

TAPI 2000

Computer interface software for IVX Series digital phones

Product Overview Installation Instructions

For use only on computers running *Windows*® 95/98/NT®/2000

Introduction

TAPI (*telephony application programming interface*) is an interface designed to allow communication between a TAPI-compliant telephone and a PC using software such as contact managers or personal information managers (PIMs). TAPI functionality provides the ability to dial out from any PIM with a TAPI-compliant dialer. TAPI-compliant programs that provide “screen pops” using Caller ID¹ from incoming calls can also be supported.

The TAPI Digital Feature Phone is equipped with a 9-pin serial interface for connection to a PC’s serial I/O port. A *TAPI 2000* software driver CD-ROM and serial cable are included with each TAPI Digital Feature Phone. TAPI functions supported by the Digital Feature Phone include: make call; ring notify; and Caller ID.

Note: TAPI is also a standard feature on both the IP Feature Phone and Remote IP Feature Phone. Refer to the *IP TAPI Installation Instructions* (ESI part # 0450-0245) for more information on installing TAPI.

TAPI 2000 drivers are available also as downloads from the software page of the ESI Resellers’ Web site, http://www.esi-estech.com/ivx_all/software.html.

TAPI software interaction

The following applications have been tested with *TAPI 2000* software.

Product	Manufacturer	Functions supported	Web site
<i>ACT!</i> ®	Interact Commerce Corp.	Dial number, Caller ID (screen pop)	www.act.com
<i>Goldmine</i> ®	Frontrange Solutions	Dial number ²	www.frontrange.com
<i>Outlook</i> ®	Microsoft Corp.	Dial number ²	www.microsoft.com
<i>CallAudit</i> ™	Mountain Systems	Dial number, Caller ID (screen pop)	www.mtnsys.com
<i>IdentaPop</i> ™	IdentaFone Software	Caller ID	www.identafone.com
<i>Phone Dialer</i>	Microsoft Corp.	Dial number ³	www.microsoft.com

Note: ESI makes no claims as to the suitability and operation of the software products shown in this table. If you require assistance with any of them, please contact the appropriate vendor(s).

¹ Caller ID information is available if the telephone service provides it. Contact your telephone company and/or long distance provider for details.

² Caller ID functions are available through integration with *CallAudit* software.

³ Included with *Windows 95, 98, NT* and *2000*.

TAPI interface installation instructions

Important: If you intend to install the TAPI drivers to a PC with *Windows NT 4.0* where Service Pack 3 (or greater) hasn't been installed, please obtain the latest Service Pack — at press time, Service Pack 6a (SP6a) — and install it before continuing. You may select and download SP6a from <http://www.microsoft.com/ntserver/nts/downloads/recommend/SP6>.

Requirements

To perform this installation, you will need:

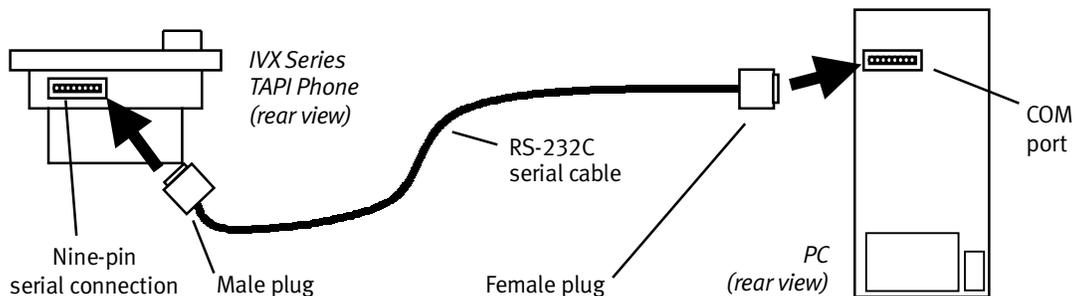
- An IVX TAPI Phone (Digital Feature Phone with TAPI interface)
- A PC running *Windows 95, 98, NT* or *2000* and with an unused COM (serial) port
- A serial communications cable — A DB9 male-to-female cable is shipped with the TAPI Phone. If the PC has a 25-pin serial connector, you'll need to obtain a DB9-male-to-DB25-female adapter (such as Radio Shack® model # 26-287).

Also, if Caller ID integration is desired, you should confirm that (a) Caller ID is enabled on the IVX Series phone system and (b) the telephone company is providing Caller ID service.

Procedure

Note: If using the CD-ROM shipped with the TAPI Phone, proceed to step 1. Otherwise, skip to step 2.

1. Insert the CD-ROM into the PC's CD-ROM drive; then browse to the CD-ROM drive and locate the *Esiivx.exe* file. (Depending on your settings, the file may appear as just *Esiivx*.) Skip to step 5.
2. Use your Web browser to reach the TAPI software download links⁴ on the ESI Resellers' site. You'll need your Resellers' site password.
3. To download the software, click on the link to the *TAPI 2000* software listed as "For IVX 128 Plus, IVX 128, IVX 20 Plus and IVX 20."
4. When prompted, select a folder in which to save the software. (We suggest *C:\Windows\Temp*.)
5. The software is a self-extracting installer. To launch the installation process, browse to the *Esiivx.exe* file and double-click on it.
6. If asked whether you wish to continue, click on **Yes**. Then, follow the instructions that appear.
7. At the end of the installation, you'll be prompted whether you wish to restart the PC. Click on **Finish**.
8. As the PC restarts, a window will appear asking you to select the COM (serial) port that will be used for TAPI activity. Select the appropriate port and click on **OK**.
9. Connect one end of the provided serial cable to the PC serial port selected in step 7. Connect the other end to the serial port on the back of the TAPI Phone (see diagram, below).



You have now successfully installed the *TAPI 2000* Windows telephony driver. Continue to the next page to test the operation of the TAPI interface.

⁴ http://www.esi-estech.com/ivx_all/software.html#TAPI2000

Testing TAPI

Windows includes a simple TAPI application called *Phone Dialer* that can be used to test the TAPI interface by dialing a phone number. Two versions of *Phone Dialer* are currently available. Depending on which version of Windows you have, follow the appropriate test procedure for the *Phone Dialer* software on your PC.

Testing with Phone Dialer (Windows 95/98)

1. Click on the *Windows Start* button; then click on **Run**, type *dialer* in the Run window and click on **OK**.
2. In the *Phone Dialer* window, click on the **Tools** menu; then click on **Connect Using...**
3. In the **Line** field, select *ESI IVX Telephony Service Provider* and click on **OK**.
4. Once again, click on **Tools**; then click on **Dialing Properties...**
5. Enter the local area code and the appropriate access codes for an outside line; to insert a pause, use a comma (e.g., for local calls, you might use 9,).
6. Make sure the **To disable call waiting, dial:** box is **not** checked. Then, click on **OK**.
7. In the *Phone Dialer* window, enter the number to dial and click on **Dial**.
8. If the TAPI installation was successful, the phone's **SPEAKER** key will light up and you'll hear the phone number being dialed. If the call can't be completed, add one or more commas to the outside access codes; also, verify that the other dialing properties are correct for the area from which you're calling.

Testing with Phone Dialer 1.0

1. Click on the *Windows Start* button; then click on **Run**, type *dialer* in the Run window and click on **OK**.
2. In the *Phone Dialer* window, click on the **Edit** menu; then click on **Options**.
3. In the **Options** window, click on **Phone and Modems Option**.
4. In the **Phone and Modems** window, a location entry should be highlighted. Click on **Edit**.
5. In the **Edit Locations** window, enter the local area code and the appropriate access codes for an outside line; to insert a pause, use a comma (e.g., for local calls, you might use 9,).
6. Make sure the **To disable call waiting, dial:** box is **not** checked. Then, click on **OK**.
7. In the **Phone and Modem Options** window, click on **OK**.
8. In the **Options** window, under **Line Used For...**, select *ESI IVX Telephony Service Provider* and click on **OK**.
9. In the *Phone Dialer* window, click on **Dial** and enter the number to dial in the **Dial** window. Then, click on the **Phone Call** radio button, followed by the **Place Call** button.
10. If the TAPI installation was successful, the phone's **SPEAKER** key will light up and you'll hear the phone number being dialed. If the call can't be completed, add one or more commas to the outside access codes; also, verify that the other dialing properties are correct for the area from which you're calling.

Proceeding to use TAPI

The TAPI interface is now ready to be integrated with the user's preferred TAPI-enabled application. For instructions on connecting to the TAPI driver, refer to the documentation for that application.

Copyright © 2000–2001 ESI (Estech Systems, Inc.).

IVX is a registered trademark of ESI. *Microsoft*, *Windows*, *NT* and *Outlook* are registered trademarks of Microsoft Corporation. *ACT!* is a registered trademark under exclusive license to Interact Commerce Corporation by its owner, Symantec Corporation, in the U.S. and other countries. *Goldmine* is a registered trademark of Frontrange Solutions, Inc. *CallAudit* is a trademark of Mountain Systems Corporation. *Identapop* is a trademark of Identafone Software Corporation. *IVX Series* and *IP Series* products are protected by U.S. Patents 6,067,349 and 6,252,944, and others pending.

ESI is an ISO 9001-certified company.

