



# **Administering Avaya Collaboration Services**

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# Chapter 1: New in this release

The following sections detail what's new in *Administering Avaya Collaboration Services* (NN10850-031) for Release 6.4.

## **Application rebranding**

The Avaya Client Applications product name is no longer attached to the Avaya Collaboration Services application. All Avaya Client Applications references in this document have been removed.

## **Instant Messaging and Presence enhancements**

The Avaya Collaboration Services IM and Presence functionality has been enhanced to work on all UC desktop clients that interwork with Avaya Collaboration Services.

## **Support for Windows 8.1 and Firefox**

Avaya Collaboration Services now supports:

- Windows 8.1 operating systems
- Firefox browsers

# Chapter 2: Introduction

This document provides the information needed to configure and build the Collaboration Services installation packages.

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## Documentation terminology

The following terminology is used throughout the Collaboration Services documentation.

- This document: *Administering Avaya Collaboration Services* (NN10850–031)
- User guides and help sets:
  - *Using Avaya Collaboration Services* (02-604208)
  - *Avaya Configurator User Guide* (02-604198)

### Product names

The following names are also used to refer to the Avaya Collaboration Services application.

- Avaya Collaboration Services
- Collaboration Services

### Applications

The following names are used to refer to the Collaboration Services Office and Browser applications when one of these applications is called out separately.

- Collaboration Services Office and Browser applications
- Office and Browser applications
- Office and Browser Add-ins

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## Avaya Mentor videos

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## About this task

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## Procedure

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# Chapter 3: Overview

The following sections provide an overview of Avaya Collaboration Services and the conceptual information to help you build installation packages using the Configurator.

The Avaya Collaboration Services applications can interwork with Lync Integration and Avaya one-X<sup>®</sup> Communicator for Windows. The Configurator builds a separate installation package for Lync Integration. There is no option to select Avaya one-X<sup>®</sup> Communicator in the Configurator and the Configurator does not build an installation package for Avaya one-X<sup>®</sup> Communicator. However, when deployed, Avaya Collaboration Services will automatically detect if Avaya one-X<sup>®</sup> Communicator is running on the Windows desktop.

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## Configurator

The Avaya Configurator is an administrative tool that you use to configure and build the Collaboration Services installation package prior to distribution to end users.

Administrators must have Microsoft .NET Framework 3.5 to run the Configurator installation package. For a complete list of system requirements, see [Configurator requirements](#) on page 11.

### Collaboration Services

When you run a Configurator build, you always build the installation package for the Collaboration Services Office and Browser applications.

Use the Custom Rule Creator to create the Browser and Office Custom Rules file. This file contains the custom number and pattern matching rules to be included in the corresponding application installation package. With the Custom Rule Creator, you can define a custom rule for a particular web browser subnet and the URL matching scheme. You can define Smart Tag custom rules for Microsoft desktop applications and the conference dialer pattern matching rule for the click-to-join conference feature.

### Lync Integration

Enable Lync Integration and configure the installation package for Lync Integration.

You can include this installation package with the build of the Collaboration Services installation package.

For more information on the Avaya Lync Integration solution and requirements, including using the Configurator to build the installation package, see the following document:

- *Avaya Microsoft Lync Integration Fundamentals for Avaya Aura<sup>®</sup>* (NN10850–014)

## **Installation packages**

The Configurator produces a configured installation package containing the Collaboration Services applications, and a separate installation package for Lync Integration. You can distribute these installation packages to end users.

# Chapter 4: System requirements

Review the system requirements before building the installation packages and distributing them to end users.

---

## Configurator requirements

The Configurator is an administrative tool used to configure and build the installation packages for the Collaboration applications prior to distribution to end users.

**Table 1: Configurator requirements for administrators**

| Software prerequisites   | Supported OS  | Privileges    |
|--|---|---------------|
| Administrators must have the following software installed on their systems before installing the Configurator: <ul style="list-style-type: none"><li>• Microsoft.NET Framework 3.5 or higher</li></ul> | Administrators must be running one of the following operating systems (OS): <ul style="list-style-type: none"><li>• Microsoft Windows 7</li><li>• Microsoft Windows 8</li></ul> Make sure the OS is fully updated with all Microsoft patches. | Administrator |

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## Browser Add-in requirements

Users should close all existing browser sessions before installing Avaya Collaboration Services. Following the installation of Collaboration Services, when users launch their web browser for the first time, they must enable Collaboration Services at the prompt, and then restart the browser if necessary.

**!** **Important:**

Microsoft Internet Explorer running on Windows 7 separates Collaboration Services Browser application data for sites in different security zones. For example, if a user makes a changes to the highlighting style, or enables and disables Collaboration Services, these changes do not propagate to windows or tabs that are showing pages in different security zones.

**Table 2: Browser Add-in requirements for end users**

| Software prerequisites  | Supported OS  | Supported browsers   | Installation privileges |
|---|---|--|-------------------------|
| <p>Users must have the following software installed on their systems to use the Collaboration Services Browser Add-in.</p> <ul style="list-style-type: none"> <li>• Microsoft.NET Framework 3.5 and 4.0</li> <li>• Avaya Microsoft Lync Integration and Microsoft.NET Framework 4.0 if integrating with Microsoft Lync Integration</li> </ul> | <p>Users must be running one of the following operating systems (OS):</p> <ul style="list-style-type: none"> <li>• Microsoft Windows 7</li> <li>• Microsoft Windows 8</li> </ul> <p>Make sure the OS is fully updated with all Microsoft patches.</p> | <p>Users must be using one of the following browsers:</p> <ul style="list-style-type: none"> <li>• Internet Explorer 8, 9, 10, and 11</li> <li>• Firefox</li> <li>• Google Chrome</li> </ul> | <p>Administrator</p>    |

## Office Add-in requirements

Users should close all existing Microsoft Outlook sessions before installing Avaya Collaboration Services.

**Table 3: Office Add-in requirements for end users**

| Software prerequisites   | Supported OS  | Supported Office versions  | Installation privileges |
|--|---|--|-------------------------|
| <p>Users must have the following software installed on their systems before running the Collaboration Services Office Add-in.</p> <ul style="list-style-type: none"> <li>• Microsoft.NET Framework 3.5 and 4.0</li> <li>• Avaya Microsoft Lync Integration and Microsoft.NET Framework 4.0 if integrating with Microsoft Lync Integration</li> </ul> | <p>Users must be running one of the following operating systems (OS):</p> <ul style="list-style-type: none"> <li>• Microsoft Windows 7</li> <li>• Microsoft Windows 8</li> </ul> <p>Make sure the OS is fully updated with all Microsoft patches.</p> | <p>Users must be using one of the following Microsoft Office versions:</p> <ul style="list-style-type: none"> <li>• Office 2007</li> <li>• Office 2010</li> <li>• Office 2013</li> </ul> | <p>Administrator</p>    |

---

## Virtual Desktop interoperability requirements

The following table summarizes the main VDI product and server requirements.

**Table 4: VDI requirements**

|                          |   |
|--------------------------|---|
| Virtual Desktop versions | <ul style="list-style-type: none"> <li>• Citrix Xen Desktop: Version 5.6</li> <li>• Citrix Xen Applications: Version 6.5</li> <li>• VMWare Horizon View: Version 5.3</li> </ul> |
| Virtual Desktop servers  | Windows 2008 R2 Enterprise for Citrix Xen Desktop, Citrix Xen Applications, and VMWare Horizon View.  |
| VDI Communicator         | Version 1.0   |

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## Collaboration Services Outlook add-in Interoperability requirements

Remove the following Outlook Add-ins to improve the overall performance of Outlook:

- Avaya one-X<sup>®</sup> Communicator Outlook Integrator.
- Avaya Aura<sup>®</sup> Conferencing Conference Manager.

When deploying Collaboration Services with Microsoft Lync Integration and Avaya Communicator for Windows, remove the following Outlook Add-ins:

- Microsoft Office Communicator 2007 Outlook Add-in.
- Lync Meeting Add-in.

You should also remove any other Outlook add-ins that you are not using.

# Chapter 5: Building the installation packages

Build the installation package for Avaya Collaboration Services.

If you are deploying Collaboration Services with Lync Integration, see the following document for more information:

- *Avaya Microsoft Lync Integration Fundamentals for Avaya Aura*<sup>®</sup> (NN10850–014)

If Collaboration Services will be interworking with an Avaya one-X<sup>®</sup> Communicator for Windows client, see the following document for more information:

- *Administering Avaya one-X*<sup>®</sup> *Communicator*

## Prerequisites for building the installation packages

- Be familiar with the [System Requirements](#) on page 11.

## Related Links

[Installing the Configurator](#) on page 14

[Configuring the installation packages for Collaboration Services with Lync Integration](#) on page 15

[Building the installation packages](#) on page 16

[Distributing the installation packages](#) on page 17

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## Installing the Configurator

Install the Avaya Collaboration Services Configurator.

### Before you begin

- Be running one of the following operating systems:
  - Microsoft Windows 7
  - Microsoft Windows 8
- Have Microsoft .NET Framework 3.5 SP1.
- Have the Collaboration.configurator.msi file on your desktop.
- Uninstall any previously installed versions of the Configurator.

## About this task

The Configurator is an administrative tool used to configure and build the installation packages for the Collaboration applications prior to distribution of the applications to end users.

## Procedure

1. Double-click the Configurator.msi file to launch the Windows installer for the Avaya Collaboration Services Configurator.
2. When the Avaya Collaboration Services Configurator installer opens, click **Next**.
3. When the Avaya Collaboration Services Configurator setup wizard opens, click **Next**.
4. In the License Agreement window, click **I Agree** to accept the license agreement.
5. In the Select Installation Folder window, specify a path to the installation folder for the Avaya Collaboration Services Configurator, and click **Next**.
6. In the Confirm Installation window, click **Next** to start the installation.

The system displays the message: Please use Windows Update to check for any critical updates to the .NET Framework.

7. In the Installation Complete window, click **Close** to exit the setup wizard.

The Avaya Collaboration Services Configurator icon appears on your desktop.

## Related Links

[Building the installation packages](#) on page 14

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# Configuring the installation packages for Collaboration Services with Lync Integration

## Before you begin

- Install the Avaya Collaboration Services Configurator.
- Know your service port number. The default port number is 40101.

### Tip:

You may need to change the default port number in one of the following cases:

- You are running Collaboration Services on a shared server, such as a Citrix or VMware environment
  - Another application running in your environment uses the same port number
- Know any custom rule requirements:
    - Browser subnet matching rule
    - Browser URL matching rule
    - Smart Tag matching rule for Microsoft desktop applications
    - Conference dialer rules for click-to-join conference

## Procedure

1. Double-click the Avaya Collaboration Services Configurator icon to open the Configurator tool.
2. Read the information in the **Welcome** screen, and then click **Next**.
3. In the **Collaboration Service Configuration** screen, update the service port number if necessary and select whether you want to build the Lync Add-in.
  - If you are building the Lync Add-in, go to the next step.
  - If you are not building the Lync Add-in, go to step [7](#) on page 16 on page 19.
4. In the **Microsoft Lync Settings** screen, click **Change**.
5. In the **Lync Integration Settings** window, select the settings you want to use. Then click **OK**.
6. In the Configurator wizard's **Microsoft Lync Settings** screen, click **Next**.
7. In the **Office and Browser Add-in Custom Rules** screen, choose whether you want to use custom rules. If you would like to use custom rules, select **Yes, I would like to enter or load some custom rules**, and then go to the next step. If you are not using custom rules, select **No, I do not want to use custom rules**, and then proceed with building the installation packages.
  - If you are using custom rules, go to the next step.
  - If you are not using custom rules, go to the last step to build the installation packages.
8. In the **Custom Rules Entry** screen, under **Office/Browser Add-in Custom Rules**, do one of the following:
  - Click the Custom Rule Creator icon to open the Custom Rule Creator and create custom rules as required to be included in the Collaboration Services installation package.  
  
Refer to the Configurator user guide or online help for more information on creating Browser Add-in custom rules.
  - Click the folder icon to open and import an existing custom rule file.
9. When you are ready to build the installation packages for the Collaboration applications, go to [Building the installation packages](#) on page 16.

## Related Links

[Building the installation packages](#) on page 14

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# Building the installation packages

## Before you begin

- Configure the installation packages for the Collaboration Services applications.

## Procedure

1. In the Configurator wizard's Build screen, click **Change** to browse for a destination folder.
2. Click **Build**.

The system displays the Build screen that shows the status of the build.

If the build is successful, the Avaya Collaboration Services folder opens and displays the folders for the selected builds.

## Result

If you are deploying with Lync Integration, a successful build includes the following folders:

- Collaboration Services
- Lync Add-in 2010 and 2013

If you are not deploying with Lync Integration, a successful build includes the following folders:

- Collaboration Services

## Related Links

[Building the installation packages](#) on page 14

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# Distributing the installation packages

Following the successful build of the Collaboration application installation packages, distribute the folder or folders that contain the appropriate installation packages to end users.

For more information on the installation packages, see [Configurator](#) on page 9.

For information on how to deploy the Collaboration applications on the desktop, see [Deploying the applications on the desktop](#) on page 18.

## Related Links

[Building the installation packages](#) on page 14

# Chapter 6: Deploying the applications on the desktop

The following sections describe installation and configuration for Avaya Collaboration Services.

## Related Links

[Installation and configuration parameters](#) on page 18

The following table describes the main installation and configuration parameters for Collaboration Services.

[Installing the Avaya Collaboration Services applications](#) on page 19

[Installing Collaboration Services on multiple machines from a remote server](#) on page 24

[Installing and uninstalling Collaboration Services on a shared server](#) on page 24

[Configuring instant messaging and presence functionality](#) on page 25

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## Installation and configuration parameters

The following table describes the main installation and configuration parameters for Collaboration Services.

| Parameter              | Description  |
|------------------------|--|
| -uninstall             | Enter this parameter in the Command window to uninstall Collaboration Services. The complete command line should be<br><code>Avaya.CollaborationServices.Installer.exe -uninstall.</code>  |
| -silent                | Enter this parameter in the Command window to start a silent installation. With this parameter, you can complete the installation with applications such as Internet Explorer running in the background. Collaboration Services appears the next time you restart the application.<br><br>The complete command line should be<br><code>Avaya.CollaborationServices.Installer.exe -silent.</code> When you add -uninstall to the command line, you start a silent uninstallation. |
| -silentshowopenappsdlg | Enter this parameter in the Command window to start a silent installation. With this parameter, you receive a warning to close applications such as Internet Explorer during the installation. The complete command line should be <code>Avaya.CollaborationServices.Installer.exe -silentshowopenappsdlg.</code>  |

| Parameter  | Description   |
|--|---|
| -ISICITRIX                                       | Enter this parameter in the Command window to install Collaboration Services in a Citrix environment. For more information, see <a href="#">Installing and uninstalling Collaboration Services on a shared server</a> on page 24.   |
| -disableIMIntegration or EnableCustomIMProviders | <p>Use this parameter to enable or disable Collaboration Services IM integration with the Outlook contact card. You can access this parameter from the Windows Registry under <b>HKEY_CURRENT_USER &gt; Software &gt; Wow6432Node &gt; Avaya &gt; Collaboration</b>.</p> <p>Setting EnableCustomIMProviders to <code>true</code> enables Collaboration Services IM integration with the Outlook contact card. Setting EnableCustomIMProviders to <code>false</code> disables Collaboration Services IM integration with the Outlook contact card.</p> |

## Installing the Avaya Collaboration Services applications

### Before you begin

- Have the Avaya.CollaborationServices.installer.exe file.
- Make sure your system meets the requirements for end users.

**Table 5: Office Add-in requirements for end users**

| Software prerequisites   | Supported OS  | Supported Office versions  | Installation privileges |
|--|---|--|-------------------------|
| <p>Users must have the following software installed on their systems before running the Collaboration Services Office Add-in.</p> <ul style="list-style-type: none"> <li>- Microsoft.NET Framework 3.5 and 4.0</li> <li>- Avaya Microsoft Lync Integration and Microsoft.NET Framework 4.0 if integrating with Microsoft Lync Integration</li> </ul> | <p>Users must be running one of the following operating systems (OS):</p> <ul style="list-style-type: none"> <li>- Microsoft Windows 7</li> <li>- Microsoft Windows 8</li> </ul> <p>Make sure the OS is fully updated with all Microsoft patches.</p> | <p>Users must be using one of the following Microsoft Office versions:</p> <ul style="list-style-type: none"> <li>- Office 2007</li> <li>- Office 2010</li> <li>- Office 2013</li> </ul> | Administrator           |

**Table 6: Browser Add-in requirements for end users**

| Software prerequisites  | Supported OS  | Supported browsers   | Installation privileges |
|---|---|--|-------------------------|
| <p>Users must have the following software installed on their systems to use the Collaboration Services Browser Add-in.</p> <ul style="list-style-type: none"> <li>- Microsoft.NET Framework 3.5 and 4.0</li> <li>- Avaya Microsoft Lync Integration and Microsoft.NET Framework 4.0 if integrating with Microsoft Lync Integration</li> </ul> | <p>Users must be running one of the following operating systems (OS):</p> <ul style="list-style-type: none"> <li>- Microsoft Windows 7</li> <li>- Microsoft Windows 8</li> </ul> <p>Make sure the OS is fully updated with all Microsoft patches.</p> | <p>Users must be using one of the following browsers:</p> <ul style="list-style-type: none"> <li>- Internet Explorer 8, 9, 10, and 11</li> <li>- Firefox</li> <li>- Google Chrome</li> </ul> | <p>Administrator</p>    |

**Procedure**

1. Close all existing Microsoft Outlook and web browser sessions.
2. Open the Avaya Collaboration Services folder and navigate to the Avaya.CollaborationServices.installer.exe file.
3. Double-click on the exe file and follow the instructions to complete the installation.  

You can use the `Avaya.CollaborationServices.Installer.exe -silent` command line to perform a silent installation.
4. Launch Microsoft Outlook.
5. In the Microsoft Office Customization Installer window, click **Install** to complete the installation.

If you click **Don't Install**, use the following steps to enable the Office Add-in.

- a. Navigate to **Add-ins**
  - In Outlook 2007, from the **Tools** menu, click **Trust Center** and then **Add-ins**.
  - In Outlook 2010 and 2013, from the **File** menu, click **Options** and then **Add-ins**.
- b. Select **COM Add-ins** from the **Manage** drop-down menu and click **Go**.
- c. In the COM Add-ins window, select **Avaya** and click **OK**.

**\* Note:**

If the Office Add-in is deployed with Lync Integration, disable the **Telephone (XML)** feature in Microsoft Outlook. If you do not disable this feature, you will receive a redundant **Telephone Number** menu option when using the Click-to-Call feature.

6. Launch your web browser.

If the Browser Add-in toolbar is not visible, right-click on the IE toolbar and select **Avaya** from the list.

If you are a user of IE 9 or higher, at the prompt, enable the Browser Add-in and then restart IE.

**\* Note:**

If you are using IE 10 or 11 with Windows 8.1, you must disable Enhanced Protected Mode (EPM) for Avaya Collaboration Services to work.

### Next steps

Enable the **Avaya (Avaya)** and **Person Name** Smart Tags in your Microsoft Office applications.

**\* Note:**

The **Person Name** option is not available in Excel and Power Point.

### Related Links

[Deploying the applications on the desktop](#) on page 18

[Enabling Smart Tags in Outlook in the Office 2007 suite](#) on page 21

[Enabling Smart Tags in Microsoft Word, Excel, or Power Point in the Office 2007 suite](#) on page 22

[Enabling Smart Tags in Outlook in the Office 2010 and 2013 suites](#) on page 22

[Enabling Smart Tags in Microsoft Word, Excel, or Power Point in the Office 2010 and 2013 suites](#) on page 23

[Smart Tag limitations in Microsoft Office applications](#) on page 23

---

## Enabling Smart Tags in Outlook in the Office 2007 suite

### Procedure

1. Open an instance of Microsoft Outlook.
2. From the **File** menu, select **New**, and then **Mail Message**.
3. Click the **Microsoft Office** button .
4. Click the **Editor Options** button.
5. On the left-hand-side pane, click **Proofing**.
6. Click the **AutoCorrect Options** button.
7. Click the **Smart Tags** tab.
8. Select **Label text with smart tags**.
9. In the **Recognizers** list, make sure **Avaya (Avaya)** and **Person Name** are selected.
10. Click **OK**.
11. On the left-hand-side pane, click **Advanced**.
12. In the **Display email content** section, select **Show smart tags**.
13. Click **OK**.

## Related Links

[Installing the Avaya Collaboration Services applications](#) on page 19

---

## Enabling Smart Tags in Microsoft Word, Excel, or Power Point in the Office 2007 suite

### Procedure

1. Open an instance of the application (Word, Excel, or Power Point).
2. Click the **Microsoft Office** button .
3. Click the **<application name> Options** button, where <application name> can be Word, Excel, or Power Point depending on the application.
4. On the left-hand-side pane, click **Add-Ins**.
5. From the **Manage** drop-down menu, select **Smart Tags** and click **Go**.
6. In the Auto Correct window, select **Label text with smart tags**.
7. For Microsoft Word, in the **Recognizers** list, make sure **Avaya (Avaya)** and **Person Name** are selected. For Microsoft Excel and Power Point, in the **Recognizers** list, make sure **Avaya (Avaya)** is selected.

### **Note:**

The **Person Name** option is not available in Excel and Power Point.

8. Click **OK**.

## Related Links

[Installing the Avaya Collaboration Services applications](#) on page 19

---

## Enabling Smart Tags in Outlook in the Office 2010 and 2013 suites

### Procedure

1. Open an instance of Microsoft Outlook.
2. Click the **New E-mail** button.
3. From the **File** menu, select **Options**.
4. From the **Mail** tab, click the **Editor Options** button.
5. On the left-hand-side pane, click the **Proofing** tab.
6. Click the **AutoCorrect Options** button.
7. Click the **Actions** tab.
8. Select **Enable additional actions in the right-click menu**.

9. Make sure that **Avaya (Avaya)** and **Person Name** are selected.
10. Click **OK**.

#### Related Links

[Installing the Avaya Collaboration Services applications](#) on page 19

## Enabling Smart Tags in Microsoft Word, Excel, or Power Point in the Office 2010 and 2013 suites

### Procedure

1. Open an instance of the application (Word, Excel, or Power Point).
2. Open the **<application name> Options** window by clicking the **Options** button under the **File** tab, where <application name> can be Word, Excel, or Power Point depending on the application.
3. On the left-hand-side pane, click **Proofing**.
4. Click the **AutoCorrect Options** button.
5. Click the **Actions** tab.
6. Select **Enable additional actions in the right-click menu**.
7. In Microsoft Word, make sure that **Avaya (Avaya)** and **Person Name** are selected. In Microsoft Excel and Power Point, make sure that **Avaya (Avaya)** is selected.

 **Note:**

The **Person Name** option is not available in Excel and Power Point.

8. Click **OK**.

#### Related Links

[Installing the Avaya Collaboration Services applications](#) on page 19

## Smart Tag limitations in Microsoft Office applications

The following sections describe Smart Tag limitations that affect Avaya Collaboration Services functionality in Microsoft Office applications.

### Valid telephone numbers are not recognized in Microsoft PowerPoint

PowerPoint can pass numbers to the Smart Tag recognizer incorrectly. Even if the number is in the correct E.164 format, Collaboration Services might not be able to read the phone number properly. For example, if the number entered in PowerPoint is +8482010541, PowerPoint might send the number to the Smart Tag recognizer as 8482010541 or might append another country code (such as +1) to the beginning of the number. Due to the absence of the +, Collaboration Services cannot recognize the phone number. Therefore, when you right click the phone number and select **Additional Actions**, Collaboration Services does not provide a **Call <number>** option.

To work around this issue, you can select the entire phone number with your mouse cursor. This triggers Collaboration Services to recognize the phone number and provide the **Call <number>** option under **Additional Actions**.

---

## Installing Collaboration Services on multiple machines from a remote server

To facilitate the headless install of the Office and Browser Collaboration Services applications using a software distribution system, an installer.exe is available in the application directory.

### Before you begin

- Meet the end-user requirements as described in [System requirements](#) on page 11.

### Procedure

1. Include all of the output files other than the registry files (.reg) from the build for a given application.
2. Zip these files to be used in a software distribution system (such as Microsoft SMS).
3. After the contents of the directory are placed on a user's system, run the following command:  
`Avaya.CollaborationServices.installer.exe -silent.`

### Next steps

Enable the **Avaya (Avaya)** and **Person Name** Smart Tags in your Microsoft Office applications.

#### **Note:**

The **Person Name** option is not available in Excel and Power Point.

### Related Links

[Deploying the applications on the desktop](#) on page 18

---

## Installing and uninstalling Collaboration Services on a shared server

### Before you begin

- You must have administrative privileges on the local desktop.
- Have the Avaya.CollaborationServices.installer.exe file.

### About this task

Use this procedure to install or uninstall Avaya Collaboration Services in a Citrix environment.

## Procedure

1. Close all existing Microsoft Outlook and web browser sessions.
2. Open Windows Explorer and navigate to the location of the Collaboration Services installation file.
3. Open a Command window.
4. In the Command window, change to the directory containing the Collaboration Services installation file.
5. For installing, enter the following command line in the Command window:  

```
Avaya.CollaborationServices.Installer.exe -install -ISCITRIX=true
```
6. For uninstalling, enter the following command line in the Command window: .  

```
Avaya.CollaborationServices.Installer.exe -uninstall -ISCITRIX=true
```
7. Follow the instructions to complete the installation.  
 Restart your machine if prompted.

---

# Configuring instant messaging and presence functionality

## Before you begin

Set required installation and configuration parameters.

## About this task

Use the following procedure to enable UC desktop clients to access Instant Messaging and Presence from Collaboration Services.

## Procedure

1. Make sure the default instant messaging application is set to Collaboration Services.
2. Navigate to **HKEY\_CURRENT\_USER > Software > Avaya > Collaboration > DirectoryData**.
3. Set `imHandleAttributeName` to a value that your UC client recognizes.

The Collaboration Services Active Directory server can access this value to provide IM and Presence functionality to the UC client. This value indicates the type of user information, such as the email address or phone number, that Collaboration Services uses to provide IM and Presence. The following are examples of values that you can set for `imHandleAttributeName`.

- `msRTCSIP-PrimaryUserAddress`
- `mail`
- `telephonenumber`

# Chapter 7: Uninstalling the Configurator or the Collaboration applications

## Procedure

1. From the Windows **Start** menu, select **Settings > Control Panel > Uninstall or change a program**.
2. In the Add or Remove Programs window, select one of the following options and then click **Uninstall**.
  - Select **Avaya Client Applications Configurator** to remove the Configurator
  - Select **Avaya Collaboration Services** to remove the Office and Browser applications
3. At the prompt to uninstall, click **Yes**.

### **Note:**

After uninstalling, the following files are not automatically deleted from **AppData > LocalLow > Avaya > Collaboration**. You can delete these files manually.

- DCE.BrowserAddIn.InstallState
- Avaya.Collaboration.ApplicationConfiguration.InstallState
- OfficeAddIn.InstallState

# Chapter 8: Upgrading the Configurator and Collaboration Services

## About this task

Use this procedure to upgrade the Avaya Collaboration Services Configurator and Collaboration Services.

### Note:

When you upgrade to a new version of Microsoft Office (for example, if you upgrade from Office 2010 to Office 2013), you must also upgrade to a new version of Collaboration Services to support the new version of Microsoft Office.

## Procedure

1. Close any instance of a Collaboration application or of an application running a Collaboration application.
2. If you are upgrading within the same release, uninstall the old versions of the Configurator and the Collaboration applications.
3. Install the new Configurator; see [Installing the Configurator](#) on page 14.
4. Build the installation packages for the Collaboration applications; see [Building the installation packages](#) on page 14.
5. Install the Collaboration applications; see [Deploying the applications on the desktop](#) on page 18.

## Result

The new versions of the Configurator and Collaboration Services are ready to use. However, after upgrading to a new release, the following files from the previous release (located under **AppData > LocalLow > Avaya > Collaboration**) are not automatically deleted. You can delete these files manually.

- DCE.BrowserAddIn.InstallState
- Avaya.Collaboration.ApplicationConfiguration.InstallState
- OfficeAddIn.InstallState

# Chapter 9: Troubleshooting the Configurator and the Collaboration Services applications

Use the information in this chapter to troubleshoot issues with the Avaya Collaboration Services Configurator and the Collaboration Services applications.

---

## Activating Avaya Collaboration Services in the Microsoft Office suite

### About this task

The Avaya Collaboration Services add-in must be a trusted publisher in the Microsoft Office suite in order for users to use features such as click-to-call from a Microsoft Office application. Use the following procedure to resolve this issue. You must only implement this change once and Collaboration Services will be available in all Microsoft Office applications.

### Procedure

1. Open a Microsoft Office document, such as a Word or Excel document.
2. Click the text in the Security Warning.
3. Under the Information window, in the **Security Warning** section, select **Enable Content > Advanced Options**
4. In the Microsoft Office Security Options window, select **Enable all code published by this publisher**.
5. Click **OK** to apply the change.

Collaboration Services should now be available within the Microsoft Office suite.

---

## Activating Avaya Collaboration Services in Internet Explorer

### About this task

You might need to update some settings in Internet Explorer (IE) for Collaboration Services to work. For security reasons, some enterprises disable third-party extensions in IE, and this setting must be enabled for the Collaboration Services add-in to appear in IE. On some Windows 8 machines, Enable Enhanced Protected Mode might be turned on by default, and you need to disable this setting for phone numbers to be properly highlighted in IE with Collaboration Services.

### Procedure

1. Open the IE browser.
2. Click **Tools > Internet Options**.
3. Select the **Advanced** tab.
4. Under Browsing, select the **Enable third-party browser extensions** check box.
5. On Windows 8 machines, make sure the **Enable Enhanced Protected Mode** check box is not selected.
6. Click **Apply** then **OK** to apply these changes.

Next time you open the IE browser, Collaboration Services should be visible and functioning correctly.

---

## Conference bridge details are not saved in Outlook meeting invitations

Using Collaboration Services, you can add your conference details to a meeting invitation in Outlook. If you close the meeting invitation without saving the meeting details, Outlook still saves the details automatically. When you open the meeting invitation, Outlook displays the **Host Conference** and **Remove Conference Details** buttons. Since you did not save the changes to the meeting invitation, Outlook should display the **Join Conference** and **Add Conference Details** buttons.

### Recovery action

No workaround is available. This issue occurs when you exit the meeting invitation without saving the meeting invitation details.

## Conference bridge numbers are marked as normal telephone numbers

When Google Chrome or Internet Explorer (IE) are used to edit a page, email message, or document, Avaya Collaboration Services cannot distinguish between conference bridge numbers and normal telephone numbers. Therefore, conference bridge numbers are marked as normal telephone numbers.

### Recovery action

No workaround is available. This issue only occurs when you are editing in the browser, not when you are just reading in the browser.

---

## Invitation text is not removed from meeting invitation

In Outlook 2007 on a 32 bit Windows 7 Operating System, when you click the button to remove conference details from the meeting invitation, the details might not get deleted.

### Recovery Action

You must delete invitation text from the meeting invitation manually.

---

## Join Conference and Host conference menu options do not appear in Outlook

In an Outlook meeting invitation, you do not see the **Join Conference** or **Host Conference** button as expected.

### Root cause

The conference bridge number and web conference details are not properly formatted in the meeting invitation according to Collaboration Services standards. The primary conference bridge phone number, participant pass code, and web conference link should be populated in the **Location** field.

### Recovery Action

1. Delete the meeting occurrence or series in your Outlook calendar.
2. If required, you can ask the meeting organizer to resend the meeting invitation with the conference details properly formatted.

## Launching web collaboration in a Citrix XenApp environment with Google Chrome

In a Citrix XenApp environment, when you launch web collaboration from Lync Integration, or from an Outlook Meeting Invitation or Reminder window with Collaboration Services, and your default web browser is Google Chrome, the web collaboration link does not open properly. The Google Chrome browser opens but you are not automatically directed to the web collaboration as expected.

### Recovery action

Before trying to launch web collaboration from Outlook or Lync Integration, make sure the Google Chrome browser is open. If the browser is already open, web collaboration should launch successfully as expected.

---

## Log file uninstallation error

The following error message appears when uninstalling Collaboration Services through the Windows Control Panel:

```
Error opening installation log file. Verify that the specified location exists and is writable.
```

### Root Cause

This issue occurs when Windows Installer Logging is enabled, but the Windows Installer engine cannot write the uninstallation log file correctly. For more information, see <http://support.microsoft.com/kb/2564571/en-us>.

### Recovery Action

Stop and restart the Explorer.exe process using Task Manager.

---

## Modifying Avaya Collaboration Services presence and instant messaging setting for Outlook

### Before you begin

Make sure Outlook is not running.

### About this task

Use the following procedure to enable or disable the default Collaboration Services Presence and instant messaging (IM) integration into Outlook. This way, users can choose to use Outlook Presence and IM functionality from the Lync 2010 or 2013 client instead of from Collaboration Services.

## Procedure

1. Start the registry editor on your computer.
2. Navigate to **HKEY\_CURRENT\_USER > Software > IM Providers**
3. Modify the `DefaultIMApp` value as appropriate.
  - To disable the Collaboration Services Presence and IM functionality and set it to Lync 2010, set the value to `Communicator`.
  - To disable the Collaboration Services Presence and IM functionality and set it to Lync 2013, set the value to `Lync`.
  - To enable the Collaboration Services Presence and IM functionality, set the value to `CollaborationService`.
4. Restart Outlook.

---

## Nationally formatted numbers are not highlighted when Office 365 is running in Google Chrome

The default locale for Office 365 is the United States (US). If you override the locale to another country when running Office 365 in Google Chrome, and then try to edit the Office 365 document, national numbers for the new locale will not be highlighted. Instead, the default US numbers continue to be highlighted. This occurs because the internal URL for Office 365 is automatically redirected when a document is edited in Google Chrome.

### Recovery action

There is no workaround for this issue in Google Chrome. Google Chrome will only highlight nationally formatted numbers for a new locale if you do not switch to Edit mode. This issue does not occur when you edit an Office 365 document in Internet Explorer (IE).

---

## Numbers are not highlighted in the search results

When you search for an E.164 number in Internet Explorer, Mozilla Firefox, or Google Chrome, Collaboration Services does not highlight some of the numbers in the search result.

### Cause

Collaboration Services does not recognize numbers embedded within HTML tags.

### Recovery Action

No workaround is available.

---

## Outlook freezes when using the click-to-call feature on an email signature

When you click a telephone number on an Outlook signature to initiate a call with Avaya Collaboration Services, Outlook freezes for approximately 3 minutes before the call is initiated. This does not occur when you use click-to-call with a phone number in the body of the email.

### Recovery action

The issue occurs when the Instant Messaging Contacts action is enabled in Outlook. To resolve this issue, see [Solution: Disabling the Instant Messaging Contacts action in Outlook](#) on page 33.

---

## Solution: Disabling the Instant Messaging Contacts action in Outlook

### About this task

Use this procedure to disable the Instant Messaging Contacts action in Outlook. When this action is enabled, Outlook freezes when you use click-to-call functionality in an email signature.

### Procedure

1. In Microsoft Outlook, select **Options**.
2. From the **Mail** tab, click the **Editor Options** button.
3. On the left-hand-side pane, click the **Proofing** tab.
4. Click the **AutoCorrect Options** button.
5. Click the **Actions** tab.
6. Deselect **Instant Messaging Contacts**.

---

## Re-enabling Avaya Collaboration Services in Google Chrome

### About this task

After removing the Collaboration Services add-in from Google Chrome, the add-in cannot be re-enabled even after the add-in is reinstalled. Do one of the following to work around this issue.

### Important:

For Avaya one-X<sup>®</sup> Communicator Windows customers, when you upgrade to the latest version of Avaya Collaboration Services, you may not be able to see the Avaya Collaboration Services add-in in Google Chrome. To resolve this issue, see [For Avaya one-X Communicator customers: Enabling Avaya Collaboration Services in Google Chrome](#) on page 34.

## Procedure

- If you have already removed the Avaya Collaboration Services add-in from Google Chrome, you must uninstall and reinstall the Google Chrome browser before you can re-enable the add-in.
- If you have not yet removed the Avaya Collaboration Services add-in from Google Chrome but are planning to do so, disable the add-in instead of removing it.

This way, you will be able re-enable the Avaya Collaboration Services add-in in Google Chrome at any time.

---

## For Avaya one-X<sup>®</sup> Communicator customers: Enabling Avaya Collaboration Services in Google Chrome

### About this task

This procedure applies to Avaya one-X<sup>®</sup> Communicator customers. Use this procedure if the latest version of Avaya Collaboration Services does not work in Google Chrome.

### Procedure

1. Export the registry key `HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Google\Chrome` to another location on your machine.
2. Delete the original registry key from `HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Google\Chrome`.
3. Open Google Chrome and enter `chrome://extensions` in the address bar.
4. Drag the extension under `C:\Program Files (x86)\Avaya\Client Applications\Collaboration Services\accs.crx` to the open Google Chrome Extensions page.
5. Delete the Avaya extension in Google Chrome.  
Make sure you do not disable the extension instead of deleting it.
6. Exit Google Chrome.
7. Import the registry key you exported in step [1](#) on page 34.
8. Start Google Chrome.

When you install the latest version of Collaboration Services , the Collaboration Services add-in should appear and work properly in Google Chrome.

---

## Setting the debug log levels for the Configurator and the Collaboration applications

### About this task

Use the following procedure to set the debug log level and gather debug log information for the Avaya Collaboration Services Configurator and applications.

### Procedure

1. Open the `log4net.config` file.
  - For the Configurator, the file is located under **AppData > LocalLow > Avaya > Collaboration > Configurator > Logs**.
  - For the Office and Browser Collaboration applications, the file is located under **AppData > LocalLow > Avaya > Collaboration > Logs**.
2. In the `<level value="INFO" />` line, change `INFO` to `DEBUG`.
3. Save the file.

#### \* Note:

If you encounter an error when you try to save the file, run a file editor program, such as Notepad, as an administrator.

4. Open the log files. They can be accessed from **Start > Programs > Avaya**.

---

## Uninstalling Collaboration Services in Google Chrome

### Before you begin

You must have administrative privileges on the local desktop.

### About this task

You can not disable the Collaboration Services add-in in Chrome by changing the settings in the Chrome extension page.

### Procedure

1. Close all existing Google Chrome web browser sessions.
2. Open the Command window as an administrator.
3. Locate the Collaboration Services folder and enter the file path in the Command window.
4. For uninstalling the Collaboration Services in Chrome, run the following command in the Command window:

```
UninstallChromeExtension.bat
```

5. Start Google Chrome.

## Using Avaya Collaboration Services in a Google Chrome proxy environment

### About this task

When Google Chrome is running in a proxy environment, you must enable the bypass proxy option for local addresses. If this is not done, Collaboration Services will not work properly in Google Chrome.

### Procedure

1. In the Google Chrome browser, navigate to **Settings**.
2. When the **Settings** screen appears, click **Show advanced settings**.
3. Under **Network**, click **Change proxy settings**.
4. Under the **Connections** tab, click **LAN settings**.
5. In the LAN Settings window, under **Proxy server**, select the **Bypass proxy server for local addresses** check box.

# Chapter 10: Configurator user guide

The Configurator user guide describes how to use the Configurator to build the installation packages for the Collaboration applications.

This information is also available from the online help that is packaged with the Configurator. To access the online help, do the following:

- When you complete the install, from the **Start** menu, select **Programs > Avaya > Client Applications > Configurator > Help**
- When you run the Configurator, click the **Help** icon (  )

---

## Avaya Configurator

Use the Avaya Configurator to build the installation packages for:

- Avaya Office and Browser Collaboration Services applications
- Avaya Microsoft Lync Integration

The Configurator must be run on a Windows desktop. You cannot execute the Configurator from a Microsoft Terminal Server.

Click **Close** to close the Configurator.

When you are ready to build the installation packages for the Collaboration applications, in the Configurator wizard's **Build** screen, the **Destination Folder** section displays the name of the folder where the final installation packages are built. Click **Change** to browse for a destination folder.

Click **Build** to start the build of the installation packages.

---

## Collaboration Services configuration

### Office and Browser Custom Rules

Custom rule files define:

- Browser subnet matching rule
- Browser URL matching rule
- Smart Tag matching rule for Microsoft desktop applications

- Conference dialer rules for click-to-join conference

In the Configurator wizard's **Custom Rules Entry** screen, under the **Office and Browser Custom Rules** section, do the following:

Click the folder icon (  ) to open an existing Office Add-in or Browser custom rule (acr) file.

Click the Custom Rule Creator icon (  ) to open the Custom Rule Creator and create Office or Browser custom rules.

## Overview of telephone number detection with Office and Browser Add-in rules

The standard regular expression rule in the Office and Browser Add-ins searches a selection of text in a web page, email, or other type of file and validates potential numbers to make sure they are telephone numbers. The following sections describe validation steps and the purpose of custom rules. For more details about the regular expression syntax, see [HTTP://MSDN.MICROSOFT.COM/EN-US/LIBRARY/AZ24SCFC.ASPX](http://msdn.microsoft.com/en-us/library/az24scfc.aspx).

### Standard validation steps

The Office and Browser Add-ins perform the following main validation steps to determine if a number is a telephone number:

- If the number is preceded by a country code, the internal database validates the country code. If the country code in the number is valid, the database checks if the number matches the corresponding dialing pattern for the country.
- If the number does not contain a country code, the database determines the locale context for the number based on the locale of the web page, where the email was sent from, or where the file was created. The database uses the locale context to determine the country code for the number and then checks if the number matches the dialing pattern for the country.
- The database ensures that the number has at least one separation character to be considered a telephone number. If the number does not have a country code preceded by a +, the number must have a space, period, slash, dash, or brackets to be considered a telephone number.

The Office and Browser Add-ins normalize validated telephone numbers and present these telephone numbers to the user in the E.164 format with the country code preceding number.

The following table shows examples of valid telephone numbers for two different locales and the normalized results of these telephone numbers.

**Table 7: Examples of normalized telephone numbers**

| Locale and country code           | Examples   |
|-----------------------------------|--|
| Europe, with the country code +41 | The original numbers on the page are: <ul style="list-style-type: none"> <li>• +41 (0) 44 450 90 90</li> </ul> |

| Locale and country code                 | Examples   |
|---|--|
|   | <ul style="list-style-type: none"> <li>• (0)44 450 90 90</li> </ul> <p>The normalized result presented in the E.164 format will be +41444509090.</p>   |
| North America, with the country code +1 | <p>The original numbers on the page are:</p> <ul style="list-style-type: none"> <li>• 257/222-4444</li> <li>• 257-222-4444</li> <li>• (257) 222 4444</li> </ul> <p>The normalized result presented in the E.164 format will be +12572224444.</p> |

### Custom rules

Some organizations have internal dialing patterns or extensions that the standard pattern matching and validation rules cannot recognize. You can use the Avaya Collaboration Services Configurator to create custom rules that recognize these telephone numbers in web pages, documents, and bodies of emails. There are three types of custom rules that you can create:

- **SmartTag rule for the Office Add-in:** this rule only recognizes numbers that appear in SmartTags. For example, this rule can recognize numbers in an Outlook email body and in a Microsoft Word or Excel document.
- **URL rule for the Browser Add-in:** use this rule if the organization has a common URL pattern for intranet domains.
- **Sub-net rule for the Browser Add-in:** use this rule if the organization has a set of numbers prefixing intranet domains.

For all three custom rules, you can define a range rule or a pattern matching rule. The following table compares range and pattern rules and describes when to use each rule.

**Table 8: Description of range and pattern rules**

| Range rule   | Pattern matching rule  |
|--|--|
| <p>Range rules include all numbers within a specific range. With this type of rule, a number must have at least one separation character to be considered a telephone number. For example, if you define a range rule of 2222222-5555555, the following numbers would be marked as telephone numbers:</p> <ul style="list-style-type: none"> <li>• 222-3333</li> <li>• 222 3333</li> <li>• 444-33-22</li> </ul> <p>However, 2223333 and 4443322 would not be marked as telephone numbers because these numbers do not contain any separation characters.</p> | <p>Use a pattern matching rule to define a unique pattern that the range rule does not cover. For example, use a pattern matching rule if you need the system to recognize a 6 digit number with no separation characters as a telephone number.</p> <p>The following are examples of pattern matching rules that you can define to detect telephone numbers.</p> <ul style="list-style-type: none"> <li>• For matching 6 digit numbers: \d{6}</li> <li>• For matching 7 digit numbers: \d{7}</li> <li>• For matching 4 digit extension numbers with the extn prefix: (? :extn) (\d{4})</li> </ul> |

## Custom Rule Creator

Use the Custom Rule Creator to create the Office and Browser Add-in Custom Rule files. These files contain the custom number and pattern matching rules to be included in the corresponding add-in installation package.

The toolbar on the Custom Rule Creator window consists of the following icons.

| Icon  | Description   |
|---|---|
|    | Creates a new empty custom rule file.   |
|    | Opens an existing custom rule file. You can open a custom rule file by double-clicking on the file or by drag-and-dropping the file into the Custom Rule Creator. |
|    | Saves the current custom rules file. The Save As dialog appears if the file has not been previously saved.  |
|    | Presents the Save As dialog allowing for a new file name to be associated with the current file.  |
|  | Imports an existing custom rule file. You can also drag-and-drop an existing custom rule file into the Custom Rule Creator.                                       |

### Office Custom Rule Creator

Right-click in the Custom Rule Creator window or on a selected rule item to see the following options. You must select at least one item for some options to be available.

| Item                                  | Description   |
|---------------------------------------|---|
| New > Smart Tag Rule                  | Opens the Smart Tag dialog to define a new Smart Tag custom rule.   |
| New > Conference Dialer Configuration | Opens the Conference Dialer Rule dialog to define the conference dialer pattern matching rule for the click-to-join conference feature. |
| Edit                                  | Opens the selected custom rule item in the corresponding dialog to edit the rule.   |
| Delete                                | Deletes the selected rule from the file.  |

### Browser Custom Rule Creator

Right-click in the Custom Rule Creator window or on a selected rule item to see the following options. You must select at least one item for some options to be available.

| Item              | Description  |
|-------------------|--|
| New > Subnet Rule | Opens the Subnet dialog to define a new custom rule for a particular subnet. |

| Item           | Description  |
|----------------|--|
| New > URL Rule | Opens the URL dialog to define a new custom rule for a particular URL matching scheme. |
| Edit           | Opens the selected custom rule item in the corresponding dialog to edit the rule.      |
| Delete         | Deletes the selected rule from the file.   |

## Smart Tag dialog

Use the Smart Tag dialog of the Creator to create number matching rules for the Smart Tag component of the Office Add-in. The Office Add-in uses the number matching rule to determine if text should be marked as a Smart Tag.

See [Number Matching Rule](#) on page 42 for more information on number matching rules.

Click **Add** to add the Smart Tag matching rule.

Click **Cancel** to ignore any changes.

## Conference Dialer Rule

Use the Conference Dialer Rule dialog of the Custom Rule Creator to define a pattern matching rule for the click-to-join conference feature of the Office Add-in. The Office Add-in uses the pattern matching rule to normalize pass code and host code numbers before they are played into a conference call. The Office Add-in also uses the conference dialer rule to detect pass codes in the Location field of appointments.

| Item                   | Description  |
|------------------------|--|
| Passcode Normalization | A rule to normalize the pass code before the application plays the pass code into the conference call. A 'p' is equal to a 2-second delay. |
| Hostcode Normalization | A rule to normalize the host code before the application plays the host code into the conference call.                                     |
| Passcode Tokens        | The key word or words used to recognize the conference access code in the Location field of an appointment.                                |

Currently the Office Add-in uses the following key words when scanning for access codes: pc, passcode, pswd, pw, pass, and pin. You cannot delete these key words; however, you can add additional key words. Separate any additional key words with a semi-colon (;), for example, password;the code;access code.

Click **Add** to add the conference dialer rule.

Click **Cancel** to ignore any changes.

## Subnet dialog

Use the Subnet dialog of the Creator to create subnet-based number matching rules.

| Item       | Description   |
|------------|---|
| IP Address | The IP address used to define the base of the subnet. Right-click the IP address to produce a context menu that allows for the resolution |

| Item                 | Description  |
|----------------------|--|
|                      | of an IP address from a given machine name or URL. See <a href="#">Resolver</a> on page 43 for more information on the Resolver.   |
| Subnet Mask          | The mask that applies to the provided IP address to define the range of IP addresses to which the rule applies.  |
| Number Matching Rule | The number matching rule that applies to the pages delivered from the defined subnet. See <a href="#">Number Matching Rule</a> on page 42 for more information on number matching rules. |

Click **Add** to add the number matching rule.

Click **Cancel** to ignore any changes.

## URL dialog

Use the URL dialog of the Creator to create URL pattern-based number matching rules.

| Item                   | Description   |
|------------------------|---|
| URL Regular Expression | The regular expression that applies to URLs from where pages are being delivered. If the URL matches the defined pattern, the following rule applies to the matching numbers.<br><br>Right-click on the text box to open a menu from which you can launch the Expression Tester dialog, as well as the standard text modification elements (cut, copy, paste, delete, and select all). See <a href="#">Expression Tester</a> on page 43 for more information on the Expression Tester dialog. |
| Number Matching Rule   | The number matching rule that applies to the pages delivered from the URLs that conform to the above URL regular expression. See <a href="#">Number Matching Rule</a> on page 42 for more information on number matching rules.   |

Click **Add** to add the number matching rule.

Click **Cancel** to ignore any changes.

## Number Matching Rule

Use the Number Matching Rule to define a range-based rule or a matching pattern-based rule.

Select the **Range** radio button to define a From and To limit in which a telephone number must fall within to be considered a match. The number of digits in the **Range From** field must match the number of digits in the **Range To** field. Define the range using numerical digits. The maximum number of digits is 30 and maximum value is 999999999999999999999999999999 (30 nines).

If you need more specific matching, select the **Matching Pattern** radio button. You can then enter a regular expression for the Number Matching Rule. Use the matching pattern option when you require non-digit elements to determine a match.

 **Note:**

The operators ^ and \$ are not permitted in the matching pattern as the rule is contained within a rule that already takes these operations into account. This is also reflected when you test the matching rule.

Right-click on the Number Matching Rule text box (in Matching Pattern mode) to open a menu from which you can launch the Test Expression dialog, as well as the standard text modification elements (cut, copy, paste, delete, and select all).

See [Expression Tester](#) on page 43 for more information on the Expression Tester dialog.

## Expression Tester

The Expression Tester dialog of the Creator lets you test regular expressions. As you enter text into the Source text box, the Results text box updates dynamically with any successful matches.

## Resolver

The Resolver dialog of the Creator lets you resolve a URL or a machine name to the corresponding IP address.

Enter the URL or host name to resolve and click **Resolve**. If the resolution is successful, the result is placed in the **IP address** field of the Subnet dialog.

Click **Cancel** to close the Resolver.

## Lync Integration

In the Configurator wizard's **Collaboration Service Configuration** screen, you can choose to configure the build for Lync Integration.

For more information on Lync Integration, see the following document:

- *Avaya Microsoft Lync Integration Fundamentals for Avaya Aura*<sup>®</sup> (NN10850–014)

### Microsoft Lync Settings

In the **Microsoft Lync Settings** screen, click the **Change** button to open the Lync Integration Settings window.

## Lync Integration Settings

Use the Lync Integration Settings window to configure the settings for the Lync Integration build.

The toolbar on the Lync Integration Settings window consists of the following icons.

| Icon  | Description   |
|---|---|
|  | Opens an existing settings file. Open the settings file by double-clicking on the file. |

| Icon  | Description  |
|---|--|
|  | Saves the current settings file. The Save As dialog appears if the file has not been previously saved. |
|  | Presents the Save As dialog allowing for a new file name to be associated with the current file.       |
|  | Resets the settings to the initial state.  |

---

## Obtaining version information

To obtain version information for the Configurator, do the following:

1. In the Configurator, click **Help**.
2. In the Help window, click  to view the version information for the Configurator.

---

## Accessing log files

Logs are generated with every build of the Configurator, and these logs contain the results of the build. With each Configurator build, logs are appended to log files. A maximum of 10 log files can be generated with each build and the maximum size of each log file is 3 MB.

Use the Configurator log files to troubleshoot issues. You can access Configurator log files under **AppData > LocalLow > Avaya > Collaboration > Configurator**.

# Chapter 11: Collaboration Services

Avaya Collaboration Services combines the Office and Browser Add-in applications to communication-enable Microsoft Office and web browsers. The Collaboration Services offer features such as initiating voice and video calls, scheduling meetings with a contact, click to join or host a conference, as well as instant messaging and presence.

 **Note:**

The instant messaging and presence features might not be supported on some deployments.

Use the Collaboration Services icon on your task bar to:

- Access help information and documentation
- View and modify the Office and Browser application settings.

---

## Settings panel

The following tabs are available in the Collaboration Services **Settings** panel. You can access the **Settings** panel from the task bar on your desktop.

### Preferences

Use this tab to select the interface language for Collaboration Services. You only need to do this if the interface language you want to use is different from the default language of your operating system.

### Conference Configuration

Use this tab to access the Conference Bridge Wizard.

You can also access the Conference Bridge Wizard from the **Start** menu, under **Programs > Avaya > Client Applications > Collaboration Services**

### Support

Use this tab to enable diagnostics and report issues.

### About

Use this tab to obtain release and version information for the Collaboration Service.

---

## Conference bridge configuration

Use the Avaya Conference Bridge Wizard to edit your conference bridge details. You can use these conference bridge details to:

- Schedule a meeting with a contact from Microsoft Outlook
- Join or host a conference from a web browser, Microsoft Outlook, or Lync Integration (if installed)
- If you are using Lync Integration, share conference bridge details with contacts in an instant messaging (IM) conversation

After you install Collaboration Services, the Avaya Conference Bridge Wizard appears the first time you launch Microsoft Outlook. To access the Avaya Conference Bridge Wizard in the future, do one of the following:

- From the **Start** menu, select **Programs > Avaya > Client Applications > Collaboration Services > Conference Bridge Wizard**.
- Select the **Conference Configuration** tab in the Collaboration applications **Settings** panel.

---

## Configuring conference bridge details

Use the following procedure to add, modify, and delete your bridge and web conference details.

### Before you begin

- Make sure the Avaya Conference Bridge Wizard is open.

### Procedure

1. Read the information in the **Welcome** screen and then click **Next**.
2. In the **Scanning for Conference Bridge Data** screen, you can allow the wizard to scan your Outlook calendar for conference bridge information that you entered when creating new meeting requests.
  - a. To scan your Outlook calendar for conference bridge information, click **Scan**.

The scan option attempts to auto-detect your conference bridge details and populate this information in the Conference Bridge Wizard. You must check the remaining screens in the Wizard to make sure the details obtained from the scan are correct and to fill in missing details that were not detected.
  - b. To skip the scan and go to the next screen in the wizard, click **Next**.
3. In the **Conference Bridge Details** screen, you can add, modify, and delete conference bridges.

You can configure multiple bridges and multiple access numbers for each bridge.

**+ Tip:**

If you are using the Collaboration feature in Lync Integration, use this screen to specify which bridge access number is the default number. This way, if you double-click the Collaboration icon from the Lync Integration bar without selecting a bridge access number to call, Lync Integration will automatically call the appropriate default number.

- a. To add a conference bridge, click **Add**. In the Conference Bridge Details window, enter the following information:
    - In the **Description** field, enter a name for your conference bridge. If applicable, include the locale or country for the bridge in this field (for example, `US bridge`).
    - In the **Access Numbers** field, click **Add** to enter a new access number for the bridge.

The Conference Bridge Configuration tool recognizes local telephone numbers based on your computer's locale. When you enter a local telephone number, accept the prompt asking if you want to switch the telephone number to the E.164 format. A warning message appears if the telephone number you entered appears to be invalid.
  - b. To modify a conference bridge name or access number, select the conference bridge and then click **Modify**. In the Conference Bridge Details window, do the following:
    - Edit the name of the conference bridge in the **Description** field
    - Click **Modify** to update an existing access number for the conference bridge
    - Click **Delete** to delete an existing access number for the conference bridge
  - c. To delete a conference bridge, select the bridge and then click **Delete**.
4. When you add a new bridge, in the **Conference Bridge Details** screen, enter the participant and host passcodes.
    - Under **Participant Passcode**, enter the conference bridge passcode for the participant.
    - Under **Moderator Passcode**, enter the conference bridge passcode for the host.
  5. Click **Next** to go to the next screen in the wizard.
  6. In the **Web Collaboration Details** screen, enter your web conference details.
    - Under **Participant Web Collaboration URL**, enter the web conference link for the participant.
    - Under **Moderator Web Collaboration URL**, enter the web conference link for the host.

To verify the web conference link for the participant or the host, click the **Test** button next to the link that you want to verify.
  7. Click **Finish** to exit the Conference Bridge Wizard.

---

## Office application features

The Collaboration Services Office application communication-enables the Microsoft Office 2007, 2010, and 2013 Suites. In Outlook or SharePoint, you can initiate a call by clicking on a contact's name or email address. Collaboration Services also provides a Smart Tag that recognizes person names and telephone numbers within Word documents, Excel Spreadsheets, Power Point presentations, and within the body of an e-mail displayed in Outlook.

---

### Click-to-Call

Use click-to-call from the Office applications to quickly and simply initiate a voice or video call to a selected contact number. The Office Add-in provides a Smart Tag, which when enabled, recognizes person names and telephone numbers within Word documents, Excel Spreadsheets, Power Point presentations, or within the body of an e-mail in Outlook.

### Launching click-to-call from Microsoft Outlook

#### About this task

Launch click-to-call from Outlook in one of the following ways.

#### Procedure

- Within an Outlook item (Mail, Calendar, Contacts, Tasks), do the following to call a contact:
  - In Outlook 2007, right-click on the contact's e-mail address and select **Additional Actions > Call**.
  - In Outlook 2010 and 2013, right-click on the contact's e-mail address, select **Call Contact**, and then select the phone number to call.
  - In Outlook 2010 and 2013, hover over the contact and click the phone number to call from the contact card. This option is only available if an IM client, such as Microsoft Lync, is installed.
- Hover over a contact to view the contact card. You can initiate a voice or video call from the contact card.
- From an open contact, click the **Call Contact** button in the inspector ribbon to initiate a call to the contact.
- - From a Reminder window, select a contact or mail reminder item and click the **Call** () button to call the contact or sender of the mail. You can also initiate a video call.

### Using click-to-call with Smart Tags

#### About this task

The click-to-call feature is available from any Office application that supports Smart Tags like Word, Excel, Power Point, and Outlook. In Office 2007, when the Smart Tag recognizes a person's name or telephone number, the system marks the name or number with a Smart Tag indicator or a purple dotted underline. In Office 2010, text is not automatically recognized by a Smart Tag and does not

display a purple dotted underline. Instead, you must trigger recognition by selecting the text and clicking **Additional Actions** on the context menu.

### Procedure

- To display the additional actions, move the insertion point over the text with a Smart Tag indicator  until the **Smart Tag Actions** button appears.
- Click the **Smart Tag Actions** button to see the menu of actions.
- Click the appropriate menu item to access the click-to-call functionality.
  - Select **Call** to make a call to the marked number. Note that the Smart Tag normalizes the number to the E.164 format based on the locale of the current text. For example, if the locale of your Office document is UK, a local UK number that appears on the document is marked, normalized into the E.164 format, and then presented in the **Call** menu item.
  - Select **Remove this Smart Tag** to remove only this Smart Tag instance.
  - Select **Stop Recognizing** "<number>" to stop recognizing a telephone number.

---

## Outlook contact card features

From Outlook 2010 and 2013 contact cards, you can access the following features:

- Make a voice or video call to a contact
- View presence status
- Send an instant message (IM)

### Important:

Some contact card functionality, such as IM and Presence or calling through an Outlook contact card, might not be supported on certain deployments. If your deployment does not support calling through an Outlook contact card, you must initiate a call by right-clicking on the contact and selecting **Additional Actions**.

You can access the Outlook contact card features by clicking the appropriate icons on the Outlook contact card. You can also expand the contact card to view the contact's telephone numbers and click the contact's instant messaging address to initiate an IM session.

The instant messaging and presence feature is not available for Outlook 2007. In Outlook 2010 and 2013, the Collaboration Services must be deployed with Lync Integration to use Presence and IM functionality.

---

## Click-to-Join Conference

The click-to-join conference feature allows you to join or host a conference call from an Outlook reminder or appointment item.

### Related Links

[Configuring conference bridge details](#) on page 46

Use the following procedure to add, modify, and delete your bridge and web conference details.

## **Adding conference bridge details from an Outlook meeting request**

### **About this task**

When you create a new Outlook meeting request, you can add conference bridge details to the Outlook meeting request.

### **Procedure**

1. Click **Add Conference Details** at the top right-hand corner of the window.
2. Select a bridge from the drop down list.

If the bridge field is empty, you can find the default bridge number, Passcode, and Web Conference link in the **Location** field. All other details, such as alternate bridge access numbers, appear in the body of the meeting or appointment message. The body of the message also includes conferencing links that you can use to quickly join the conference from a web browser, mobile device, or tablet.

## **Removing conference bridge details from an Outlook meeting request**

### **About this task**

You can remove previously populated conference bridge details from a meeting request or appointment.

### **Procedure**

1. Open a meeting from your Outlook calendar.
2. Click **Remove Conference Details** at the top right-hand corner of the window.

## **Joining or hosting a conference from an Outlook reminder**

### **Procedure**

1. Select an appointment on the Reminder window.
2. If the appointment has bridge and web conference details, click the drop-down arrow beside the click-to-join conference button and select one of the following options:
  - Select the bridge to call.
  - Click Launch Web Collaboration to enter the web conference.
  - Click Call Access Number and Launch Web Collaboration to simultaneously dial into the bridge on your phone and enter the web conference.
3. Click the **Call** button to click-to-call the contact or sender of the mail.

## **Joining or hosting a conference from an appointment inspector window**

### **Procedure**

1. Open an appointment from your Outlook calendar.

- If the calendar item has conference bridge details, select the available button on the inspector ribbon:

- If you are not the appointment organizer, click **Join Conference**.

 **Note:**

If the item has multiple conference bridge details, select the appropriate bridge access number to call from the **Join Conference** button drop-down list.

- If you are the appointment organizer, click **Host Conference**.

## Joining or hosting a conference from an appointment context menu

### Procedure

- From the Outlook calendar view, right-click a selected calendar item that contains conference bridge details.
- Select any of the following options from the context menu:
  - If you are not the appointment organizer, click **Join Conference** to join a conference call.
  - If you are the appointment organizer, click **Host Conference** to host the conference call.

If the calendar item has multiple conference call details, select the appropriate bridge access number to call from the **Join Conference** drop-down list.

## Joining conference and launching web collaboration from calendar invite and meeting invitation

### Procedure

- Select a meeting invitation or open a meeting invitation from the Outlook calendar.
- Right click a meeting, and select **Host conference**.
- If the meeting has bridge and web conference details, click the drop down list and select any of the following options:
  - Call access number.**
  - Launch web collaboration.**
  - Call Access Number and Launch Web Collaboration.**

If a meeting has more than one access number, Outlook selects and calls the primary number in the list when you click **Call Access Number and Launch Web Collaboration**.

## Limitations: Click to join conference

### Outlook add-in issues

If other add-ins, such as the win-zip add-in, are enabled in Outlook, you might not be able to join or host a conference by right-clicking on the meeting invitation. If you experience this issue, do one of the following:

- Disable other add-ins in Outlook temporarily.

- Join the conference from the Reminder or Appointment Inspector window

### Browser add-in issues

With Internet Explorer, Google Chrome, and Mozilla Firefox, Collaboration Services does not support certain HTML tags for number marking or passcode detection. For example, Collaboration Services does not detect conference numbers if the browser uses a `<span>` tag to separate the conference bridge number and passcode.

---

## Browser application features

The Collaboration Services Browser application extends the capability of the Internet Explorer (IE) and Google Chrome browsers. For example, you can initiate a call directly from a web page that contains valid telephone numbers (valid telephone numbers are numbers that have the format appropriate to the locale of the web page). The Browser application automatically searches through the page and marks the valid telephone numbers. When you hover your mouse over the marked phone number, a button appears that you can click, to initiate a call from your preferred device. You can also use the Browser application contact card to make voice and video calls, view a contact's presence status, and send an instant message to the contact.

---

## Enabling the Browser application

### Procedure

If you need to enable the Browser application in your web browser, do the following:

- a. In IE, right-click the toolbar and select **Avaya Collaboration Services**.
- b. In Firefox, navigate to the **Add-on Manager** and enable **Avaya Collaboration Services**.

 **Note:**

In Google Chrome, Collaboration Services is enabled automatically. You cannot disable the Collaboration Services add-in within the Google Chrome browser. Your administrator must disable and re-enable Collaboration Services on Google Chrome using a `.bat` file.

---

## Browser application settings panel

You can access the Browser application settings panel from the toolbar near the top of your browser window.

From the tabs at the top of the Browser application settings panel, you can access the following features:

| Icons   | Feature  |
|---|--|
|  | Select the appropriate country or locale. Use this option when you need to override the automatically detected locale. |
|  | View and edit disabled sites. On these sites, the Browser application does not detect telephone numbers                |
|  | Access release and version information   |

---

## Making a call

Use the Browser application to initiate a call from a telephone number listed on a web page. The application automatically identifies and marks the numbers you can call.

Click the phone icon () to place a call to the highlighted telephone number.

---

## Browser application contact card

When you hover over the phone number of a contact in your browser, Collaboration Services displays a contact card for the contact.

From this contact card, you can view the contact's presence status and access the following icons:

| Icons   | Feature                             |
|---|-------------------------------------|
|  | Initiate a voice call               |
|  | Initiate a video call               |
|  | Send an email                       |
|  | Schedule a meeting with the contact |
|  | Send an instant message (IM)        |

---

## Click-to-conference

Use the Browser application to join or host a conference from a web browser. The Browser application highlights conference bridge phone numbers on web pages or in the Outlook Web Access tool. To dial in to a conference bridge, hover your mouse over the conference bridge phone

number and click the conferencing icon () next to the number.

### **Related Links**

[Configuring conference bridge details](#) on page 46

Use the following procedure to add, modify, and delete your bridge and web conference details.

# Appendix A: Support matrix for Avaya Collaboration Services

The following sections provide information about support for Avaya Collaboration Services functionality within hosted applications, such as Google Applications and Office 365.

**\* Note:**

A hosted applications limitation exists where Collaboration Services cannot recognize phone numbers embedded within image blocks. The following sections indicate where this limitation applies.

---

## Support for Google Applications

You can use Collaboration Services click to call and click to join or host a conference functionality within Google Applications, such as Gmail, Calendar, Sheets, Documents, and Forms.

The following image provides an overview of Collaboration Services support with Google Applications.

**\* Note:**

- You might need to disable Google Add-ins and Skype Click-to-Call to ensure proper functioning of Collaboration Services browser add-in.
- In some cases, due to a Java script limitation, phone numbers and conference bridge numbers are not highlighted in Calendar Reminder windows. This limitation applies in both Read and Edit Mode. This limitation occurs intermittently and is not marked in the following image.

## Hosted(Cloud) Apps support

Google Apps



|              | IE                           | Chrome                       | IE                           | Chrome                       |
|--------------|------------------------------|------------------------------|------------------------------|------------------------------|
|              | Read Mode                    |                              | Edit Mode                    |                              |
| Spreadsheet  | Shows number marking         | Shows number marking         | Shows number marking         | Shows number marking         |
| Email        | Shows number marking         | Shows number marking         | Does not show number marking | Does not show number marking |
| Documents    | Shows number marking         | Shows number marking         | Shows number marking         | Shows number marking         |
| Presentation | Does not show number marking |
| Form         | Shows number marking         | Shows number marking         | Does not show number marking | Does not show number marking |
| Calendar     | Shows number marking         | Shows number marking         | Does not show number marking | Does not show number marking |
| People       | Shows number marking         | Shows number marking         | Does not show number marking | Does not show number marking |
| Drawing      | Does not show number marking |

Legend:

Hosted Apps limitation

Shows number marking

Does not show number marking

Figure 1: Google Applications support matrix

## Support for Office 365

You can use Collaboration Services click to call and click to join or host a conference functionality from Office 365 with the web versions of Microsoft Word, Excel, Outlook, Calendar, SharePoint, and One Note.

The following image provides an overview of Collaboration Services support with Office 365 web applications.

**\* Note:**

A hosted applications limitation exists where Collaboration Services cannot recognize phone numbers embedded within image blocks.

## Hosted(Cloud) Apps support

Microsoft Office 365  Office 365

|            | IE        | Chrome | IE        | Chrome |
|------------|-----------|--------|-----------|--------|
|            | Read Mode |        | Edit Mode |        |
| Excel      |           |        |           |        |
| Outlook    |           |        |           |        |
| Word       |           |        |           |        |
| PowerPoint |           |        |           |        |
| OneNote    |           |        |           |        |
| SharePoint |           |        |           |        |
| Calendar   |           |        |           |        |
| People     |           |        |           |        |

Legend:

Hosted Apps  
limitation

Shows number  
marking

Does not show  
number marking

Figure 2: Office 365 support matrix