



IP Office - Job Aid

Dialing from Windows using TAPI

Summary

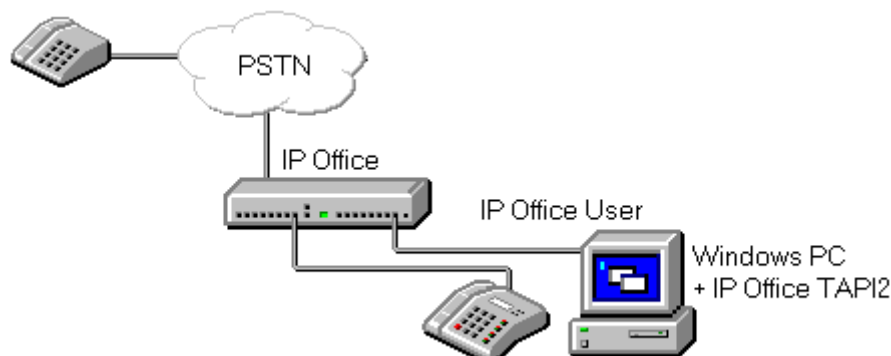
This document shows how TAPI Lite, provided as a free application on the IP Office User Applications CD, can be used with Windows applications that are TAPI enabled.

Examples are included for Microsoft Phone Dialer, Outlook 2000, ACT!, Lotus Organizer, Maximizer and GoldMine.

Dialing from Windows Using TAPI

Introduction

TAPI is an interface standard that lets Windows applications and telephony devices make and answer telephone calls. In this case it allows IP Office extension users to make calls from TAPI enabled Windows applications.



The IP Office TAPI software is provided on the IP Office User Applications CD. It can be run in two modes:

- **TAPI Lite:** Also known as **Single User**
Does not require any IP Office licenses. May be installed on as many user PC's as required. This is the mode looked at in this document.
- **TAPI Pro:** Also known as **Third Party**
Used to interface with third-party application written specifically for the IP Office. Requires IP Office licenses which may also restrict the number of users.

Each release of IP Office TAPI Lite is tested with the following applications to make calls:

- ACT!2000
- Maximizer 6.0
- Goldmine 5.5
- Lotus Notes
- Windows Phone Dialer
- Outlook 2000

Note: In some cases, the examples in this document were done using different versions of these applications.

- **Important Note:** Though TAPI is currently tested with the applications above, this is not a commitment to continually test or support those applications in future levels of software. They are third-party applications not controlled by Avaya.

Note: When an analogue extension user makes a call from a TAPI application, their extension will begin ringing to indicate that the handset should be lifted. When using a digital extension, the calling phone is connected automatically.

Installing IP Office TAPI Lite

The IP Office User Applications CD includes the Avaya IP Office TAPI2 driver.

1. Insert the IP Office User Applications CD.
 - This should start the CD wizard. If this does not occur, open the CD in My Computer and double-click on **setup.exe**.
2. Click **Next >**.
3. The wizard should report that it has found an IP Office system. If this does not happen then there is a problem with the network between the user PC and the IP Office Control Unit.
4. Using the drop-down list select the **User Name** for the user's extension.
5. Enter there **User Password** is one has been set.
6. Click on **Next >** and then on **Finish**.
7. The IP Office User Suite installer is now started.
8. Select **Modify** and then click on **Next >**.
9. Select the applications you want to install. In this case ensure that **TAPI** is amongst the applications selected.
 - If the IP Office User Suite has already been run on the user PC, those applications already installed are automatically selected. **Do not deselect these as it will cause the installer to remove them.**
10. Click on **Next >** to begin installation.
11. Installation of TAPI requires the PC to be rebooted following installation.

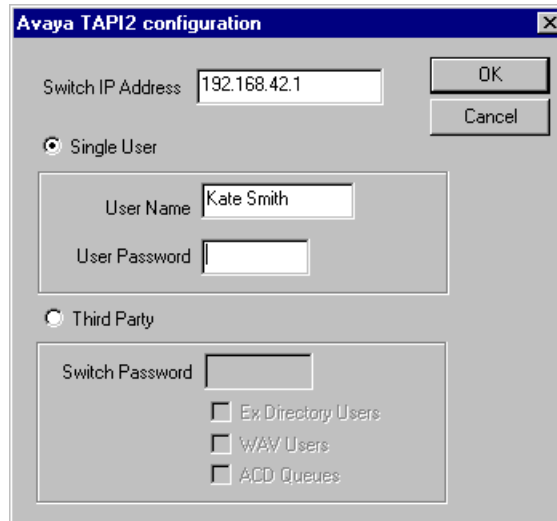
IP Office TAPI Configuration

This should not normally be necessary as the installation process will have inserted the User Name and the IP Office IP Address.

1. Select **Start | Settings | Control Panel**.
2. The next steps vary between different versions of Windows. Also if these settings have not been accessed before on this PC, you may be asked by a wizard to confirm various dialing details.
 - **Windows NT4/9x:**
Select **Telephony**. Select the **Telephony Drivers** tab.
 - **Windows 2000:**
Select **Phone and Modem Options**. Select the **Advanced** tab.
3. The **Avaya IP Office TAPI2 Service Driver** should be shown in the list of installed services.



4. Select the **Avaya IP Office TAPI2 Service Provider** and click on **Configure**.



5. Enter the **Switch IP Address** of the IP Office Control Unit.
6. Select **Single User** and enter the **User Name** and, if set, the **User Password**.
 - The **Third Party** options are only used with TAPI applications developed for IP Office by third-party CTI developers.
7. Click on **OK** and then on **Close**.

Microsoft Phone Dialer

For this document, Phone Dialer 4.0 on Windows NT4 was used with the IP Office 1.4 suite.

Dialer allows you to make and receive calls and includes a list of personal speed dials. It can also be used as a dialer tool by some other Windows applications.

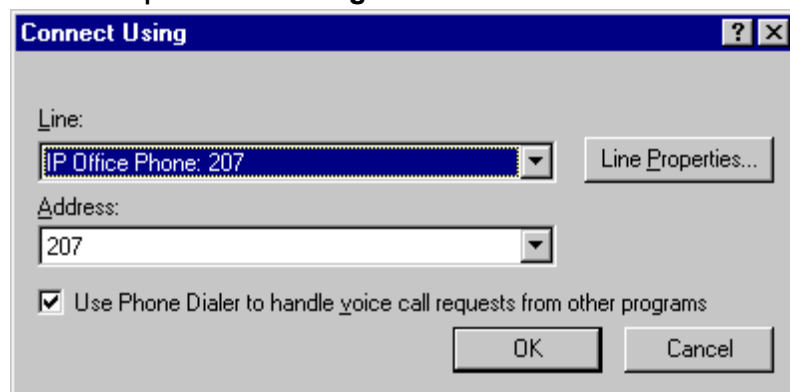
Note: Whilst Phone Dialer is a standard application on most Windows installations, the version and therefore appearance of Phone Dialer varies between different versions of Windows.

Configuring Phone Dialer for TAPI Dialing

1. Start **Phone Dialer** (typically found under **Programs | Accessories | Communications | Phone Dialer**).



2. Select **Tools | Connect Using...**





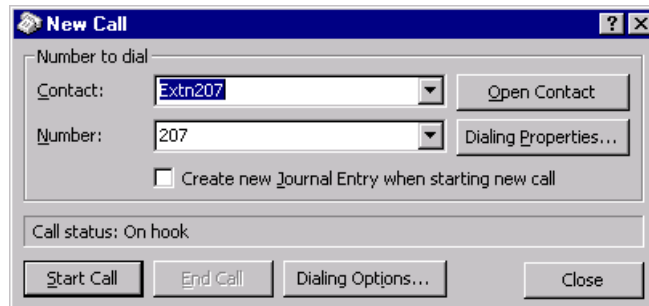
3. In the **Line:** drop-down list select *IP Office Phone:*.
 - The extension number shown should match your extension. If it doesn't, click on **Line Properties** and refer page 4. If you have to change the extension you should close and restart Outlook.
4. Click on **OK**. The line selection will be remembered and used by Phone Dialer for any following calls.

Microsoft Outlook 2000

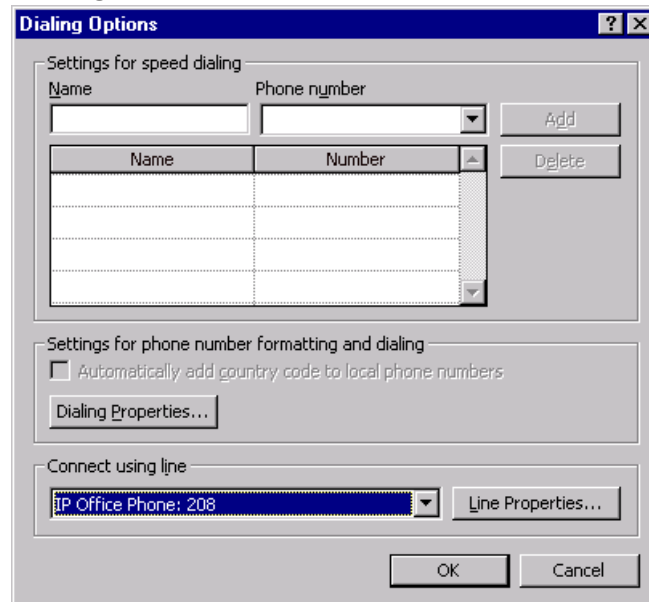
For this document Outlook 2000 was used with the IP Office 1.3 suite.

From Outlook you can dial either through the Address book or through the Contacts, refer to the Outlook help file. The example below is given to show how, for the first call, you select dialing via the IP Office.

1. Open the Outlook  **Address Book** and highlight the contact required.
2. Click on  **Action** and select **Dial**. If the contact has several phone numbers use the **Number** drop-down list to select the one required.



3. Click on **Dialing Options**.



4. In the **Connect using line** drop-down list select **IP Office Phone:**
 - The extension number shown should match your extension. If it doesn't, click on **Line Properties** and refer page 4. If you have to change the extension you should close and restart Outlook.
5. Click on **OK**. The line selection will be remembered and used by Outlook for any following calls.
6. Click on **Start Call**.

Note: Outlook Screen Popping

Screen popping of outlook contact on incoming calls can be achieved using IP Office Phone Manager Pro. This is separate from TAPI Lite operation.

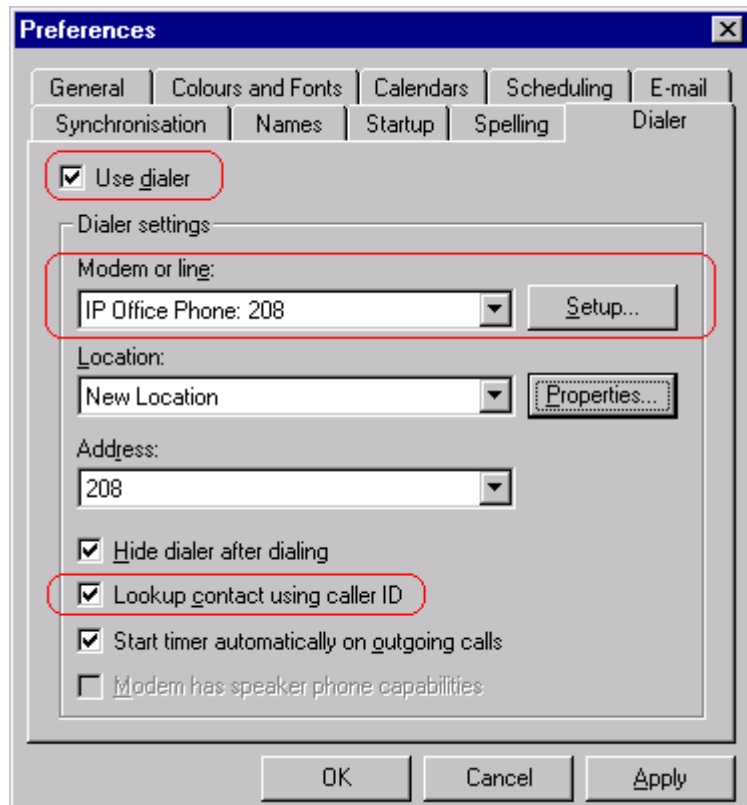
ACT!

For this document ACT!6 was used with the IP Office 1.3 suite. Making calls from the contacts database and screen popping* on CLI were used. The ACT!6 dialer also supported TAPI controls for Answer, Hold, Transfer and Hangup.

[*Screen popping in this case refers to, if in ACT!6 contacts, ACT!6 automatically displaying the first match to the received calling number. ACT!6 will not maximize if a call is received whilst minimized.]

Configuring ACT! for TAPI Dialing:

1. From the menu bar select **Edit | Preferences**.
2. Select the **Dialer** tab.



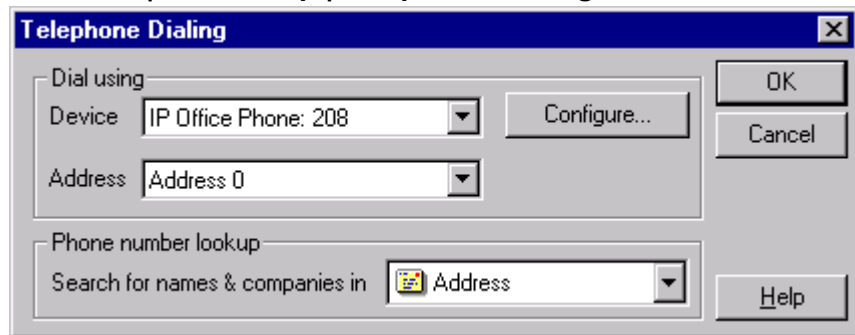
3. Tick **Use dialer**.
4. In the **Modem or line:** drop-down list select **IP Office Phone:**
 - The extension number shown should match your extension. If it doesn't, click on **Setup** and refer page 4. If you have to change the extension you should close and restart ACT!.
5. To use ACT! to screen pop on incoming calls, tick **Lookup contact using caller ID**.
6. Click on **OK**.

Lotus Organizer


For this document Lotus Organizer 97 was used with the IP Office 1.3 suite.

Configuring Lotus Organizer for TAPI Dialing:

1. Select **File | User Setup | Telephone Dialing**.



2. In the **Device** drop-down list select **IP Office Phone:**
 - The extension number shown should match your extension. If it doesn't, click on **Configure** and refer page 4. If you have to change the extension you should close and restart Organizer.
3. Click on **OK**.

To make calls, drag address book or call Log entries onto the  icon. The **Dial** dialogue will appear.

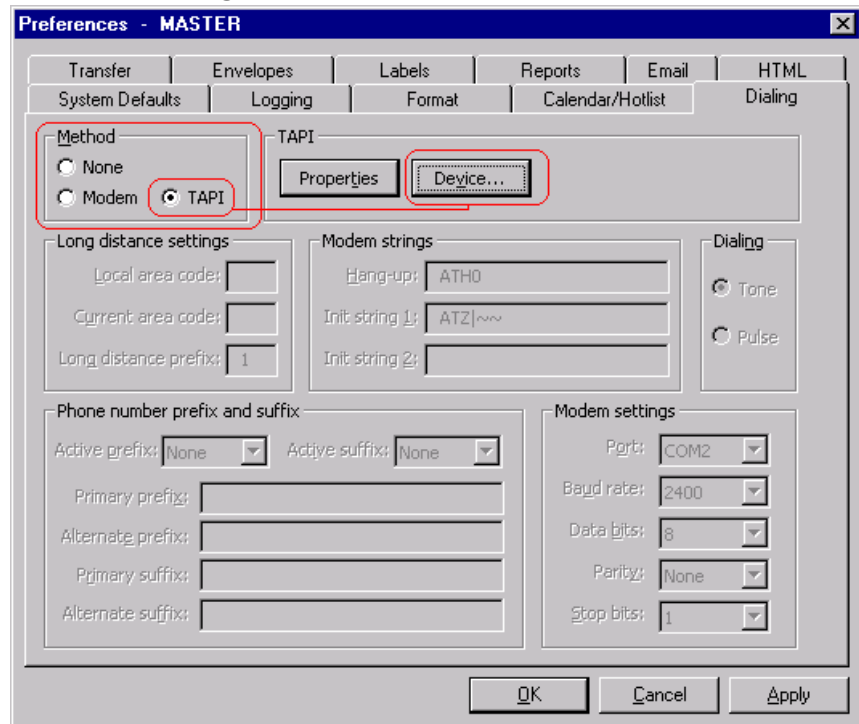


Maximizer

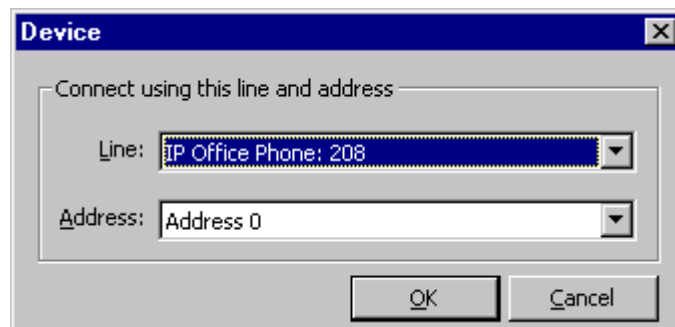
For this document Maximizer 7 was used with the IP Office 1.3 suite.

Configuring Maximizer for TAPI Dialing:

1. Select **File | Preferences**.
2. Select the **Dialing** tab.



3. Set the **Method** to **TAPI**.
4. Click on the **Device** button.



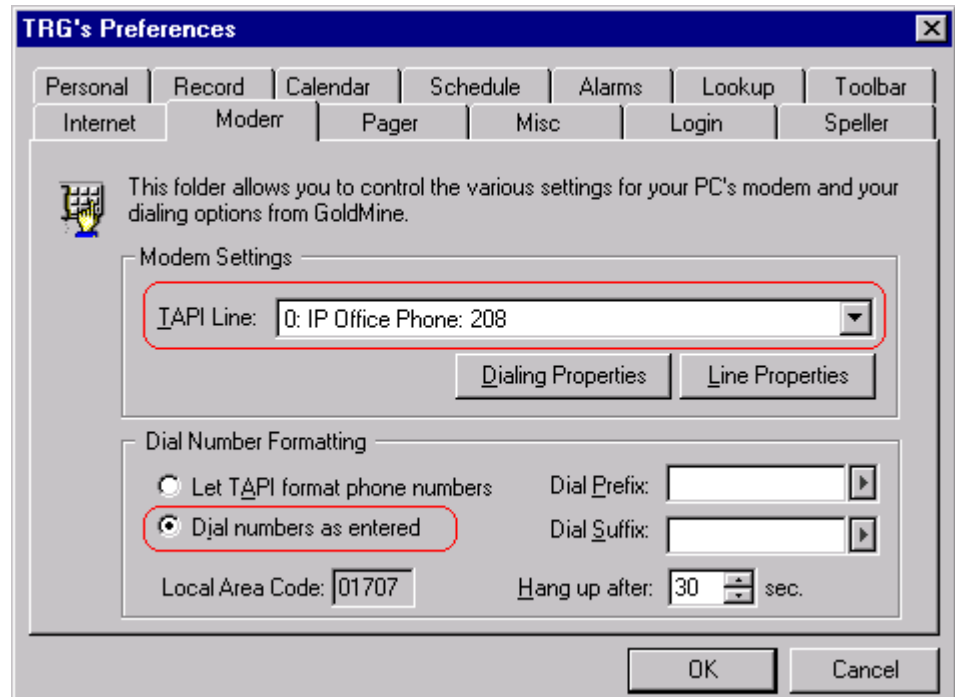
4. In the **Line** drop-down list select **IP Office Phone:**
 - The extension number shown should match your extension. If it doesn't, close Maximizer and refer page 4.
5. Click on **OK** twice.
6. The dialing functions within Maximizer will now use IP Office TAPI.

Goldmine

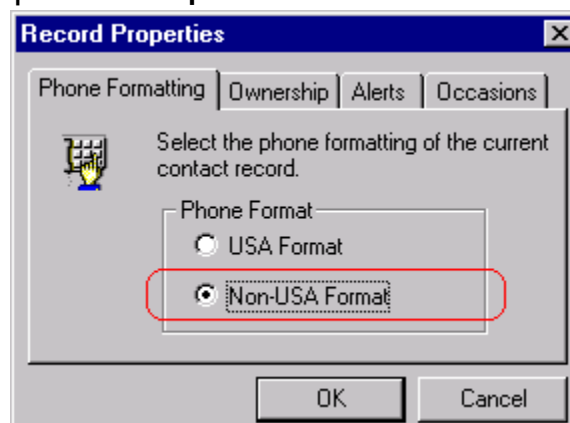
For this document GoldMine 6 was used with the IP Office 1.3 suite.

Configuring Goldmine for TAPI Dialing:

1. Select **Edit | Preferences**.
2. Select the **Modem** tab.



3. In the **TAPI Line** drop-down list select **IP Office Phone:**
 - The extension number shown should match your extension. If it doesn't, click on **Line Properties** and refer page 4. If you have to change the extension you should close and restart GoldMine.
4. Under **Dial Number Formatting** select **Dial numbers as entered**.
5. Click on **OK**.
6. Select **Edit | Record Properties**.



7. On the **Phone Formatting** tab, select **Non-USA Format**.
8. Click on **OK**.

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