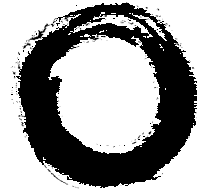


Lucent Technologies
Bell Labs Innovations



PassageWay[®] Telephony Manager R2.0
for PARTNER[®] Communications System
Getting Started

560-201-121
Comcode 108363052
Issue 1
December 1998

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Introduction

1

What is PassageWay Telephony Manager?

PassageWay® Telephony Manager is a set of computer telephony integration (CTI) applications enabling you to control telephone calls (both incoming and outgoing) directly from your personal computer (PC). These applications run with Microsoft® Windows® 95, Microsoft Windows NT® Workstation 4.0 or later, and Microsoft Windows NT Server 4.0 or later, and provide you with an interface between your PC and your company's PARTNER® Communications System via your telephone.

PassageWay Telephony Manager increases your telecommunications capabilities by providing the following applications:

- **Telephony Manager**

Telephony Manager is an application that enables you to control telephone calls (both incoming and outgoing) directly from your PC. From the Telephony Manager window, you can:

- make calls
- answer calls
- view the calling/called party information for each call (referred to as *caller ID* in this guide), if available

- take notes during calls
- place calls on hold
- hang up calls
- transfer calls
- set up and manage conference calls
- program speed dial buttons
- program and invoke system feature buttons

■ **Phonebook**

Phonebook is a card file application that enables you to maintain names, addresses, telephone numbers, and other information you need. You can place calls directly from Phonebook "cards," and you can set Telephony Manager to match the telephone numbers of incoming calls with entries in Phonebook. If the telephone number matches an entry in Phonebook, Telephony Manager displays the name of the caller, enabling you to know who is calling before you answer your telephone.

■ **Log Manager**

Log Manager is an application that enables you to access information from the call log, which stores a record of every call you make and receive while Telephony Manager is running. Using Log Manager, you can review and edit notes you took during calls via Telephony Manager and place calls directly from the call records.

- **Script Editor**

Script Editor is an application that enables you to automate routine tasks by recording scripts that you can run with Telephony Manager. Scripts are user-defined tasks (such as, running a program or performing a set of actions). For example, using Script Editor, you can program automatic “screen pops,” where your database application searches your files to find a match with the information for the incoming call (such as the caller ID number or caller ID name) automatically. If a match is found, the record containing the matching information in your database application is displayed without you having to perform any actions. You can use these scripts with Auto-Task Manager and Telephony Manager Function buttons.

- **Auto-Task Manager**

Auto-Task Manager is an application that enables you to specify criteria (for example, incoming call or outgoing call, calling party number, calling party name, called party number, or called party name) that will “trigger” scripts to run automatically.

- **Anywhere Dialer**

Anywhere Dialer is an application that enables you to dial telephone numbers from any Windows application via Telephony Manager.

Support for TAPI

Telephony Manager runs with the Microsoft Windows Telephony Application Programming Interface (TAPI). To be used with a PARTNER system, Telephony Manager requires the PassageWay Service Provider software, which is a device driver that enables TAPI-compliant applications (such as Telephony Manager) to communicate with your telephone. Telephony Manager also supports the Unimodem and Unimodem V service providers, enabling you to use Telephony Manager on a laptop PC when you are away from the office (that is, not connected to your company’s PARTNER system).

About This Guide

- **Chapter 1 - Introduction**

This chapter describes the structure and content of this guide. This chapter also provides a brief introduction to Telephony Manager.

- **Chapter 2 - Installing and Configuring Telephony Manager**

This chapter describes how to install and configure the PassageWay Telephony Manager software and the PassageWay Service Provider software.

- **Chapter 3 - Using the Telephony Manager Applications**

This chapter describes how to start the Telephony Manager, Phonebook, Log Manager, Auto-Task Manager, Script Editor, and Anywhere Dialer applications.

- **Chapter 4 - Troubleshooting**

This chapter provides information about possible error conditions and how to respond to them when you install, start, and use PassageWay Telephony Manager.

- **Index**

The index provides a quick way of locating information within this guide.

User Responsibilities

Before using the PassageWay Telephony Manager applications, you should be familiar with basic Windows functions and procedures. If not, consult your *Microsoft Windows User's Guide*.

You also may need to contact your PC vendor for information on configuring your PC to meet PassageWay Telephony Manager requirements.

Online Help

To access procedures on how to use the Telephony Manager applications, consult the online help for each application. You can access the online help for an application by pressing the F1 key on your keyboard or choosing Contents from the Help menu.

Conventions Used in This Guide

The following conventions are used in this guide:

- Throughout this guide, telephones are grouped into two different categories: system telephones and standard telephones. System telephones refer to Lucent telephones specifically designed to work with the PARTNER system. These telephones include the PARTNER-34D, PARTNER Endeavor-34D, MLS-34D, PARTNER-18D, PARTNER-18, PARTNER Endeavor-18D, PARTNER Endeavor-18, MLS-18D, MLS-12D, MLS-12[®], PARTNER-6, PARTNER Endeavor-6, MLS-6[®], and MLC-6 model telephones. Standard telephones refer to industry-standard, single-line rotary or touch-tone telephones, including feature phones with built-in feature buttons and lights.
- Text you should enter appears *in this style of type*.
- Commands, values, instructions, and prompts that appear on the screen are **in this style of type**.
- Components of dialog boxes (such as boxes) appear *in this style of type*.
- Key names that are always located on the keyboard in the same place appear in all capital letters (for example, ENTER).
- Key combinations (holding down one key while pressing another key) are connected with a "+" (for example, SHIFT+TAB).
- Only active windows are displayed.

- The terms *option buttons* and *radio buttons* refer to the same object.
- Throughout this guide, the term *PARTNER* refers to all versions of the following systems:
 - PARTNER Advanced Communications System (ACS)
 - PARTNER Endeavor
 - PARTNER II
 - PARTNER Plus
 - PARTNER

Getting Help

If you have questions about or problems with the PassageWay Service Provider that this guide does not resolve, call the Lucent Technologies National Customer Care Center at **1 800 628-2888** or your local Authorized Dealer.

Installing and Configuring the PassageWay Service Provider

2

Overview

This chapter provides the procedures for installing and configuring PassageWay Telephony Manager and the PassageWay Service Provider.

Installation Instructions

To install Telephony Manager, you must perform the following steps:

1. Read the section “PassageWay Telephony Manager Components” on page 2-4 to make sure that you have all of the Telephony Manager components.
2. Read the section “PassageWay Telephony Manager Requirements” on page 2-4 to make sure that you have the required hardware and software to run Telephony Manager.
3. Install and configure the PassageWay Service Provider by performing the procedures in the section “Installing and Configuring the PassageWay Service Provider” on page 2-8.

 **NOTE:**

If you will not use Telephony Manager with a PARTNER system, you can skip Step 3. The PassageWay Service Provider is required to use Telephony Manager with a PARTNER system.

To install and configure the PassageWay Service Provider, you must perform the following procedures:

- a. Read the section “Before You Begin” on page 2-9 to make sure you have the necessary information to set up and configure the PassageWay Service Provider.
- b. Connect your PassageWay adapter to your PC and your telephone. Refer to the section “Installing the PassageWay Adapter” on page 2-10.
- c. If you have an existing version of the PassageWay Service Provider installed, you must uninstall it. Refer to the section “Removing the PassageWay Service Provider” on page 2-51 for more information.

- d. Install and configure the PassageWay Service Provider software by performing the procedures in the section “Installing the PassageWay Service Provider Software” on page 2-14.
4. Install Telephony Manager by performing the procedures in the section “Installing the Telephony Manager Software” on page 2-34.
5. Start Telephony Manager by performing the procedures in the section “Starting Telephony Manager” on page 2-38.
6. Configure the dialing information for Telephony Manager by performing the procedures in the section “Configuring the Dialing Information” on page 2-42.
7. Configure how Telephony Manager and Phonebook will operate by performing the procedures in the section “Configuring Telephony Manager and Phonebook Options” on page 2-46.

PassageWay Telephony Manager Components

Telephony Manager consists of the following components:

- a CD-ROM

⇒ NOTE:

If you require 3-1/2" diskettes, please contact the PassageWay Fulfillment Center at 860 434-3961 and request the diskette version of software for Telephony Manager R2 for PARTNER.

- this guide (A PDF version of this guide is located in the *Getting Started Guide* directory on the CD-ROM. Consult the *Readme* file in this directory for more information.)

PassageWay Telephony Manager Requirements

Telephony Manager requires the hardware and software listed below. Note that system performance may be adversely affected by lower system speeds and lower memory capacities.

- a PC with the following hardware:
 - an 80486/66DX or higher processor
 - an available serial port
 - a minimum of 16 MB of RAM
 - a 3.5-inch, 1.44-MB, high-density diskette drive or CD-ROM drive
 - a hard disk with at least 25 MB of space available
 - a VGA or better monitor

— a Windows-compatible pointing device (a mouse or trackball is recommended)

 **NOTE:**

If you want to use Telephony Manager with your company's PARTNER system, you must have an available serial port in your PC that is dedicated to the PassageWay Service Provider. The PassageWay Service Provider cannot share a serial port with other devices.

If all the serial ports in your PC are already in use, you must purchase an additional serial port or free up an existing serial port to use with the PassageWay Service Provider.

- Microsoft Windows 95, Microsoft Windows NT Server 4.0 or later, or Microsoft Windows NT Workstation 4.0 or later

 **NOTE:**

Only English (United States) is supported.

- The PassageWay Service Provider is required to use Telephony Manager or another TAPI application with your company's PARTNER system. If you want to use Telephony Manager with a modem, you will need the Unimodem service provider or Unimodem V service provider. The Unimodem service provider should be present on your PC. However, if you never used your modem, you will be prompted to configure the Unimodem service provider.

 **NOTE:**

You should install and configure the service provider(s) before installing PassageWay Telephony Manager. This document describes how to install and configure the PassageWay Service Provider.

- a system or standard telephone connected to a PARTNER system that is configured and operating properly (if you want to use Telephony Manager with a PARTNER system)

 **NOTE:**

A complete list of all the telephones supported by the PassageWay Service Provider is provided in the PassageWay Service Provider software (also known as the “PassageWay Configurator”).

The PassageWay Service Provider operates with all versions of the following PARTNER systems:

- PARTNER ACS
- PARTNER Endeavor
- PARTNER II
- PARTNER Plus
- PARTNER

 **NOTE:**

Throughout this document, the term *PARTNER* is used to refer to all of the systems listed above.

For caller ID capabilities, you must have:

- a PARTNER ACS, PARTNER Endeavor, or a PARTNER II Release 3.0 or later system.

A PARTNER ACS will provide caller ID (if available) for all outside lines connected to the control unit, a 206EC module, or a 400EC module.

A PARTNER Endeavor will provide caller ID (if available) for all outside lines connected to the control unit or a 362EC module.

A PARTNER II Release 3.0 or later system will provide caller ID (if available) for all outside lines connected to a 206EC module or a 400EC module.

- outside lines subscribed to caller ID from your local telephone company.
- a system telephone that has a display and a Caller ID Inspect button programmed. The Caller ID Inspect button is a display feature button that shows you call-related information for an incoming call when you are already active on a call.

Installing and Configuring the PassageWay Service Provider

This section describes how to install and configure the PassageWay Service Provider. You must perform the procedures in this section if you want to use Telephony Manager with a PARTNER system. You should install the PassageWay Service Provider before you install Telephony Manager.

The PassageWay Service Provider is a device driver that enables applications that are compliant with the Microsoft Windows Telephony Application Programming Interface (TAPI) (such as PassageWay Telephony Manager) to communicate with your telephone and your company's PARTNER system. The PassageWay Service Provider accepts the basic TAPI requests from your TAPI-compliant application and translates these requests into instructions to the PassageWay adapter to control your telephone and interact with your company's PARTNER system.

Before You Begin

This section describes the information that is required to install and configure the PassageWay Service Provider.

Before installing the PassageWay Service Provider, you also must know the following information:

- the version and release of the PARTNER system your company has (for example, PARTNER ACS R3.0)
- the type of telephone you have
- the extension number of your telephone
- the location and telephone number of each outside line button on your telephone
- the location of feature buttons on your telephone
- the number of the COM port (for example, COM1, COM2, COM3, COM4, etc.) to which you are connecting the serial cord from the PassageWay adapter. (PassageWay supports up to COM9.)

 **NOTE:**

If your PARTNER system supports caller ID and you have a system telephone with a display, you should have a Caller ID Inspect button programmed on your telephone. A Caller ID Inspect button enables you to view caller ID information for an incoming call while you are already active on another call. Without a Caller ID Inspect button, the PassageWay Service Provider will present caller ID information for the first call that starts ringing at your telephone, but it will not provide caller ID information for any other calls you receive while you are active on a call.

Installing the PassageWay Adapter

This section describes how to connect the PassageWay adapter to your telephone, your PC, and the line jack. The PassageWay adapter provides an interface between the serial port on your PC and the Line jack on your telephone, enabling you to access the PARTNER system from your PC. The PassageWay adapter has a DB-25 connector for 25-pin serial ports. If you have a 9-pin serial port on your PC, use the 9-pin to 25-pin adapter to connect your PassageWay adapter to your serial port.



NOTE:

Do not install the PassageWay adapter while you are active on a call.

To install the PassageWay adapter:

1. Turn off your PC.
2. Unplug the line cord from your telephone.
3. Connect the line cord to the jack labeled "Line" on the PassageWay adapter (Figure 2-1).

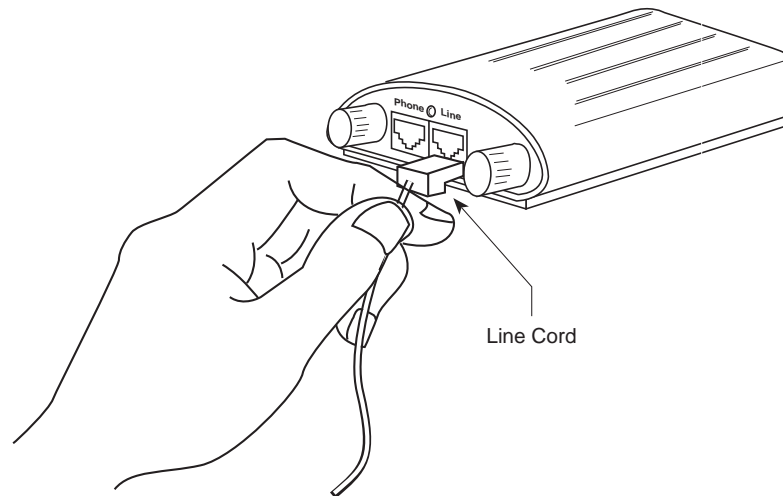


Figure 2-1. Connecting the Line Cord to the PassageWay Adapter

4. Determine the type of serial port (9 pin or 25 pin) you have on your PC. If you have a 9-pin serial port, you will use the 9-pin to 25-pin adapter.
5. Connect the DB-25 connector on the PassageWay adapter to the serial (COM) port on your PC. If your PC has a 9-pin serial (COM) port, connect the 9-pin to 25-pin adapter to the 9-pin serial (COM) port, and then connect the PassageWay adapter to the 25-pin connector on the 9-pin to 25-pin adapter.

⇒ NOTE:

You can use an RS-232 cable to connect the adapter to the PC if you do not want to connect the adapter directly to the PC.

6. Connect one end of the 7-foot, 2-pair, modular phone cord (D4BU) to the jack labeled "Phone" on the PassageWay adapter (Figure 2-2).

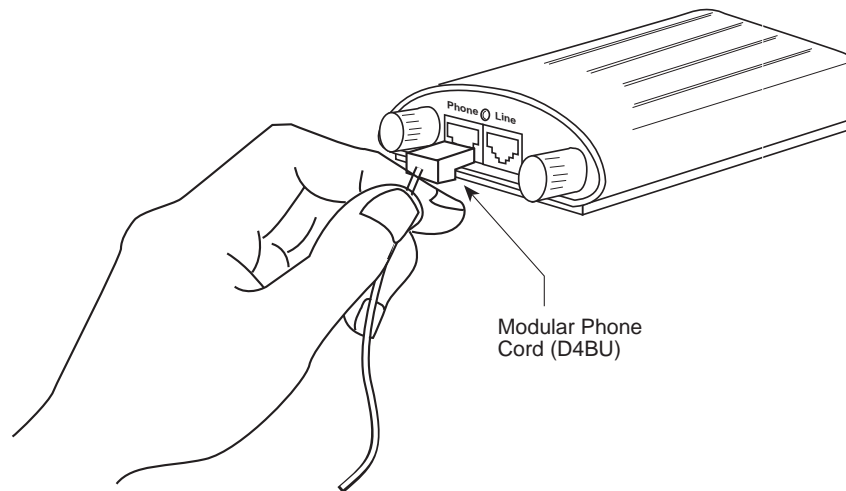


Figure 2-2. Connecting the Modular Phone Cord to the PassageWay Adapter

7. Connect the other end of the 7-foot, 2-pair, modular phone cord (D4BU) to the Line jack on your telephone.
8. Check the LED on the PassageWay adapter. The LED is located next to the Phone and Line jacks on the PassageWay adapter.
If the red LED is “on,” proceed to Step 9.
If the red LED is “off,” proceed to the section “PassageWay Adapter LEDs” in Chapter 4.
9. Turn on your PC.

If you have an existing version of the PassageWay Service Provider installed, you must uninstall it and then install the new PassageWay Service Provider. Refer to “Removing the PassageWay Service Provider” on page 2-51 to uninstall the PassageWay Service Provider. Refer to “Installing the PassageWay Service Provider Software” on page 2-14 to install the new PassageWay Service Provider.

If you do not have an existing version of the PassageWay Service Provider installed, proceed to “Installing the PassageWay Service Provider Software” on page 2-14.

Installing the PassageWay Service Provider Software

This section describes how to install and configure the PassageWay Service Provider. You can modify the PassageWay Service Provider configuration information later by running the PassageWay Configurator.



NOTE:

If you have an earlier version of PassageWay Solution, you must exit Connect or AT&TConnect (if it is running) before installing the new PassageWay Service Provider.

To install the PassageWay Service Provider:

1. Start Windows (if it is not running already).
2. Shut down all applications running on your PC.
3. If you have an earlier version of PassageWay Solution applications (for example, AT&TCall, AT&TConnect, or AT&TBuzz) installed already, perform one of the following steps:
 - If you do not want to run the earlier version of PassageWay Solution applications again, delete Connect or AT&TConnect from your StartUp folder (if present).
 - If you want to run the earlier version of PassageWay Solution applications again, leave Connect or AT&TConnect in your StartUp folder (if present). Be sure to install the PassageWay Service Provider in the directory that contains the PassageWay Solution applications. If you install the PassageWay Service Provider in a different directory, you must manually change the properties of Connect or AT&TConnect in the StartUp folder so that it uses the new Connect application. (See your Windows User's Guide to change the properties of a shortcut in the StartUp folder.)

4. If you are installing from CD-ROM, insert the Telephony Manager CD-ROM into the CD-ROM drive of your PC. If the Autorun feature is enabled on your PC, the PassageWay Setup dialog box appears. Proceed to Step 7.

If you are installing from a shared directory on a network server, proceed to Step 5.

If you are installing from diskette, insert PassageWay Service Provider diskette #1 into the diskette drive of your PC. Proceed to Step 5.

5. Double-click on the My Computer icon on your desktop.

The My Computer window appears.

6. Depending on whether you are installing from a CD-ROM, a shared directory, or a diskette, perform one of the following steps:
 - If you are installing from CD-ROM, double-click on the CD-ROM icon, and then double click on **start.exe**. The PassageWay Setup dialog box appears.
 - If you are installing from a shared directory, double-click on the network drive icon specified by your Network Administrator, and then double-click on **setup.exe**. The PassageWay for PARTNER Service Provider Setup dialog box appears. Proceed to Step 8.
 - If you are installing from diskette, double-click on the diskette drive icon, and then double-click on **setup.exe**. The PassageWay for PARTNER Service Provider Setup dialog box appears. Proceed to Step 8.
7. Select the *PassageWay Service Provider* option button, and then choose the OK button.

The PassageWay for PARTNER Service Provider Setup dialog box appears.

8. Choose the Next button.

The Select Destination Directory dialog box appears. This dialog box displays the name of the directory where the PassageWay Service Provider software will be installed by default.

9. If the default directory is unacceptable, choose the Browse button and specify an alternate directory. Otherwise, proceed to Step 10.
10. Choose the Next button.

The Select Application Folder dialog box appears. This dialog box displays the name of the application folder to which the PassageWay Service Provider icons will be added.

11. If the default application folder is unacceptable, enter the name of the new folder to be created or select an existing folder. Otherwise, proceed to Step 12.

12. Choose the Next button.

The Ready to Install dialog box appears.

13. Choose the Next button.

The installation program copies files to the destination directory. The installation program displays a message box to inform you of its status as it installs files.

If you are installing from diskette, insert the requested PassageWay Service Provider software diskette into the PC when prompted, and choose the OK button.

After the software is installed, the Creating Application Folder & Short Cuts message box appears.

14. Choose the OK button.

The Installation Completed message box appears.

15. Choose the Finish button.

The PassageWay Configurator is launched, and it displays the Find PassageWay Phone dialog box.

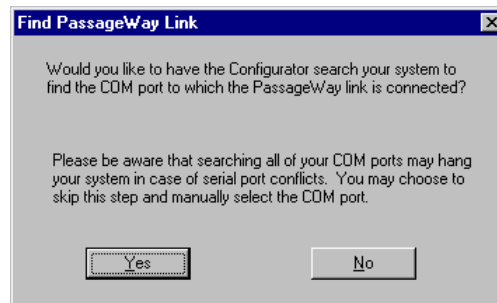


Figure 2-3. Find PassageWay Link Dialog Box

The PassageWay Configurator is a software application that enables you to set up the PassageWay Service Provider. Until you set up the PassageWay Service Provider, you will be unable to use any TAPI applications.

Setting up the PassageWay Service Provider consists of specifying the following information:

- the COM port to which the PassageWay adapter is connected
- the version and release of the PARTNER system your company has (for example, PARTNER ACS R3.0)
- the type of telephone you have
- the extension number of your telephone

- the location and telephone number of each outside line button on your telephone
- the location of feature buttons on your telephone

 **NOTE:**

The PassageWay Configurator does not verify whether the information you enter is correct. When you run a TAPI application (for example, Telephony Manager), the PassageWay Service Provider tries to use the information you entered via the PassageWay Configurator. If the information you entered in the PassageWay Configurator was correct, the TAPI application works properly. If any of the information you entered is incorrect, the TAPI application will not work. You must then run the PassageWay Configurator and change the incorrect information.

The Find PassageWay Link dialog box enables you to have the PassageWay Configurator determine the COM port to which your PassageWay adapter is connected.

16. Choose the Yes button.

If the PassageWay Configurator found the COM port to which your PassageWay adapter is connected, a message box appears, stating that the PassageWay link was found and providing the number of the COM port. Choose the OK button. The PassageWay Configurator - COM Port dialog box appears, and the option button for the corresponding COM port is selected.

If the PassageWay Configurator did not find the COM port to which your PassageWay adapter is connected, the PassageWay Link Not Found message box appears. Choose the OK button. The PassageWay Configurator - COM Port dialog box appears, and no COM port option button is selected.

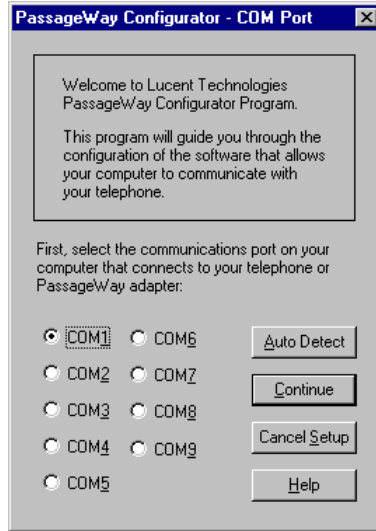


Figure 2-4. Sample PassageWay Configurator - COM Port Dialog Box

17. Perform one of the following steps:

- If PassageWay “found” the COM port for you, choose the Continue button.
- If PassageWay did not find the COM port for you, select the option button of the COM port in your PC to which your PassageWay adapter is connected, and then choose the Continue button.

The PARTNER System Version dialog box appears.

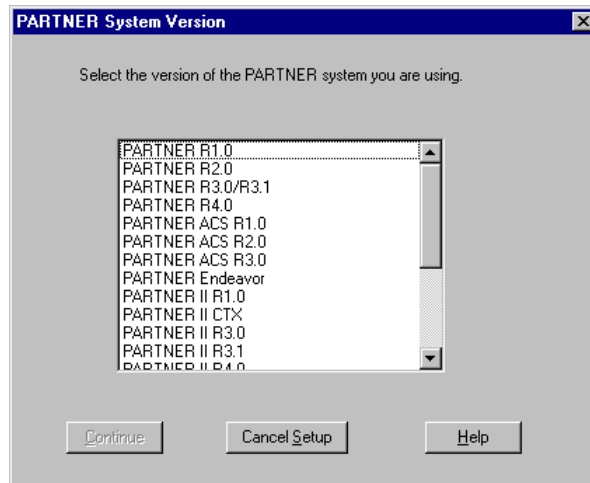


Figure 2-5. PARTNER System Version Dialog Box

18. From the PARTNER System Version dialog box, select the PARTNER system you are using, and then choose the Continue button.

The Telephone Models dialog box appears.

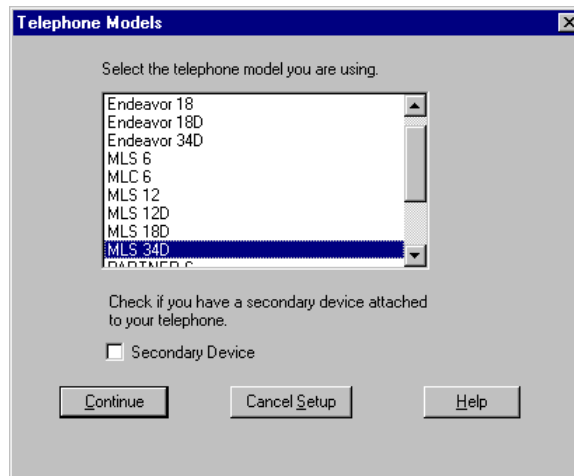


Figure 2-6. Telephone Models Dialog Box

19. Select the telephone you are using.
20. If a secondary device (such as answering machine or a fax machine) is attached your PARTNER system phone, choose the *Secondary Device* check box.

21. Choose the Continue button.

The Auto Configure Your Telephone dialog box appears.

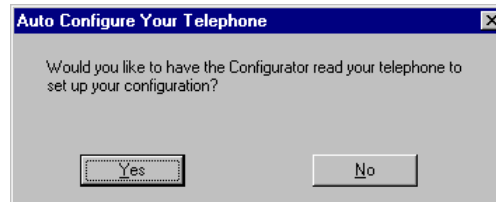


Figure 2-7. Auto Configure Your Telephone Dialog Box

The PassageWay Configurator can automatically "read" the following information from your telephone:

- the location of outside line buttons on your telephone
- the location of Auto Dial buttons, Call Forward buttons, Do Not Disturb button, and Caller ID Inspect (Inspect) button programmed on your telephone

22. Perform one of the following steps:

- If you want to manually configure the PassageWay Configurator, proceed to Step 23.
- If you want to automatically configure the PassageWay Configurator, perform the following steps:
 - a. Choose the Yes button.

A message box appears showing the status of the PassageWay Configurator reading the programming from your telephone.

If the PassageWay Configurator is unable to read the programming from your telephone, an Error message box appears. Choose the OK button. The Extension Number dialog box appears. Proceed to Step 24.

When the PassageWay Configurator is finished reading the programming information from your telephone, the Phone Line Information dialog box appears for the telephone type you specified.

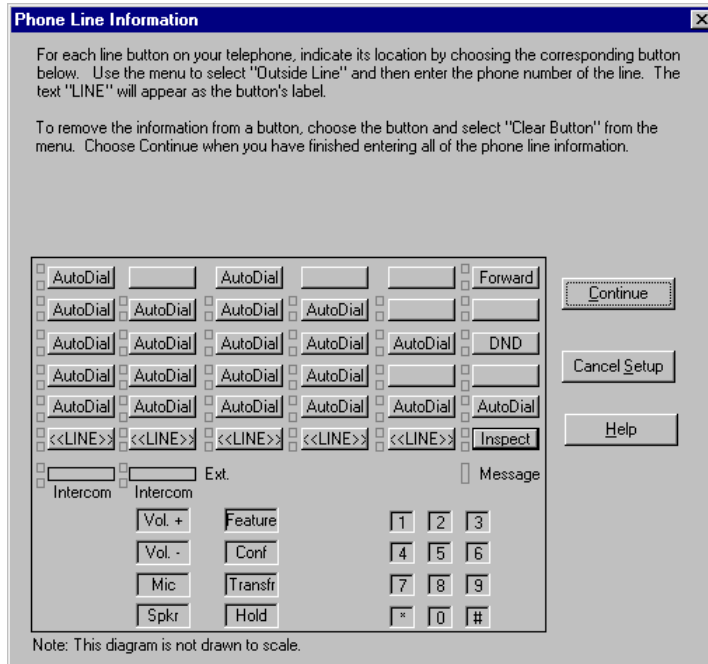


Figure 2-8. Sample Phone Line Information Dialog Box

This dialog box shows the location of outside line buttons, Auto Dial buttons, Call Forward buttons, Do Not Disturb button, and Caller ID Inspect button programmed on your telephone.

At this point, you must specify the telephone number for each <<LINE>> button displayed in the Phone Line Information dialog box.

- b. Click on a "<<LINE>>" button.

A submenu appears, displaying the following options:

- Clear Button, which removes the programming (if any) and label (if any) from the selected button.
- Outside Line, which enables you to specify the telephone number of the outside line for the selected button.
- Cancel, which closes the submenu without changing the programming for the selected button.

- c. Choose Outside Line.

The Enter Number dialog box appears.

- d. Enter the telephone number for this outside line, and then choose the OK button.

The button displays "LINE".

- e. Repeat Steps b through d for any other "<<LINE>>" buttons on your telephone.

- f. When you are finished, choose the Continue button.

The Feature Buttons dialog box appears.

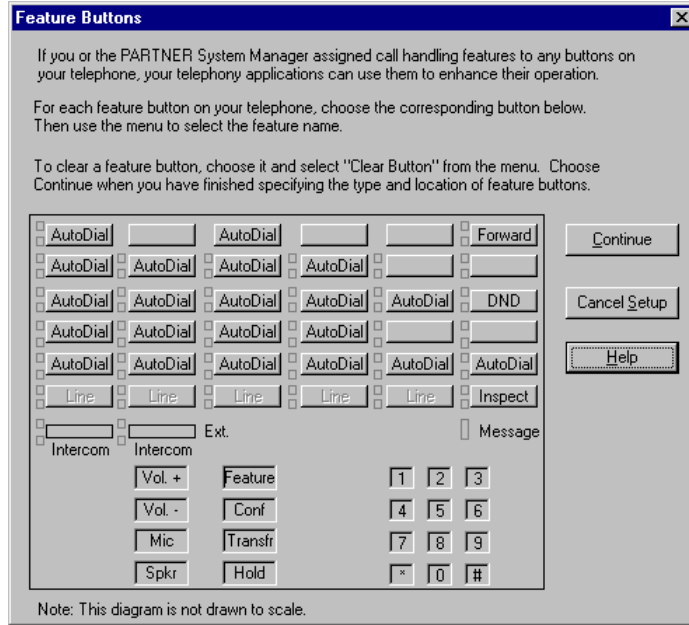


Figure 2-9. Sample Feature Buttons Dialog Box

This dialog box shows the location of call handling features assigned to buttons on your telephone by the PARTNER System Manager. Telephony applications can use these call handling features to enhance their operation.

The PassageWay Service Provider can recognize the following call handling features programmed to your telephone:

- Auto Dial
- Call Forward
- Do Not Disturb
- Caller ID Inspect (Inspect)



NOTE:

Features that cannot be programmed to buttons on your telephone are disabled (that is, you cannot program these features).

- g. Choose the Continue button.
The Configuration Complete message box appears.
- h. Proceed to Step 35.

23. Choose the No button.

The Extension Number dialog box appears.

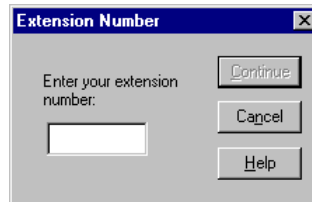


Figure 2-10. Extension Number Dialog Box

24. Enter your extension number, and then choose the Continue button.

If you specified that you have a standard telephone, the Enter Number dialog box appears. Enter the telephone number for the outside line, and then choose the OK button. The PassageWay Configurator - Complete message box appears. Proceed to Step 34.

If you specified that you have a PARTNER system telephone, the Phone Line Information dialog box appears for the telephone type you specified.

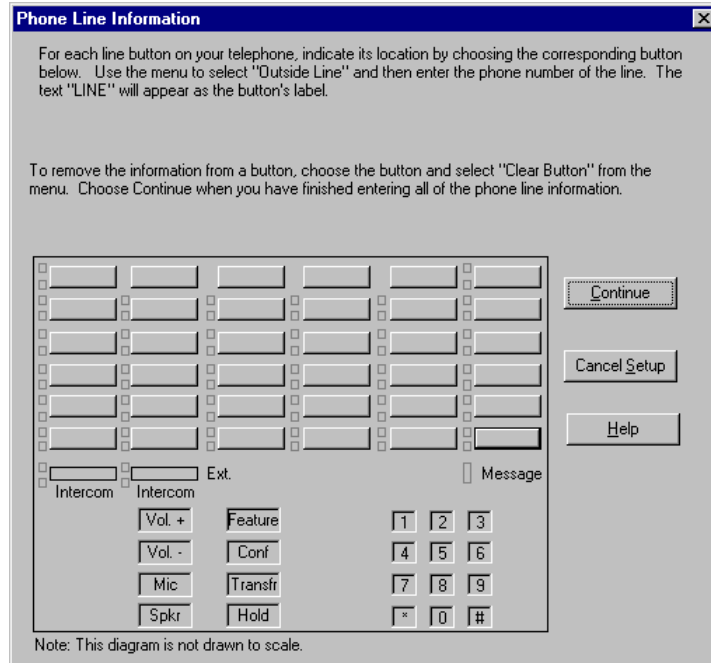


Figure 2-11. Sample Phone Line Information Dialog Box

This dialog box presents a representation of the buttons on your telephone. Using this dialog box, you will specify the location for each outside line on your telephone.

25. Choose the location of an outside line on your telephone.

A submenu appears, displaying the following options:

- Clear Button, which removes the programming (if any) and label (if any) from the selected button.
- Outside Line, which enables you to specify the telephone number of the outside line for the selected button.
- Cancel, which closes the submenu without changing the programming for the selected button.

 **NOTE:**

Make sure you specify the correct location of each outside line on your telephone. If you incorrectly specify this information, your system will not work as expected.

26. Choose **Outside Line**.

The Enter Number dialog box appears.

27. Enter the telephone number for the outside line, and then choose the OK button.

The button displays "LINE."

28. Repeat Steps 25 through 27 for any other outside lines on your telephone.

29. When you are finished, choose the Continue button.

The Feature Buttons dialog box appears.

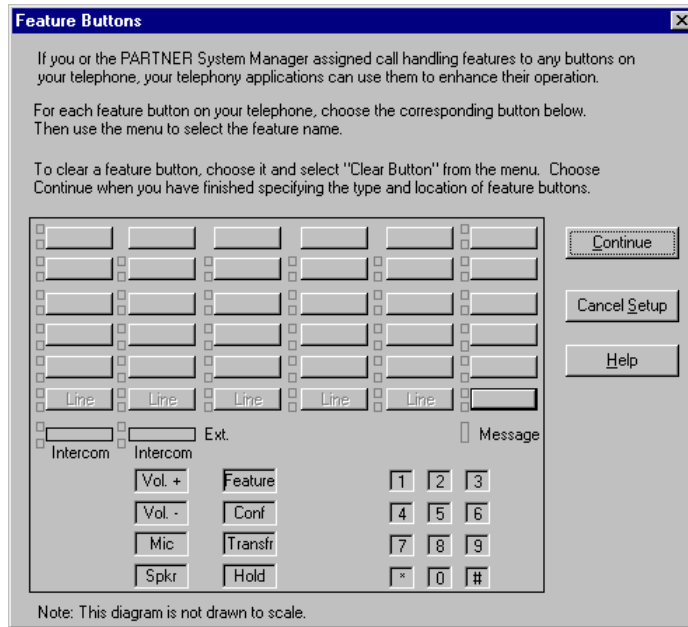


Figure 2-12. Sample Feature Buttons Dialog Box

Using this dialog box, you specify the location of call handling features assigned to buttons on your telephone by the PARTNER System Manager. By specifying the locations of feature buttons, telephony applications can use these call handling features to enhance their operation.

The PassageWay Service Provider can recognize the following call handling features programmed to your telephone:

- Auto Dial
- Call Forward
- Do Not Disturb
- Caller ID Inspect (Inspect)

 **NOTE:**

- Features that cannot be programmed to buttons on your telephone are disabled (that is, you cannot program these features).
- Make sure you specify the correct type and location of each feature assigned to buttons on your telephone. If you incorrectly specify any of this information, your system will not work as expected.

30. Choose a button where a feature is assigned.

A submenu appears, displaying the following options:

- Clear Button
- Auto Dial
- Call Forward
- Do Not Disturb
- Inspect
- Cancel

31. Choose the appropriate feature for the selected button.

The label for the selected feature appears on the button.

32. Repeat Steps 30 and 31 for any other buttons.

33. When you are finished, choose the Continue button.

The PassageWay Configurator - Complete message box appears.

34. Choose the OK button.

The Configuration Complete message box appears.

35. Choose the OK button.

The View README File dialog box appears. If you want to view the Readme file now, make sure the check box is selected. (This check box is selected by default). If you do not want to view the Readme file now, make sure the check box is not selected.

36. Choose the Finish button.

If the Readme file check box was selected, the Notepad window appears, displaying the contents of the Readme file. Proceed to Step 37.

If the Readme file check box was not selected, the About To Restart Windows message box appears. Proceed to Step 38.

37. When you are finished reading the Readme file, select **Exit** from the File menu to close the Notepad window.

 **NOTE:**

If you have any other Notepad windows open, you must close all of them now. The installation will not continue until all Notepad windows are closed.

The About To Restart Windows message box appears.

38. Choose the OK button.

The Install dialog box appears.

39. Remove the diskette from the diskette drive (if you are installing from diskette), and choose the OK button.

Depending on your version of Windows, either the system or Windows restarts.

The PassageWay Service Provider is now installed.

If you need to modify any of the information for your telephone (for example, lines or features are added to or removed from your telephone), run the PassageWay Configurator. The PassageWay Configurator is located in the application folder that contains the PassageWay Service Provider. (The default application folder is **PassageWay for PARTNER**.)

 **NOTE:**

If you experience any difficulties running telephony applications, ask your PARTNER System Manager to check the administration of your telephone and then run the PassageWay Configurator again to correct any errors you may have made.

Installing the Telephony Manager Software

This section describes how to install Telephony Manager.

To install Telephony Manager:

1. Start Windows (if it is not running already).
2. Shut down all applications running on your PC.
3. If you are installing from CD-ROM, insert the Telephony Manager CD-ROM into the CD-ROM drive of your PC. If the Autorun feature is enabled on your PC, the PassageWay Setup dialog box appears. Proceed to Step 6.

If you are installing from a shared directory on a network server, proceed to Step 4.

If you are installing from diskette, insert Telephony Manager diskette #1 into the diskette drive of your PC.

4. Double-click on the My Computer icon on your desktop.

The My Computer window appears.

5. Depending on whether you are installing from a CD-ROM, a shared directory, or a diskette, perform one of the following steps:
 - If you are installing from CD-ROM, double-click on the CD-ROM icon, and then double click on **start.exe**. The PassageWay Setup dialog box appears.
 - If you are installing from a shared directory, double-click on the network drive icon specified by your Network Administrator, and then double-click on **setup.exe**. The PassageWay Telephony Manager Setup dialog box appears. Proceed to Step 7.

- If you are installing from diskette, double-click on the diskette drive icon, and then double-click on **setup.exe**. The PassageWay Telephony Manager Setup dialog box appears. Proceed to Step 7.
- 6. Select the *PassageWay Telephony Manager* option button, and then choose the OK button.
The PassageWay Telephony Manager Setup dialog box appears.
- 7. Choose the Next button.
The Select Destination Directory dialog box appears. This dialog box displays the name of the directory where the Telephony Manager applications will be installed by default.
- 8. If the default directory is unacceptable, choose the Browse button and specify an alternate directory. Otherwise, proceed to Step 9.
- 9. Choose the Next button.
The Select Application Folder dialog box appears. This dialog box displays the name of the application folder to which the Telephony Manager icons will be added. Proceed to Step 10.
- 10. If the default application folder is unacceptable, enter the name of the new folder to be created or select an existing folder. Otherwise, proceed to Step 11.
- 11. Choose the Next button.
The Creating Short Cuts dialog box appears.
- 12. If you would like to have a short cut for Telephony Manager on the Windows desktop, make sure the first check box is selected. (The check box is selected by default.)
- 13. If you would like to have a short cut for Telephony Manager on the Start menu, make sure the second check box is selected. (The check box is selected by default.)

14. Choose the Next button.

The Add to StartUp dialog box appears.

15. If you would like to have the Anywhere Dialer application added to your Startup folder so that it starts every time you start your system, make sure the first check box is selected. (The check box is selected by default.) Anywhere Dialer allows you to use Telephony Manager to dial telephone numbers that are located in other applications.
16. If you would like to have Telephony Manager added to your Startup folder so that it starts every time you start your system, make sure the second check box is selected.
17. Choose the Next button.

The Ready to Install dialog box appears.

18. Choose the Next button.

The installation program copies files to the destination directory. The installation program displays a message box to inform you of its status as it installs files.

If you are installing from diskette, insert the requested diskette into the PC when prompted, and choose the OK button.

After the software is installed, the Installation Completed dialog box appears. If you want to view the Readme file now, make sure the check box is selected. (This check box is selected by default). If you do not want to view the Readme file now, make sure the check box is not selected.

19. Choose the Finish button.

If the *Readme file* check box was selected, the Notepad window appears, displaying the contents of the Readme file. Proceed to Step 20.

If the *Readme file* check box was not selected, the About To Restart Windows message box appears. Proceed to Step 21.

20. When you are finished reading the Readme file, select **Exit** from the File menu to close the Notepad window.

 **NOTE:**

If you have any other Notepad windows open, you must close all of them now. The installation will not continue until all Notepad windows are closed.

The About To Restart Windows message box appears.

Depending on your system, you may have to restart your PC.

21. Choose the OK button.

If the Install dialog box appears, remove the diskette from the diskette drive (if you are installing from diskette), and choose the OK button.

If the Install dialog box does not appear, the installation is completed.

Telephony Manager is now installed. Proceed to “Starting Telephony Manager.”

Starting Telephony Manager

The first time you start Telephony Manager you are prompted to configure the following settings:

- the number of call appearances on your telephone. You can enter up to eight call appearances (six outside lines and two intercom).
- the minimum number or default number of call appearances you want displayed in the Telephony Manager window. These call appearances will be displayed even when there is no corresponding call on your telephone.
- whether you want the size of the Call Appearance area of the Telephony Manager window to change automatically as you make and receive calls. If you enable the Auto-Sizing feature, the Telephony Manager window automatically displays a call appearance for each call that appears at your telephone up to the number of call appearances you specified in the *Number of telephone lines available* setting (that is, the number of primary call appearances on your telephone). When each call disconnects, the call appearance for each call is automatically removed from the Call Appearance area of the Telephony Manager window. The number of call appearances that remains is the minimum number or default number of call appearances you specified. By default, the Auto-Sizing feature is enabled.

If you disable the Auto-Sizing feature, the maximum number, minimum number, or default number of call appearances you specified appears in the Call Appearance area of the Telephony Manager window, depending on the state of the Maximize/Minimize Call Appearance Area button. These call appearances are displayed even when there are no calls appearing on your telephone.

To start Telephony Manager:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Telephony Manager. (The default application folder is **PassageWay Telephony Manager**.)
4. Select **PassageWay Telephony Manager**.

If you have configured the Dialing Properties for your PC previously, the Number of Calls dialog box appears the first time you start Telephony Manager.

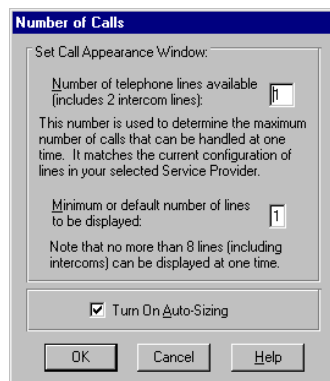


Figure 2-13. Number of Calls Dialog Box

If you have not configured the Dialing Properties for your PC previously, a message box appears, prompting you to configure your dialing locations. Choose the OK button. The Dialing Properties dialog box appears. Perform Steps 3 to 9 in the next section “Configuring the Dialing Information” to configure your dialing locations and then perform the steps in this procedure.

5. In the *Number of telephone lines available* box, enter the number of call appearances on your telephone. You can enter a maximum of eight call appearances (six outside lines and two intercom).
6. In the *Minimum or default number of lines to be displayed* box, enter the minimum number of call appearances you want displayed in the Telephony Manager window. These call appearances will be displayed even when there are no calls appearing at your telephone.
7. Select the *Turn On Auto-Sizing* check box to enable or disable the Auto-Sizing feature. A check mark in the *Turn On Auto-Sizing* check box indicates that the Auto-Sizing feature is enabled.

If you want the size of the Telephony Manager window to change automatically as you make and receive calls, enable the Auto-Sizing feature and make sure the Call Appearance area is not maximized (using the Maximize/Minimize Call Appearance Area button in the Telephony Manager window).

If you do not want the size of the Telephony Manager window to change automatically as you make and receive calls, disable the Auto-Sizing feature. If you want to view all of the call appearances, you must maximize the Call Appearance area (using the Maximize/Minimize Call Appearance Area button in the Telephony Manager window).

8. Choose the OK button.

If only one telephony provider is installed on your PC (that is, either the PassageWay Service Provider or the Unimodem Service Provider), the Telephony Manager window appears. Proceed to “Configuring the Dialing Information,” later in this chapter.

If both the PassageWay Service Provider and the Unimodem Service Provider are installed and configured on your PC, a message box appears, stating that you must select a service provider.

Choose the OK button to close the message box. The Connect Using dialog box appears. From the *Line* box, select the telephony provider you want to use, and then choose the OK button. (If you are using Telephony Manager with a PARTNER system, select **PARTNER/Line**). The Telephony Manager window appears. Proceed to “Configuring the Dialing Information,” later in this chapter.

Configuring the Dialing Information

This section describes how to configure the following dialing information:

- the digit(s) you must dial before you can make a local call (that is, an external call)
- the digit(s) you must dial before you can make a long-distance call
- the area code for your telephone

To configure the dialing information:

1. From the View menu in the Telephony Manager window, choose **Dialing Properties**.

If you are using Windows NT, the Dialing Properties dialog box appears. Proceed to Step 3.

If you are using Windows 95, the Telephony Properties dialog box appears (Figure 2-14).

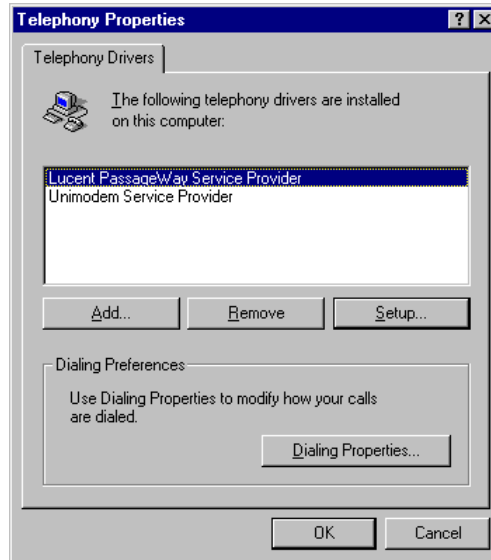


Figure 2-14. Sample Telephony Properties Dialog Box

2. If you are using Windows 95, choose the Dialing Properties button.
The Dialing Properties dialog box appears.

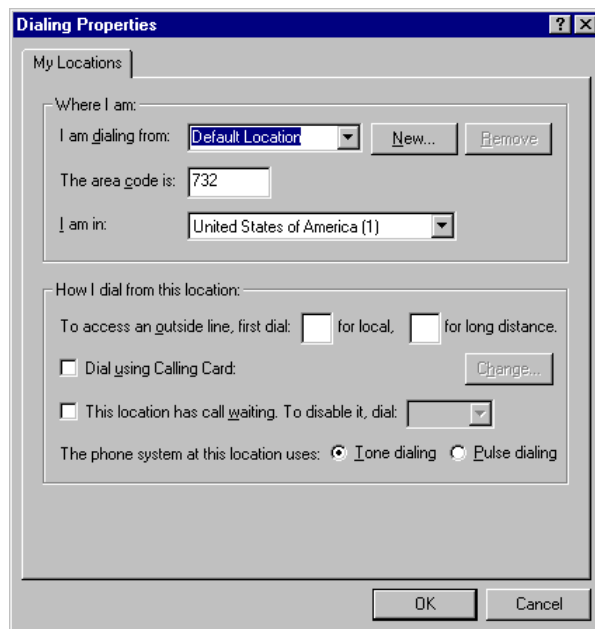


Figure 2-15. Sample Dialing Properties Dialog Box

3. In the *I am dialing from* box, select **Default Location**.
4. In *The area code is* box, enter the area code for your location.
5. In the *I am in* box, select your country.

6. In the *First dial for local* box, enter the digit(s) you must dial to access an outside line for local calls (for example, "9"). Once you enter the digit(s), you do not need to enter them when you make calls from Telephony Manager. Telephony Manager inserts the digit(s) automatically.
7. In the *First dial for long distance* box, enter the digit(s) you must dial to access an outside line for long-distance calls (for example, "9"). Once you enter the digit(s), you do not need to enter them when you make calls from Telephony Manager. Telephony Manager inserts the digit(s) automatically.



NOTE:

Do not enter "1" in the *First dial for long distance* box. The "1" is inserted automatically when necessary for a long-distance call.

8. Choose the OK button.
The Dialing Properties dialog box closes.
9. If you are using Windows 95, choose the OK button in the Telephony Properties dialog box.

Proceed to "Configuring Telephony Manager and Phonebook Options," later in this chapter.

Configuring Telephony Manager and Phonebook Options

This section describes how to configure the following:

- how you want Telephony Manager and Phonebook to operate when you receive and answer calls.
- whether you want Telephony Manager to match the caller ID for calls against entries in your Phonebook directory.
- whether you want Phonebook to start automatically every time you start Telephony Manager.
- whether you want Telephony Manager to place active calls on hold automatically when you make or answer another call.
- whether you want Telephony Manager to play feedback tones on your sound system speakers when you transfer and conference calls successfully via Telephony Manager.

To configure the Phonebook options:

1. From the Options menu in the Telephony Manager window, choose **Preferences**.

The Preferences dialog box appears.

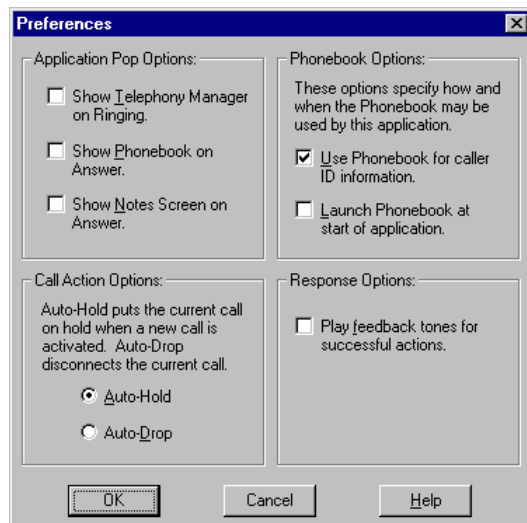


Figure 2-16. Preferences Dialog Box

2. In the Application Pop Options area, select the *Show Telephony Manager on Ringing* check box to specify whether Telephony Manager will appear when you receive a call. A check mark in the *Show Telephony Manager on Ringing* check box indicates that the Telephony Manager window will appear when you receive a call.

3. Select the *Show Phonebook on Answer* check box to specify whether the Phonebook window will appear when you answer a call. A check mark in the *Show Phonebook on Answer* check box indicates that the Phonebook window will appear when you answer a call.
4. Select the *Show Notes Screen on Answer* check box to specify whether the Log Notes and Details window will appear when you answer a call. A check mark in the *Show Notes Screen on Answer* check box indicates that the Log Notes and Details window will appear when you answer a call.
5. In the Phonebook Options area, select the *Use Phonebook for caller ID information* check box to enable or disable caller ID matching. A check mark in the *Use Phonebook for caller ID information* check box indicates that Telephony Manager will try to match caller ID with Phonebook entries.

If you set Telephony Manager to match caller ID with Phonebook entries, Telephony Manager takes the caller ID (if available) for incoming, external calls and tries to find a matching telephone number in Phonebook. If a match is found, the name and telephone number from Phonebook are displayed for the call in the Call Appearance area of Telephony Manager. If a match is not found, the information from your company's telephone system is displayed for the call in the Call Appearance area.

 **NOTE:**

Caller ID matching is only performed when there is no calling name provided with the incoming call. Also, Phonebook must be running for caller ID matching to work.

If you do not set Telephony Manager to match caller ID with Phonebook entries, the information from your company's telephone system is displayed for the call in the Call Appearance area of Telephony Manager.

6. Select the *Launch Phonebook at start of application* check box to enable or disable Phonebook to start automatically when Telephony Manager starts. A check mark in the *Launch Phonebook at start of application* check box indicates that Phonebook will start automatically when Telephony Manager starts.
7. In the Call Action Options area, select the option button of the action you want Telephony Manager to perform when you make or answer a call while you are already active on a call.

If you want Telephony Manager to place the active call on hold automatically when you make or answer another call, select the *Auto-Hold* option button.

If you want Telephony Manager to drop (that is, hang up) the active call automatically when you make or answer another call, select the *Auto-Drop* option button.

8. In the Response Options area, select the *Play feedback tones for successful actions* check box to enable or disable Telephony Manager to play feedback tones on your sound system speakers when you transfer and conference calls successfully. If you do not have a sound board and speakers, you will not hear these tones. A check mark in the *Play feedback tones for successful actions* check box indicates that Telephony Manager will play the feedback tones on your sound system speakers when you transfer and conference calls successfully.
9. Choose the OK button.

You have finished configuring Telephony Manager and Phonebook. Refer to Chapter 3 to start the Telephony Manager applications. If you need information about features and procedures for Telephony Manager, Phonebook, Log Manager, Anywhere Dialer, Auto-Task Manager, and Script Editor, be sure to consult the online help that is provided with these applications.

 **NOTE:**

If you want to convert your existing telephone number/address files (such as AT&TCall files) into Phonebook files, select the **Import** command from the File menu in Phonebook. Be sure to check the Phonebook online help for complete instructions on importing existing files into Phonebook. (See the “Import files into a Phonebook directory” topic, which is located under “Exporting/Importing Information” in the online help.)

Removing the PassageWay Service Provider

Use the following procedure to remove the PassageWay Service Provider.

To remove the PassageWay Service Provider from your PC:

1. Close all PassageWay applications and telephony applications.
2. Select the Start button.
The Start menu appears.
3. Select **Programs**.
4. Select the application folder that contains the PassageWay Service Provider. (The default application folder is **PassageWay for PARTNER**.)

5. Select **UnInstaller for Service Provider**.

The PassageWay for PARTNER UnInstaller dialog box appears.

6. Choose the Next button.

The Ready to UnInstall dialog box appears.

7. Choose the Finish button.

The Perform Uninstall status box appears, displaying the status of the uninstall process. When the uninstall is completed, the UnInstaller Finished message box appears.

8. Choose the OK button.

If you are using Windows 95, the PassageWay Service Provider is removed from your PC.

If you are using Windows NT 4.0 or later, a dialog box appears, prompting you to restart your computer. Make sure there is no diskette in your diskette drive, and choose the OK button to restart your PC.

Removing Telephony Manager

Use the following procedure to remove Telephony Manager.

To remove Telephony Manager from your PC:

1. Close all PassageWay applications and telephony applications.
2. Select the Start button.
The Start menu appears.
3. Select **Programs**.
4. Select the application folder that contains Telephony Manager. (The default application folder is **PassageWay Telephony Manager**.)
5. Select **UnInstaller for Telephony Manager**.
The PassageWay Telephony Manager UnInstaller dialog box appears.
6. Choose the Next button.
The Ready to UnInstall dialog box appears.
7. Choose the Finish button.
The Perform Uninstall status box appears, displaying the status of the uninstall process. When the uninstall is completed, the UnInstaller Finished message box appears.
8. Choose the OK button.

Using the Telephony Manager Applications

3

Overview

This chapter provides an overview of each Telephony Manager application and describes how to start each application. Refer to the online help for each application for the specific tasks you can perform with the application.

Using Telephony Manager

Telephony Manager is a software application that enables you to control telephone calls (both incoming and outgoing) directly from your PC.

From the Telephony Manager window, you can:

- make calls
- answer calls
- view the calling/called party information for each call (referred to as caller ID), if available
- place calls on hold
- hang up calls
- transfer calls
- set up and manage conference calls
- program speed dial buttons
- program call handling features such as Call Forward and Do Not Disturb to Function buttons. You can also program Function buttons with scripts that you created with Script Editor.

Using Telephony Manager, you can place calls from Phonebook and Log Manager.

You can also set Telephony Manager to match the telephone numbers of incoming calls with entries in Phonebook. If the telephone number matches an entry in Phonebook (and no caller name is provided with call), Telephony Manager displays the name of the caller, enabling you to know who is calling before you answer your telephone. This feature is useful if you subscribe to a caller ID service.

Starting Telephony Manager

If you specified that you wanted Telephony Manager to be added to your Startup folder during installation, Telephony Manager is started automatically when you start your system.

Depending on the selections you made when you installed Telephony Manager, you can start Telephony Manager in the following ways:

- Double-click on the Telephony Manager desktop shortcut.
- Select **PassageWay Telephony Manager** from the Start menu.
- Perform the following steps:
 1. Select the Start button.
The Start menu appears.
 2. Select **Programs**.
 3. Select the application folder that contains PassageWay Telephony Manager. (The default application folder is **PassageWay Telephony Manager**.)
 4. Select **PassageWay Telephony Manager**.

The Telephony Manager window appears. Refer to the online help to use Telephony Manager.

Using Phonebook

Phonebook is a card file application that serves as your phone book in which you store names, addresses, and phone numbers. By clicking the mouse, you can place calls directly from Phonebook.

To understand how Phonebook operates, it is helpful to recall how a card file works. A card file is a unit that stores separate index cards, which are sorted according to whatever method you want (usually alphabetical order) and contain specific information you enter. When you obtain a new card file, it is usually empty. You must then enter data on a card and add the card to the card file. Eventually, the card file contains a “bank” of cards. If you want to modify a card in the card file, you must find the card in the card file, remove it, make your changes, and then place it back to its position in the bank. If you want to delete a card, you must locate the card in the card file and remove it (usually, you throw it away).

Each Phonebook directory can be thought of as being a separate card file unit. Each Phonebook directory contains separate data entries, which are referred to as “cards.” Each Phonebook directory can contain a maximum of 20,000 cards. These cards contain specific information that you enter. When you create a new Phonebook directory, it does not contain any cards. The card list box, which lists the cards present in the directory, is empty, and the Card Contents form displays a blank card. As with a card file, you must then access a new, blank card (via the Add button), enter data on the blank card, and add the new card to the Phonebook (via the Save button).

If you want to modify a card in the Phonebook directory, you must find the card that you wish to modify, remove it from the card list box, make your changes to the card (via the Edit button), and then place it back in the card list box (via the Save button). If you want to delete a card, you must locate the card in the card list box and delete it (via the Delete button) from the directory.

Unlike a card file, Phonebook enables you to perform the following tasks quickly and easily:

- place calls directly from a card
- modify the card field labels for all the cards in all of the Phonebook directories
- include notes for each card

You can convert your existing telephone number/address files (such as AT&TCall files) into Phonebook files by selecting the **Import** command from the File menu in Phonebook. Be sure to check the Phonebook online help for complete instructions on importing existing files into Phonebook. (See the “Import files into a Phonebook directory” topic, which is located under “Exporting/Importing Information” in the online help.)

Starting Phonebook

To start Phonebook:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Phonebook. (The default application folder is **PassageWay Telephony Manager**.)
4. Select **PassageWay Phonebook**.

The PassageWay Phonebook window appears. Refer to the online help to use Phonebook.

If Telephony Manager is running, you can also start Phonebook by choosing the Phonebook button in the Telephony Manager window.

Using Log Manager

Log Manager is an application that stores information on incoming and outgoing calls by automatically generating a call record. The information stored includes the date, time and duration of the call, the number dialed or the number received, the status of the call, the type of call, the subject of the call, and the name of the person. Log Manager allows you to add and modify the notes for a call record.

The Log Manager window displays a list of all call records in the call log. The list contains a one-line summary of each call. You can select a record from the list to review a detailed record for that call, to add or modify notes in the record, or to delete the call record. You can also dial the selected number from the record.

Each call record consists of the following components:

- the name of the caller or called party
- the telephone number of the incoming or outgoing call
- the time the call started
- the duration of the call
- the status of the call
- the type of call including direction
- the subject of the call
- any notes you took about the call

Starting Log Manager

To start Log Manager:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Log Manager.
(The default application folder is **PassageWay Telephony Manager**.)
4. Select **PassageWay Log Manager**.

The Log Manager window appears. Refer to the online help to use Log Manager.

If Telephony Manager is running, you can also start Log Manager by choosing the Log button in the Telephony Manager window.

Using Anywhere Dialer

Anywhere Dialer is an application that enables you to dial telephone numbers from any Windows application via Telephony Manager.

Starting Anywhere Dialer

If you specified that you wanted Anywhere Dialer to be added to your Startup folder during installation, Anywhere Dialer is started automatically when you start your system. When running, the Anywhere Dialer icon appears in the system tray on the Windows Taskbar. Figure 3-1 shows the Anywhere Dialer icon in the system tray.



Figure 3-1. Anywhere Dialer Icon in the System Tray

To start Anywhere Dialer manually:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Anywhere Dialer. (The default application folder is **PassageWay Telephony Manager**.)

4. Select **PassageWay Anywhere Dialer**.

The Anywhere Dialer icon appears in the system tray on the Windows Taskbar.

Making Calls with Anywhere Dialer

To make a call with Anywhere Dialer:

1. Make sure Anywhere Dialer is running.
2. Open the application that has the telephone number you want to dial.
3. Highlight (that is, select) the telephone number you want to dial.
4. Perform one of the following steps:
 - Double-click on the Anywhere Dialer icon in the system tray on the Windows Taskbar.
 - Right-click the mouse on the Anywhere Dialer icon in the system tray on the Windows Taskbar. A menu appears. Select **Dial Highlighted Text** from the menu.

If the **Confirm Before Dialing** option is not selected in the menu, a call appearance appears in the Telephony Manager window, and the call is placed on the line that is selected in the on Line box in the Telephony Manager window.

If the **Confirm Before Dialing** option is selected in the menu, the Confirm Double-Click Dialing dialog box appears, displaying the number that will be dialed. Choose the Yes button to dial the number. A call appearance appears in the Telephony Manager window, and the call is placed on the line that is selected in the on Line box in the Telephony Manager window.

If you do not want the Confirm Double-Click Dialing dialog box to appear every time you use Anywhere Dialer, select the **Confirm Before Dialing** option in the Anywhere Dialer menu. A check next to this option indicates that the dialog box will be displayed when you try to place a call with Anywhere Dialer.

When Anywhere Dialer places a call, the Telephony Manager window becomes active if it is already open (that is, not minimized). If the Telephony Manager window is minimized, it “pops” open automatically when Anywhere Dialer places a call. You can set whether the Telephony Manager window “pops” open if it is minimized when you make calls using Anywhere Dialer. See “Set Telephony Manager to pop on dialing” in the Anywhere Dialer online help.

If Telephony Manager is not running and you place a call from Anywhere Dialer, Telephony Manager will start automatically if it is your default TAPI application.

Using Script Editor

Script Editor is an application that enables you to automate routine tasks by creating scripts that you can run with Telephony Manager. For example, using Script Editor, you can program automatic “screen pops,” where your database application searches your files to find a match with the information for the incoming call (such as the caller ID number or caller ID name) automatically. If a match is found, the record containing the matching information in your database application is displayed without you having to perform any actions.

When you start Script Editor, the Script Editor window is empty. At this point, you can create a new script or modify an existing script. You can create your scripts by recording the movements of your mouse or by entering the keystrokes that you want the script to perform. If you create a script by entering keystrokes instead of recording the movements of your mouse, the script will be much more reliable.

Once you create scripts, you can associate them with Function buttons in the Telephony Manager window or incorporate them into auto-tasks using Auto-Task Manager.

For example, suppose you have all of your contact information (that is, names and telephone numbers) in the ACT!® application. You can create a script that will perform the following actions to give you screen pops on incoming calls:

1. Start the ACT! application.
2. Take the caller ID name or caller ID number for the call and search for matching information in ACT!.
3. Display the matching record in ACT! (if there is a match).

Once you enter the keystrokes and commands to perform the actions described above, you can incorporate this script into an auto-task in the Auto-Task Manager, enabling you to have Telephony Manager execute this script when a call rings at your telephone or when you answer a call. A sample macro for ACT! is provided in "Creating a Script for ACT!," later in this section.

Starting Script Editor

To start Script Editor:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Script Editor. (The default application folder is **PassageWay Telephony Manager**.)
4. Select **PassageWay Script Editor**.

The Script Editor window appears. Refer to the online help to create and modify scripts. Be sure to read the Planning Tips and Recording Tips topics in the online help.

Creating a Script for ACT!

This section describes how to create a script for ACT! 3.0 that will match the incoming caller ID number with telephone numbers in your ACT! database. To use this script, you must have ACT! installed and operating properly on your PC.

To create a script for ACT!

1. Start Script Editor.

The Script Editor window appears.

2. Click the New button on the Toolbar in the Script Editor window.
3. From the Actions menu, choose **Insert Command**.

The Script Editor - Insert Command dialog box appears.

4. Click the Script Commands tab.
5. In the Select a Command from the List box, choose **Run an application**.

The Run Application area appears at the bottom of the dialog box.

6. In the Program Name box, enter the path and file name of the ACT! executable. Use the Browse button to specify this information.
7. Choose the Insert button.

The Run command and the information you specified appears in the Script Editor window.

8. In the Select a Command from the List box, choose **Delay Script Playback**.

The Delay area appears at the bottom of the dialog box. This option lets you enter a delay in the script.

9. Enter **5** and then choose the Insert button.

Playback.Delay 5 appears in the Script Editor window. When this script is executed, there will be a five-second delay after ACT! is started and before the next command in the script is performed. This helps to ensure that ACT! is started before the next command is performed.

10. In the Select a Command from the List box, choose **Send a Sequence of Keys**.

The Send Keys area appears at the bottom of the dialog box. This option lets you send a sequence of keystrokes (for example, ALT+F) during a script.

11. In the Key Sequence box, enter **{alt}1**.

Be sure to include **{ }** around the word "alt" to indicate that you want to send the ALT key. The keystrokes ALT+I will open the Lookup menu in the ACT! window.

12. Choose the Insert button.

The command **SendKeys "{alt}1"** appears in the Script Editor window.

13. In the Select a Command from the List box, choose **Send a Keystroke**.

The Key Press area appears at the bottom of the dialog box. Note that the Press option button is selected.

14. In the Key box, enter **p**.

This command presses the P key to specify the Phone option from the Lookup menu.

15. Choose the Insert button.

The commands **Keystroke p down** and **Keystroke p up** appear in the Script Editor window.

16. In the Script Editor - Insert Command dialog box, click the Call Event Information tab.

17. In the Select Type of Information to Insert box, choose **Incoming Call Phone Number**.

This command takes the incoming caller ID and pastes it into the Phone Number field in the Lookup dialog box.

18. Choose the Insert button.

The command **SendKeys "<<CALLINGNUM=>>"** appear in the Script Editor window.

19. In the Script Editor - Insert Command dialog box, click the Script Commands tab.

20. In the Select a Command from the List box, choose **Send a Keystroke**.

The Key Press area appears at the bottom of the dialog box. Note that the Press option button is selected.

21. In the Key box, enter **{enter}**.

This command presses the ENTER key to search the Phone Number field for a telephone number that matches the incoming caller ID. Be sure to include **{ }** around the word "enter" to indicate that you want to press the ENTER key.

22. Choose the Insert button.

The commands **Keystroke {enter} down** and **Keystroke {enter} up** appear in the Script Editor window.

23. Choose the Close button to close the Script Editor - Insert Command dialog box.

24. Save this script.

The content of this script is displayed below. References to the step in the procedure where each command was inserted is displayed **in this style of type**.

```
0 'Playback speed: (100)' Normal
0 Run "C:\ACT\Act.exe" Steps 4 through 7
0 Playback.Delay 5 Steps 8 and 9
0 SendKeys "{alt}l" Steps 10 through 12
0 Keystroke p down Steps 13 through 15
0 Keystroke p up Steps 13 through 15
0 SendKeys "<<CALLINGNUM=>>" Steps 16 through 18
0 Keystroke {enter} down Steps 19 through 22
0 Keystroke {enter} up Steps 19 through 22
```

To use this script, perform the following steps:

1. Start Auto-Task Manager.
2. Create an auto-task that will perform this script when an incoming call rings at your telephone.
3. Create an auto-task group that contains the auto-task you created in Step 2.
4. Make this new auto-task group active.
5. Refresh the auto-task (via the Refresh Auto-Tasks command) in the Telephony Manager window (if Telephony Manager is running).

Using Auto-Task Manager

Auto-Task Manager is an application that enables you to specify criteria (for example, incoming call or outgoing call, calling party number, calling party name, called party number, or called party name) that will “trigger” tasks to run automatically. The criteria and tasks you specify are known as “auto-tasks.”

Once you create auto-tasks, you add them to an auto-task group, which you can use with Telephony Manager. When an auto-task group is activated (that is, selected to be used by Telephony Manager), any calls you make or receive while Telephony Manager is running will be checked to see if they match the criteria you specified for any of the auto-tasks in the selected auto-task group. Telephony Manager checks the criteria of the auto-tasks in the selected auto-task group in the order in which the auto-tasks are listed in the auto-task group. The first auto-task that matches the criteria (if any) is then run (that is, the actions for the specified auto-task are performed).

You can create a maximum of 200 auto-tasks and 100 auto-task groups. An auto-task can consist of a maximum of 16 actions.

Starting Auto-Task Manager

To start Auto-Task Manager:

1. Select the Start button.
The Start menu appears.
2. Select **Programs**.
3. Select the application folder that contains PassageWay Auto-Task.
(The default application folder is **PassageWay Telephony Manager**.)
4. Select **PassageWay Auto-Task Manager**.

The Auto-Task Manager window appears. Refer to the online help to create, modify, and activate auto-tasks and auto-task groups.

Troubleshooting

4

Overview

This chapter provides information that can assist you in solving problems you might encounter when you install, start, and use the Telephony Manager applications. This chapter is divided into the following sections:

- Troubleshooting Telephony Manager
- PassageWay Adapter LEDs
- Troubleshooting Connect

Refer to the appropriate section to find the information required to solve your particular problem.

If you are using Windows 95, keep in mind that Telephony Manager depends on Connect in order to communicate with your telephone (when used with the PassageWay Service Provider). Connect is installed when you install the PassageWay Service Provider with Windows 95; Connect is **not present** with Windows NT 4.0 or later. As a result, Connect may be used to help diagnose problems with Telephony Manager.

Troubleshooting Telephony Manager

This section presents some common problems that you might encounter while using Telephony Manager.

Starting Telephony Manager

This section presents some common problems that you might encounter when you start Telephony Manager.

Problem 1: When you start Telephony Manager, a message box appears displaying the message: TAPI is not installed or a necessary file is missing or corrupted.

This message can appear if:

- TAPI.DLL is not installed on your PC.
- TAPI.DLL is corrupted.

Uninstall (remove) the PassageWay Service Provider (if installed), restart the system, and then re-install the PassageWay Service Provider. (Refer to Chapter 2 to uninstall and install the PassageWay Service Provider.)

Problem 2: When you start Telephony Manager, a message box appears displaying the message: There are no telephony service providers available on your computer. A service provider is required for your computer to communicate with your telephone or modem. Please install and configure a service provider and try again.

This message appears if the PassageWay Service Provider is not installed on your PC.

You must have TAPI and the Unimodem or PassageWay Service Provider (version 2.5x or later) installed on your PC. TAPI is installed automatically when you install the PassageWay Service Provider.

Install and configure the service provider you want to use. If you want to use the PassageWay Service Provider, refer to Chapter 2 to install the PassageWay Service Provider.

Problem 3: When you start Telephony Manager, a message box appears displaying the message: The telephony service provider previously in use is no longer available. The remaining service provider will be used. Note that changing service providers may affect the availability of certain features in the application.

This message may appear if either of the following conditions exists:

- You had two service providers installed on your PC, but you uninstalled the service provider that Telephony Manager was using.
- You had only one service provider installed on your PC, but you uninstalled the service provider and then reinstalled it. (In this case, Telephony Manager is looking for the ID that it assigned to the previous installation of the service provider.)

If the service provider that Telephony Manager was using is not installed (that is, you uninstalled the service provider), perform the following steps:

1. Choose the OK button to close the message box.
2. Reinstall the service provider.
3. Restart Telephony Manager.
4. Select the new service provider using the **Change Telephony Provider** option in the View menu.

If the service provider is already installed, choose the OK button in the message box.

Problem 4: When you start Telephony Manager, a message box appears displaying the message: Cannot initialize the service provider.

The service provider is not working properly. If you are using the PassageWay Service Provider, uninstall the PassageWay Service Provider, restart the system, and then re-install the PassageWay Service Provider. (Refer to Chapter 2 to uninstall and install the PassageWay Service Provider.)

Problem 5: When you start Telephony Manager, a message box appears displaying the message: Service Provider not started.

No service provider is configured. Choose the OK button to close the message box, and then configure the service provider.

Problem 6: When you start Telephony Manager, a message box appears displaying the message: There is not enough memory available to run this application. Please close some other applications or restart Windows and try again.

Close any other applications that may be running and then restart Telephony Manager.

Problem 7: Telephony Manager starts successfully, but the following message is displayed in the Call Status area at the bottom of the Telephony Manager window: Telephony is not available.

If you are using the PassageWay Service Provider, there may be a problem with your telephone, the connection between your telephone and your PC, or your company's PARTNER system. Perform the following steps:

1. Check the connection between your PC and your PassageWay adapter.
2. Check the connection between the wall jack and your PassageWay adapter.
3. Restart Telephony Manager.

If this message still appears, contact your PARTNER System Manager.

If you are not using the PassageWay Service Provider, there may be a problem with your modem, the connection between your modem and your PC or your telephone line. Perform the following steps:

1. Check the connection between your PC and your modem.
2. Check the connection between the wall jack and your modem.
3. If you have an external modem, check that it is plugged in.
4. Restart Telephony Manager.

Problem 8: A message box appears displaying the message: A required component of the PARTNER Service Provider is corrupt. The registry does not contain a SwitchType setting. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 9: A message box appears displaying the message:

A required component of the PARTNER Service Provider is corrupt. The registry contains an inconsistent SwitchType. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 10: A message box appears displaying the message:

A required component of the PARTNER Service Provider is corrupt. The registry does not contain a valid PassageWayPath setting. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 11: A message box appears displaying the message:

A required component of the PARTNER driver (file name) is missing. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 12: A message box appears displaying the message:

A required component of the PARTNER driver (file name) is corrupt. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 13: A message box appears displaying the message:

A required component of the PARTNER driver (file name) could not initialize properly. Check your COM port setting.

Uninstall and reinstall the PassageWay Service Provider.

Problem 14: A message box appears displaying the message:

A required component of the PARTNER driver (file name) could not initialize properly. Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Problem 15: A message box appears displaying the message:

A required registry entry of the PARTNER Service Provider is missing (PARTNER). Re-installing the PARTNER software may fix this problem.

Uninstall and reinstall the PassageWay Service Provider.

Answering Calls with Telephony Manager

This section presents some common problems that you might encounter when answering calls with Telephony Manager.

Problem 1: You cannot answer calls via Telephony Manager.

If you are trying to use Telephony Manager and find that an incoming call is not seen by the application, it is possible that the PC link to the PARTNER adapter has not been properly established. To verify whether this is the cause of the failure, you should restart all of your telephony applications and try the application again.

Please keep in mind that there are many types of applications that classify as telephony applications. For example, Microsoft Exchange and Microsoft Schedule+ are both telephony applications. If either are running, they will have to be shutdown and restarted.

Problem 2: The Mute button is disabled.

The Mute button is not supported.

Problem 3: Telephony Manager does not display caller ID information for incoming intercom calls.

The PassageWay Service Provider does not provide caller ID information for incoming intercom calls.

Problem 4: When you drop/hang up a consultation call, all other calls are disconnected.

If you are creating a conference call, have a consultation call, and then drop the consultation call (possibly to make a different consultation call), and find that calls on the conference go to the Idle state, you most likely have an older PARTNER adapter and need to upgrade to the latest version of the PARTNER adapter. To verify whether you have the older adapter, see Problem 1 in the section “Using the PassageWay Configurator” on page 4-20 and perform Steps 6 to 9.

Problem 5: Telephony Manager does not properly reflect the status of your phone.

During the use of your application, it is possible that the application may get out of sync with the phone. There are many reasons why this may occur. Some of these reasons may be attributed to some of the issues documented in the above items.

If you are experiencing these problems, such as “phantom calls,” where there are calls displayed on the application without a corresponding call on the phone, or the opposite, where there are calls on the phone that are not displayed on the application, then you should restart the application and any other telephony application that you have running on your system.

Please keep in mind that there are many types of applications that classify as telephony applications. For example, Microsoft Exchange and Microsoft Schedule+ are both telephony applications. If either are running, they will have to be shutdown and restarted.

Placing Calls on Hold with Telephony Manager

This section presents some common problems that you might encounter when placing calls on hold with Telephony Manager.

Problem 1: There is a long delay before you are able to place a call on hold.

Due to a limitation with the PassageWay hardware, you may experience a long delay (around six or more seconds) before you can place a call on hold. This problem is most often seen when trying to place a call after answering an incoming call.

Problem 2: When you place an outgoing, ringing call on hold via Telephony Manager, the call is dropped (that is, disconnected).

You should not place outgoing, ringing calls on hold. The PassageWay Service Provider will disconnect these calls.

Problem 3: You cannot place a consultation call on hold during a transfer.

If you are in the middle of a transfer, have an established consultation call that you then decide to place on hold, you will find that you are not able to place the consultation call on hold. This is a limitation of the service provider that may be addressed in a future release.

Problem 4: You are unable to place a bridged call on hold.

You can only answer and disconnect bridged calls.

Transferring or Forwarding Calls with Telephony Manager

This section presents some common problems that you might encounter when transferring or forwarding calls with Telephony Manager.

Problem 1: You are unable to forward calls.

Due to a limitation with the Service Provider, call forwarding is not supported on telephones that do not have speakerphones. This is true even if you go off-hook on such a telephone.

Additionally, the Do Not Disturb (DND) feature is not supported on these telephones unless a feature button is administered.

Problem 2: You are unable to transfer calls with Telephony Manager when other TAPI applications are also running.

If you are running Telephony Manager and other TAPI applications (such as Snap Connection) at the same time, and you did not start Telephony Manager first, you will be unable to transfer calls using Telephony Manager. If you are going to use Telephony Manager with other TAPI applications, make sure you start Telephony Manager before the other TAPI applications.

Problem 3: You are unable to transfer a bridged call.

You can only answer and disconnect bridged calls.

Making Calls with Telephony Manager

This section presents some common problems that you might encounter when making calls with Telephony Manager.

Problem 1: Calls are not being completed.

Telephony Manager dials the call, but the call fails (that is, you hear a “fast-busy” signal or an announcement that the call could not be completed). Insert a ^ in front of the number you are dialing and then dial the number. The ^ character disables TAPI from prepending digits for that particular call.

Problem 2: You cannot make calls via Telephony Manager.

If you are trying to use Telephony Manager and find that it is unable to initiate a call, it is possible that the PC link to the PARTNER adapter has not been properly established. To verify whether this is the cause of the failure, you should restart all of your telephony applications and try the application again.

Please keep in mind that there are many types of applications that classify as telephony applications. For example, Microsoft Exchange and Microsoft Schedule+ are both telephony applications. If either are running, they will have to be shutdown and restarted.

Problem 3: You cannot access the Dialpad window when any dialog box is open.

To use the Dialpad window, you must first close the open dialog box(es).

Problem 4: You are unable to dial from Telephony Manager.

Perform the following steps:

1. Verify that the PassageWay Service Provider was installed and configured properly.
2. If you are using Windows 95, close all telephony applications, and then run Connect.
3. From the Setup menu in Connect, select **Test Adapter**, and follow the instructions on the screen.

If the PassageWay Adapter Test fails, note the error number and refer to the next section, "Troubleshooting Connect."

If all tests pass successfully, run Telephony Manager.

Problem 5: You cannot make a call with the speakerphone.

If you are using a TAPI application, like Microsoft Dialer (Dialer is provided with Windows 95 and Windows NT 4.x) to operate your PARTNER set, you may encounter a problem. You can make calls on the phone using the TAPI application. However, if the TAPI application is running and you try to make a call on the speakerphone manually, the line will be disconnected. This problem is the result of a problem with Microsoft TAPI. To correct this problem, you should close the offending TAPI application. Or, as a workaround, you should lift the hand-set first and then turn on the speakerphone.



NOTE:

This problem will exist with some TAPI applications. One application that does not exhibit this problem is Microsoft Phone (only available for Windows 95).

Conferencing Calls with Telephony Manager

This section presents some common problems that you might encounter when setting up and managing conference calls with Telephony Manager.

Problem 1: During a conference call started by another caller, you are unable to drop/hang up from the call while using the telephone handset.

If you are participating in a conference call that was started by another caller (that is, you did not start the conference) and you are not using your speakerphone, you will be unable to use Telephony Manager to hang up from the conference. To hang up, you must place the handset back in the cradle.

Problem 2: The Drop Last button does not function properly in the Conference Manager.

If you use the Conference Manager, it is possible that you may encounter a problem using the Drop Last feature in the Conference Manager window. You can only use the Drop Last button if the last call that was added to the conference was an outside call. You cannot use the Drop Last button if the last call that was added to the conference call was an intercom call.

After a conference is established and intercom parties drop off of the conference (that is, the far end party leaves the conference), the Telephony Manager Conference Manager will not update to reflect just the parties that remain on the conference. Additionally, if all but one of the parties drop from the conference, you are no longer in a conference. However, the Conference Manager is still not updated. The problem that exists here is that pressing the Drop Last button will act peculiarly if you are using the speakerphone. It will drop the party to whom you are talking and then go back off-hook.

Problem 3: Starting conferences from your telephone.

The conference will be tracked by the Telephony Manager except Drop Last in the Conference Manager may not work properly. To ensure that Telephony Manager handles conference calls properly, you should establish the conference using Telephony Manager.

Problem 4: When you conference an outgoing, ringing call via Telephony Manager, the outgoing call is dropped, but Telephony Manager indicates that the conference exists.

You should not conference outgoing, ringing calls. The PassageWay Service Provider will disconnect these calls. Even though the call was dropped, your application may incorrectly indicate that the call is part of the conference.

Problem 5: You receive a failure message after a completing a conference.

If you have successfully completed a conference and then receive a failure message about the conference, you most likely have an older PARTNER adapter and need to upgrade to the latest version of the PARTNER adapter. To verify whether you have the older adapter, see Problem 1 in the section "Using the PassageWay Configurator on page 4-20 and perform Steps 6 to 9.

Problem 6: Telephony Manager completes a conference without a real conference existing.

If you drop the consultation call or if the party on the other end of the consultation call hangs-up in midst of setting up a conference, the application may incorrectly show that the conference was completed. Meanwhile, there is only one call active on the phone. This is a known problem that will be addressed in a later release of the PassageWay Service Provider.

If you are experiencing this problem, then you should restart the application and any other telephony application that you have running on your system. Please keep in mind that there are many types of applications that classify as telephony applications. For example, Microsoft Exchange and Microsoft Schedule+ are both telephony applications. If either are running, they will have to be shutdown and restarted.

Problem 7: You have problems placing calls on hold using a standard phone.

If you are using a standard phone with your PARTNER system and you place a call on hold, you should not place the handset in the cradle. If you do so, you will not be able to answer another incoming call. If left out of the cradle, you will be able to answer incoming calls in addition to reconnecting to the held call. This problem will be addressed in a later release of the PassageWay Service Provider.

Problem 8: You are unable to remove intercom calls from a conference.

If you are on a conference that includes internal (intercom) calls, you will find that you cannot remove the internal calls using the application. You will have to remove them manually from the phone. This problem will be addressed in a later release of the PassageWay Service Provider.

Problem 9: You are unable to add more parties to a conference.

If you have established a conference, there are times that you will not be able to add more parties to the conference. If parties that are currently on the conference drop from the conference, this information may not be properly reflected in the application. Once this occurs, it may not be possible to add more parties to the conference.

At this point, you will have to add more parties using the phone. After the conference is completed, you should restart the application to resync the application with your phone. This problem will be addressed in a later release of the PassageWay Service Provider.

Problem 10: You are unable to conference a bridged call.

You can only answer and disconnect bridged calls.

Using Phonebook and Log Manager

This section presents some common problems that you might encounter when using the Phonebook and Log Manager.

Problem 1: When you start Phonebook or Log Manager, you receive the following message: Run-Time Error 7 - Out of Memory.

If you are using Windows 95, there is either not enough memory or not enough hard disk space available to start Phonebook or Log Manager. Close some other applications that are running and then try to start Phonebook or Log Manager. If Phonebook or Log Manager still does not run, free up some disk space and then try to start the application.

If you are using Windows NT 4.0 or later, there is not enough memory available to start Phonebook or Log Manager. Close some applications that are running and then try to start Phonebook or Log Manager.

Problem 2: When you start Phonebook or Log Manager, you receive the following message: Memory could not be read.

There is not enough hard disk space available on your Windows NT system to start Phonebook or Log Manager. Free up some disk space and then try to start Phonebook or Log Manager.

Problem 3: Phonebook is using an old database file.

When you remove (uninstall) the Telephony Manager software, not all of the files are removed (see "Removing Telephony Manager"). The database files you may have created will remain. The configuration files used by the software will also remain. If you then install the software again, you will find that the Phonebook application will open the old database file. This may be disconcerting if the second installation of the software is in a different directory. If you do not want to use this database, you should create a new database in the desired directory.

Problem 4: When you start Log Manager, an error message appears indicating that a database is corrupted.

Call the Lucent Technologies Customer Care Center at 1 800 628-2888.

Using Script Editor

This section presents some common problems that you might encounter when using Script Editor.

Problem 1: Scripts you created with Script Editor are not working properly.

If your script is not working properly, try to identify where the script is failing, and insert a delay at those points in the script. If this does not solve your problem, try recreating the script without using your mouse (that is, use keystrokes and commands). Scripts that consist of keystrokes and commands are more reliable than scripts that contain recorded mouse movements.

Also, open your applications before you start recording. Using desktop short cuts and the Start menu during recording may cause problems with your script.

Using the PassageWay Configurator

This section presents some common problems that you might encounter when using the PassageWay Configurator.

Problem 1: When you start the PassageWay Configurator and use the Auto Detect feature (that is, the Find PassageWay Link dialog box), the PassageWay Link Not Found message box appears.

This message box appears there is a problem with the connection between your PC and your PassageWay adapter.

Perform the following steps:

1. Choose the OK button to close the message box.
The PassageWay Configurator - COM Port dialog box appears.
2. Verify that the PassageWay adapter is installed properly. Refer to "Installing the PassageWay Adapter" in Chapter 2.
3. Look at the back of your PC and verify the COM port to which the PassageWay adapter is connected.
4. In the PassageWay Configurator - COM Port dialog box, select the option button of the COM port to which your adapter is connected, and then choose the Auto Detect button.

If the PassageWay Configurator found the COM port to which your PassageWay adapter is connected, a message box appears, stating that the PassageWay link was found and providing the number of the COM port. Choose the OK button and finish configuring the PassageWay Service Provider.

If the PassageWay Configurator could not find the COM port to which your PassageWay adapter is connected, the PassageWay Link Not Found message box appears. Choose the OK button, and then proceed to Step 5.

5. Choose the Continue button in the PassageWay Configurator - COM Port dialog box and finish configuring the PassageWay Service Provider.
6. If you are using Windows NT 4.0 or later, proceed to Step 8.
If you are using Windows 95, select **PassageWay Connect** from the application folder that contains the PassageWay Service Provider after the PassageWay Service Provider is configured. (The default application folder is **PassageWay for PARTNER**.)
The Connect - Communications Error dialog box appears.
7. Choose the Test button and follow the instructions on the screen.
If the PassageWay Adapter Test fails, note the error number and refer to the next section, "Troubleshooting Connect." If you still cannot solve the problem, proceed to Step 8.
If all tests pass successfully, run Telephony Manager.
8. Look at the bottom of your PassageWay adapter and check if there is a bar code label.
9. Contact the Lucent Technologies National Customer Care Center at 1-800-628-2888.

Problem 2: When you start the PassageWay Configurator and use the Auto Detect feature, you receive the message "Device Not Present."

In configuring the service provider, you may choose to let the Configurator search for the COM port to which the PassageWay link is connected. All of the COM ports known to the system will be searched. If the Windows system comes across a PCMCIA COM port that is not physically there, but is available to Windows, you will receive the following error message ("Device Not Present"). The following example is for COM4.

"A PCMCIA Card for the COM4 port is not present in a slot. Insert a card for the port and select the OK button. You may have to reconfigure the COM port."

Problem 3: The PassageWay Setup screen does not display properly.

On some PCs, depending on the type of video display adapter that is installed, some of the Setup screens may not display properly. That is, the background image for Setup may not be totally clear. This is an interaction with the video adapter and how the adapter switches from one resolution to another. This does not last throughout the entire Setup session.

Additionally, on some systems, if you move the current dialogue box displayed during Setup, it is possible that the painting of the dialogue box in its new position might also be accompanied with a residual image of the dialogue box in its old position. This phenomenon does not last and is cleared once the current dialogue is dismissed. Again, this problem is a result of the interaction with the video display adapter.

Problem 4: Your PassageWay adapter is not functioning with a standard phone.

If you are using a standard phone (that is, analog phone) and find that the link to the PC goes down when you go off-hook on the phone, you most likely are not using the proper phone cable. To ensure that your standard phone works, you should use a 2-conductor wire phone cable. The use of a 4-conductor wire phone cable may temporarily disable the adapter from working (until you place the standard phone on-hook again) or permanently disable the adapter from working (until you disconnect the phone line from the extension jack on the PARTNER system module).



NOTE:

Even though the adapter is not functioning (that is, the link to the PC is gone), you can still make and receive calls from your telephone.

Problem 5: The PassageWay Link is not always detected.

During the installation, you will be asked if you would like the system to search for your PassageWay link/adaptor. If you choose to have this done for you, it is possible that the link will not be found. Assuming that you know the proper serial port, you can use the Auto Detect button on the PassageWay Configurator - COM Port dialog box to verify that the system can find the PassageWay adapter. Even though the automatic search did not find the link, assuming that you are properly connected and there isn't a conflict in the system, the adapter should be found. This problem will be addressed in a later release of the PassageWay Service Provider.

Problem 6: Your COM (serial) port is not recognized.

If all of the COM Ports that are listed in the PassageWay Configurator - COM Port dialog box are disabled, then you may have a newer PC that supports Plug-n-Play (PnP) for the serial ports. The PassageWay software is trying to identify the location of the COM ports through the System BIOS. If that information is not there, as seen in PnP systems, then PassageWay does not know of the existence of the COM ports. If you have PnP, you will have to access the PC BIOS information to turn off Plug-n-Play for the serial ports. This problem will be addressed in a later release of the PassageWay Service Provider. Also, refer to Problem 1 in this section.

Problem 7: You experience problems while uninstalling the PassageWay service provider.

If you choose the Cancel button while running the UnInstaller, you may not be able to run UnInstaller again. You may also find pieces of the PassageWay software still installed. Your best bet at this point is to install the software again, run the UnInstaller, and allow the UnInstaller to complete its operation. When the UnInstaller has completed its operation, the PassageWay software will have removed itself.

Problem 8: You receive an error when you shut down Windows.

During the shutdown of Windows, it is possible that you may encounter an error pointing to the PWTIMER.DLL file. This problem will be addressed in a later release of the PassageWay Service Provider.

PassageWay Adapter LED

This section describes the error conditions represented by the LED located next to the Phone jack and Line jack on the PassageWay adapter.

Problem 1: The LED is “off.”

This indicates that your PassageWay adapter is not receiving power. Make sure the PassageWay adapter is installed properly. Refer to “Installing the PassageWay Adapter” in Chapter 2.

If you have verified that the PassageWay adapter is properly connected to your telephone, yet the LED on the adapter is NOT illuminated, verify that your telephone is working properly. If your telephone is not working properly, consult your PARTNER system documentation or your PARTNER System Manager for troubleshooting procedures.

If your telephone is working properly and the LED on the adapter is NOT illuminated, contact the Lucent Technologies National Customer Care Center at 1-800-628-2888.

Troubleshooting Connect

This section presents some common problems that you might encounter while using Connect. For each problem, a strategy is presented that you can follow to isolate and solve your problem.



NOTE:

Connect is only present with Windows 95. Connect is not present with Windows NT 4.0 or later.

Problem 1: Connect displays the message: This application requires a serial port and terminates.

This message indicates that Connect cannot find an available serial port on your system. This message will most likely appear immediately after you have completed the installation of the PassageWay software using the setup program since this is the first time Connect tries to run.

If you do not have an available serial port (for example, if you have only one serial port, and this port is being used by your mouse), you will need to add an additional serial port to your PC in order to use the PassageWay Service Provider. Your computer vendor can assist you in obtaining the necessary hardware to add another serial port.

If you are certain that you have an available serial port (other than a port being used by your mouse), the available port might be disabled, in which case Connect will be unable to detect its presence.

If you are able to determine that your PC has no active COM ports, or only COM1 is active (but is used by your mouse under Windows), you will need to either purchase an additional COM port for your PC or consult your PC's hardware documentation to determine how to re-enable a COM port that might be disabled. Re-enabling a COM port may require changing the placement of a jumper on your computer's system board or running your PC's setup program.

Problem 2: Connect displays its Communications Error dialog box within a few seconds after it is run.

This message indicates that Connect cannot communicate properly with your telephone. This message can appear for one of the following reasons:

- Your PassageWay adapter is not connected properly to your PC serial port and/or your telephone.
- Your PassageWay adapter is not receiving power from the PARTNER system.
- Connect is administered to use a different serial port than the one to which the PassageWay adapter is connected.
- One or more cables and/or adapters are damaged, not properly attached, or not compatible with the PassageWay Service Provider.

You should follow the instructions provided in this dialog box to troubleshoot the problem. These instructions ask you to verify the following items:

- The PC-side and phone-side cabling are connected properly.

Insure that the 7-foot phone cord between the jack marked "Line" on the telephone and the jack marked "Phone" on the PassageWay adapter is completely inserted into both jacks. A proper connection is confirmed by a tactile "click" as the cord is fully inserted.

Also insure that any RS-232 cables and adapters that you might be using to connect the PassageWay adapter to your PC are NOT null modem cables (a special type of cable), and that the total length of the combined RS-232 cabling does not exceed about 40 feet (the length should be as short as is convenient for your setup).

- Insure your PassageWay adapter is receiving power from the PARTNER system (as indicated by the illumination of the LED).

If you have verified that the PassageWay adapter is properly connected to your telephone, yet the LED on the adapter is NOT illuminated, your telephone system wiring may not support the remote powering of adjuncts. If this is the case, you should consult you account representative or authorized dealer to obtain the proper wall supply to power your PassageWay adapter or to correct any wiring problems that may be the cause.

- Connect's software-based link test passes.

To assist you in diagnosing problems, Connect contains a built-in link test procedure. This test can be run directly from the Communications Error dialog box by choosing the Test button.

If the test procedure concludes successfully, Connect is communicating properly with your PassageWay adapter over the COM port you selected, and you should select the Continue button on the Communications Error dialog box to restore normal operation.

If, however, the test fails, an error number will be provided. Refer to the following pages to interpret the error numbers and to find suggestions for how to resolve the particular error you encountered.

Failure Code -111

Meaning: The PC and the PassageWay adapter cannot communicate over your serial port.

Things to Try: Perform the following steps:

1. Verify that the PassageWay adapter is installed correctly. Be sure to check the connections between the telephone wall jack and the adapter, the adapter and the telephone, and the adapter and the PC COM port. (Refer to Chapter 2.)
2. Make sure you have selected the proper COM port in Connect.

Failure Code -121

Meaning: The PC and the PassageWay adapter cannot communicate over your serial port.

Things to Try: Follow the instructions for Failure Code 111.

Failure Code -131, -132, -133, or -135

Meaning: The PC cannot communicate properly with your PassageWay adapter.

Things to Try: Try replacing any RS-232 cables or adapters you are using between your PC's COM port and the PassageWay adapter's 25-pin connector.

Failure Code -134 or -141

Meaning: The PassageWay adapter cannot communicate properly with your telephone.

Things to Try: Try replacing the 7-foot telephone cable between the PassageWay adapter and your telephone.

Failure Code -200 and above

Meaning: A conflict or application error has occurred which prevented Connect from operating your PC serial port.

Things to Try: Try closing all Windows applications except Connect, and then try the test again. If this does not work, contact the Lucent Technologies National Customer Care Center at 1-800-628-2888.

Problem 3: Connect will not work on COM ports other than COM1 and COM2.

By default, many PCs are not configured to permit the simultaneous use of three or more COM ports. Specifically, most PCs are configured such that COM ports are grouped into pairs: COM1 is paired with COM3, and COM2 is paired with COM4. By default, such PCs permit only one COM port from each pair to be operating at the same time (for example, COM1 with COM2). COM ports within the same pair will usually conflict with one another and are not supported (that is, COM1 with COM3, or COM2 with COM4).

If you cannot get Connect to work properly on COM3, check if another device is using COM1 at the same time. Similarly, if you cannot get Connect to work on COM4, determine if another device is using COM2 at the same time. If so, you may need to make some changes to your PC configuration to support using the PassageWay Service Provider on COM3 or COM4. If you need assistance in setting up devices on COM ports other than COM1 and COM2, consult your PC hardware vendor.

Problem 4: Connect occasionally displays its initialization window while one or more PassageWay applications are running.

Connect displays its initialization window whenever it establishes (or re-establishes) communication with the telephone. Generally, this window is displayed only once, at the time when a single PassageWay application is first executed. However, if a communications problem occurs at any time, Connect attempts to clear the problem by reinitializing itself, which causes the initialization window to reappear temporarily. If this occurs while a PassageWay application is performing a task involving the telephone, the operation in progress will be aborted and must be restarted manually once the initialization window disappears. If no task involving the telephone is in progress during this process, the operation of PassageWay applications is unaffected.

The chance of a communications problem depends on your PC's configuration. The PassageWay Service Provider operates at a data rate of 4800 baud, and it relies on Windows to manage the flow of data through your PC's serial port. Depending upon the speed of your PC, the number and type of applications you are using, and various hardware components in your PC configuration, Windows will be able to manage serial communications with varying degrees of effectiveness.

If you encounter frequent communications errors using the PassageWay Service Provider, your PC's current hardware configuration may not support reliable high-speed communications under Windows.

Problem 5: Connect will not run. It displays the message: Connect must terminate due to an unexpected communications error and then terminates.

This message indicates that Connect cannot communicate with the COM port you specified using the PassageWay Configurator. Run the PassageWay Configurator and select a different COM port.

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Installation Reference Guide

**Perform the following steps to install and configure
PassageWay Telephony Manager R2.0**

Step 1 Connect your PassageWay Adapter to Your PC (New PassageWay Service Provider Users)

You must connect the PassageWay adapter to your PC. See “Installing the PassageWay Adapter” in Chapter 2 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1*.

Once the PassageWay adapter is properly connected, proceed to “Step 3: Install the PassageWay Service Provider Software.”

**Step 2 Uninstall the Existing PassageWay Service Provider Software
(Existing PassageWay Service Provider Users)**

You must remove the existing PassageWay Service Provider software from your PC. See “Removing the PassageWay Service Provider” in Chapter 2 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1* for more information.

Step 3 Install the PassageWay Service Provider Software

1. Insert the Telephony Manager CD into your CD-ROM drive.

If the Autorun feature is enabled on your PC, the PassageWay Setup dialog box appears. Proceed to Step 4 below.

2. Double-click on the My Computer icon on your desktop.

3. Double-click on the CD-ROM icon, and then double-click on **start.exe**.
4. Select the PassageWay Service Provider option button, and then choose the OK button.

Follow the prompts to install and configure the PassageWay Service Provider software.

If you would like more information, see “Installing the PassageWay Service Provider Software” in Chapter 2 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1*.

When you are finished installing and configuring the PassageWay Service Provider software, proceed to “Step 4: Install the Telephony Manager R2 Software.”

Step 4 Install the Telephony Manager R2 Software

1. Insert the Telephony Manager CD into your CD-ROM drive.

If the Autorun feature is enabled on your PC, the PassageWay Setup dialog box appears. Proceed to Step 4 below.

2. Double-click on the My Computer icon on your desktop.
3. Double-click on the CD-ROM icon, and then double-click on **start.exe**.
4. Select the PassageWay Telephony Manager option button, and then choose the OK button.

Follow the prompts to install the Telephony Manager software.

If you would like more information, see “Installing the Telephony Manager Software” in Chapter 2 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1*.

When you are finished installing the Telephony Manager software, proceed to “Step 5: Start Telephony Manager.”

Step 5 Start Telephony Manager

1. Start Telephony Manager in one of the following ways:
 - Double-click on the Telephony Manager desktop short cut.
 - Select the Telephony Manager short cut from the Start menu.
 - From the Start menu, select **Programs** > the application folder that contains Telephony Manager (default is **PassageWay Telephony Manager**) > **PassageWay Telephony Manager**.

If you have configured the dialing properties for your PC previously, the Number of Calls dialog box appears the first time you start Telephony Manager.

If you have not configured the Dialing Properties for your PC previously, a message box appears, prompting you to configure your dialing locations. Choose the OK button. The Dialing Properties box appears. Perform procedures 3 to 9 in

“Step 6: Configure the Dialing Information” to configure your dialing locations. Once you configure the dialing properties, perform the procedures in this step.

2. In the *Number of telephone lines available* box, enter the number of primary call appearances on your telephone.
3. In the *Minimum or default number of lines to be displayed* box, enter the minimum number of call appearances you want displayed in the Telephony Manager window. These call appearances will be displayed even when there are no calls appearing at your telephone.
4. Select the *Turn On Auto-Sizing* check box to enable or disable the Auto-Sizing feature.

If you want the size of the Telephony Manager window to change automatically as you make and receive calls, enable the Auto-Sizing feature and make sure the Call Appearance area is not maximized (using the Maximize/Minimize Call Appearance Area button in the Telephony Manager window).

If you do not want the size of the Telephony Manager window to change automatically as you make and receive calls, disable the Auto-Sizing feature. If you want to view all of the call appearances, you must maximize the Call Appearance area (using the Maximize/Minimize Call Appearance Area button in the Telephony Manager window).

5. Choose the OK button.

If both the PassageWay Service Provider and the Unimodem Service Provider are installed and configured on your PC, a message box appears. Choose the OK button. The Connect Using dialog box appears. From the *Line* box, select the telephony provider you want to use, and then choose the OK button. (If you are using Telephony Manager with a DEFINITY system, select **PARTNER/Line**). The Telephony Manager window appears. If you have not previously configured the dialing properties for your PC, proceed to “Step 6: Configure the Dialing Information.”

If only one telephony provider is installed on your PC (that is, either the PassageWay Service Provider or the Unimodem Service Provider), the Telephony Manager window appears. If you have not previously configured the dialing properties for your PC, proceed to “Step 6: Configure the Dialing Information.”

Step 6 Configure the Dialing Information (New PassageWay Service Provider Users)

1. From the View menu in the Telephony Manager window, choose **Dialing Properties**.
2. If you are using Windows 95, choose the Dialing Properties button.
3. In the *I am dialing from* box, select Default Location.
4. In *The area code is* box, enter the area code for your location.
5. In the *I am in* box, select your country.
6. In the *First dial for local* box, enter the digit(s) you must dial to access an outside line for local calls (for example, "9"). Once you enter the digit(s), you do not need to enter them when you make calls from Telephony Manager. Telephony Manager inserts them automatically.

7. In the *First dial for long distance* box, enter the digit(s) you must dial to access an outside line for long-distance calls (for example, "9"). After you enter the digit(s), you do not need to enter them when you make calls from Telephony Manager. Telephony Manager inserts the digits automatically.

NOTE: Do not enter "1" in the *First dial for long distance* box. The "1" is inserted automatically when necessary for a long-distance call.

8. Choose the OK button.
9. In the Telephony Properties dialog box, choose the OK button.

You are now ready to use PassageWay Telephony Manager.

If you would like to change any of the default settings for Telephony Manager, see "Configuring Telephony Manager and Phonebook Options" in Chapter 2 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1*.

See Chapter 3 of the *PassageWay® Telephony Manager R2.0 for PARTNER® Communications System Getting Started, Issue 1* to start the Telephony Manager applications.

If you need information about features and procedures for Telephony Manager, Phonebook, Log Manager, Anywhere Dialer, Auto-Task Manager, and Script Editor, be sure to consult the online help that is provided with these applications.

NOTE: If you want to convert your existing telephone number/address files (such as AT&TCall files) into Phonebook files, select the **Import** command from the File menu in Phonebook. Be sure to check the Phonebook online help for complete instructions on importing existing files into Phonebook. (See the “Import files into a Phonebook directory” topic, which is located under “Exporting/Importing Information” in the online help.)