

TAPIT NOVA ezBox

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Getting Started

Step 1. Connect ezBox PC to the network.....**page 3** (**page 4** for ezBox Enhanced).

Step 2. Set up access to ezBox either via Remote Desktop or by connecting a monitor, a keyboard and a mouse directly to ezBox PC.....**page 5**.

Please note:

Monitor is NOT provided by Trisys;

Keyboard and a mouse are **ONLY** included with ezBox **Enhanced**.

Step3. Tapit Nova is already installed on the ezBox. Some of the TAPIT NOVA settings are system specific. They have to be configured so your call data is processed correctly.

First, configure SMDR Service Manger.....**page 6**.

Second, enable Tapit Nova email feature – for reports and system notifications.....**page 11**.

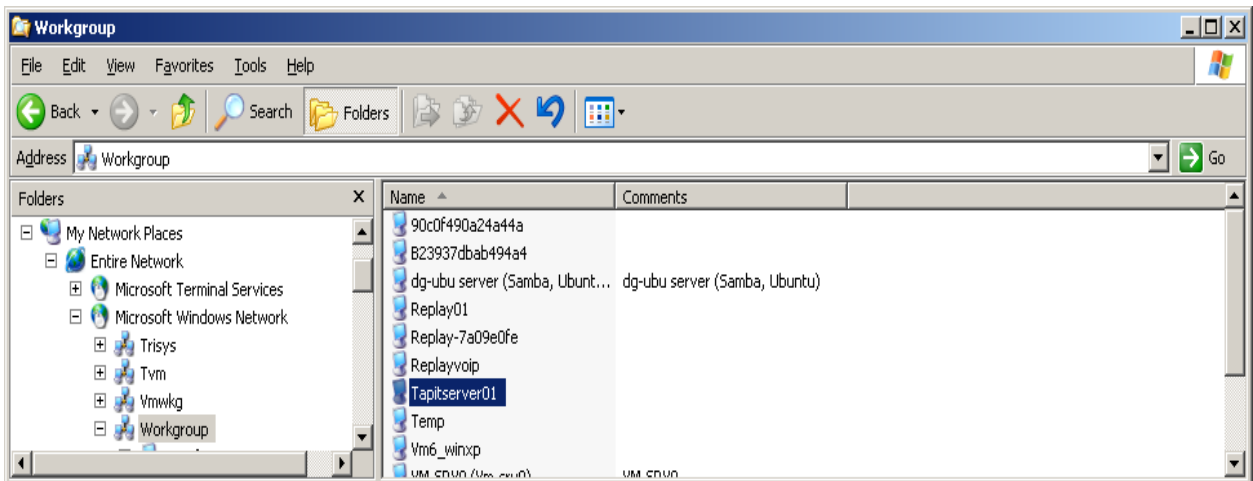
Third, refer to Tapit Nova manual and, if needed, set up Users, Departments, Clients, DNIS Numbers and Campaign, Matter Codes, Pricing, etc.

Connecting ezBox to your network

1. Connect your network cable to the **LEFT RJ-45** slot (when looking from the back).



2. Turn the ezBox PC on.
By default, ezBox is configured to be a member of your Workgroup, and get the IP address from your DHCP server.
3. Open **Windows Explorer** on any pc on your network.
4. Select **My Network Places\Entire Network\Microsoft Windows Network\Workgroup**.
5. **Tapitserver01** should be one of the computer names displayed in the right-hand side panel.



Connecting ezBox Enhanced to your network

1. Connect your network cable to the **RJ-45** slot (on the back panel).

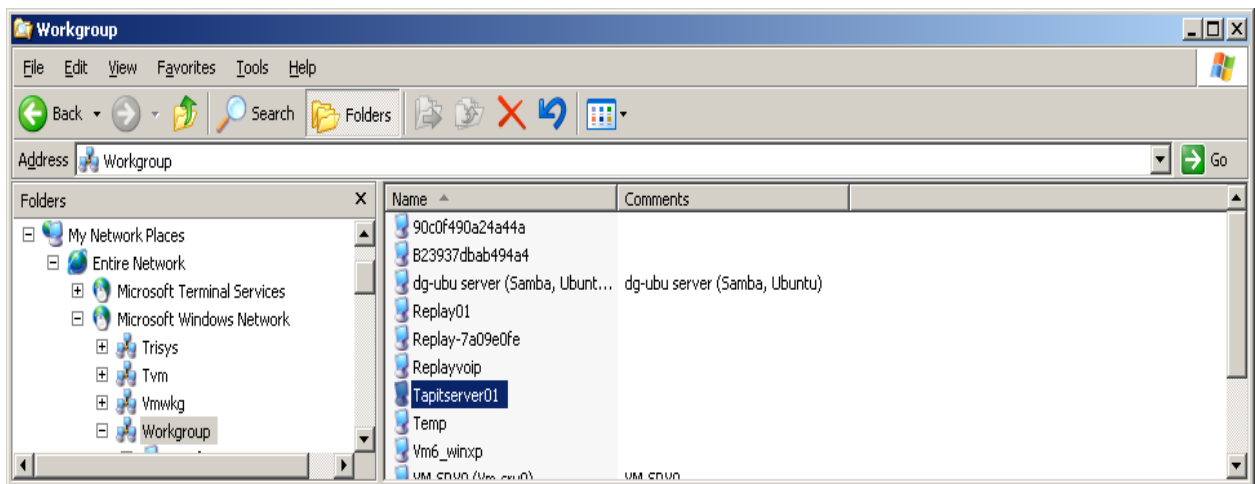


2. Turn the ezBox PC on.

NOTE: the “rackmount” case has 2 switches that must be turned ON. One is located on the back of the PC next to the power cord. It must be **turned ON first**. Then, on the front panel (the left side, above the DVD), press the **LEFT button** to turn the PC on.

NOTE: By default, ezBox is configured to be a member of your Workgroup, and get the IP address from your DHCP server.

3. Open **Windows Explorer** on any pc on your network.
4. Select **My Network Places\Entire Network\Microsoft Windows Network\Workgroup**.
5. **Tapitserver01** should be one of the computer names displayed in the right-hand side panel.



Accessing ezBox

Once the ezBox PC is connected to the network you can access it in two ways.

1. By connecting a monitor, a keyboard and a mouse directly to the ezBox PC.
Please note: a monitor, a keyboard and a mouse are not included in the ezBox purchase.
2. By remote desktop access; ezBox gets the IP address from your DHCP server as soon as it is connected to the network. Your network administrator will be able to provide the IP address for the for the remote connection to the ezBox.
3. Log in to the ezBox PC with default windows account:
User Name: **admin**
Password: **trisys123**

Configuring SMDR Service Manager

Before using Tapit NOVA the SMDR Service Manager needs to be configured.

1. If you are not logged in to ezBox PC follow instructions on how to access ezBox from section above, Accessing ezBox.
2. The SMDR Service Manger may already be opened and minimized on your PC, if this is not the case, open SMDR Service Manager - **Start/Tapit Nova/SMDR Service Manger**.
3. Click on the **Action** menu.
4. Click on **Stop Service**. If **Stop Service** option is disabled (grayed out) it means the service is stopped already and you can proceed with pt.4.
5. Click on the **Settings** menu.
6. Click on **PBX Format**.
7. The **Current PBX Settings** screen comes up.

Current PBX Settings

Local Phone Number
9088981386 (10 digits only, e.g. 9733602300)

Collect and Process SMDR Data from COM Port or Text File ?

COM Port (For configuration screen select 'COM Port' under 'Settings' menu)

Text File (Call data collected using IP Collector, CDR Loader or other utility)

C:\TAPITNOVA\LOCATIONS\LO\DATA\TELMSG.DAT

Select current PBX format:
CISCO CCM 5.1 w/ FTP Push File - CDRWM - NXP

eXtended Processing (Note: This option is NOT available for all PBX formats)

Use Computer or Telephone System Date ?

Computer Date PBX Date

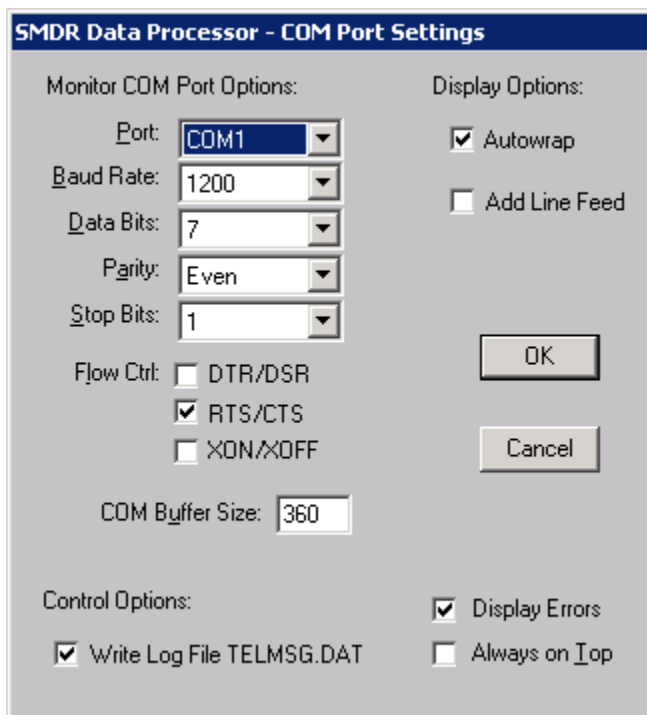
Check and process Text file every 120 seconds (in 60 sec. increments)

OK Cancel

Note: in case you have more than one location (you've purchased Remote Manager) this screen pertains to the Main location.

8. **Local Phone Number** - enter the local phone number for the Main location.

9. Depending on how Tapit is obtaining SMDR data click on one of the options under **Collect and Process SMDR Data from COM Port or Text File?**
COM Port – select this option if SMDR data is collected via COM Port.
Text File – select this option if SMDR data is collected via IP Collector, CDR Loader or another utility.
10. **Select current PBX format** – select the PBX format you are using.
11. **eXtended Processing** - this option is not available for ALL PBX formats. For some PBX formats it is checked by default. If the box is not checked by default, check it only when you are certain TAPIT supports extended processing format, or when suggested by Trisys Technical Support.
12. **Use Computer or Telephone System Date?** - click on the PBX or the Computer option to specify whether date information for the call records is going to be processed based on the computer or PBX date. You must check the **Computer date** option if your phone system is not generating the following date information: day, month and year. Otherwise we recommend you use the **PBX date**.
13. **Check and process Text file every...seconds** – this option becomes available when the **Load Calls from Text File** box is checked. The value entered in this box determines how often TAPIT loads data from the text file (as opposed to the Call Load task that converts raw information into TAPIT database format file).
14. Click on **OK** to save settings.
15. If TAPIT NOVA is collecting SMDR data via COM Port, open **Settings/Com Port**. However, if TAPIT NOVA is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader or another utility) proceed with point 22.



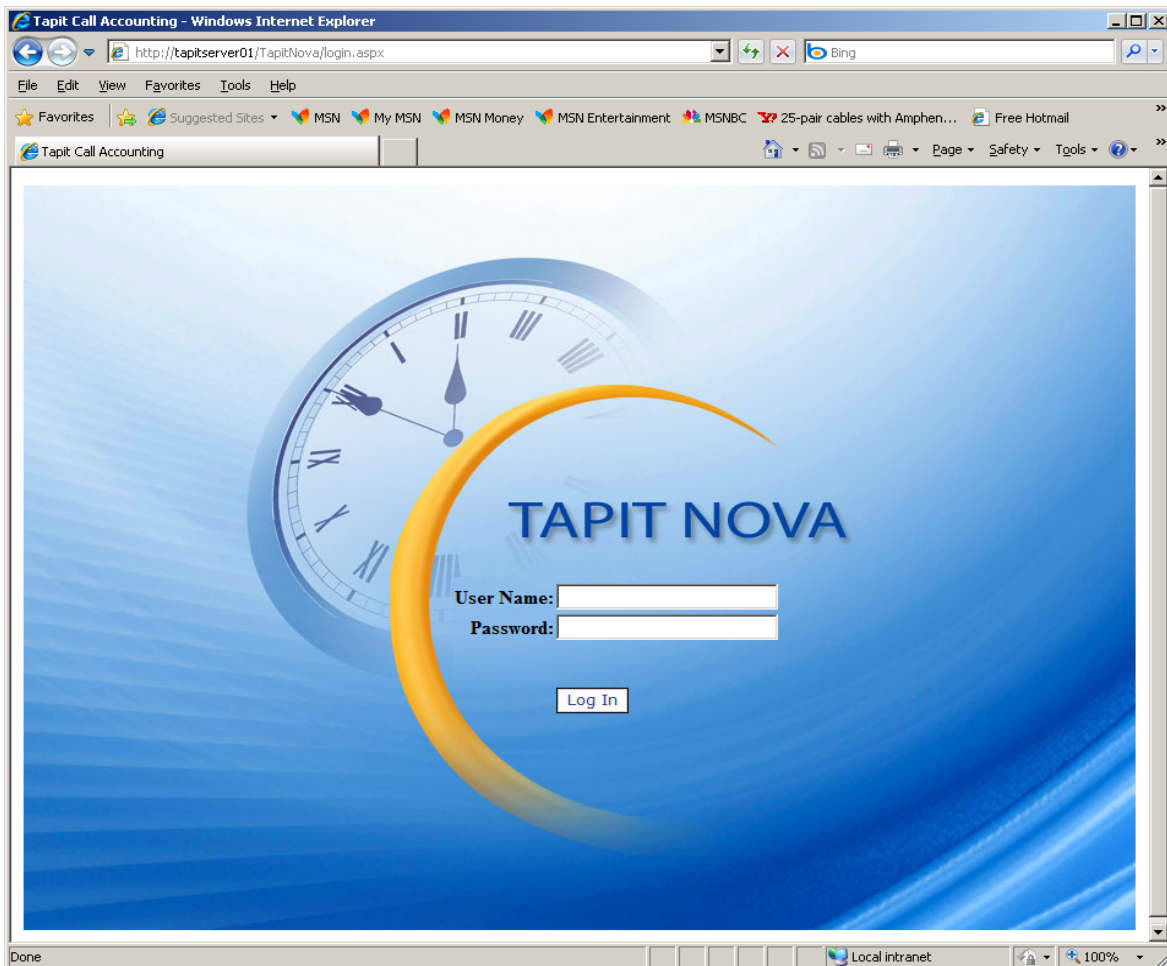
16. **Port** - click on the down arrow icon in the **Port** field to select a port on the computer the SMDR cable is connected to.

17. **Baud Rate** - click on the down arrow icon in the **Baud Rate** field to select a transmission speed the phone system is set at.
18. **Data Bits** - click on the down arrow icon in the **Data Bits** field to select a data bits setting of the phone system.
19. **Parity** - click on the down arrow icon in the **Parity** field to select a parity setting of the phone system.
20. **Stop Bits** - click on the down arrow icon in the **Stop Bits** field to select a stop bits setting of the phone system.
21. **Flow Ctrl.** - check an appropriate box to select a flow control parameter that may be required by the PBX (refer to PBX's documentation).
22. **Com Buffer Size** - a number of characters SMDR Monitor will hold in the memory buffer before saving data to the hard disk of the computer (recommended setting is 360).
23. When finished click on **Action** and then **Start Service** to start data collection.
The **SMDR Data Processor Service** has started and is ready to process call data.

Accessing Tapit Nova via Internet Explorer

Tapit NOVA interface is 100% Web based. You can access it from any PC with the connection to ezBox PC.

1. Open your Internet Explorer.
2. Type in the URL field: `//tapitserver01/TapitNova` and press ENTER.
The Tapit Call Accounting screen comes up.



3. Login into Tapit Nova with the default login credentials (user name: `tapit_manager` and password: `tapit_manager`).
Enter `tapit_manager` into both user name and password fields.
Click on **Log In**.

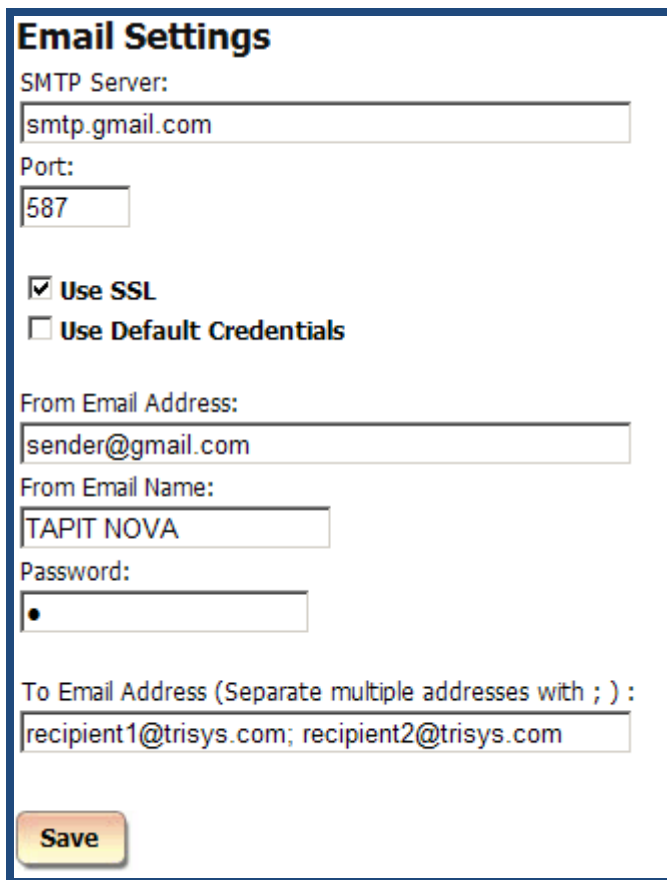
"tapit_manager" is a default System Manager account. It works as both a user name and a password for logging in to TAPIT NOVA. In future, if you would like to use the Security feature of TAPIT NOVA to restrict access to the application, it is recommended to create another System Manager password and delete the default account.

Enabling TAPIT NOVA Email

We strongly recommend that you configure **Email** settings in Tapit Nova.

The **Email Settings** screen is used to enter email information needed for sending reports and/or system notifications.

1. Log in to the Tapit Nova application (follow instructions from the section above **Accessing Tapit Nova via Internet Explorer** on how to log in to TAPIT NOVA).
2. Click on the **System** button located on the top of the screen.
3. Click on the **System** tab.
4. Click on the **Email** link. The **Email** screen is displayed.



The screenshot shows the 'Email Settings' configuration page. It includes the following fields and options:

- SMTP Server:** smtp.gmail.com
- Port:** 587
- Use SSL**
- Use Default Credentials**
- From Email Address:** sender@gmail.com
- From Email Name:** TAPIT NOVA
- Password:** [masked with a dot]
- To Email Address (Separate multiple addresses with ;) :** recipient1@trisys.com; recipient2@trisys.com
- Save** button

The above settings are for EXAMPLE ONLY. The correct settings for your SMTP server should be easily obtained from your Network administrator. Properly configured email settings are critical to optimal performance of Tapit Nova. It is the **ONLY** way that Nova can communicate with you.

5. **Host** – enter the name of the SMTP Server.
6. **Port** – enter the port you would like to use to send email from TAPIT NOVA.
7. **SSL** – check this option if you would like to use SSL certificate.

8. **Use Default Credentials** – check this option if you would like to use **Default Network Credentials**. Otherwise, email will be sent anonymously.
9. **From Email Address** – enter sender’s valid email address.
10. **From Email Name** – enter the name to represent sender.
11. **Password** – enter password for SMTP Server authentication (optional, only if needed).
12. **Send Tapit Error Reports to** – enter recipient’s valid email address.

Hardware Support and Warranty

Trisys takes great care to make sure that all our hardware systems (including all hardware and software components) are fully operational prior to shipping. The initial **one year** support and warranty is provided with the purchase of every system, and covers normal business use. Additional support and warranty may **only** be purchased while the system is still under support and warranty.

In the unlikely event that any component of our system malfunctions, we will fix or replace it as long as the system is under warranty.

The following is not covered under our support and warranty agreement. Trisys may consider repairing such a system, however, the repairs would be on a “Time and Material” basis:

The following voids the warranty:

Any modification made to the hardware or software components (as well as installation of any additional software) without prior written consent from Trisys will void the warranty;

Any damage to the system resulting from vandalism, software virus, power surge/outage, an act of nature, or any type of physical abuse.

Sending hardware systems to Trisys for warranty work:

Please make sure to obtain Work Order # from Trisys’ technical support; then clearly display it on the package. Units received by Trisys without WO# will not be opened until all information is available. This may significantly delay the repair work.

Each hardware system sold by Trisys has the necessary operating system and hardware device drivers software included. When sending your system for repair, the **original software must** accompany the unit. If this software is not provided, Trisys will have to bill the client for the replacement cost.

It is client’s responsibility to backup, if possible, any important data. Trisys will not be responsible for any data loss.

All systems sent back to Trisys for repair must be packaged well to minimize the damage in transit. We strongly recommend that the system be insured during shipping. Trisys will not be responsible for systems damaged in transit on the way to us.

Trisys’ technical support will provide you with the shipping address of your unit.

Getting Help

For technical assistance, please call **973.360.2300**

or

Email to tech@trisys.com

FAQ is available at www.trisys.com