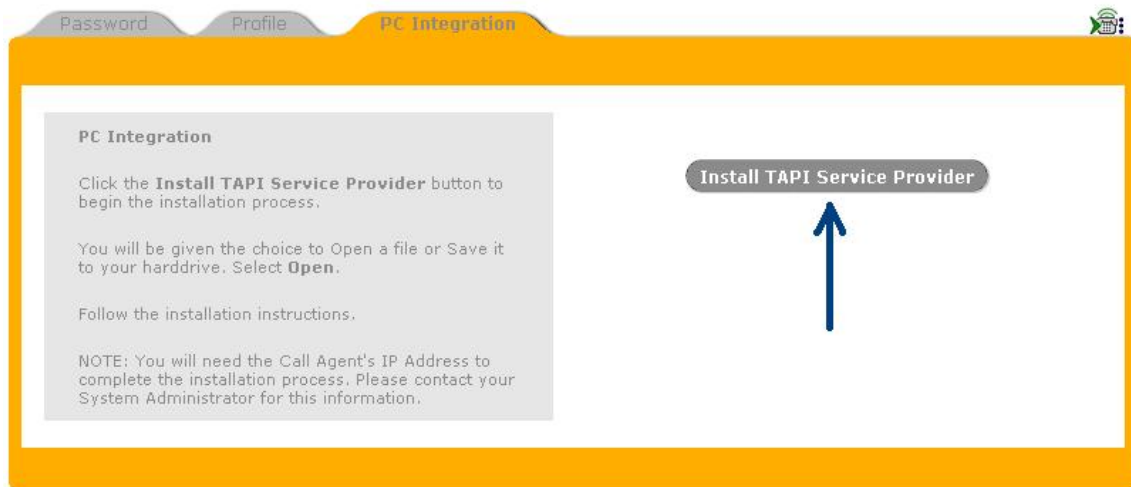


Installing the TAPI Support Software

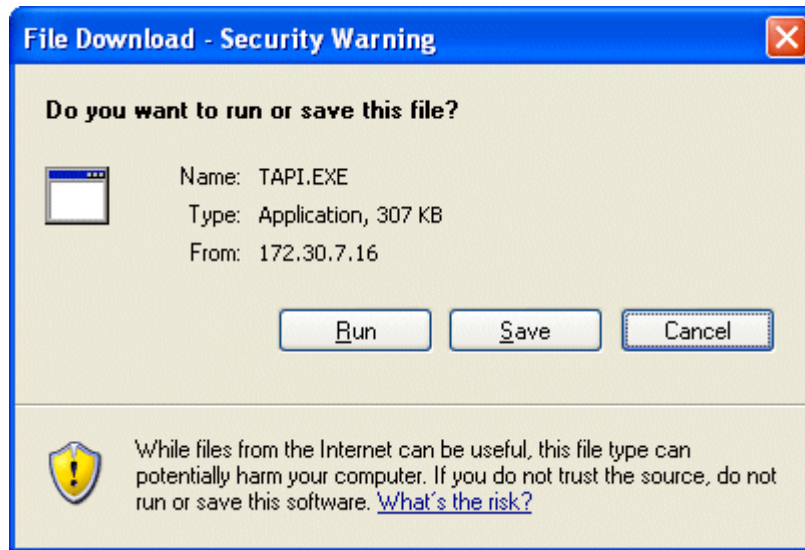
To install and set up the TAPI 2.1-compliant software, use the following steps:

1. Start Web Portal.
2. Click the **Options** tab.
3. Click the **PC Integration** tab.
4. Click **Install TAPI Service Provider** to begin the installation process.

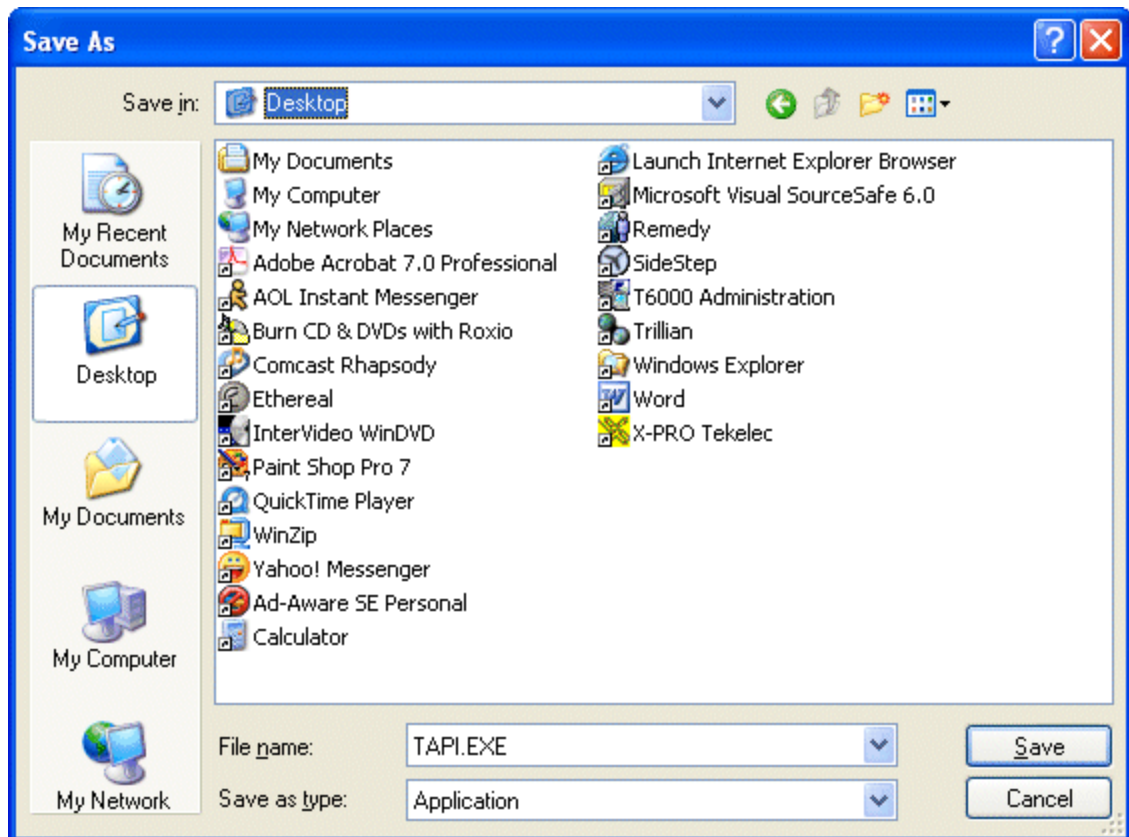


5. Select a method for the installation and click **OK**. This procedure uses the **Save** option so that the program can be reinstalled if needed again.

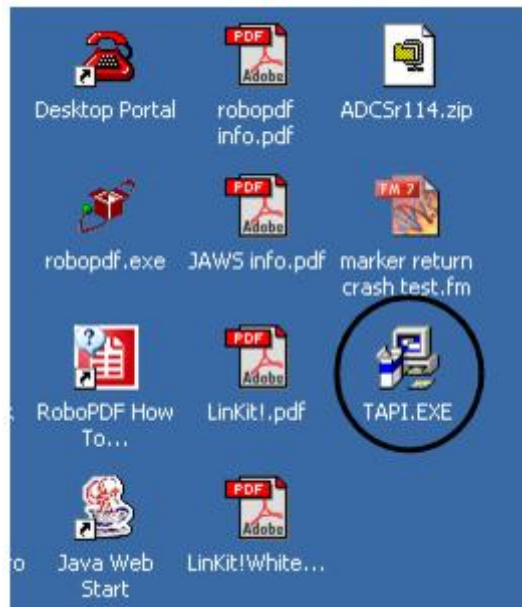
NOTE: The IP address shown in the location notice will be the IP address of the web server the Web Portal is connected to.



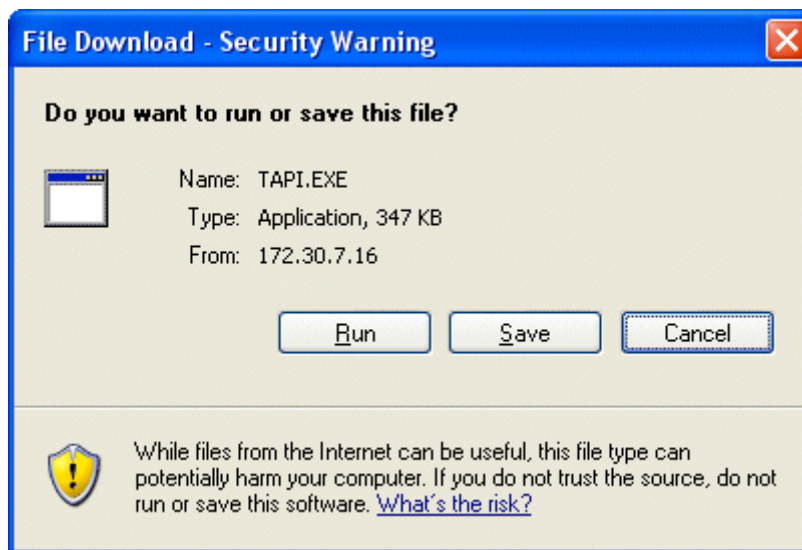
1. Choose where to save the **TAPI**.EXE file and click **Save**. This example saves it to the desktop to be easy to find.



2. Find the **TAPI**.EXE file (shown here on the PC desktop) and double click it to run the install program.



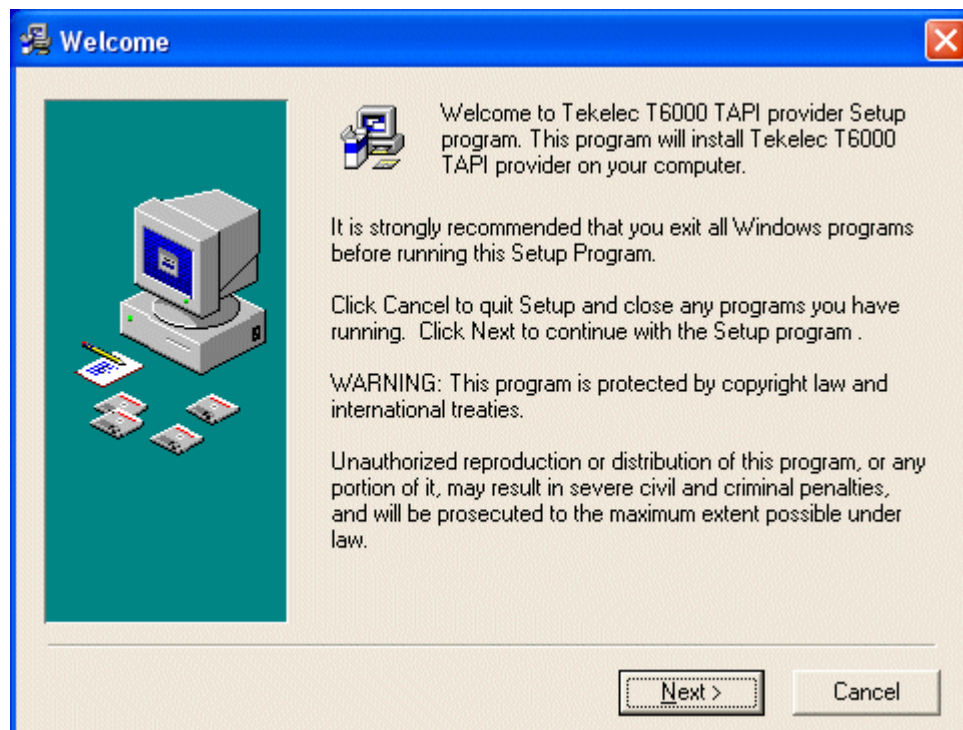
3. When you run the program, a message may appear stating that the executable is from an unknown publisher. Click **Run** to continue the installation.



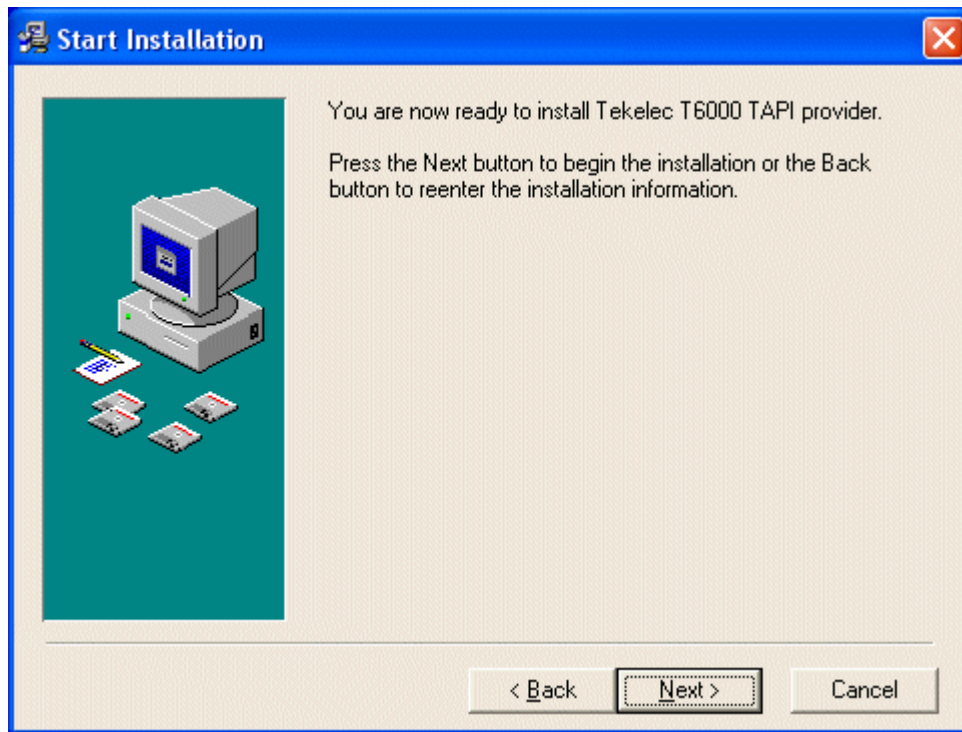
4. The next prompt asks you to confirm whether or not you want to run the **TAPI** software. Click **Run**.



5. The Install Shield wizard will start. Click **Next** in the Welcome dialog box to install the **TAPI** program.



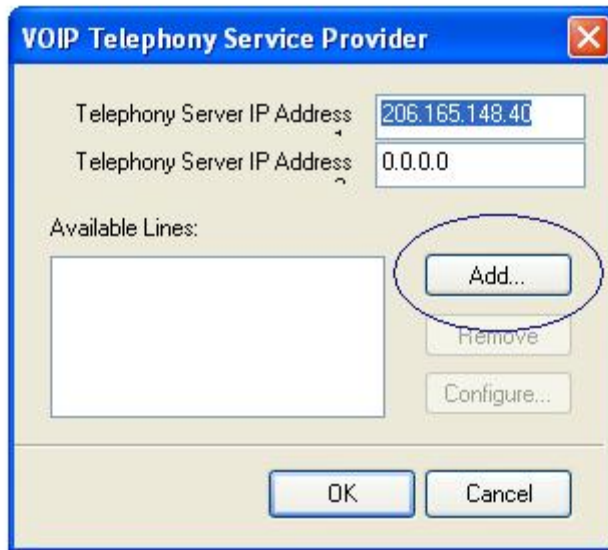
6. Click **Next** to start the installation.



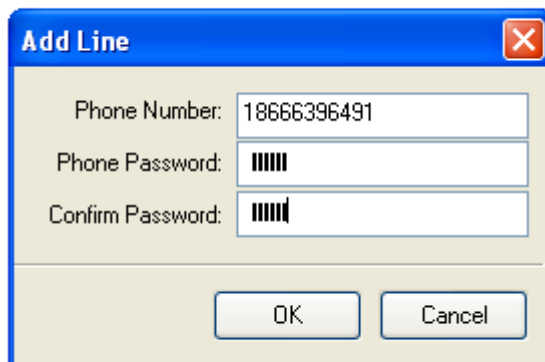
7. The next dialog box shows the progress of the installation.

NOTE: A dialog box may appear while the Installation dialog is still running. Do NOT click Cancel or the close icon when the dialog box appears. You will be returning to this dialog box after completing two steps.

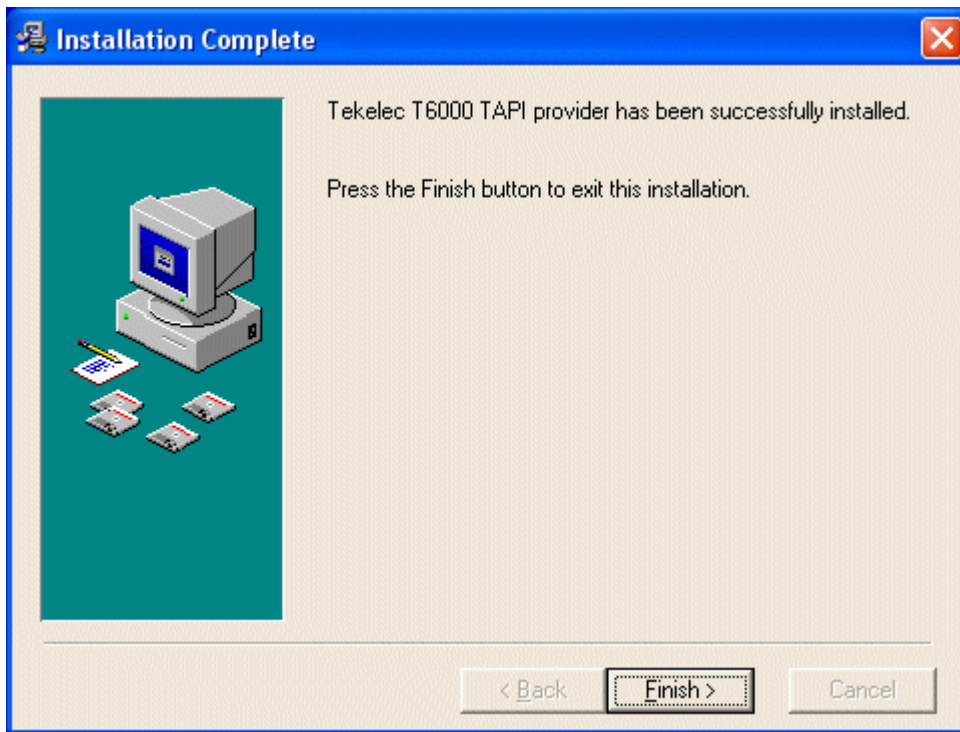
1. When the dialog box appears while the Installing dialog box continues to run, do the following:
 - a. Enter the IP addresses of the servers as provided by your system administrator in the Telephony Server IP Address 1 and 2 fields.
 - b. Click **Add** to add your telephone number (the one that will be used with the **TAPI**-enabled program [such as Outlook]).



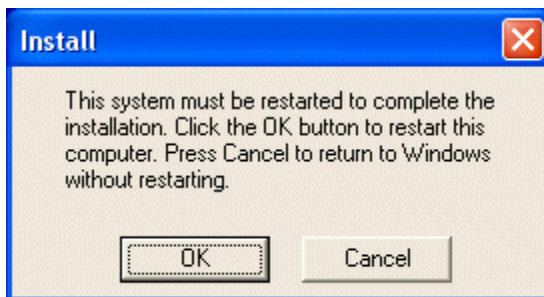
2. Enter your telephone number and password and click **OK**.



3. Click **OK** in the dialog box.
4. Click **Finish** in the Installation Complete dialog box to complete the **TAPI** program installation.



5. The final prompt states that the PC must be rebooted for the changes to take effect.



NOTE: Before you can dial from the **TAPI**-enabled program, you must [configure Windows for TAPI](#) and [configure Outlook \(or other dialing program\)](#) to use the IP telephone line.

Configuring Windows for **TAPI**

For TAPI-enabled programs to be able to dial using the TAPI Service Provider, Windows must be configured correctly to be able to use the proper line, get an outside line, and dial correctly.

General Information

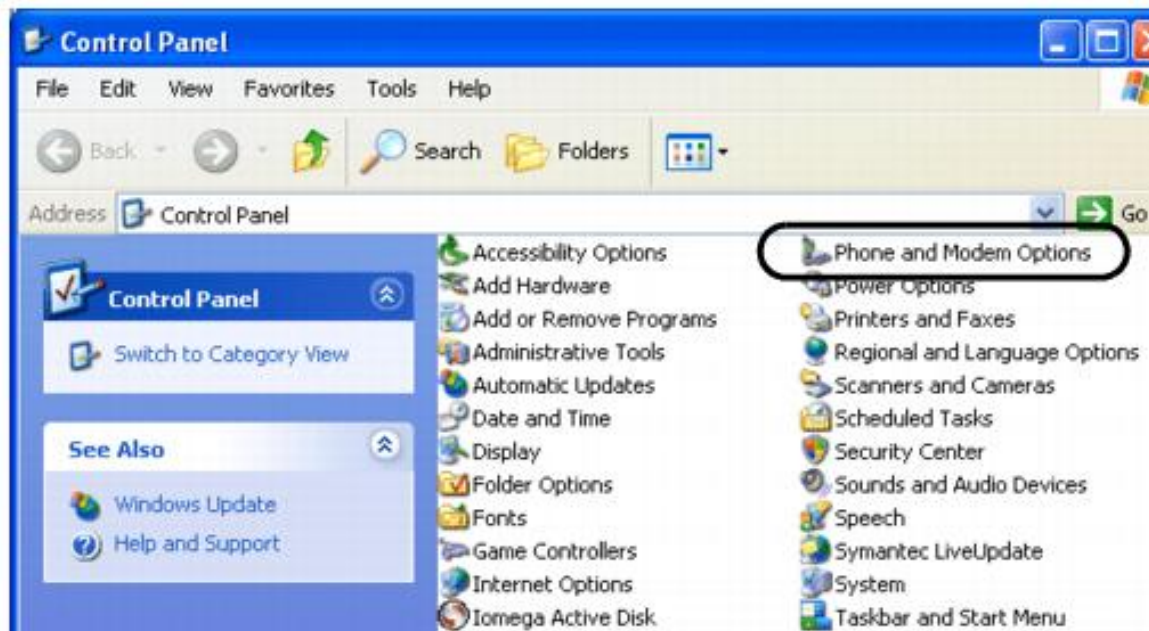
The following notes apply to all TAPI-enabled programs:

- The program must be set to use the Tekelec T6000 Telephony Service Provider that must be installed on your PC.
- The access codes required for outside calls (usually 9 or 8) must be configured.
- Instructions for handling area codes and, if necessary, 10-digit dialing must be configured.

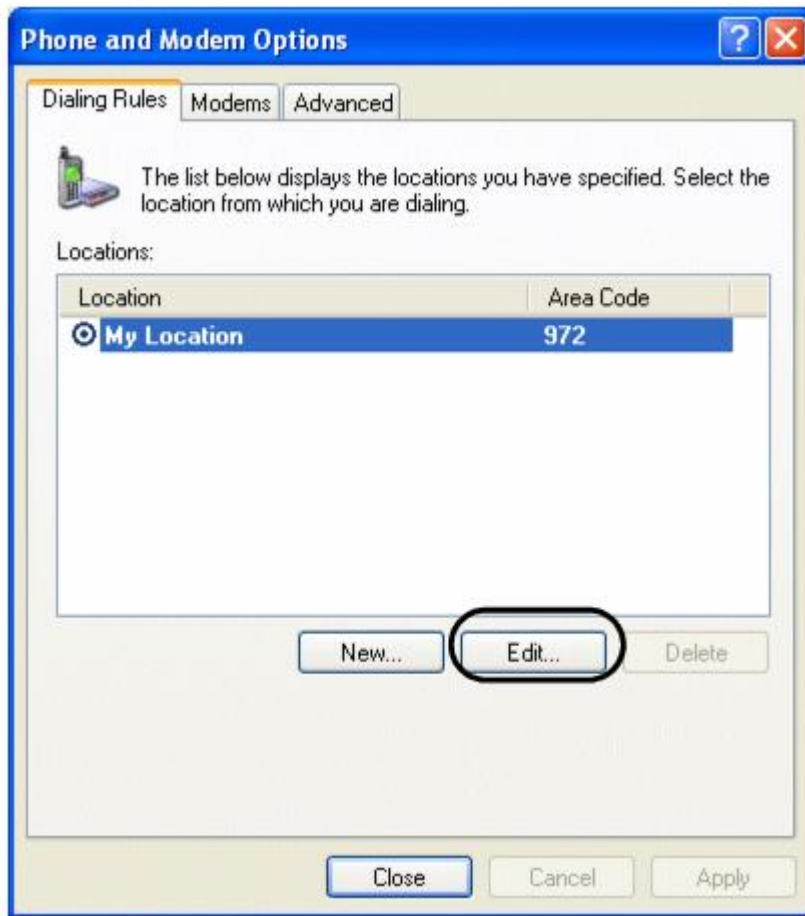
Setting Up TAPI

Use the following steps to set up TAPI 2.1-compliant Service Provider in Windows. These steps are from Windows 2000. Other Windows versions should be similar.

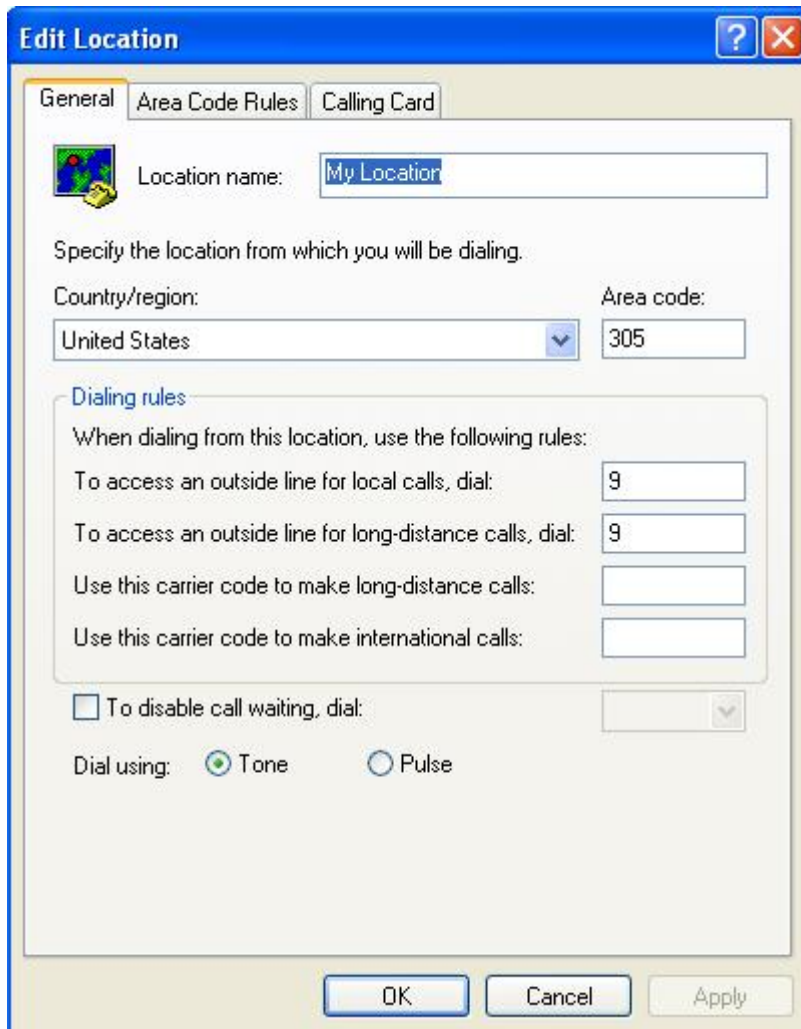
1. Click **Start**, **Settings** and **Control Panel** to open the Control panel window.
2. Double click **Phone and Modem Options** (circled).



3. Click **Edit** (circled) in the Phone and Modem Options dialog box.

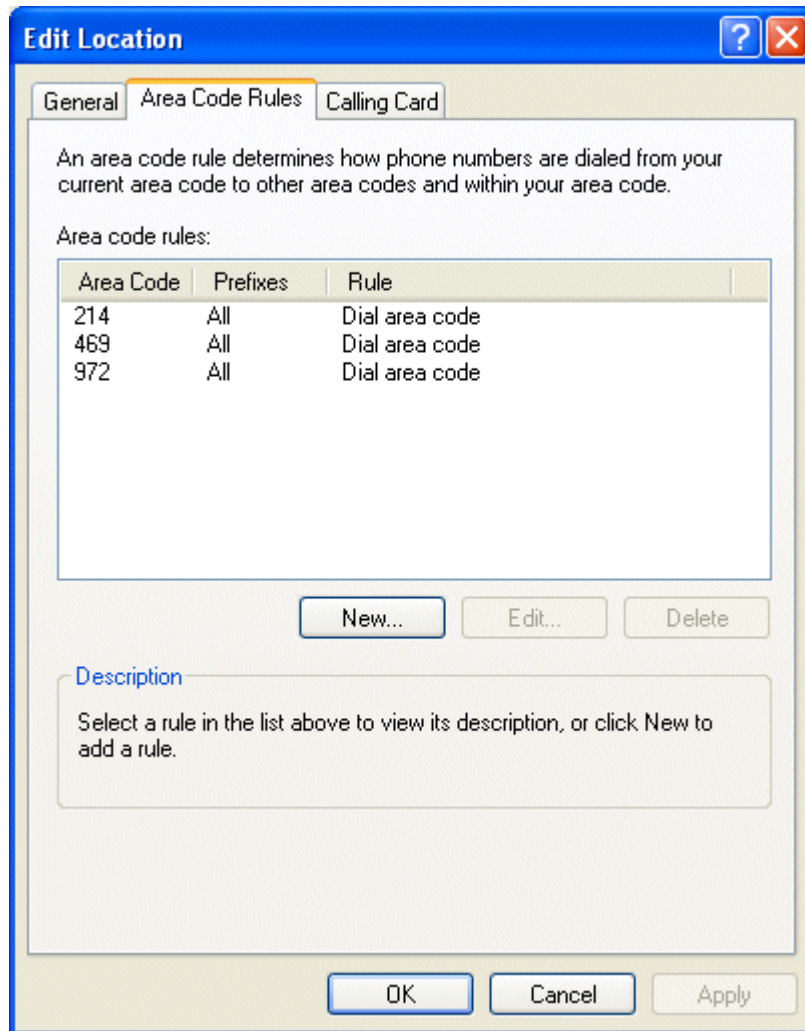


4. In the Edit Location dialog box, click the **General** tab (if not selected) and do the following:
 - a. Enter a **Location name**, if desired (boxed).
 - b. Make sure the **Country/Region** and **Area Code** information match your location and area code (see arrows).
 - c. Set the outside access digits in the Dialing Rules section to the digit that must be dialed to make an outside call (circled).



5. Click **Apply**.
6. Click the **Area Code Rules** tab and do one of the following:
 - a. Click **New** to add an area code to the list.
 - b. Highlight an existing entry and click **Edit** to make changes.

NOTE: If you have never configured Phone and Modem Options for your Windows computer, the **Area Code Rules** field will be empty. If you have setup Phone and Modem Options before for any device or application, the previously entered information will be displayed.



1. Enter the three-digit area code in the **Area Code** field for each area code where you have special rules that need to apply - such as dialing all 10 digits within your area code or having multiple area codes that are not long distance - by filling in the necessary information in the New/Edit Area Code Rule dialog box.

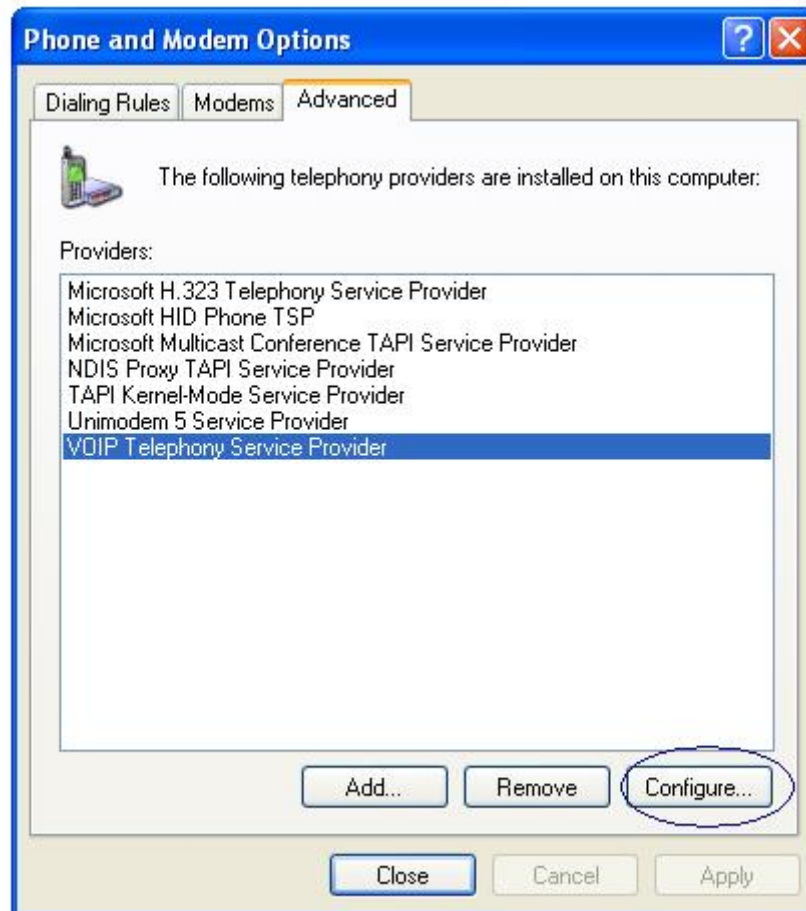
NOTE: Depending on whether you clicked New or Edit, the dialog box will say either New Area Code Rule or Edit Area Code Rule. If you clicked Edit, the area code you highlighted will be displayed in the **Area Code** field.

Example: Residents in the Dallas area have three area codes (shown in the Edit Locations), must dial the entire 10-digit number for all calls and do not need to dial 1 before making calls to any of those three area codes. As a result, the information in the Edit Area Code Rule box for 214 is set as follows:

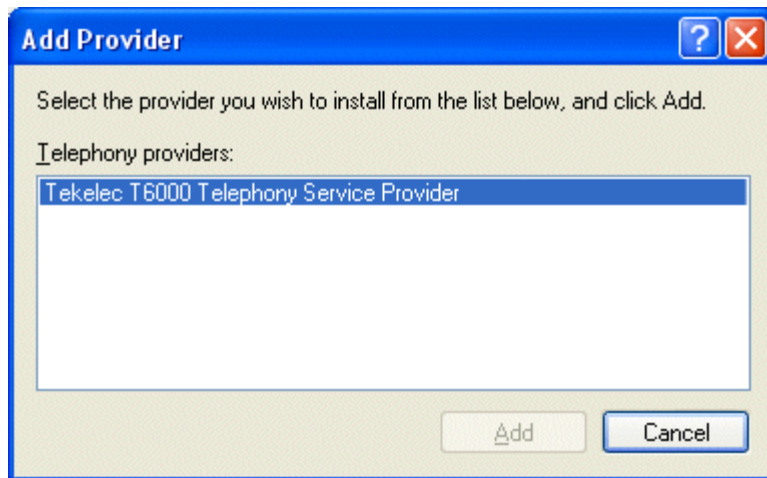
- "Include all the prefixes within this area code" is selected.
- "Dial 1" is unchecked.
- "Include the area code" is checked.
- Click **Apply** when the information is correctly set and do one of the following:
 - a. Click **New** to add another area code to the list.
 - b. Highlight another existing entry and click **Edit** to make changes.
 - c. Click **Calling Card** if you use a calling card for calls, then select the type of calling card you use and fill in the appropriate fields.

NOTE: If you need additional information about using Calling Card, please consult the Windows on-line help from the Start menu.

1. When you are finished entering information in the New Location or Edit Location dialog box, click **OK** to accept the dialing properties and close the dialog box. Return to the **Phone and Modem Options** dialog box.
2. Click the **Advanced** tab to see the list of available telephone providers.



3. If you completed the VoIP setup as part of the **TAPI** install from Web Portal, you should see the Tekelec T6000 Telephony Service Provider and you can skip to ["Configuring Outlook to Use TAPI"](#).
4. If you did not complete the VoIP setup as part of the **TAPI** install from Web Portal, click **Add** to open the Add Provider dialog box.



5. Select the listed service provider and click **Add**.
6. If a Telephony configuration dialog box appears, do the following:
 - a. Enter the IP addresses of the Call Agent servers as provided by your system administrator in the Telephony Server IP Address 1 and 2 fields.
 - b. Click **Add** to add your telephone number (the one that will be used with the **TAPI**-enabled program [such as Outlook]).



7. Enter your telephone number and password and click **OK**.



The image shows a Windows dialog box titled "Add Line". It has a blue title bar with a close button (X) in the top right corner. The dialog contains three input fields: "Phone Number" with the value "18666396491", "Phone Password" with masked characters "|||||", and "Confirm Password" with masked characters "|||||". At the bottom of the dialog are two buttons: "OK" and "Cancel".

8. Click **OK** in the dialog box to return to the Phone and Modem Options dialog box.
9. Click **Close** in the Phone and Modem Options dialog box.

Windows is now configured to allow users to make calls from their contacts, but the **TAPI**-enabled program must be configured to use the IP phone line for dialing. For information on configuring the program to use the IP phone line for dialing, go to "[Configuring Outlook to Use TAPI](#)".

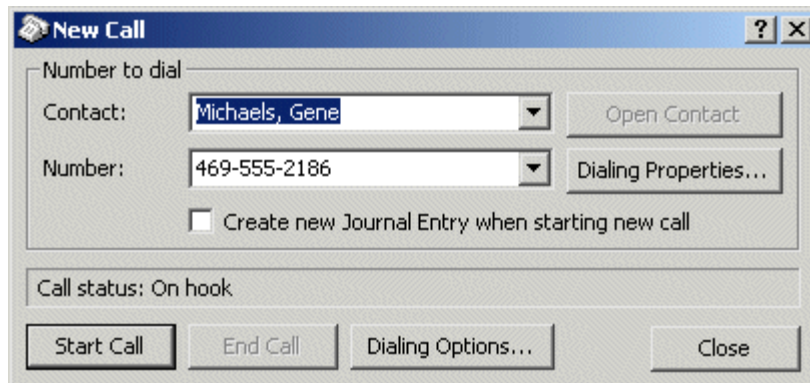
Configuring Outlook to Use **TAPI**

To configure Outlook or another **TAPI**-enabled program to dial using the VoIP system, use the following steps:

1. If not already running, start Outlook (or the **TAPI**-enabled application).
2. Click the Contacts icon to switch to the Contacts listing.
3. Right click any contact to bring up the Actions pop-up menu.



4. Click **Call Contact** on the menu (circled in the previous screen) to open the New Call dialog box.



5. Click **Dialing Options** to open the Dialing Options dialog box.
6. Click on the drop-down menu in the **Connect using line** field and scroll down any entries until you find your telephone number (circled).



7. Select your telephone number and click **OK** to return to the New Call dialog box.
8. You may call this contact or close the New Call dialog box.

NOTE: Outlook (or your **TAPI**-enabled application) is now configured to place calls using your IP telephone number.

Using **TAPI** to Call from Outlook

Once you have configured Outlook or another **TAPI**-enabled program to dial using the VoIP system, you can place calls through your telephone from the application. You must be connected to the same network that your phone is connected to for **TAPI**-enabled dialing to work with your IP phone.

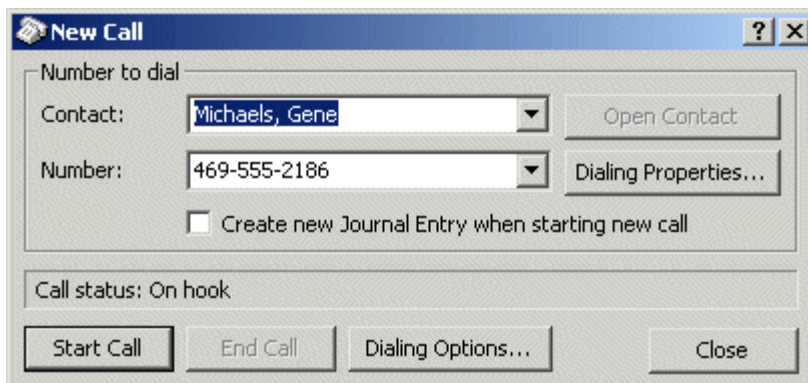
This example uses Outlook, but other **TAPI**-enabled programs will be similar. The application documentation or online help should have information on making calls using the **TAPI** functionality.

To place a call from Outlook, use the following steps:

1. Start Outlook (if not already running).
2. Click the **Contacts** icon to switch to the Contacts listing.
3. Right click on the contact you wish to call to bring up the Actions pop-up menu.



4. Click **Call Contact** on the menu (circled in the previous screen) to open the New Call dialog box.



5. Click **Start Call** to dial the telephone number displayed in the Number field.

NOTE: You cannot call four-digit extensions from Outlook. A complete 7- or 10-

digit phone number must be used.

NOTE: Always check to be sure you have the correct number selected before starting a call. If you have multiple phone numbers entered for the person you are calling, you must use the drop-down list to select the number to call.

1. The speaker on your telephone should be activated and you should hear ringing or a busy signal as the call is connected to the dialed number.
 2. If the person you called answers, carry-on the conversation in the usual manner.
-

NOTE: Do NOT click the **Close** button or icon in the New Call dialog box while carrying on a conversation on the speakerphone (if available on your phone). Closing the New Call dialog box while using the speakerphone will end the call immediately. Minimize the New Call dialog box or, if you need to close the dialog box, pick up the handset. Picking up the handset moves control of the call to the physical phone from the computer under Outlook and **TAPI**.

1. End the call by hanging up the handset, pressing the speaker button or clicking the **Close** button or icon in the New Call dialog box.

COMPATIBILITY MATRIX

The following software configurations were tested:

Operating System	Outlook 2003	Outlook 2003 SP1	Outlook 2003 SP2
Windows XP SP1	FAIL*	FAIL*	FAIL*
Windows XP SP2	FAIL*	PASS	PASS
Windows 2000 SP4	PASS	PASS	PASS

* Load the appropriate Service Pack to ensure compatibility.

TROUBLESHOOTING TIPS

The following are common configuration problems and their resolution.

Symptom	Resolution
Received "unable to detect dial tone" message via Windows.	Edit the Dialing Options and ensure the <i>Connect Using Line</i> is the subscriber's telephone number.
Received "unable to connect" message via Windows.	Go to <i>Start</i> ⇒ <i>Control Panel</i> ⇒ <i>Phone and Modem Options</i> ⇒ <i>Advanced</i> tab. Select the <i>VocalData VOISS Telephony Service Provider</i> and click <i>Remove</i> . Close all open Windows and restart the computer. Access <i>Web Portal Options</i> ⇒ <i>PC Integration</i> tab and download the application again. Install and configure based upon this document.
Received "another program is using the selected telephony device" message via Windows.	Upgrade to the latest Service Pack (see compatibility matrix in this document). Uninstall the <i>VocalData VOISS Telephony Service Provider</i> . Reboot PC. Download the <i>TAPI Integration</i> from <i>Web Portal</i> . Install and configure based upon this document.

For more information, please contact your nexogy® Sales Engineer.