incoming Call - wrong Prefix](#)<sup>[137]</sup>

If incoming calls still do not work, send us a log file<sup>[138]</sup>.

#### **See also**

[Incoming call - wrong address information is displayed](#)<sup>[137]</sup>

### 9.2.7.3 Incoming Call - wrong Prefix

If the number of an incoming call is signaled but with a wrong prefix (e.g. **00** 70054885342), try to cut a prefix e.g. 9 or 0.  
If the leading 0 is missing (e.g. 70054885342), add 0 for incoming calls.

This can be configured within Expert Settings, TAPI configuration<sup>[60]</sup>.

### 9.2.7.4 Incoming Call - Caller Identification not working

If the number of an incoming call is signaled, but the caller can not be identified, firstly perform the following checks:

- If you get the wrong caller signalled, change the value for Caller Identification - truncate number of digits<sup>[73]</sup> to a value between 1 to 3
- Make sure that the number is stored in your database or MS-Outlook
- If you are using MS-Outlook / Exchange, make sure you have the right Outlook folder selected<sup>[75]</sup>
- If you are using a single user installation, firstly perform Format Phone Numbers
- If you have your address information stored in the PBX, check Incoming Call - use address data from PBX<sup>[137]</sup>
- If you are using a network installation, either test with a number stored in MS-Outlook or have the administrator perform the synchronization of the the phone numbers on the server<sup>[83]</sup>
- If the number is signaled with a wrong prefix (e.g. **007**0054885342), check Incoming Call - wrong Prefix<sup>[137]</sup>
- If the number is signaled with additional characters (e.g. 070054885342@xy.com), truncate the incoming phone number at the @ sign - check Expert Settings, TAPI Configuration<sup>[60]</sup>
- If only internal calls are not identified, check Incoming Call - problem with Internal Number<sup>[138]</sup>

### 9.2.7.5 Incoming Call - use address data stored in PBX

If the address data is stored in the PBX or phone, this data can be used additionally for caller identification. Enable Display Caller ID Name identified by PBX.<sup>[74]</sup>

### 9.2.7.6 Incoming Call - wrong address information is displayed

If you often get into the situation that multiple addresses are displayed in combination with the text *Caller could not be identified exactly*, this is due to the feature of truncating phone numbers. Reduce the number of digits which are truncated - see settings *Caller Identification truncate number of digits*<sup>[74]</sup>

- In Europe - use either 3 or 2
- In USA / Canada - always use 0

### 9.2.7.7 Incoming Call - problem with Internal Number

Check the following configuration settings:

- Minimum length of phone number indication an external call<sup>[69]</sup> - this is the main configuration setting to determine if a call is internal or external
- Activate the Desktop Notification window<sup>[78]</sup> for **incoming** calls to get each call signaled
- The configuration option: Don't show internal calls<sup>[73]</sup> must be unchecked
- If the internal number is e.g. signaled with 12 but the number stored in the database is 07342/7383-12, see in Prefix for Internal Numbers<sup>[61]</sup> how to add the company number and area code

### 9.2.8 How do I send a log file?

If a problem can not be located, CTI Data Connector Office Edition can log all events coming from the TAPI driver. Often wrong implementations of the TAPI driver or functions not implemented like call transferring are causing problems. Our support team can analyze the log file.

To send us a log file, perform the following steps:

- Start the Configuration Wizard (CTI Data Connector Office Edition icon, right mouse click, Configuration Wizard)
- Browse to step 1 (depending on the program version this can be another page) and select the Button Expert Settings<sup>[58]</sup>
- Check **Activate call logging**
- Press button *OK*, then button *Finish*
- CTI Data Connector Office Edition starts. Now perform the operation **that is not working correctly**, e.g. make an incoming call with your mobile phone
- Everything is now logged into a file
- Start the Configuration Wizard (CTI Data Connector Office Edition icon, right mouse click, Configuration Wizard)
- Browse to step 1 (depending on the program version this can be another page) and select the Button Expert Settings<sup>[58]</sup>
- Press the button **Send Log File**. Your e-mail client opens. Add a detailed description of the problem and the exact phone numbers which do not work. Send the e-mail.
- **Uncheck Activate call logging**
- Press button *OK*, then button *Finish*

### 9.2.9 Special requirements for Access database in a network environment

If an Access Database is used in a network environment, it could never be backed up as long as CTI Data Connector Office Edition is running.

Enable the configuration option: Terminate database connection after each call<sup>[66]</sup> on each client PC and **disable this option on the server** which performs the phone number formatting<sup>[83]</sup>.

### 9.2.10 How to use the Called ID (my number) for caller identification?

By default, the phone number of the person who is calling (CallerID) is used for caller identification. If the number which was called (Called ID) should be used, select the option Use Called ID for caller identification<sup>[73]</sup>.

### 9.2.11 How can I suppress the notification of internal calls?

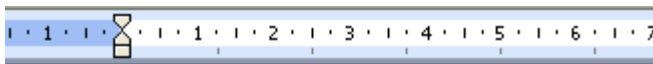
By default, internal calls are signalled. Check the configuration option: Don't show internal calls<sup>[73]</sup>

### 9.2.12 How can I dial with an Hotkey?

In nearly any application a phone number can be **highlighted** and dialed using the Hotkey defined in the configuration settings<sup>[56]</sup>. **The default value is the key F10.**

Highlight the phone number within the Web Browser by pressing down the left mouse key and dragging the mouse cursor to the right. When reaching the end of the phone number, release the left mouse button and press F10.

In the example below a phone number has been highlighted. It can be dialed using the defined Hotkey.



United Whiskey Distilleries Ltd.  
Freemont Tower  
3 Perkins Bridge  
Windsor  
SL44QQ  
United Kingdom

Phone: **++44734273833**

#### **See also**

Troubleshooting - Hotkey is not working<sup>[135]</sup>

Configuration - Hotkey to dial with a highlighted phone number<sup>[56]</sup>

Configuration - Activate dialing via Hotkey<sup>[54]</sup>

### 9.2.13 How can I dial with an Hyperlink?

You can dial with a Hyperlink in Browser applications. To use this functionality, the application has to be modified. Dialing via Hyperlink allows to dial just with a click.

To dial via an hyperlink in a Browser based application, just insert the following command in your application:

```
<a href="callto://phonenumber">phonenumber</a>
```

where phonenumber has to be replaced by the real phone number like

```
<a href="callto://+4970054885342">+4970054885342</a>
```

It is displayed on the screen as follows: +4970054885342

To enable dialing via hyperlink open the Configuration Wizard and check *Activate dialing via Hyperlink*<sup>[54]</sup>.

 This function is available in all Browsers (e.g. Internet Explorer or Firefox).

#### **See also**

Enable Dial with a Hyperlink<sup>[58]</sup>

Troubleshooting - Dial with a Hyperlink is not working<sup>[134]</sup>

Configuration - Application used for dialing with Hyperlink<sup>[56]</sup>

### 9.2.14 How can I speed up dialling?

Often dialling of a phone number can be accelerated by using an additional character - especially when using an IP phone or software.

The configuration of the additional character (e.g. #) can be done in the Configuration Wizard, Expert Settings, Provider Postfix<sup>[61]</sup>.

### 9.2.15 How can I check my version number?

Right mouse click on the icon and select Open CTI Data Connector Office Edition. Select menu ?, **About CTI Data Connector Office Edition**. You will find the detailed version number there.

To check for the latest updates, select menu ?, **Software Service**.

### 9.2.16 How do I uninstall CTI Data Connector Office Edition

To uninstall CTI Data Connector Office Edition

- Select Start, Control Panel
- Add/Remove Programs

Search for CTI Data Connector Office Edition 2.3.1 and select Remove.

### 9.2.17 I found no answer for my questions

If you did not find an answer for your questions in the tutorial search in the extensive Online Knowledge Base.

## Browse Online Knowledge Base

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