

**SAVANCE**  
EIOBOARD

## **What Is EIOBoard's TAPI Feature**

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## What Is EIOBoard's TAPI Feature

### TAPI Integration with EIOBoard

The TAPI feature allows you to integrate EIOBoard with your telephone system to improve efficiency in the office. TAPI allows EIOBoard to monitor extensions and change user's statuses when they make or receive phone calls, and it allows other users to see who you are on the phone with by adding caller ID information to your EIOBoard comment. This saves users the hassle of manually changing their status to "On The Phone" while they are on the phone, it prevents users from forgetting to change their status, and it allows administrators to easily run reports on how much time any user spent on the phone. [Click Here](#) for more information on what TAPI is.

### TAPI Modes

When setting up TAPI, there are two modes: Server Mode and Client Mode. Both modes function very similarly, but their setup is slightly different. The main functionality difference is that Server Mode allows for users' statuses to change even if their computer is not turned on; in Client Mode, their status will only change if their computer is on and they are logged into EIOBoard. Either mode may be chosen based on the user's preference. Each mode is described in detail below:

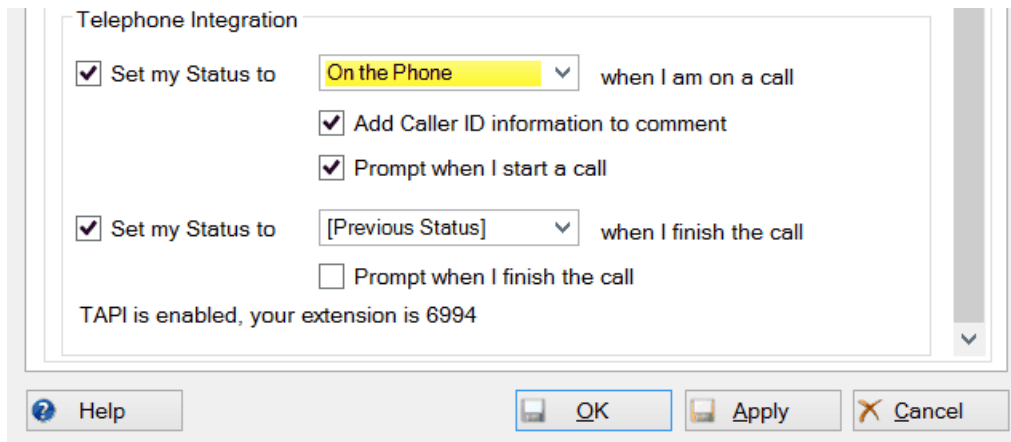
- **Server Mode:** Extension monitoring is done only by the EIOBoard Server, meaning that users' statuses will change anytime they make or receive a phone call (even if their computer is off or they are not logged on to EIOBoard). The TAPI driver will only need to be installed on the server machine, not on any user machines. This mode is ideal if you would like users' statuses to change even if they are not logged into EIOBoard or if particular users use the Browser Interface (which does not work with Client Mode). NOTE: This mode is only available to Customer-Hosted customers because the TAPI driver must be installed on the server.
- **Client Mode:** Extension monitoring is done by each client, meaning that users' statuses will change only if their EIOBoard is open and logged in. The TAPI driver will need to be installed on each machine that uses EIOBoard, and users will have to use the EIOBoard Stand-Alone Application or the EIOBoard Outlook Add-In. This mode might be ideal if extension monitoring only needs to be done for a small amount of users or if the TAPI driver can't be installed on the EIOBoard server. Users will have to use Client Mode if they are EIOBoard-Hosted because they do not have a server to install the TAPI driver on.



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### How the Client is Used

You have a couple of options on how to utilize TAPI and configure settings. An administrator can deploy settings from Company User Settings, or settings can be configured on a user-by-user basis. An individual user's TAPI settings can be accessed by going to Settings > Default Status > Telephone Integration (seen below):



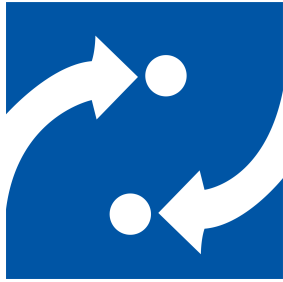
If the user checks the “Set my status to X when I am on a call” checkbox, the user’s status will be changed to the specified status whenever a call is made or received. Optionally, the user can check the checkboxes below to add caller ID information to their EIOBoard comment (which would, for example, indicate that the user received an incoming call from 248-555-9587). The user can also be prompted before his or her status is changed, meaning that the status change will not occur unless the user confirms it on his or her computer.

Finally, if the user checks the “Set my status to X when I finish the call” checkbox, the user’s status will be changed to the specified status whenever a call is ended. This feature is optional; if unchecked, the user will have to manually change his or her status once the call has ended. The user has the option to change to “[Previous Status]”, which means that the user’s status will change to whatever his or her status was before the call. The user can also be prompted to change their status when the call ends, just like at the start of a call.

EIOBoard’s TAPI feature can improve efficiency in the workplace, and it’s just another way that EIOBoard can automate office processes so that users can continue to stay focused on their work.

### Helpful Links

- [Information on TAPI including a list of phone systems that support it](#)
- [List of Phone Systems supported through Mondago's Universal TAPI Driver](#)
- [How to configure Telephone Presence Sensing](#)
- [How to apply a License Key to gain access to TAPI](#)



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**Thank you for choosing Savance!**

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