Allworx®

TSP Installation Guide

Version 2.2.6.0

Updated February 24, 2015

allworx®

Allworx® TSP Installation Guide Version 2.2.6.0

Contents

allworx

1   Introduction

The Allworx Telephony Service Provider (Allworx TSP) is a Telephony Application Programming Interface or TAPI-compliant driver for the Microsoft Windows operating system. This driver uses TAPI-compliant applications to support:

•   inbound and outbound calling.

•   call transferring.

•   call parking.

•   holding and un-holding calls.

1.1   Who Should Read this Guide

This guide is for Allworx Server Administrators that:

•   install and maintain Allworx servers

•   understand computer networking and basic telephony

•   completed the Allworx Partner technical training.

Allworx technical support is limited to supporting the Allworx TSP driver to integrate with the Microsoft Outlook messaging system. All other support of third party TAPI compliant applications are the responsibility of the reseller and end-user customer. See the Allworx TSP Application Notes document for more information on using the Allworx TSP drivers with popular Microsoft Windows-based applications.

1.2   Guide Purpose

This document describes the process to set up and configure the Allworx TSP driver.

Note:	The processes described in this document require the user to have permissions to Install, Configure, Edit, or Uninstall programs.

allworx

1.3 Equipment Requirements

The table below is a complete list of equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements

PC	• Running OS (with latest service pack)
	   • Windows 7 32-bit SP1
	   • Windows 7 64-bit SP1
	   • Windows 8 32-bit
	   • Windows 8 64-bit
	   • Windows 8.1 32-bit
	   • Windows 8.1 64-bit
	 • RAM minimum: 2 GB
	 • Monitor resolution: 1024 x 768 (XGA)
	 • Internet connection
	 • TAPI-compliant application (e.g. Microsoft Outlook messaging application: 2003, 2007 or 2010).
	 • .NET Framework version 3.5 SP 1 (includes 2.0 and 3.0).

Allworx server	• Server Software 7.0 or higher • Administration permissions and passwords for each Allworx server. • IP Address or DNS name of each Allworx server. • Allworx Server with the Call Assistant Software Feature Key installed, if using Allworx Server Software 7.7 or lower. • Allworx server version 7.5 or greater requires running Allworx TSP version 2.2.6.0
Allworx phone	• Allworx phone with firmware 2.2 or greater. A compatible version of the phone firmware automatically downloads to Allworx phones when attached to servers running software release 7.0 or higher. • Allworx phone firmware revision 2.5 or greater requires running Allworx TSP version 2.2.6.0

1.4 Important Installation Information

• Review the latest Allworx Release Notes document found on the Allworx public website or Allworx Partner Portal at www.allworxportal.com.

• Install the Call Assistant Software Feature Key on the Allworx Server, if using Allworx Server Software 7.7 or lower.

• Verify the PC running the Allworx TSP driver and the configured Allworx phone are on the same network.

• Remote phones can utilize the Allworx TSP driver when connecting the PC to the Allworx phone.

1.5   Installing.NET Framework

To install the .NET Framework version 3.5 SP1 installer on the Windows Vista, Windows 7, or Windows 8 operating system:

1. Navigate to the computer **Start Menu** > **Control Panel**. Verify the view is the Classic view, and click the Programs and Features icon.

2.   Click **Turn Windows Features on** or off (located in the left column).

    Windows Vista, Windows 7, and Windows 8 operating systems have User Account Control. Accept to proceed.

3. Select the .NET Framework 3.5 (includes .NET 2.0 and 3.0) installer and click OK the install begins. Click **Download** files from Windows Update. The install completes.

2 Upgrading the Software

The system retains the configuration data during the Windows-TSP driver upgrade; however, on other operating systems, the system may not maintain the configuration data. Allworx recommends obtaining the configuration data.

2.1 Objective

Upon completing the instructions, Allworx Server Administrators can successfully:

•   obtain the configuration data.

•   upgrade the TSP driver.

2.2 Equipment Requirements

This chapter uses the equipment specified in "Equipment Requirements" on page 2. No other special equipment is necessary.

2.3 Upgrading the Software

To obtain the configuration data:

1. Navigate to the control panel.

    For Windows 8 operating system: Click the WINKEY (), type "Control Panel", and select the Control Panel icon.

2. Verify you are in the classic view. Click the icon.

    For Windows 7 or Windows 8 operating systems: Phone and Modem

3. Click the Advanced tab, select Allworx TSP from the list, and then click **Configure**.

4. Copy the configuration information associated with the currently installed TSP driver, and click **Cancel**. This opens the Phone and Modem Options dialog box.

allworx®

To upgrade the TSP driver:

1. Obtain the configuration data – see above.

2. Uninstall previous version of the Allworx TSP driver. The system does not maintain the configuration data in this process. Follow the procedure: "Removing the Software Package" on page 21 for details to remove the previous version prior to the upgrade.

3. Navigate to https://allworxportal.com/, and click the **Portal Login** button. Login with your Allworx Portal Username and Password, and click **Login**.

4. Click the **Skip and go to portal** link. Click **Support & Training** > **Software** > **System Support Files**. Select the appropriate driver. This downloads the installer file.

5. Install the required files.

   a. Double-click the appropriate installer file.

      Separate drivers exist for 32-bit and 64-bit Microsoft Operating Systems and are available in separate compressed-ZIP files, available from the Allworx Portal.

      • 32-bit Operating Systems (installer file name: AllworxTspSetup_x86) for Windows Vista, Windows 7, or Windows 8 operating system workstations.

      • 64-bit Operating Systems (installer file name: AllworxTspSetup_x64) for Windows 7 or Windows 8 operating system workstations.

   b. If the installer detects the Visual C++ 2008 Redistributable file is missing, the Welcome to the Prerequisite Wizard dialog box displays.

      • Click **Next** to continue the installation. Check the checkbox, and then click **Next**. The Visual C++ 2008 Redistributable Setup dialog box displays.

      • Windows Vista, Windows 7, and Windows 8 have User Account Control. Accept to proceed.

      • Click **Next**, the Licensing Terms dialog box displays.

      • Read and check the checkbox next to I have read and accept the license terms, and click **Install**. This installs the redistributable file.

      • Click **Finish**.

   The Welcome to the Allworx TSP Setup Wizard dialog box displays.

6. Click **Next** to start the Setup Wizard. The Licensing Terms dialog box displays. Read and accept the License Agreement. The page default is I do not accept the terms in the License Agreement.

7. Click **Next** and the Allworx TSP Setup is ready to install.

8. Click **Install** to begin installation.

    Windows Vista, Windows 7, and Windows 8 operating systems have User Account Control. Accept to proceed.

9. Click **Finish** to complete the Allworx TSP Setup Wizard.

10. Restart the PC.

3   Installing the Allworx TSP Driver

This chapter explains how to install the Allworx TSP driver.

3.1   Objective

Upon completing the instructions, Allworx Server Administrators can successfully manage the Allworx TSP driver by:

•   installing the driver.

•   adding and/or configuring TSP driver.

3.2   Equipment Requirements

This chapter uses the equipment specified in "Equipment Requirements" on page 2. No other special equipment is necessary.

3.3   Installing the Allworx TSP Driver
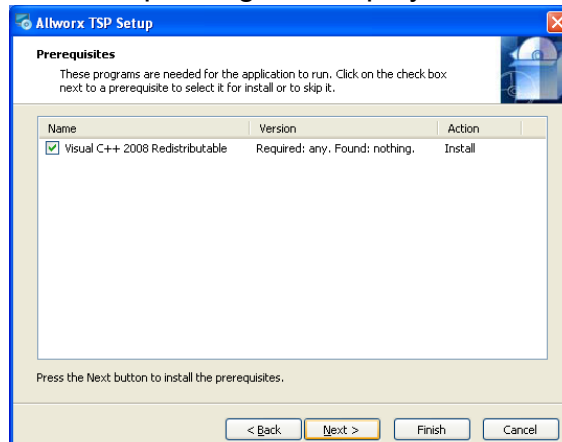
Pre-requisite: Microsoft .NET Framework 3.5 SP 1 installer

To install the Allworx TSP driver:

1.   Install the pre-requisite. See page 3.

2.   Navigate to www.allworxportal.com, and click the **Portal Login** button. The login page displays.

3.   Login with your Username and Password, and click **Login**.

4.   Click the **Skip and go to portal** link.

5.   Click **Support & Training** > **Software** > **System Support Files**. Select the appropriate driver. This downloads the installer file.

6.   Install the required files.

     a.   Double-click the appropriate installer file.

Separate drivers exist for 32-bit and 64-bit Microsoft Operating Systems and are available in separate compressed-ZIP files, available from the Allworx Portal.

- 32-bit Operating Systems (installer file name: AllworxTspSetup_x86) for Windows Vista, Windows 7, or Windows 8 operating system workstations.

- 64-bit Operating Systems (installer file name: AllworxTspSetup_x64) for Windows 7 or Windows 8 operating system workstations.

b. If the installer detects the Visual C++ 2008 Redistributable file is missing, the Welcome to the Prerequisite Wizard dialog box displays.

- Click **Next** to continue the installation. Check the checkbox, and then click **Next**. The Visual C++ 2008 Redistributable Setup dialog box displays.

Windows Vista, Windows 7, and Windows 8 have User Account Control. Accept to proceed.

- Click **Next**, the Licensing Terms dialog box displays.

- Read and check the checkbox next to I have read and accept the license terms, and click Install. This installs the redistributable file.

- Click **Finish**.

The Welcome to the Allworx TSP Setup Wizard dialog box displays.

7. Click **Next** to start the Setup Wizard. The Licensing Terms dialog box displays.

8. Read and accept the License Agreement. The page default is I do not accept the terms in the License Agreement.

9. Click **Next** and the Allworx TSP Setup is ready to install.

allworx.

10. Click **Install** to begin installation.

    Windows Vista, Windows 7, and Windows 8 operating systems have User Account Control. Accept to proceed.

11. Click **Finish** to complete the Allworx TSP Setup Wizard.

12. Restart the PC.

3.4 Setting up the Allworx TSP

To add and/or configure the Allworx TSP driver:

1. Navigate to the control panel.

   For Windows Vista, or Windows 7 operating systems: **Start Menu** > **Control Panel**.
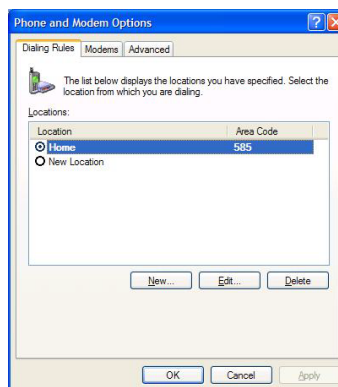
   For Windows 8 operating system: Click the WINKEY ( ), type "Control Panel", and select the Control Panel icon.

2. Verify you are in the classic view. Click the icon.
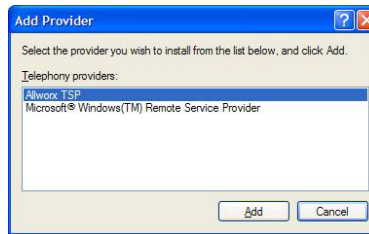
   For Windows Vista operating systems: Phone and Modem Options.

   For Windows 7 or Windows 8 operating systems: Phone and Modem.

3. Click the Advanced tab.

allworx®

a. If Allworx TSP is not in the list of available Providers, click the **Add** button. The Add Provider dialog box displays.

Windows Vista, Windows 7, and Windows 8 operating systems have User Account Control. Accept to proceed.

Select Allworx TSP, and then click the Add button. The Configuration dialog box immediate displays.

b. If the Allworx TSP driver is in the list of available providers, then select Allworx TSP from the Phone and Modem Options dialog box, and then click the Configure button.

Windows Vista, Windows 7, and Windows 8 operating systems have User Account Control. Accept to proceed.

4 Configuring the Allworx TSP Driver

This chapter explains how to configure the Allworx TSP driver.

4.1 Objective

Upon completing the instructions, Allworx Server Administrators can successfully manage the Allworx TSP driver by:

- configuring the driver.

- testing the driver.

- verifying the dial plan settings.
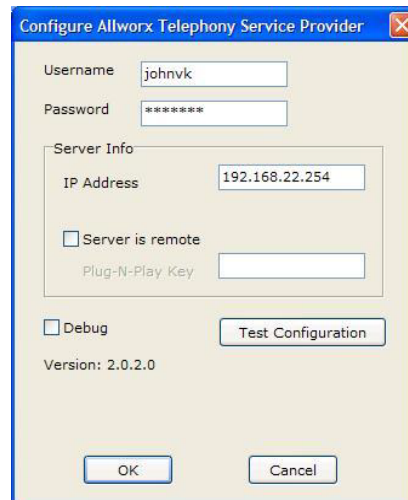
4.2 Equipment Requirements

This chapter uses the equipment specified in <u>"Equipment Requirements" on page 2</u>. No other special equipment is necessary.

Toll Free 1-800-ALLWORX * 585-421-3850   Page 13
www.allworx.com
Revised: 2/24/15

4.3 Configure the Allworx TSP Driver

The Allworx Server Administrator can configure the Allworx TSP driver on a given PC for only one user at a time and assign this user to an Allworx phone. The user may have more than one phone.

Configure the Allworx TSP driver for the user's phone by entering the Allworx Username, Allworx password, and the Allworx server IP address.

For remote connections to the Allworx server, check the "Server is remote" checkbox, and enter the server Plug-N-Play Key.

4.4 Additional Options

Option	Description
Debug	Troubleshooting for Allworx Technical Support.
Test Configuration	Verifies the IP address of an Allworx server, assigns the selected user an Allworx phone, and validates the username and password.

1. Click the **Test Configuration** button to verify the settings.

2. Click **OK** to store the configuration settings.

4.5   Dialing Rules Settings

To verify the dialing rules settings:

1. Navigate to the control panel.

    For Windows Vista, or Windows 7 operating systems: **Start Menu** > **Control Panel**.

    For Windows 8 operating system: Click the WINKEY (   ), type "Control Panel", and select the
   Control Panel icon.

2. Verify you are in the classic view. Click the icon. The Phone and Modem dialog box displays and
    the Dialing Rules tab opens as the default.

    For Windows Vista operating systems: Phone and Modem Options. For Windows 7 or Windows 8
    operating systems: Phone and Modem.

3. Click the **Edit** button and adjust the settings, as necessary.

    These settings include country/region, area code, and outside line dialing access for local and long
    distance calls. For example, dialing an outside line may require entering either 9 or 78+PIN for the
    fields under the "Dialing rules" section. Consult the Allworx Server Administrator for the proper
    settings.

    For Windows Vista, Windows 7, and Windows 8 operating systems, click **Edit**, and the User
    Account Control asks for permission. Accept to proceed.
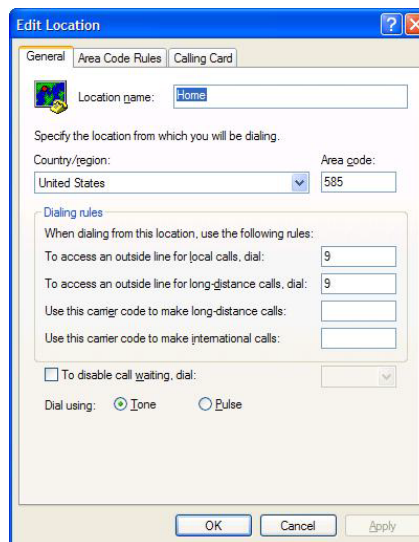
5 Using Outlook Messaging Application

This chapter explains how to use the Allworx TSP driver with the Outlook Messaging application.

5.1 Objective

Upon completing the instructions, Allworx Server Administrators can successfully:

• access the new call dialog box.

• place an outbound call using the Outlook messaging application.

• configure or select the dialing rules.

5.2 Equipment Requirements

This chapter uses the equipment specified in "Equipment Requirements" on page 2. No other special equipment is necessary.

5.3 Placing an Outbound Call

To access the New Call dialog box:

1. Select a contact from the Contacts panel and right mouse-click on the contact.

2. Navigate to **Call Contact** > **New Call**. The New Call dialog box opens.
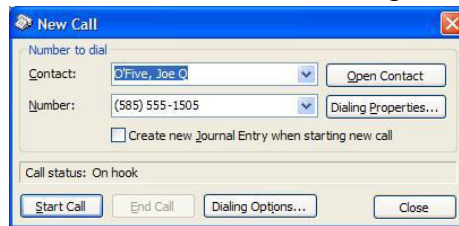
Continue with one of the following options:

To place an outbound call using the Outlook messaging application:

1. Access the New Call dialog box, at the beginning of this section.

2. Select the Number from the drop-down list.

3. Click the **Start Call** button to place a call from the user's phone to the selected contact.

4. Click the **End Call** button or use the phone to end the call.

To select user's phone or to change phones for users with multiple phones:

1. Access the New Call dialog box, at the beginning of this section.

2. Click the **Dialing Options** button and the Dialing Options dialog box displays.
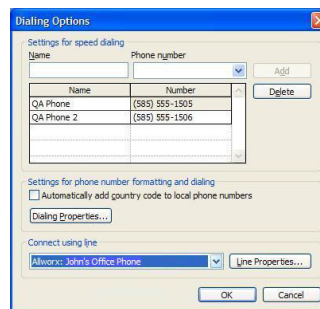
3. Select Allworx: <user's phone name> from the Connect using line drop-down list. Each phone assigned to a user has an entry in the drop-down list.

   On some systems, this selection may not be visible when initially viewing the drop-down menu and the ability to scroll through the selections may not be readily apparent. If Allworx: <user's phone name(s)> is not available:

   a. Check the network connections of the PC and phone(s).

   b. Check the Allworx TSP configuration (See "Important Installation Information" on page 2).

4. Enter a name in the Name field, and then enter a phone number in the Phone number field or select an existing number from the drop-down list.

5. Click **Add**.

6. Click **OK** to save changes.

To configure or select the dialing rules:

1. Access the New Call dialog box, at the beginning of this section.

2. Click the **Dialing Properties** button on the Dialing Options dialog box. The Phone and Modem displays with the Dialing rules tab. Click **OK**.

3. Click **Edit**. The Edit Location dialog box displays.

   For Windows Vista, Windows 7, and Windows 8 operating systems, click Edit, and the User Account Control asks for permission. Accept to proceed.

4. Enter the area code, Country/Region in the appropriate fields. Contact the Allworx Server Administrator for the information for the four dialing rules):

• To access an outside line for local calls dial:

• To access an outside line for long-distance calls dial:

• Use the carrier code to make long-distance coals:

• Use the carrier code to make international calls:

5. Click **OK** to save changes.

6 Removing the Software Package

This chapter explains how to remove the Allworx TSP driver.

6.1 Objective

Upon completing the instructions, Allworx Server Administrators can successfully remove the Allworx TSP driver package.

6.2 Equipment Requirements

This chapter uses the equipment specified in "Equipment Requirements" on page 2. No other special equipment is necessary.

6.3 Removing the Allworx TSP Driver

To remove the Allworx TSP driver package completely.:

1. Navigate to the control panel.

   For Windows Vista, or Windows 7 operating systems: **Start Menu** > **Control Panel**.

   For Windows 8 operating system: Click the WINKEY (), type "Control Panel", and select the Control Panel icon.

2. Verify you are in the classic view. Click the icon. The Phone and Modem dialog box displays and the Dialing Rules tab opens as the default.
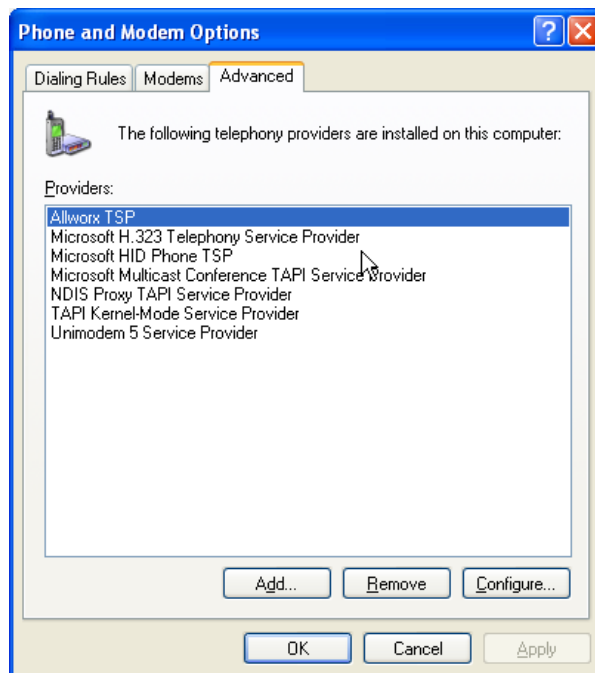
   For Windows Vista operating systems: Phone and Modem Options.

allworx®

For Windows 7 or Windows 8 operating systems: Phone and Modem.
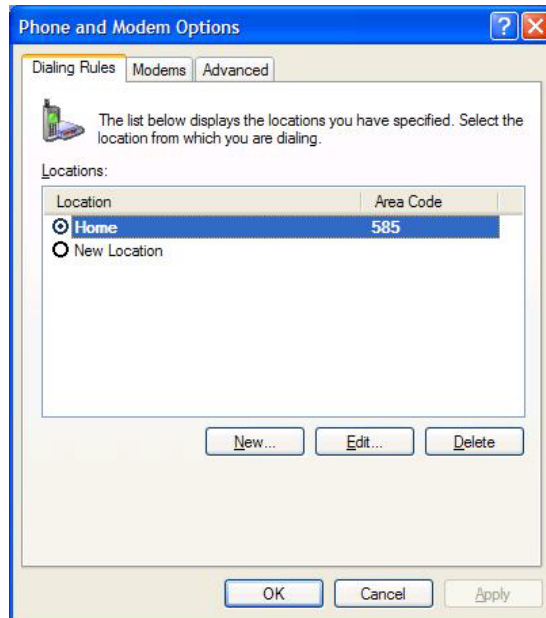
3. Click the Advanced tab from the Phone and Modem Options dialog box. Select with the Allworx TSP provider as shown in the figure below, click the **Remove** button.

   For Windows Vista, Windows 7, and Windows 8 operating systems, click Edit, and the User Account Control asks for permission. Accept to proceed.

4. Click **Yes** to confirm removal of Allworx TSP.

5. Open the option on the Windows Control Panel used to remove currently installed programs and features.

   In the Windows Vista, Windows 7, or Windows 8 operating systems, this is Programs and Features.

6. Select the Allworx TSP entry and click **Uninstall** (Windows Vista, Windows 7, or Windows 8) button to remove the package.

   For Windows Vista, Windows 7, and Windows 8 operating systems, click Edit, and the User Account Control asks for permission. Accept to proceed.

7 Troubleshooting

Problem	Cause	Solution
Allworx TSP does not show in the Telephony Providers List after installation.	A missing dependency causes this problem. The Allworx TSP driver requires installation of the.NET Framework version 3.5 installer.	NET Framework version 3.5 SP1 (includes 2.0 and 3.0) installer. This is available from Microsoft: See "Installing.NET Framework" on page 3.
The Allworx TSP does not show up in the Telephony Providers List after installing the.NET Framework 4.0/4.5 installer.	The.NET 3.5 Framework installer not being present on the system causes this problem. Even though version 4.0/4.5 of the framework is a later version of the framework, version 3.5 is still required to be present on the system for the Allworx TSP for proper configuration. This may be due to a new installation of Windows 7 or Windows 8 or simply missing the dependency.	.NET Framework version 3.5 (includes 2.0 and 3.0) installer. This is available from Microsoft: See "Installing.NET Framework" on page 3.
Upgrading the Allworx TSP on Windows Vista fails and during the upgrade shows many Windows services in use which must be shutdown before the upgrade can proceed.	The Allworx TSP being present in the Telephony Service Providers List during the upgrade causes this problem.	It is required to complete the procedure "Removing the Software Package" on page 21 to remove the previous version of the Allworx TSP prior to the upgrade. Note: The system does not maintain configuration data with the removal of the Allworx TSP. Allworx recommends copying the configuration data prior to the removal of the Allworx TSP. See "Upgrading the Software" on page 5 for more information.
Allworx TSP was uninstalled but shows AllworxTSP.tsp the Phone and Modem advanced options dialog and the Remove button is inactive.	Not removing the Allworx TSP from the providers list prior to running the uninstaller causes this problem.	Run the Allworx TSP installation program to install the Allworx TSP. Once installed, follow the procedure titled "Removing the Software Package" on page 21 to remove the Allworx TSP correctly following the steps in order.

Problem	Cause	Solution

The Outlook contacts dialer displays a dialog which states "To start call, lift receiver", and I can't figure out how to dial my Outlook contact.	The dialer configuration uses a modem and not the Allworx TSP. To use the Allworx TSP, configure it for use.	1. Navigate to **Start** > **Control Panel** > **Phone and Modem** > **Advanced**.
		2. Verify the Allworx TSP is present in the list.
		
		  a. If the Allworx TSP is not present in the telephony providers list:
		
		    • Click **Add…**
		    • Select Allworx TSP from the list.
		    • Click **Add**.
		    • Select Allworx TSP provider from the list.
		    • Click **OK**.
		
		  b. If the Allworx TSP is present in the telephony providers list:
		
		    • Select Allworx TSP provider from the list.
		    • Click **OK.**

Cannot make a TAPI call when running Microsoft Communicator and Outlook.	There is a known issue with Microsoft Outlook 2007 and Outlook 2010 such that users cannot make a TAPI call if either is running in conjunction with Microsoft Office Communicator 2007.	Corrective information is available in Microsoft Knowledge Base Article 959625. Depending on the version of these tools active at the time, the TAPI application requires a Microsoft hot-fix and/or a registry setting change to enable a successful TAPI call.

Toll Free 1-866-ALLWORX • 585-421-3850
www.allworx.com
Version: 2.2.6.0 Revised February 24, 2015