

# Office@Hand for Outlook

## Installation & User Guide



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# Introduction



## About Office@Hand for Outlook

Office@Hand for Outlook® creates a powerful best-of-breed solution that gives Microsoft Outlook® the best of both worlds: enterprise-caliber communications—PSTN calling click-to-dial, SMS, combined directory experience, conferencing, and integrated calendaring—integrated into the most popular email client.

It offers these features:

- Make calls from Outlook using RingOut.
- Click to dial any phone number that appears in Outlook contacts.
- View incoming caller IDs while working within Outlook.
- Send and receive text messages from the Outlook interface.
- View your complete communications history—calls, texts, faxes, and voicemails—from Outlook.
- Combine Office@Hand and Outlook contacts on one easy-to-search screen.
- Schedule an Office@Hand meeting or audio conference from within your Outlook calendar.

Note: Office@Hand for Outlook is a plugin for Windows/PC only.

## About this guide

This guide is designed for users of Office@Hand for Outlook. It shows how to add the application to your browser and how to use the application. This guide also provides some basic troubleshooting tips.

## Basics

For optimal user experience, ensure that:

- You have set the correct number as your Office@Hand Direct Number—you will be making and receiving calls from this number through the Outlook interface. You can find Office@Hand Direct Number in the Office@Hand Portal at **My Settings > Phones and Numbers > Direct Numbers**.
- You are using Microsoft Outlook 2010 or later.
- You are using Windows 7 or later.



# Installation



# Installation

Make sure you have ability to install new software on your Windows computer, as sometimes administrator privileges are required to install software.

Download the latest version of Office@Hand for Outlook from this application gallery [page](#). Make sure you close all of your Outlook windows if they are open before you run the installation file. Run the installation .msi file and follow the prompts. (Figure 1)

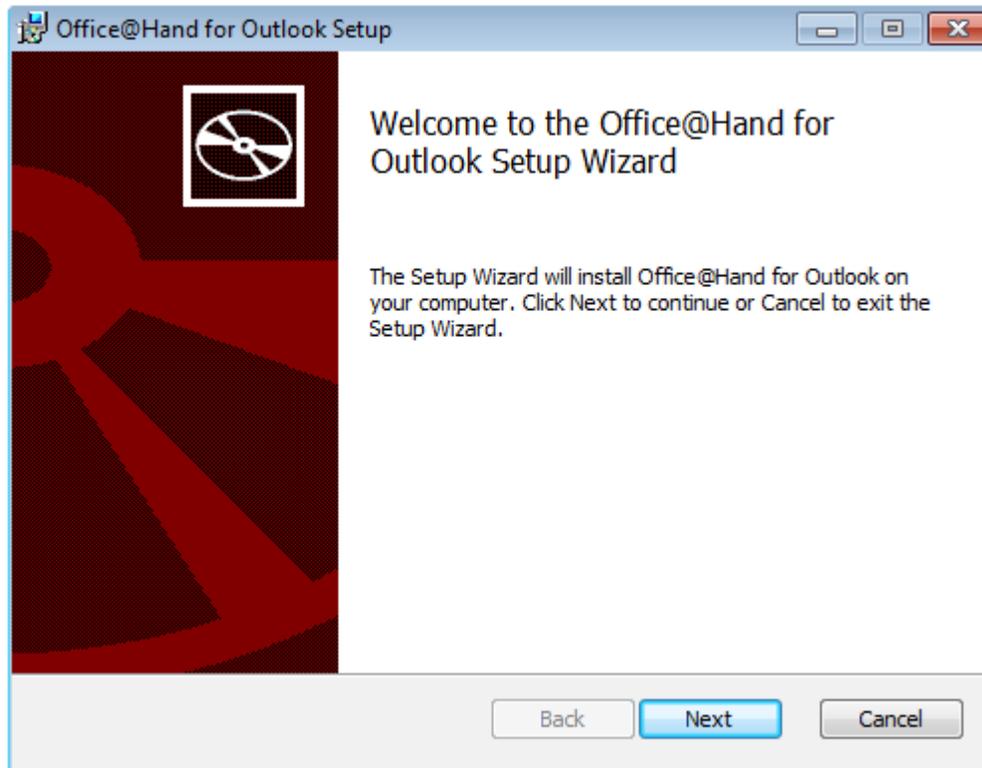


Figure 1



# Verify Installation

After the app is installed, open Outlook. You should see **Login to Office@Hand** on the right side of your Outlook. After logging in with your Office@Hand credentials, all of your communication needs will be integrated with your most used application. (Figure 2)

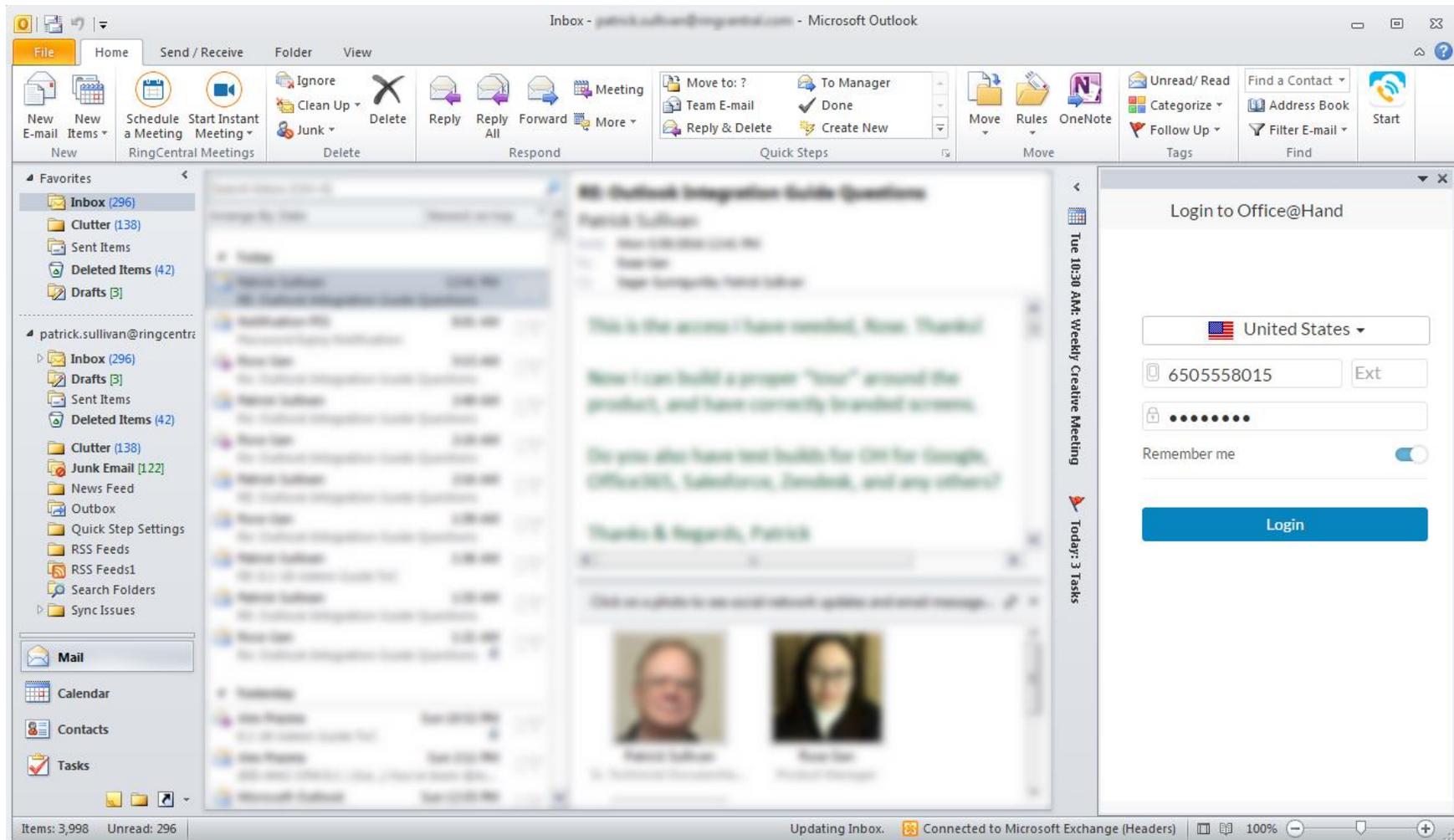


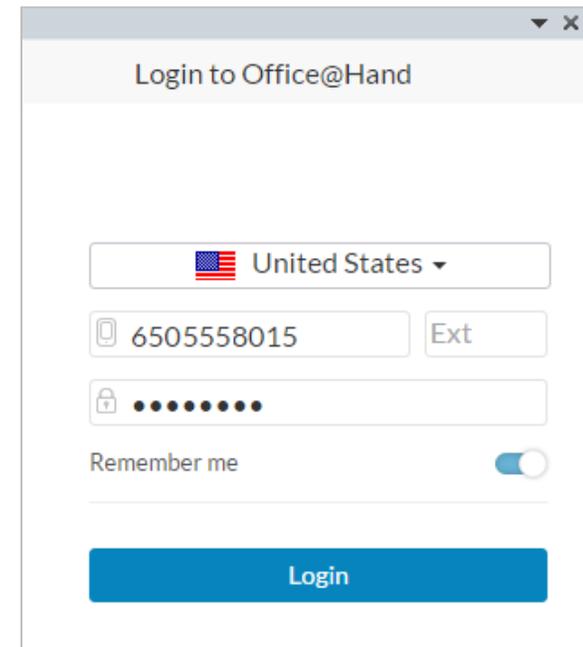
Figure 2



## Login

To log in to Office@Hand for Outlook , use your Office@Hand Direct Number for the phone number and your Office@Hand password. Office@Hand for Outlook is available for all Office@Hand customers. (Figure 3)

You can select **Remember me** to stay logged in to Office@Hand for Outlook for one week.



The screenshot shows a web browser window titled "Login to Office@Hand". The window contains the following elements:

- A dropdown menu for country selection, currently set to "United States" with a US flag icon.
- A phone number input field containing "6505558015" and an "Ext" button to its right.
- A password input field with a lock icon and ten dots representing the password.
- A "Remember me" checkbox, which is currently checked.
- A large blue "Login" button at the bottom.

Figure 3



## Resize and Close Option

When Office@Hand for Outlook is not in use, you can **Size** it or **Close** it to give yourself more reading area in your Outlook. (Figure 4)

If you close it, you can restart Office@Hand for Outlook by clicking the **Start** icon. You will need to login again. (Figure 5)

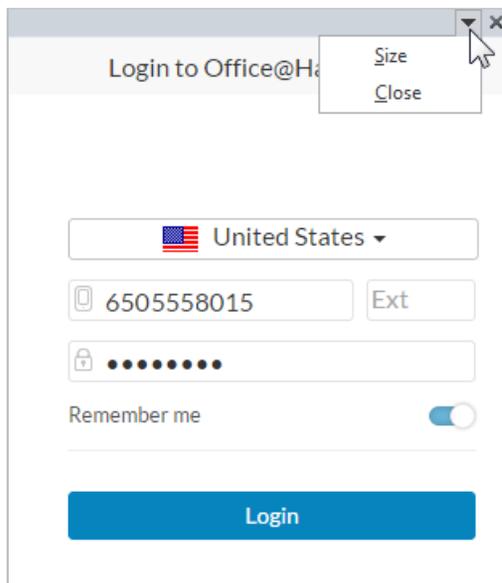


Figure 4

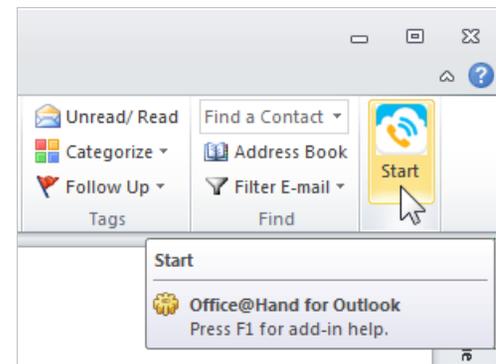


Figure 5



# Dialer

You can bring up the dialer by clicking the dialer icon  on the navigation bar. In order to make an outbound call you can either use the number buttons on the dial pad or type a number directly in the text box.

## Make Outbound Call

You can make an outbound call with your Office@Hand desk phone, or with any valid phone number.

**Browser**—you can use your computer to make and receive calls. When you use this option make sure you have a working microphone and speaker. You can also select a caller ID that will be displayed to your call recipient. Please note your inbound call will also ring your computer when selecting this option. (Figure 6)

**Other phone**—you can use your Office@Hand desk phone, the Office@Hand softphone on your computer, or any custom number you specify. (Figure 7)

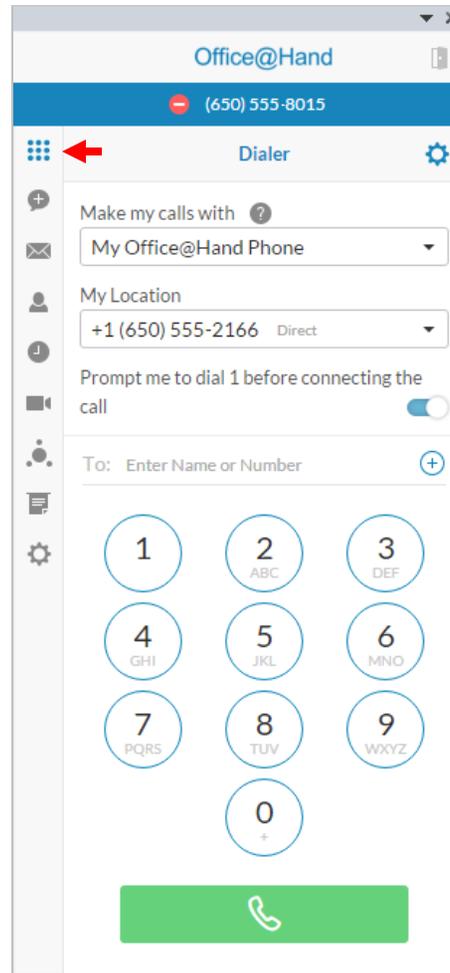
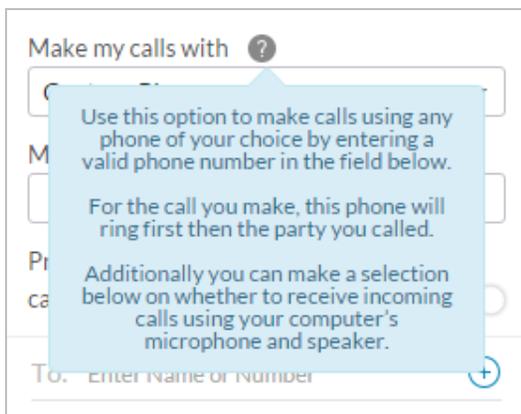


Figure 6

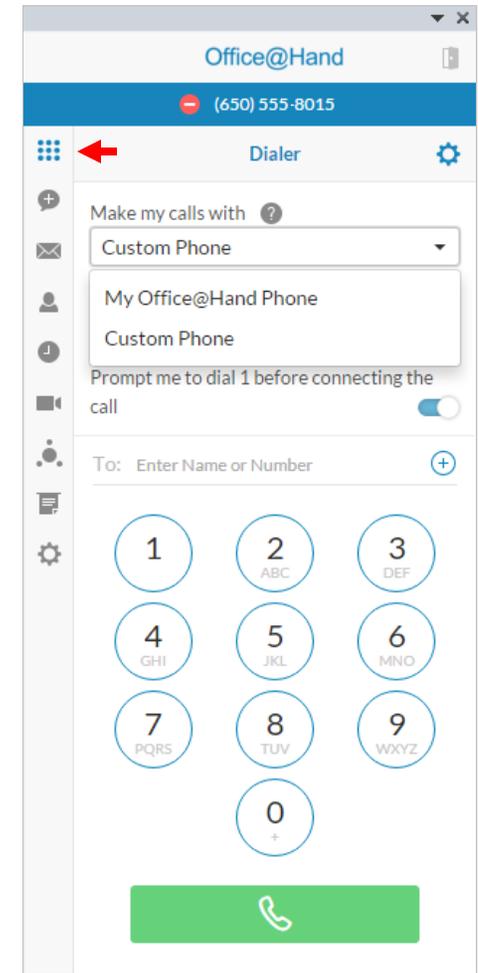


Figure 7



# Click-to-dial

You can also use the click-to-dial feature to make an outbound call. Once you are logged in successfully to Office@Hand for Outlook, all phone numbers in your email can be selected to bring up a context menu with the “Call with Office@Hand” option that, when clicked, will dial that number. (Figure 8)

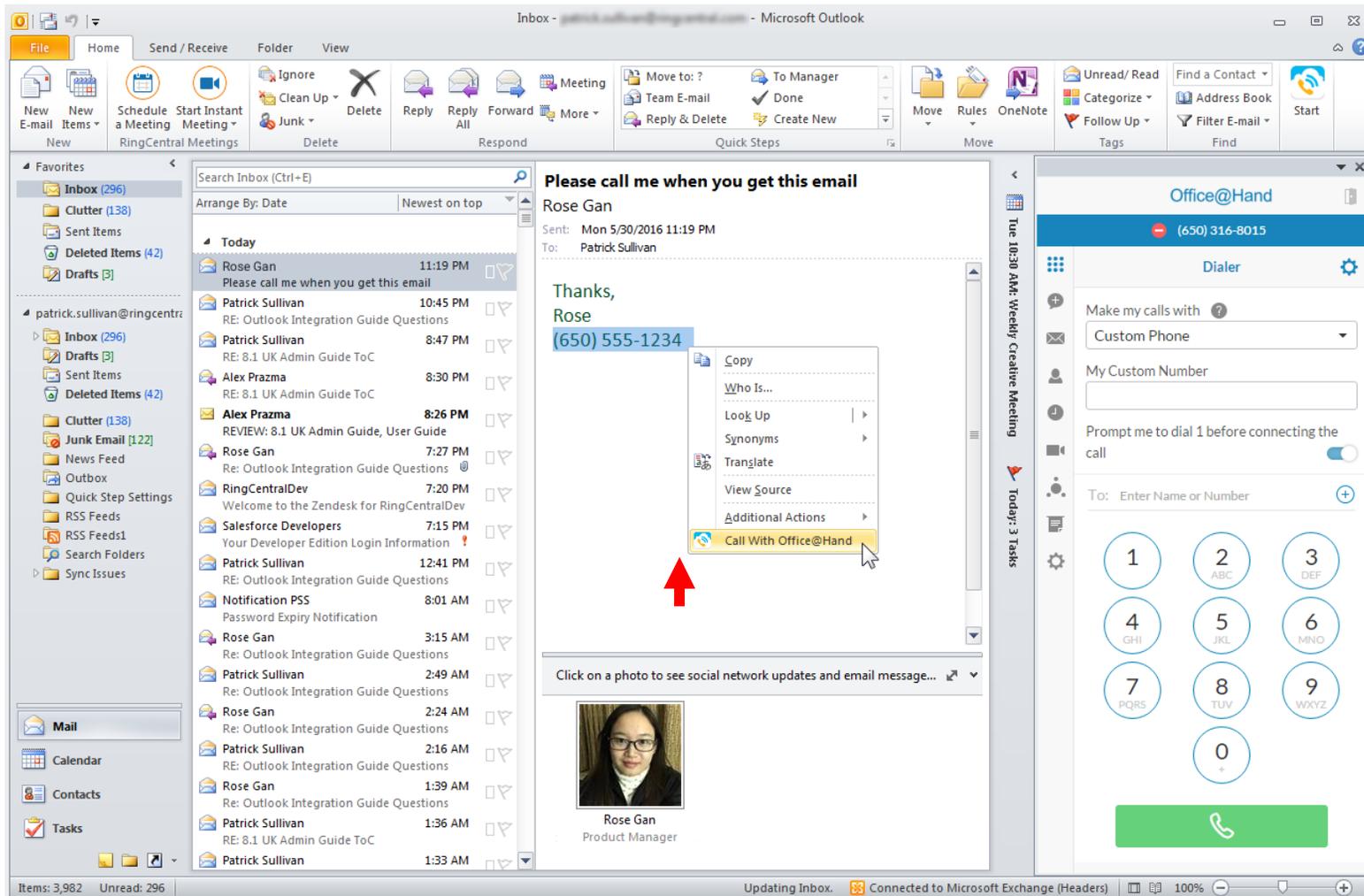


Figure 8



# Outgoing Call

Once you click on a phone number as described in **Click-to-dial** above, or use the dial pad to make an outgoing call, Office@Hand for Outlook shows the status of your call and your selected Office@Hand device will ring. (Figure 9)

If you choose to use an Office@Hand device rather than browser after you accept the call on your Office@Hand device, you may be prompted to press 1 if you had selected the check box on your setting screen. Once you have accepted the call (either by pressing 1 or simply by picking up the phone depending on your settings), the destination phone will ring.

Once the call is connected and the destination phone is ringing, the status is shown on Office@Hand for Outlook. (Figure 10)

When the call is finished, the status will appear as shown in Figure 11.

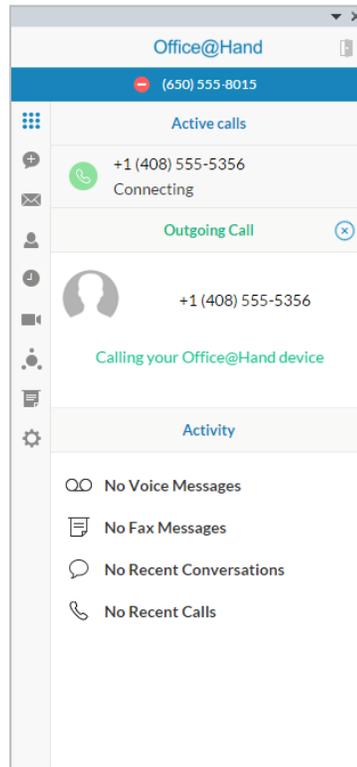


Figure 9

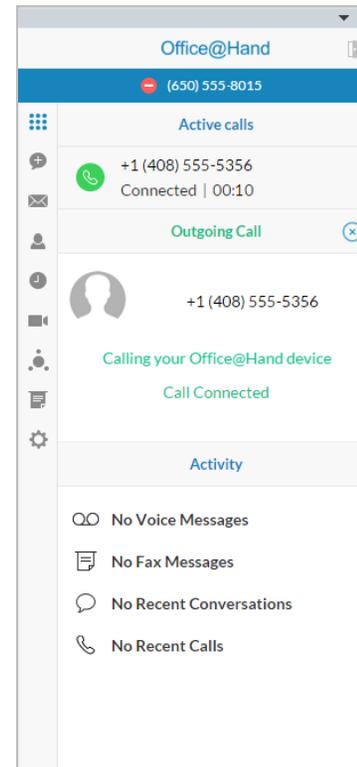


Figure 10

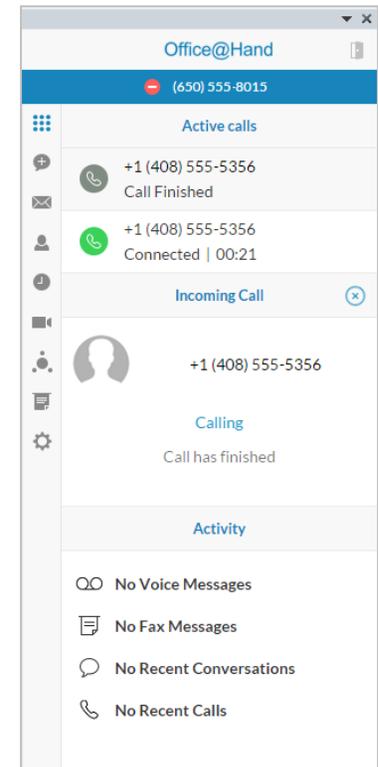


Figure 11



# Incoming Call

When you have an incoming call, Office@Hand for Outlook will show you the call indicator. You can answer the call on your Office@Hand device. (Figure 12)

Once the call is connected, the call timer starts.

When is finished (Figure 13) you are returned to the screen you were on prior to the call. (Figure 14)

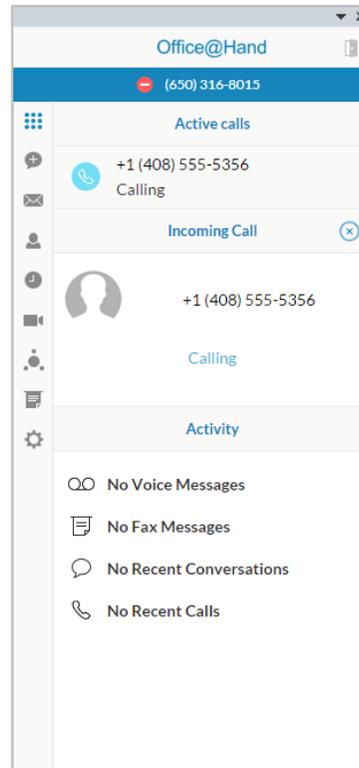


Figure 12

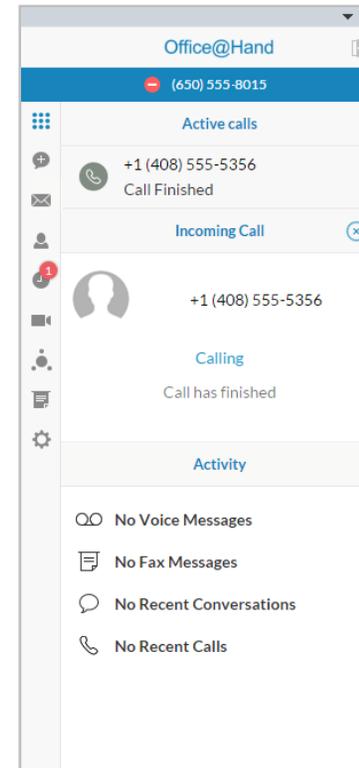


Figure 13

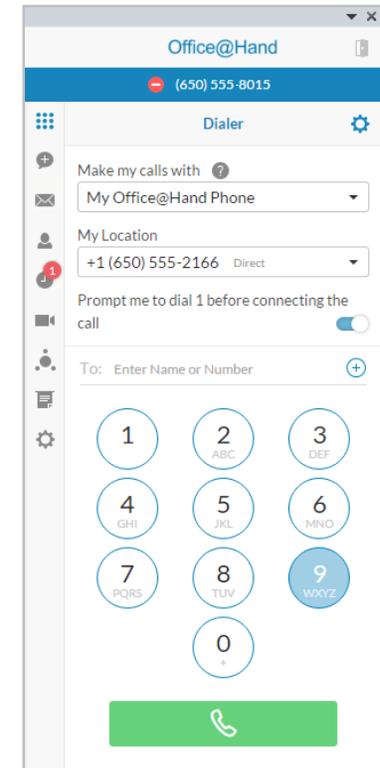


Figure 14



## New SMS

The **New SMS** screen allows you to send a text message to your Outlook contacts, your company colleagues, your personal contacts, or any other phone number. The screen allows you to select more than one contact or phone number in case you want the same message to be sent to multiple recipients. (Figure 15)

As you start typing in the “To” field, Office@Hand for Outlook will search across your Office@Hand Corporate Directory, Office@Hand Personal Contacts, and your Outlook Contacts to try to find a match. (Figure 16)

After the message is sent, you will see the **Conversation** screen. See the **Message conversation** section for more details.

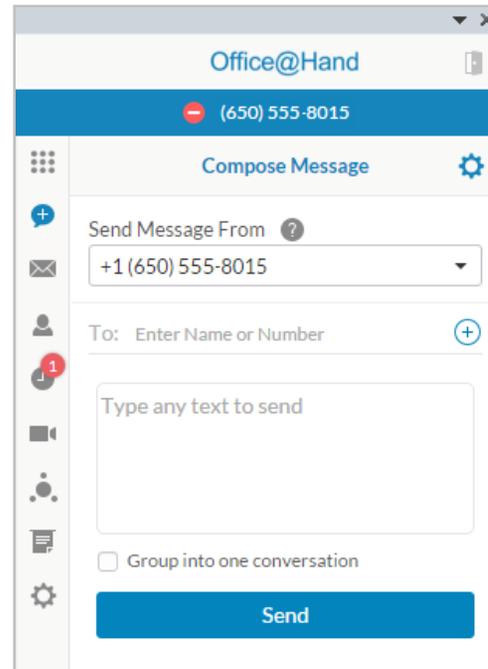


Figure 15

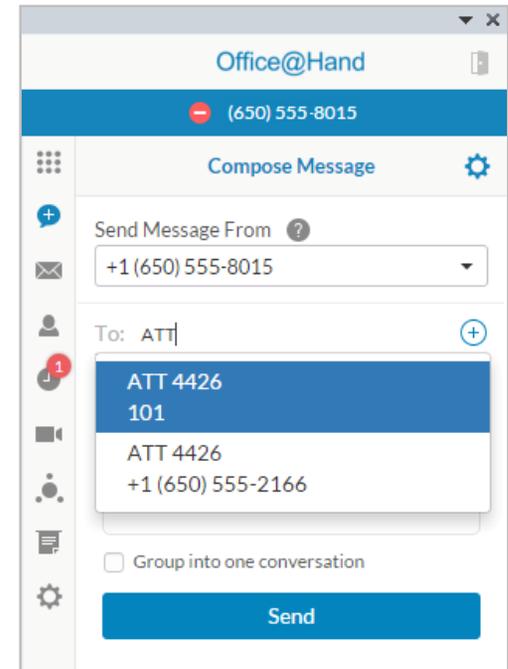


Figure 16



# Messages

You can view all your Voice, Fax and Text messages on the **Messages** screen. This screen is designed to display all the messages that you have received for the past week. Messages are organized in tabs.

Click the **Messages** icon  to display all of your messages, including voice, fax, and text combined. You can select a specific icon to view the list of messages of that type. You can also search your messages for key words. (Figure 17)

Click the recording icon  or the sender's name to open the voice message. Click the **Play** button  to hear it. (Figure 18)

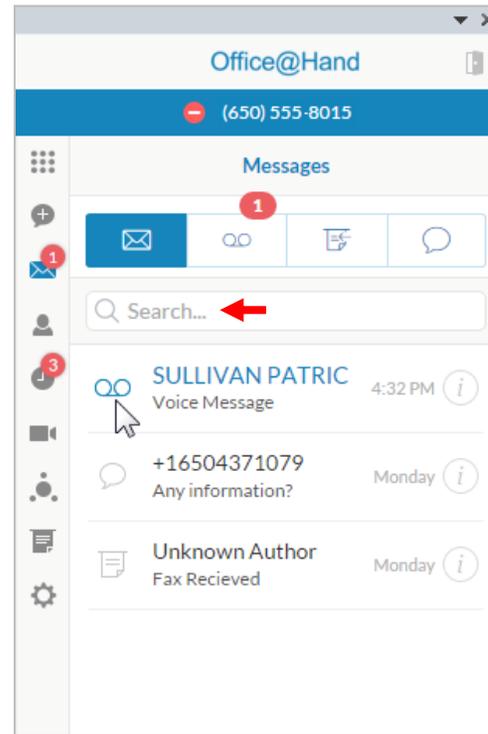


Figure 17

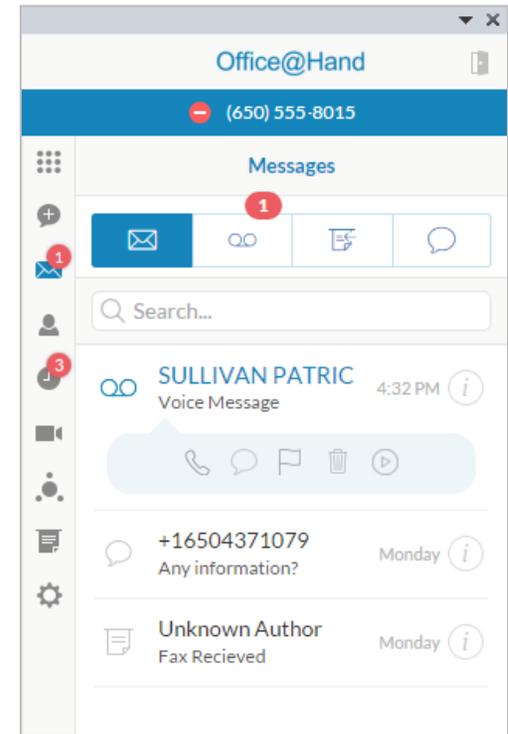


Figure 18



## New Message Indicator

When you receive a new message, the Office@Hand for Outlook **Messages** screen displays a new message indicator as a number in a **red** field. The number indicates the total number of messages that are new (that is, not heard or read). (Figure 19)

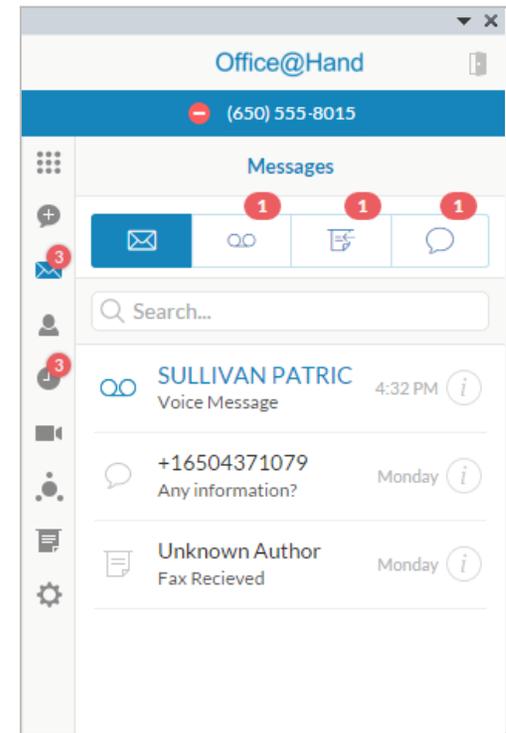


Figure 19



# Message Details

On the **Message Details** screen, click the **Info** icon (i) to see:

- Direction of the message (Incoming or Outgoing).
- Contact name (if available).
- Phone number.
- Message Received or Sent time.
- A **Call** button that allows you to make a call to your message sender or recipient.
- A **Send Text** button allows you to send a text to your message sender or recipient.
- A **Back** button allows you to go back to the message list.

(Figures 20 and 21)

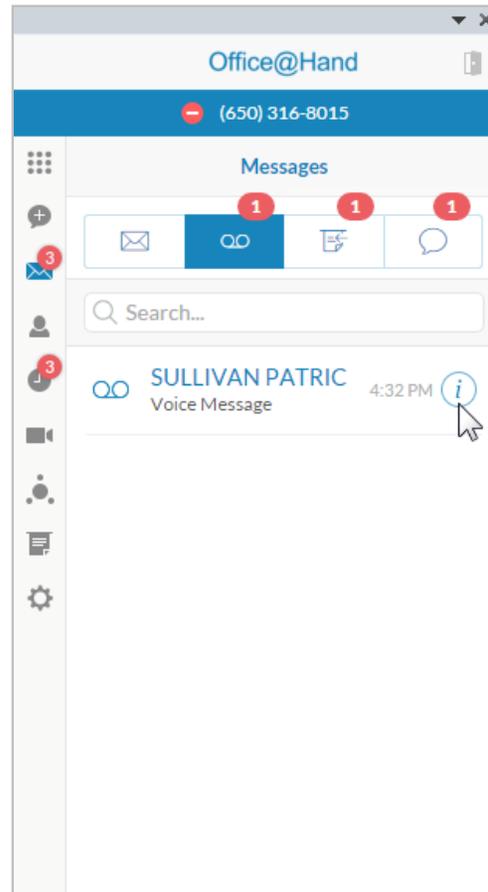


Figure 20

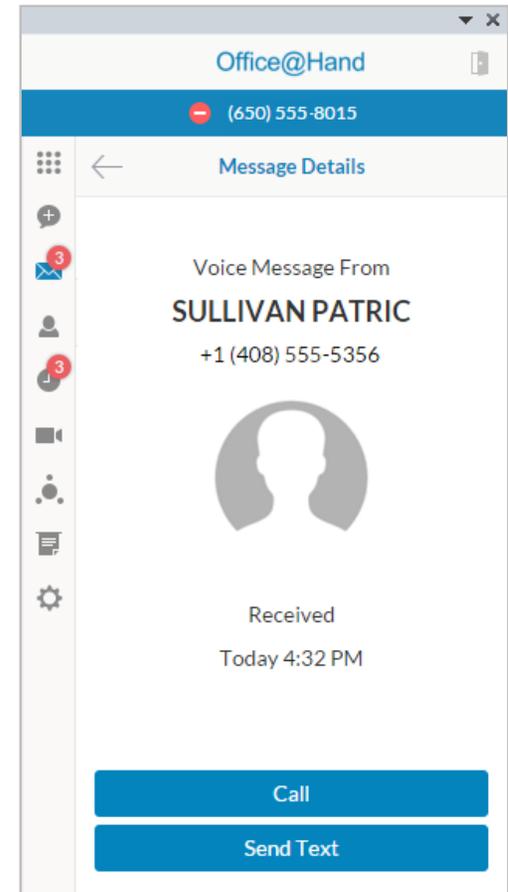


Figure 21



# Voicemail Messages

In order to listen to your voice messages, click on the name or number that appears on the message. A voicemail audio control will pop up. (Figure 22)

- The play  button will allow you play your voice message through your computer’s audio.
- The voice message duration is displayed.
- You can pause and resume anytime the message is playing.
- You can return a call to the person who left you this message by clicking on the phone icon.
- You can send a text message to the person who left you this message by clicking the balloon icon.
- You can flag this message by clicking on the flag icon.
- You can delete a message by clicking on the delete icon.

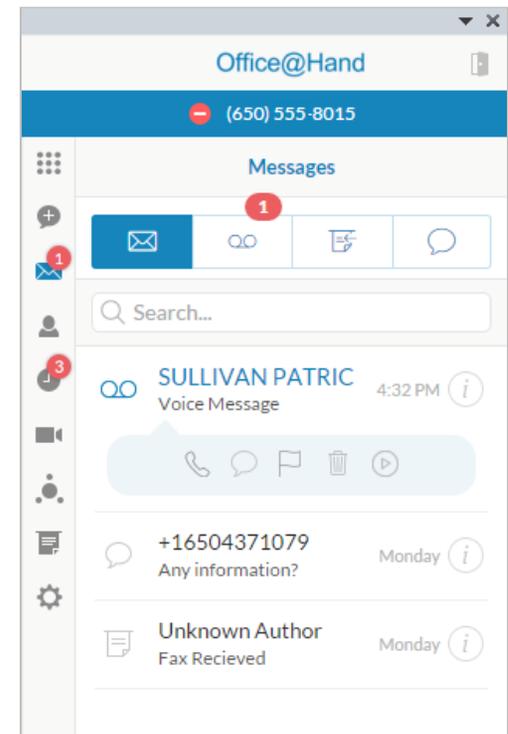


Figure 22



# Fax Messages

To view a fax message, click on the name or number that appears on the message. A fax message control will pop up.

- When you click on the fax icon on the pop up, the fax will open up in your browser. (Figure 23)
- Clicking **Delete** will delete the fax message.

To compose a fax, click the **Fax** icon  **Send Fax** on the menu. The Office@Hand for Outlook **Send Fax** screen opens.

Select recipients and compose your message. Attachments up to 20 MB can be included. (Figure 24)

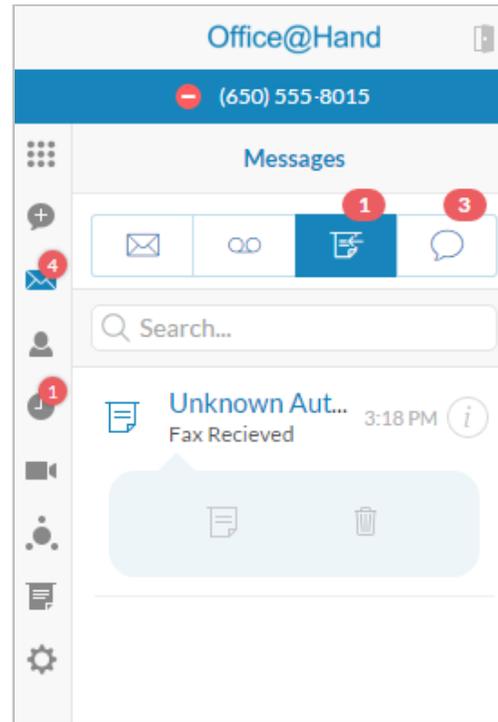


Figure 23

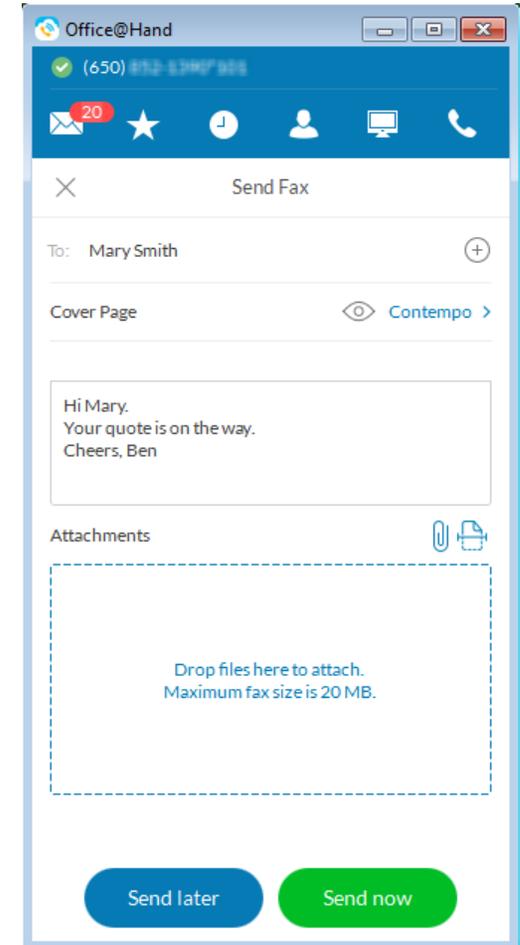


Figure 24



# Text Messages

When you see a list of messages, the list displays the most recent message if the message is part of a conversation. (Figure 25)

To view your text message conversation, click on the name or number that appears on the message. (Figure 26)

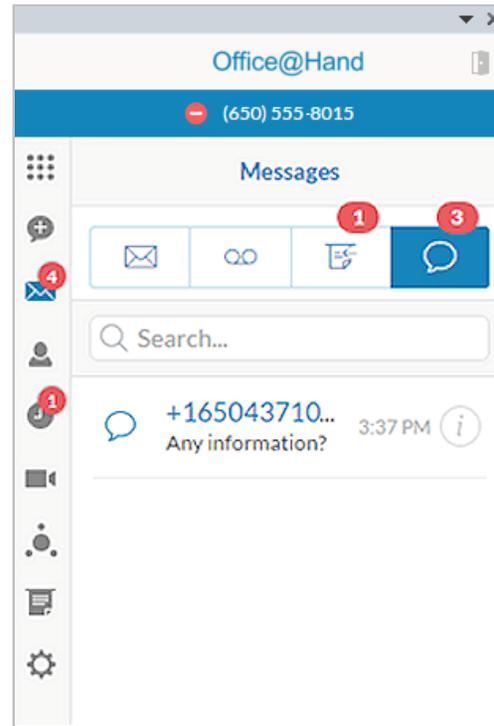


Figure 25

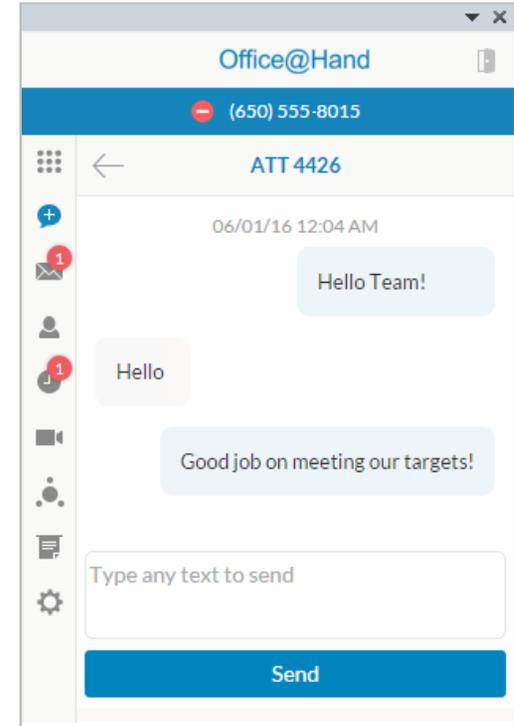


Figure 26



## Message Conversation

Once you are on the conversation screen, you will see messages that are part of this conversation. The messages are sorted by the time they arrived or were sent. Newer messages are displayed at the bottom. (Figure 27)

You can send a new message as part of this conversation by typing in the text box and by clicking the **Send** button, or by hitting the **Enter** key.

The back arrow button will navigate you back to the message list.

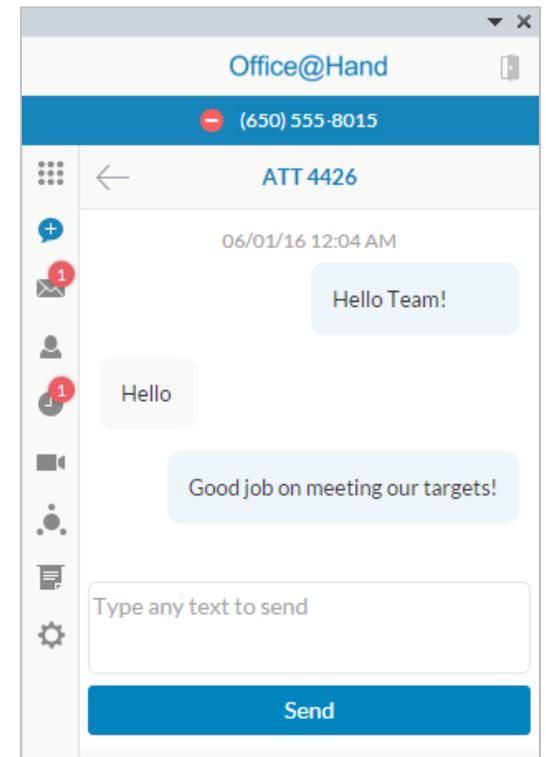


Figure 27



# Contacts

You can access your Office@Hand Company Directory, Office@Hand Personal Contacts, and Outlook Contacts from Office@Hand for Outlook.

You can navigate to the **Contacts** screen by clicking on the **Contacts** icon  in the navigation bar.

The screen is initially blank (Figure 28). Type in the search box to find your contact. (Figure 29)

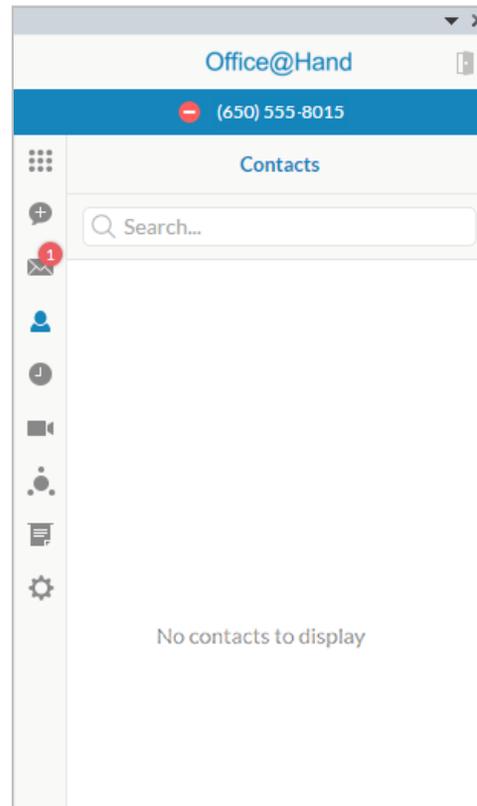


Figure 28

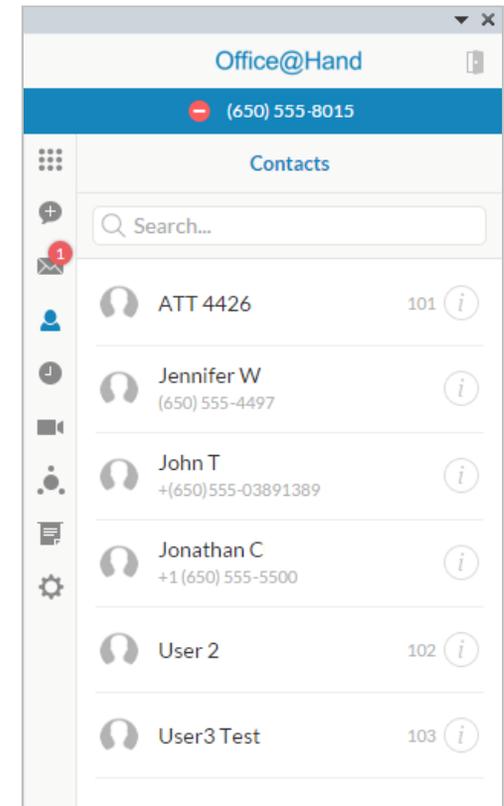


Figure 29



## Contacts Search

As you start typing in the search text box, Office@Hand for Outlook will simultaneously search your Outlook, Personal, and Company Directory contacts and display them on your **Contacts** screen. (Figure 30)

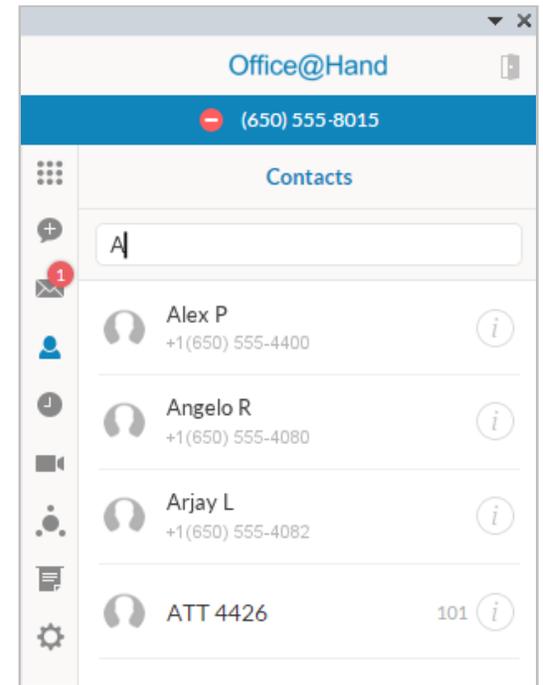


Figure 30



## Contact Details

On the **Contacts** screen (previous page) you can click on a name or the info icon (i) to view the contact's details: first name, last name, email, and phone number.

On the **Contact Details** screen (this page), when you click the down-facing caret (v) next to a phone number, it will reverse (^) and the screen will expand with options to initiate a call or send a text message to your contact.

Clicking the back arrow (←) on the **Contact Details** screen will return you to the **Contacts** screen and your search results (shown on the previous page). (Figure 31)

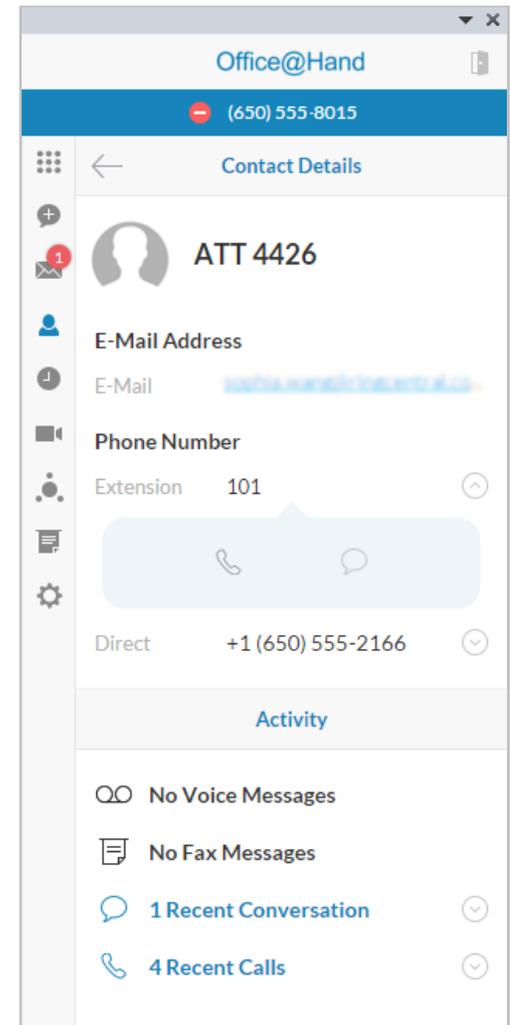


Figure 31



# Call Log

The **Call Log** screen shows a list of all your calls in the last week. Click the clock icon  on the navigation bar to bring up the **Call Log** screen.

The **Call Log** screen is organized into two tabs. The **All** tab displays all of your calls, while the **Missed** tab displays a list of calls that you missed.

The list displays the caller name, caller location, and time of the call. The list of calls is sorted by time when the call was originated, with the newest calls on top.

The screen allows you to search for a call record. By entering a phone number or caller name in the search box, you can filter the call logs according to the search criteria you entered.

A phone icon with an arrow pointing to the right  indicates an incoming call, and an arrow pointing to the left  indicates an outgoing call.

The info icon  on a given call record will allow you to view the call details. (Figure 32)

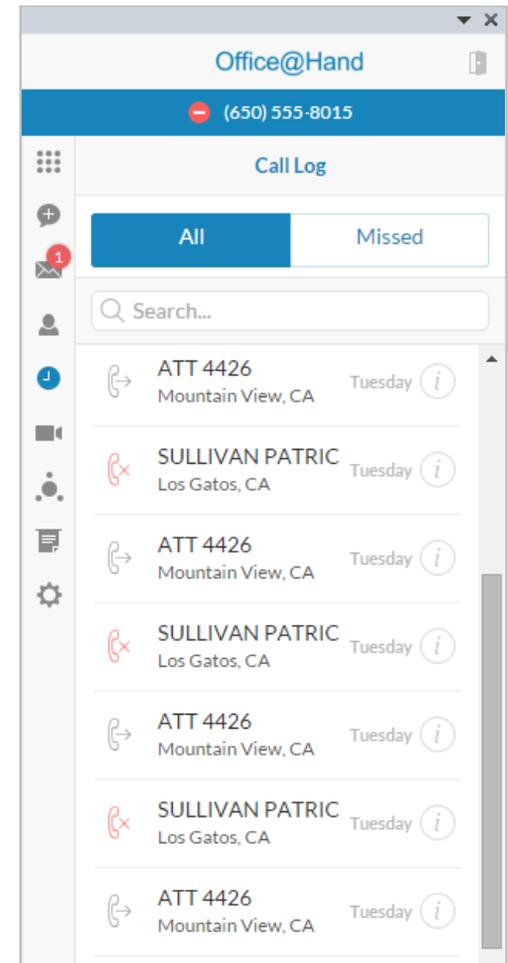


Figure 32



# Call Details

The **Call Details** screen shows detailed call information.

Here you can view the call direction, caller ID, call location, call time, and call duration.

You can also initiate a call or send a text to the caller or person you called. (Figure 33)

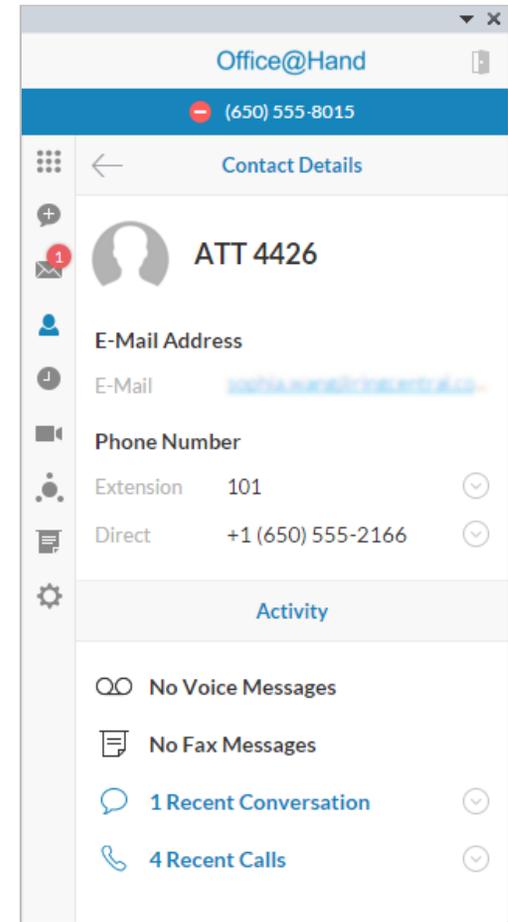


Figure 33



# Office@Hand Conference

You can view your Office@Hand Conference information or schedule a new Office@Hand Conference in the Office@Hand **New Conference** screen. (Figure 34)

The screen displays the dial-in number, your host code, and the participant code that you distribute to people whom you wish to participate in your conference.

When you select **International participants**, Office@Hand for Outlook displays a list of countries along with their respective dial-in numbers.

The list is searchable; you can type in the first few letters of the country name to avoid scrolling through the entire list. You can select the country by selecting the checkbox for that country name.

Clicking **Save in Calendar** will create an Outlook calendar invitation, as described in the next section.

## Office@Hand Conference Commands

\* # 2

**Caller Count:** Keep track of how many people are on the call

\* # 3

**Leave Conference:** Lets the host hang up and end the call

\* # 4

**Menu:** Listen to the list of touchtone commands

\* # 5

**Set Listening Modes**

- Press 1x: **Mute callers** - Callers can unmute with \* # 6

- Press 2x: **Mute callers** - Listen only. No unmuting option

- Press 3x: **Unmute callers** - Opens the line again

\* # 6

**Mute Host Line**

- Press once to **MUTE**
- Press again to **UNMUTE**

\* # 7

**Secure the Call**

- Press once to **BLOCK** all callers
- Press again to **OPEN** the call

\* # 8

**Hear sound when people Enter or Exit call**

- Press 1x: Turns OFF sound
- Press 2x: Enter tone is ON Exit tone is OFF
- Press 3x: Enter tone is OFF Exit tone is ON
- Press 4x: Turns ON sound

\* 9

**Record your conference**

- Press once to **START** recording
- Press again to **STOP** recording

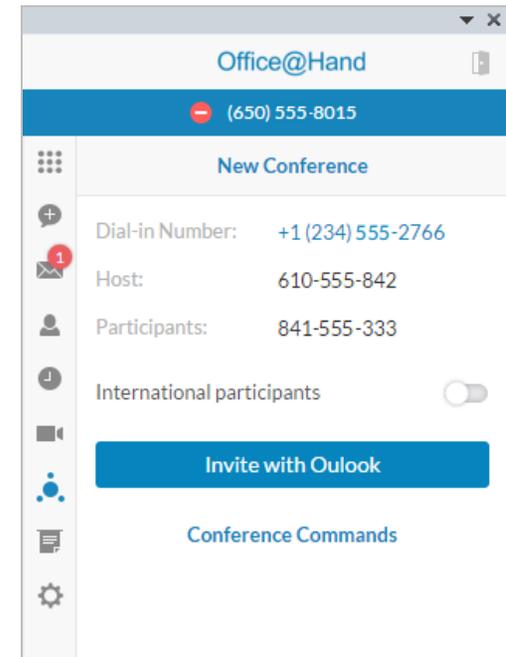


Figure 34



# Office@Hand Conference—Outlook Calendar Invitation

Once you have created an Outlook Calendar invitation from the Office@Hand **New Conference** screen, you'll find that the conference information has been prepopulated into your Outlook Calendar invitation. Here you can interact with your Outlook Calendar invitation just as you normally would; enter your event name, invite guests, or edit the description. (Figure 35)

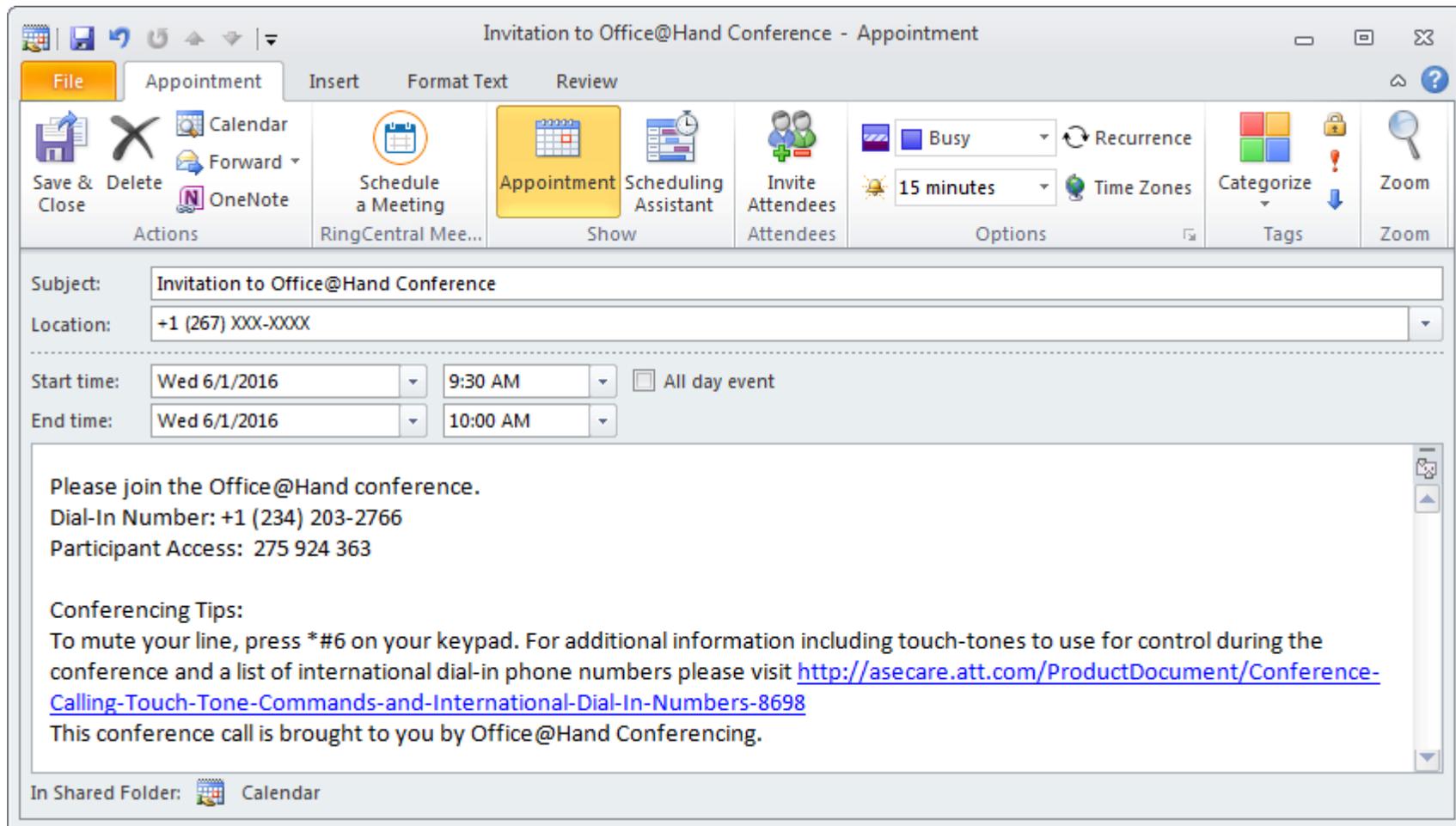


Figure 35



# Office@Hand Meetings

You can schedule an **Office@Hand Meetings** event with your Outlook Calendar. **Office@Hand Meetings** allows you to host meetings with audio, video, or screen sharing. The calendar icon on the navigation bar brings up the Office@Hand **New Meeting** schedule screen. (Figure 36)

The meeting topic is required.

Select **Recurring Meeting** if you would like that option; otherwise select a single date and time.

Select **Meeting Type** and **Meeting Options**; then click **Create a meeting in Outlook**.

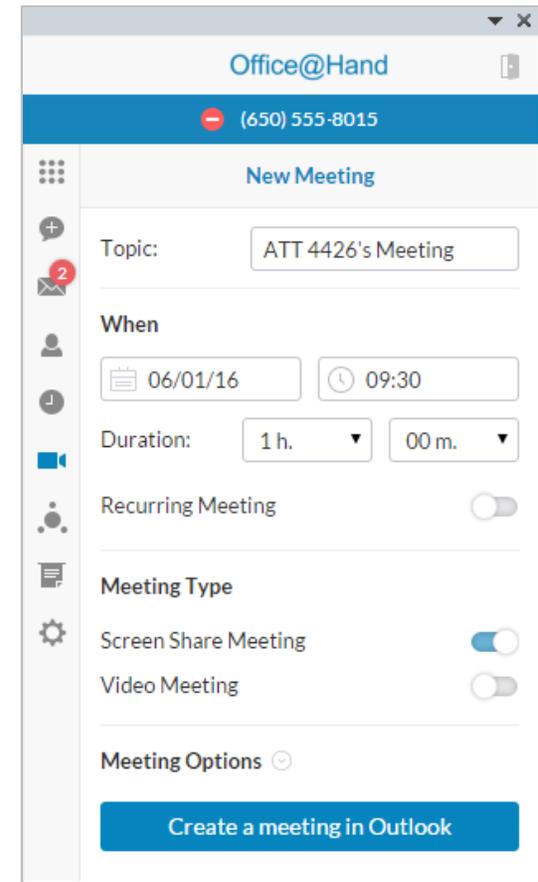


Figure 36



# Office@Hand Meetings—Outlook Calendar invitation

Once you have set up your meeting in Office@Hand for Outlook, a new Outlook Calendar invitation will be created for you, prepopulated with the information you specified. You will see the Office@Hand Meeting information is also prepopulated in your Outlook Calendar invitation. (Figure 37)

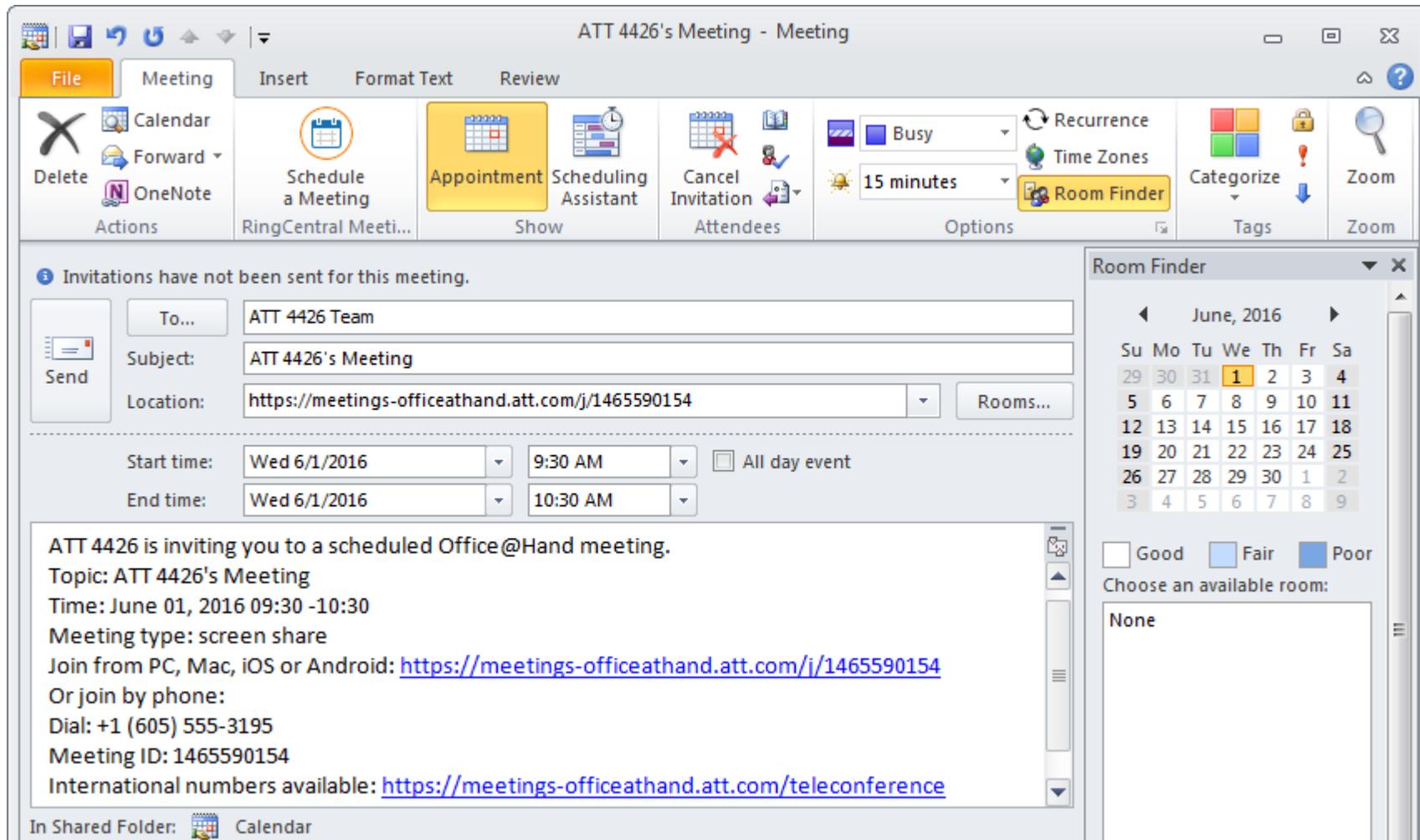


Figure 37



# Troubleshooting

**Q: I can't see Office@Hand for Outlook when I open Outlook. What is the problem? Does it require some special permission?**

A: No, Office@Hand for Outlook does not require any special permission. Make sure Office@Hand for Outlook is installed correctly and is enabled—you can check this by going to the Outlook menu, and then to **Outlook Options > Add-Ins**. Also make sure **Office@Hand for Outlook Add In** is checked.

**Q: I would like to disable this feature for now.**

A: Go to Windows Control Panel and Uninstall Office@Hand for Outlook.

**Q: Which operating systems are supported?**

A: The following operating systems are supported: Windows 7 and above.

