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Tapit Web Reports

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http://www.trisys.com/
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REQUIREMENTS

You must have administrative rights for the local computer in order to install the Tapit Web Reports.

Tapit EX Multi-User must be installed and set up.
Tapit Web Reports can work only with Multi-User versions of TAPIT.
When installing Tapit Web Reports on a machine other then your TAPIT Server make sure you can point from it to the TAPIT database located on the TAPIT Server.

Windows Firewall has to be turned off on the PC where the Tapit Web Reports software is installed to enable access to Tapit Web Reports from different PCs on Intranet/Internet.
Windows Firewall has to be turned off on the Replay Boxes as well to enable listening to voice files residing on the Replay Boxes via Web Reports.

If you've purchased Screen Logger:
Screen Logger Viewer must be installed on each PC used to view computer activity for registered extensions.
Screen logger needs to be setup via Web Reports. Please see page 57 for instructions.

If you've purchased Replay TX:
Each PC used for listening to the recordings must have a sound card.

Hardware:

- CPU: Pentium II 200MHz or faster

- RAM: 64 MB (more recommended)

- Hard-disk Space: Minimum 20 MB

Windows 2000 and Windows XP Professional software requirements:

- OS: Windows 2000 Server Service Pack 1 or higher recommended

- Browser: Internet Explorer 5.5 Service Pack 2 or higher

- Data Access Drivers: MDAC 2.5 or higher

INSTALLATION

Before installing Tapit Web Reports

- You must have administrative access rights to the computer where the Tapit Web Reports application will be installed.
- TAPIT EX Multi-User version must be installed and set up.
  To verify the correct version of the TAPIT EX database, go to Start/Tapit/Tapit Repair. The initial TAPIT Repair screen displays the database release number in the lower right corner. If you have the Remote Manager software installed click on Continue. To verify the release number for each location database select the location name and check the lower right corner.
  The correct release number for the TAPIT EX database is 5.
- When installing Tapit Web Reports on a computer other than your TAPIT Server, you must be able to point from that machine to the TAPIT database folder located on the TAPIT Server. You must have read and write access rights to the TAPIT database folder.

Installation program may require you to reboot your PC.

NOTE for Replay users:
In order to protect your recordings from security breach, we recommend installing Web Reports on the Intranet. If you need to listen to the recorded phone conversations from outside, use VPN connection.

IMPORTANT:
All Replay Boxes clocks should be synchronized with either TAPIT Server, or PBX (depending which is date/time stamping TAPIT phone records) within the same Tapit location*. Each Replay Box clock has to be set at **exactly the same time** or **behind** (up to 5 seconds) the clock Tapit is using to date/time stamp call records (PC or PBX). Replay box clock **cannot be faster** than the clock Tapit is using.

*If you have purchased Remote Manager you most likely have more than one location (Main and remote sites), otherwise you have only one location (Main).

To change Replay Box time:

Replay T1 Box - use the box's web interface to change time (see ReplayT1BoxAdminManual.pdf on your Replay CD for instructions).

Replay ATS Box is a PC. Use this PC clock to change time.

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Installing Tapit Web Reports

If you are **installing** Tapit Web Reports on **a computer other than TAPIT Server machine** follow the instructions below before you proceed with installation.

- On the computer where the TAPIT database is residing check if the database folder is shared. In this case, we are going to use the following database folder path: i.e. C:\TAPITW32\Data\Main. For this example Data is a shared folder.
- Confirm the Tapit.ini file is located in the TAPIT database folder.
- Map the shared directory onto the Tapit Web Reports computer (where the Tapit Web Reports application is going to be installed) i.e. the mapped path to the database folder is K:\Main.

1. Insert Replay CD into the CD ROM drive. **Replay Installation** screen is displayed in your Internet Explorer browser.
2. Click on **Install Tapit Web Reports.**
3. **Tapit Reports Installation** screen appears.
   Click on the **Next** button to continue.
4. The new screen **Tapit Database Folder Path** is displayed.

Enter the path to the folder where the Tapit database is located or click on a **Browse** button to locate the database folder. Only the path to the database folder (without ending backslash) is required i.e. C:\TapitW32\Data\Main.
Do NOT enter the Tapit database file name.
Click on **Next**.
Note: If TAPIT is not properly installed or you have entered an incorrect path to the database or the TAPIT database release number is not "5" then the message "Cannot access the Tapit database at *: your database path*" appears. You cannot continue with Tapit Web Reports installation.

5. **User Account** screen appears.
   User Name field - enter a user account to be used by IIS to run the Tapit Web Reports application. This account needs Full Control permissions for all Tapit Web Report application folders (**TapitWeb** folder where Tapit Web Reports are installed and its subfolders - especially **TapitWeb\TapitReps\Data** folder) and TAPIT database folder (where TAPIT database resides).
   When entering Domain User Name use the following format: DOMAIN\User
   Enter this user's password in the **Password** field and confirm the password by reentering it in the **Confirm Password** field.
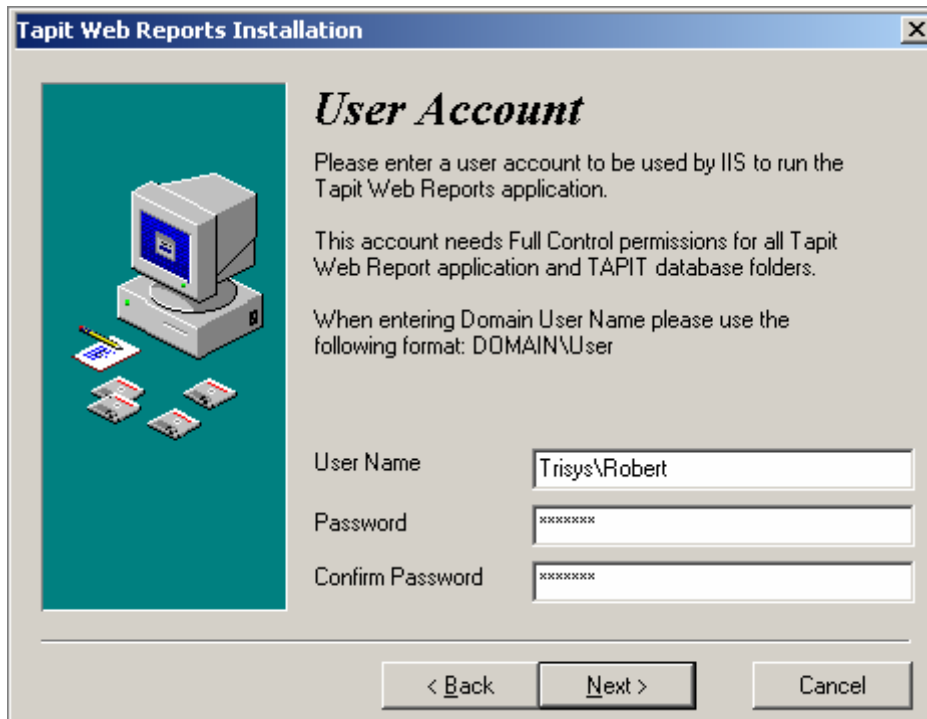
6. The Mail Server screen appears.
   Tapit Web Reports application, when used with Replay recording software, enables a user to email MP3 voice files. The Mail Server settings are required to facilitate this feature.
   If you don't have this information handy you can enter mail server parameters at a later time when using Tapit Web Reports.
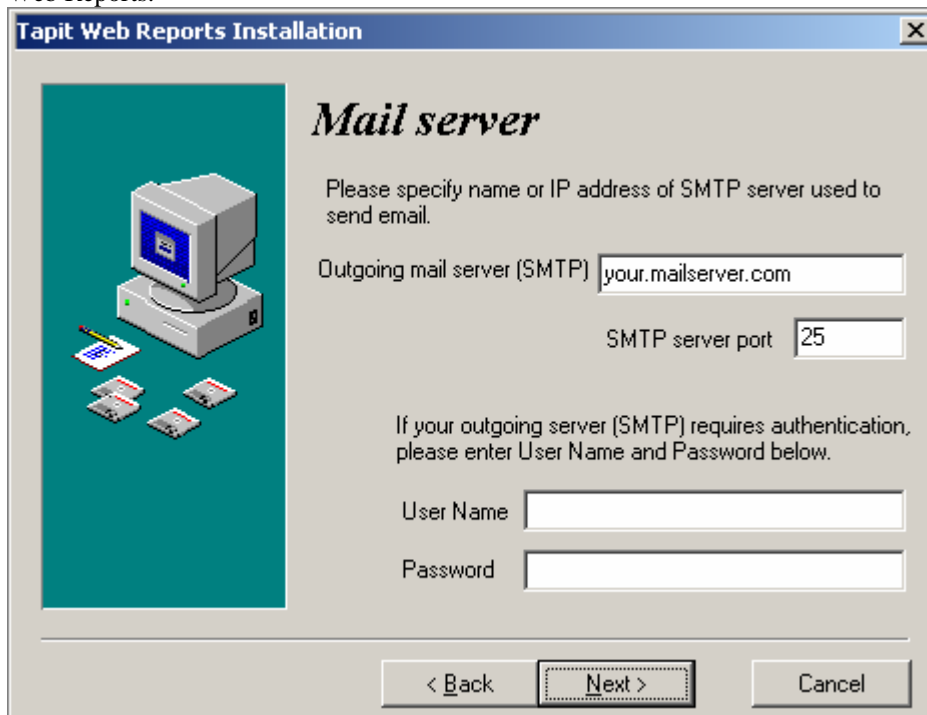
7. **Application Passwords** screen follows.

Create two passwords. These passwords are required to log into the Tapit Web Reports application. Users will not be able to view reports without a password. The passwords are required entries.
Note: User password allows for running all reports except the Authorization Code and Trunk Analysis categories. Administrator password enables a person to change passwords and generate all available reports.

8. Click on **Next**.
9. This screen prompts you to select the path to the folder where the Tapit Web Reports application will be installed.
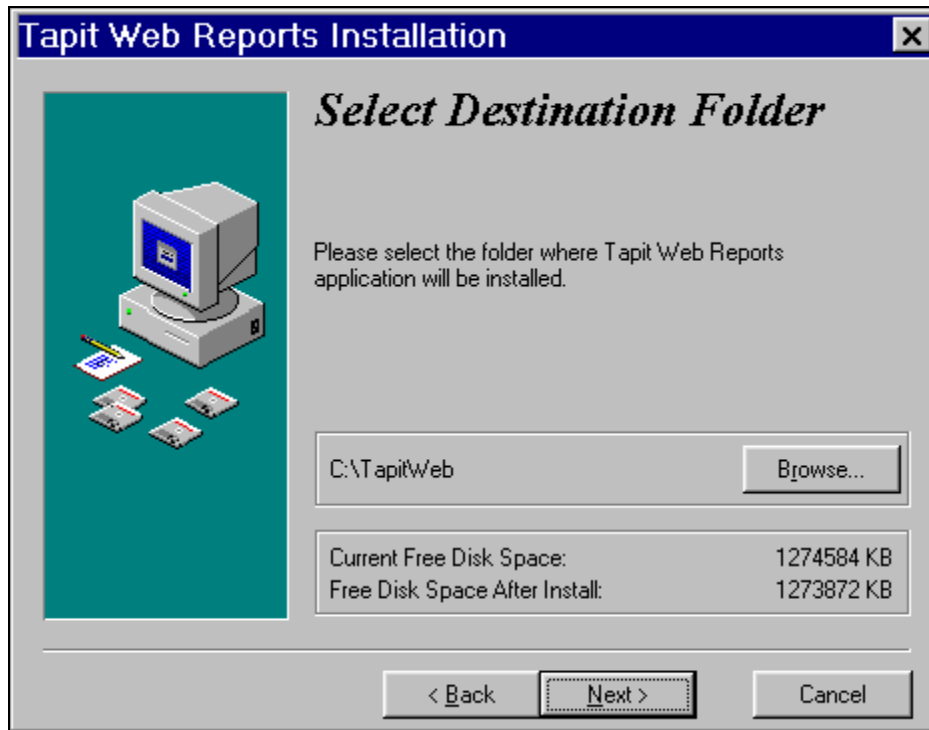
Accept the default value or click on the **Browse** button to locate a different folder.
Click on **Next**.

10. The **Ready to Install!** screen appears. Click on **Next**. Setup program starts installing files.

11. **Installation Completed** screen is displayed. Check the **View ReadMe.txt** check box if you would like to print/read user instructions document. Click on **Finish**.

Changing IIS permissions

During installation entries from the User Account screen are used to set up IIS to use an appropriate user account when running the Tapit Web Reports application. However, you can change user account settings using provided *TapitWebConfig.hta* utility or manually.

*Changing IIS permissions with **TapitWebConfig.hta***

1. Click on **Start** menu and select **Start/Programs/Tapit Web Reports/ Tapit Web Config.**
   Tapit Web Reports Configuration screen opens in your Internet browser.

2. User field contains the currently used (by IIS) User Name. You can type a new user name if required.
   Note: this user account is used by IIS to run the Tapit Web Reports and it needs Full Control permissions for all Tapit Web Report application folders (TapitWeb folder where Tapit Web Reports are installed and its subfolders - especially TapitWeb\TapitReps\Data folder) and TAPIT database folder (where TAPIT database resides).
   When entering Domain User Name use the following format: DOMAIN\User
3. Enter this users' password in a **Password** field and confirm the password by reentering it in the **Confirm Password** field.
4. Click on **Change**.
   If the IIS settings are changed successfully you will receive a confirmation message.

*Changing IIS permissions with **manually***.

1. Click on **Start** menu and select **Programs/Administrative Tools/Internet Services Manager** (when working with Windows NT click on the **Internet Services Manager** icon on your desktop). The **Internet Information Services** screen (or if using Windows NT the **Microsoft Management Console** screen) appears.
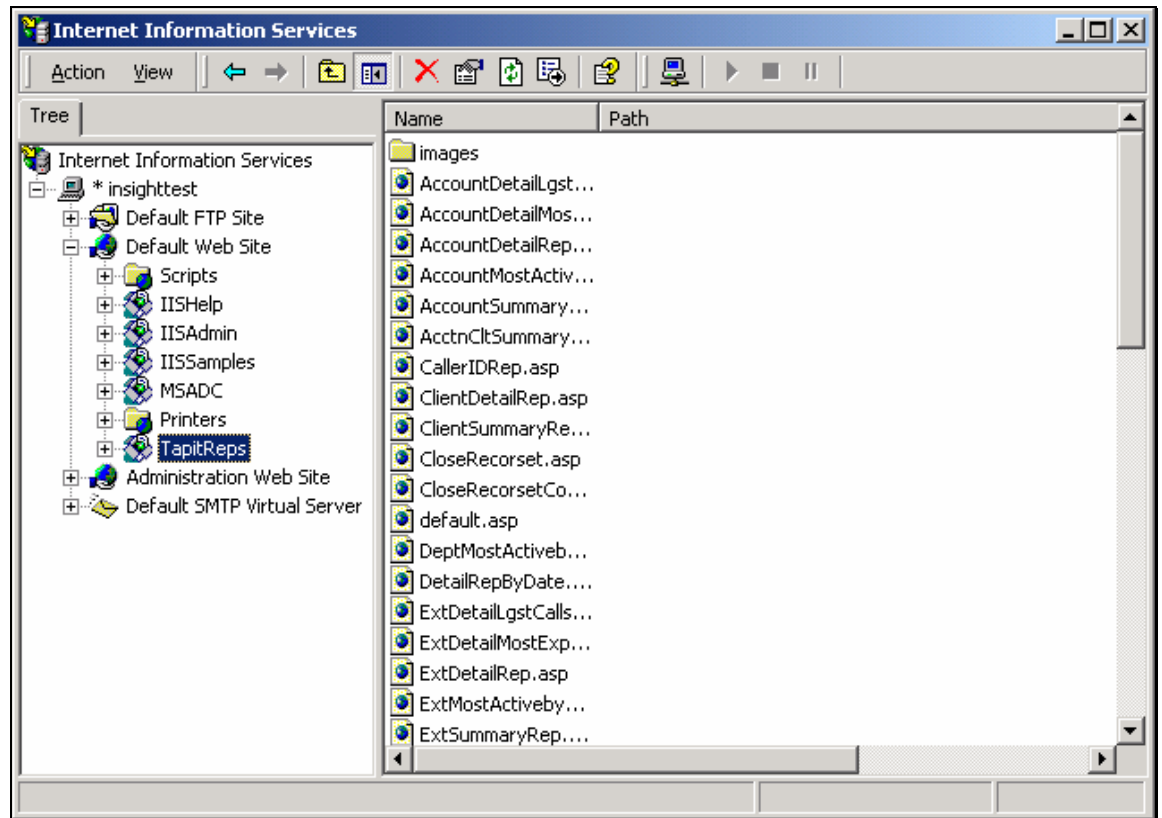
2. Click on the **Default Web Site** folder and select **TapitReps** folder below. Right-click on the folder and select the **Properties** option from the drop-down menu.

3. The **TapitReps Properties** screen is displayed.
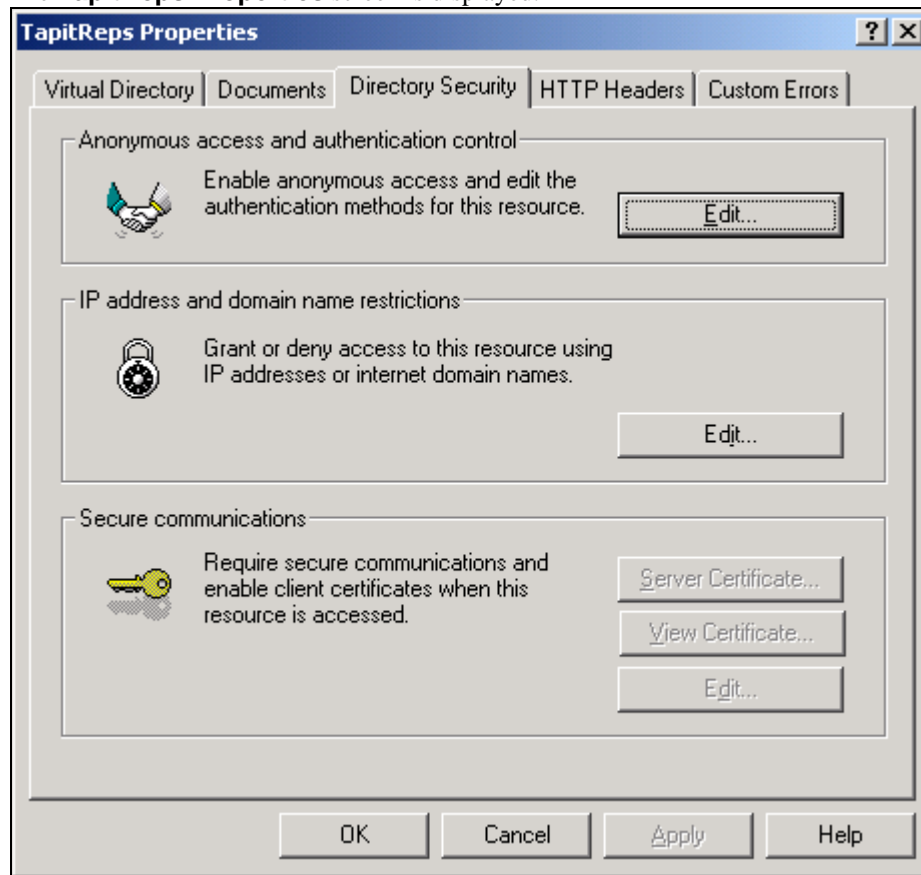
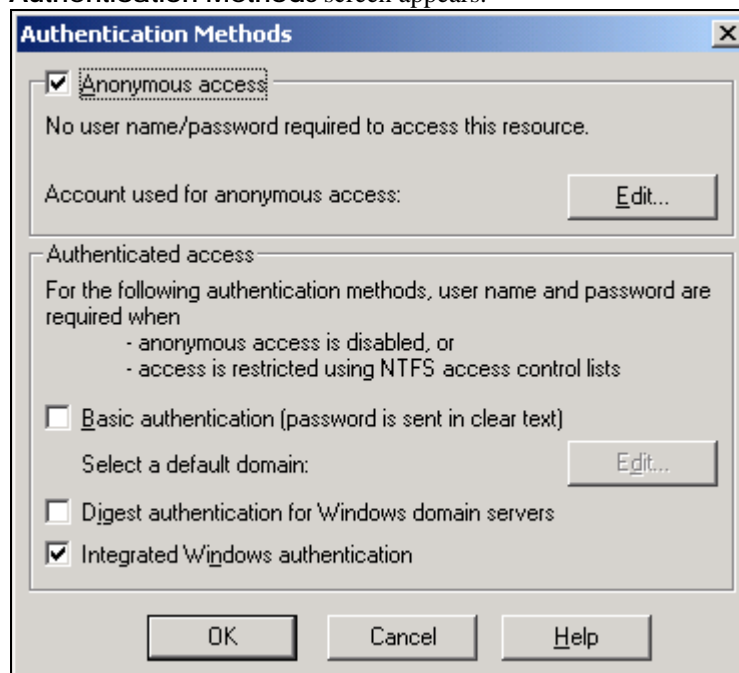4. Click on the **Directory Security** tab.
5. Click on the **Edit** button located in the Anonymous access and authentication control group.
   Authentication Methods screen appears.

6. Click on **Edit**. The **Anonymous User Account** screen is displayed.

The screen contains the default account user name for the Tapit Web Reports application used to access the TAPIT database and other files located on a TAPIT Server computer.
This default account does not have read or write permissions to the TAPIT Server machine.

7. Click on the **Allow IIS to control password** (if using Windows NT - **Enable Automatic Password Synchronization**) box to <u>uncheck</u> it.

8. Enter the account name into the **Username** text box or click on the **Browse** button and select the appropriate name from the list. This account needs Full Control permissions for all Tapit Web Report application folders (**TapitWeb** folder where Tapit Web Reports are installed and its subfolders - especially **TapitWeb\TapitReps\Data** folder) and TAPIT database folder (where TAPIT database resides).

9. Enter the new password. Press enter.
Type in the password again in the confirmation screen. Click on **OK**.

10. Your screen should look similar to the screen below with the exception of the **Username** value, which will be different in your case.

11. Click on **OK**.

- To start the Tapit Web Reports application on the same computer:
Go to **Start/Programs/Tapit Web Reports/Tapit Reports**.

To view Tapit Web Reports via Network from a different computer:
Note: The computer where the Tapit Web Reports application has been installed must be turned on and its Web Server must be running.
Open the Internet Explorer and type in the following link:
http://*web server name***/TapitReps** (i.e. http://myserver/TapitReps).

Note for IIS 6.00 and later:

IIS 6.0 introduced Application Pools. When IIS 6.0 is running in Worker Process Isolation Mode (the default in a new installation of Microsoft® Windows Server™ 2003), every IIS 6.0 site runs in an

application pool. If Tapit Web Reports runs on IIS 6.0 in Worker Process Isolation Mode you need to increase the Idle Timeout setting for the Worker Processes. This setting is 20 minutes by default. Tapit Web Reports session is 60 minutes. If Idle Timeout is left at default, Web Reports is going to terminate in 20 minutes of idle time instead of 60 minutes.

How to change the Idle Timeout setting:

1. Open IIS.
2. Right -click on the **TapitReps** virtual folder and bring up the **Properties** screen.
3. Go to the **Virtual Directory** tab. Make a note of the application pool name in the **Application pool** field. In our example it is the **DefaultAppPool**.
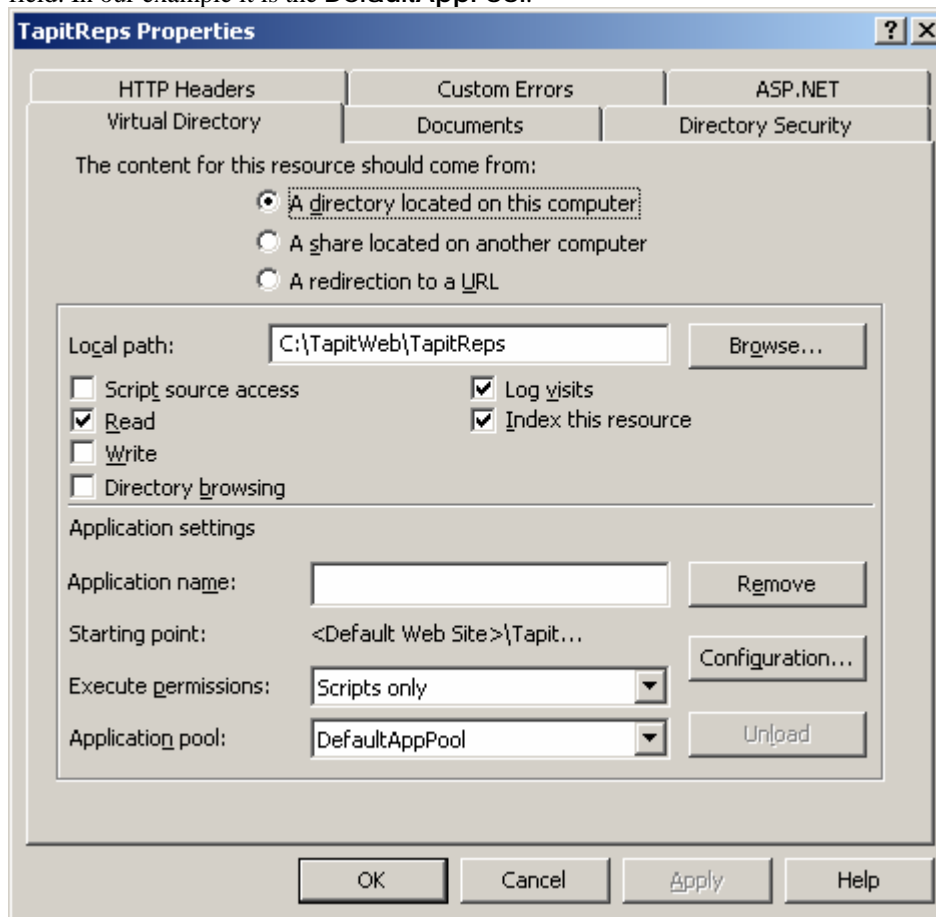
4. Close the **TapitReps** properties screen.
5. Right-click on the application pool name (in IIS under Application Pools) used by TapitReps and bring up the **Properties** screen. Go to the **Performance** tab.
6. Increase **Shutdown worker processes after being idled for (time in minutes):** setting to 70.
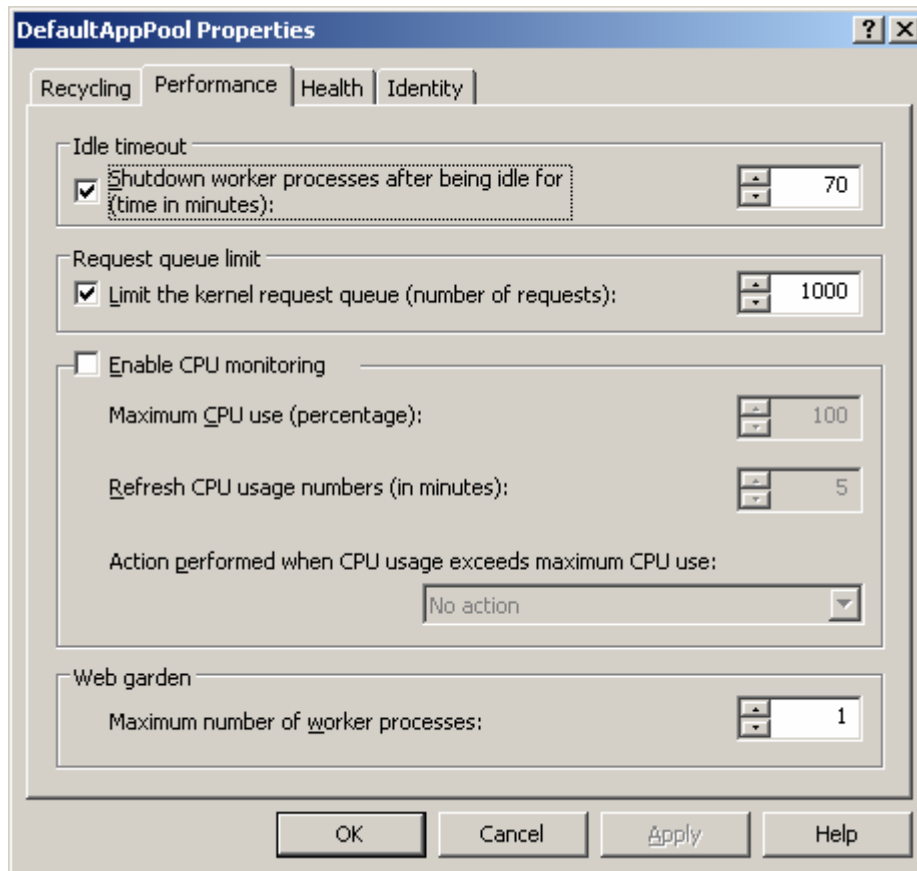
7. Click on **Apply**.
8. Click on **OK**.
9. Close IIS.

UPGRADING TAPIT WEB REPORTS

Note: TAPIT Web Reports version 4.1.1.5 (versions distributed with TAPIT EX 4.1.0 and higher) and higher works ONLY with the Multi-User versions of TAPIT EX.
TAPIT EX must be installed and set up before upgrading TAPIT Web Reports.

When upgrading TAPIT Web Reports passwords are not carried from the old version to the new version.
You have to re-enter passwords while installing the software.

Upgrading TAPIT Web Reports ver. 4.1.5.0 and higher (versions distributed with TAPIT EX 4.1.5 and higher)

The location/department level permission module has been added to the Tapit Web Reports ver. 4.1.5.0
The permission information is stored in TapitWeb/Bin/ Security.mdb database.
When performing uninstall this database is deleted.
If you are using permission module (you have created users and permissions for Tapit Web Reports) do not uninstall Tapit Web Reports. Simply run the installation of the upgrade version. The upgrade installation will update your files without deleting Security.mdb.
If you need to uninstall the program and want to preserve your security data, you need to make a backup of the Security.mdb first. Store the backup file in a folder outside the TapitWeb folder. Once the upgrade installation is finished you can overwrite the new Security.mdb file with the backed up file.

For upgrade installation follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports ver. 4.1.1.5 and higher (versions distributed with TAPIT EX 4.1.0 and higher)

1. Go to **Start/TapitWeb/Uninstall Web Reports** and run the uninstall program.
2. Follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports ver. 1.1.1.4 (version distributed with TAPIT 2000 3.1.9)

Note: When upgrading to version 4.1.1.5 and higher you must upgrade your TAPIT 2000 to TAPIT EX first.
3. Go to **Start/TapitWeb/Uninstall Web Reports** and run the uninstall program.
4. Follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports version 1.1.1.3
(TAPIT Web Reports version 1.1.1.3 has been distributed with the TAPIT 2000 3.1.8 version)

Note: When upgrading to version 4.1.1.5 and higher you must upgrade your TAPIT 2000 to TAPIT EX first.
This version has a problem with the uninstall program.
Do not use the uninstall utility. It can impair your TAPIT software. Remove TapitWebReports folder as well as TapitWeb entries in **Start/Programs** menu manually.

Proceed with the installation of the new product – see **Installing Web Reports** section of this document.

USER INSTRUCTIONS

Logging in to the Tapit Web Reports

There are two ways to use **Tapit Web Reports**.

A = if required, you can set up **location/department level** permissions and only users with assigned permissions will be able to view reports.

B = you can use Tapit Web Reports "as is" – using the two passwords created during installation.

1. Open **Tapit Web Reports**.
   Login screen appears.
2. **A** If you are not using location/department permissions
   or no permissions have yet been created,
   login screen has only one entry field - **Password**.
   (If permissions have already been set up, skip this point and go to point 3.)
   Enter your password.
   If the administrative password has been entered, the main menu is displayed.
   This screen contains the following options: **View Reports**, **Passwords**, **and Set up Permissions**.
   To view reports, click on the **View Reports** option.
   Reports menu screen appears.
   For more information on how to generate reports see the **Creating /Printing Reports** section below.
   If you decide to set up permissions click on the **Set up Permissions** option. Refer to the **Permissions** section for further instructions.

If the user's password has been entered, the report menu is displayed.
For more information on how to generate reports see **Creating /Printing Reports** section below.

3.   **B** If you are already using location/department level permissions, login screen displays
two entry fields – **Login User Id** and **Password**.
Note: if you want to use location/department level permissions and but no permissions have yet been
set up, refer to point 2.
Enter your user id and password.
If the full control user id and password have been entered, the main menu is displayed.
This screen contains the following options: **View Reports**, **Permissions**.
To view reports, click on the **View Reports** option.
Reports menu screen appears.
For more information on how to generate reports see the **Creating /Printing Reports** section
below.
To add/edit users/permissions click on the **Permissions** option. Refer to the **Permissions** section
for further instructions.

If the user's password has been entered, the report menu is displayed.
For more information on how to generate reports see **Creating /Printing Reports** section below.

Depending on user's permissions, the report menu may not have all the options shown above.

CREATING/PRINTING REPORTS

1. Open the report menu (see Logging in to the Tapit Web Reports for instructions on how to open report menu).

2. Each option on the menu is a report category. Each category contains several reports. For example click on **Phone Number**. Your screen displays the list of reports in a **Phone Number** category.

3. Click on the name of a required report.
4. The filter screen appears. Enter the appropriate criteria.

Location

If the Remote Manager is not installed this list contains only one item – Main. Otherwise
Location list box enables you to switch locations and run reports for any of your remote sites.

Date

enter the time frame in the following format: "mm/dd/yyyy-mm/dd/yyyy" or select data range from
the list box below

Time Window

enter the time window in the following format: "hh:mm-hh:mm". The report will run only for calls
taking place in that time bracket.

Extension

enter the extension bracket or if you want to run a report for a specific extension, enter the same
value in both text boxes.

Trunk

enter the trunk bracket or if you want to run a report for a specific trunk, enter the same value in both
text boxes.

Account Code

enter the account code bracket or if you want to run a report for a specific account code, enter the
same value in both text boxes.

Matter Code

enter the matter code bracket or if you want to run a report for a specific matter code, enter the same
value in both text boxes.

Author. Code

enter the authorization code bracket or if you want to run a report for a specific authorization code,
enter the same value in both text boxes.

Area Code

enter the area code bracket or if you want to run a report for a specific area code, enter the same value in both text boxes.

Source IP Addr

enter the source IP address. Use "*" wild character at the end of the entry if you want to search for all source IP addresses containing the entered string.

Dest. IP Addr

enter the destination IP address. Use "*" wild character at the end of the entry if you want to search for all destination IP addresses containing the entered string.

Duration

click on the down arrow to open the operator list. Select the appropriate operator and enter the call duration value in the following format: "hh:mm:ss".

Ring Duration

click on the down arrow to open the operator list. Select the appropriate operator and enter the ring duration value in the following format: "hh:mm:ss". **Ring Duration** indicates the length of the ring time before the call was picked up.

Hold Duration

click on a down arrow to open the operator list. Select the appropriate operator and enter the call duration value in the following format: "hh:mm:ss". **Hold Duration** indicates how long the call stayed on hold.

Cost

click on the down arrow to open the operator list. Select the appropriate operator and enter the call cost value (i.e. enter 1.0 for $1 and .5 for 50 cents)

Telephone #

enter the telephone number. You can enter partial numbers. i.e. only area code or area code and exchange (973 or 973 360).

DNIS #

enter the DNIS number.

Direction

select the direction of phone activity.

To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.

To select list entries that are not consecutive, press and hold down CTRL, and then click each item.

Call Status

select the desired call status option.

To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.

To select list entries that are not consecutive, press and hold down CTRL, and then click each item.

Department, User, Client, States

If your Tapit database does not contain any Department, Client or User records the list boxes will be empty.

To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.

 To select list entries that are not consecutive, press and hold down CTRL, and then click each item.

Only Local Calls/Exclude Local Calls

check one of the boxes if you want to run a report only for local calls or all calls except local respectively.

5.   To start over clean the filter screen by clicking on **Clear**.

When you have entered all filter criteria, click on the **Create Report** button.

Report screen appears. Depending on the size of your database, the scope of the report and the speed of your Internet connection it may take a few minutes.

If the report has more than one page, links to the next pages (up to 10) appear on the top and the bottom of the screen. Ten page numbers are displayed at the same time. You can move to each page by clicking on its number.

To advance to the next 10 pages, click the single arrow pointing to the right.

To go back to the previous 10 pages, click on the single arrow pointing to the left.

Click the right double arrow to go to the last page of the report.
If you want to go to the first page of the report, click the left double arrow

6. **Print To File** opens the **Print To File** screen.
    Use it if you need to save a copy of a report for printing or emailing.
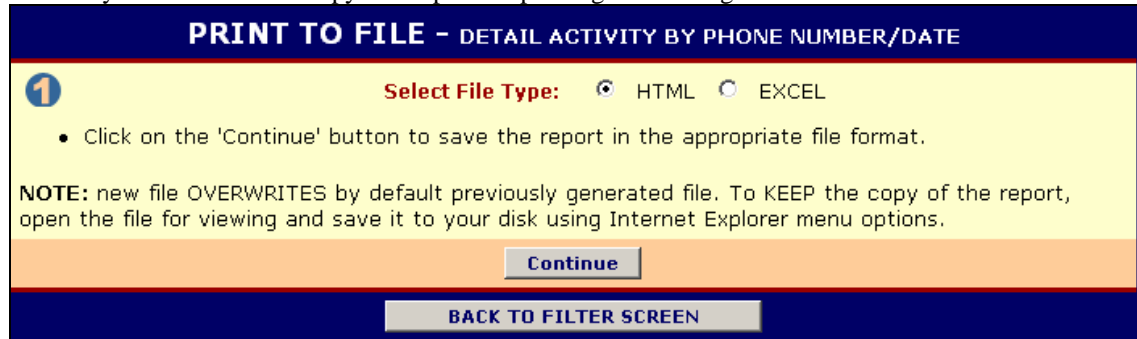
Select appropriate file type: HTML or EXCEL (to view EXCEL files MS EXCEL must be installed)
and click on **Continue**.
The Print to File screen expands to display View File button and specs for the newly generated file.
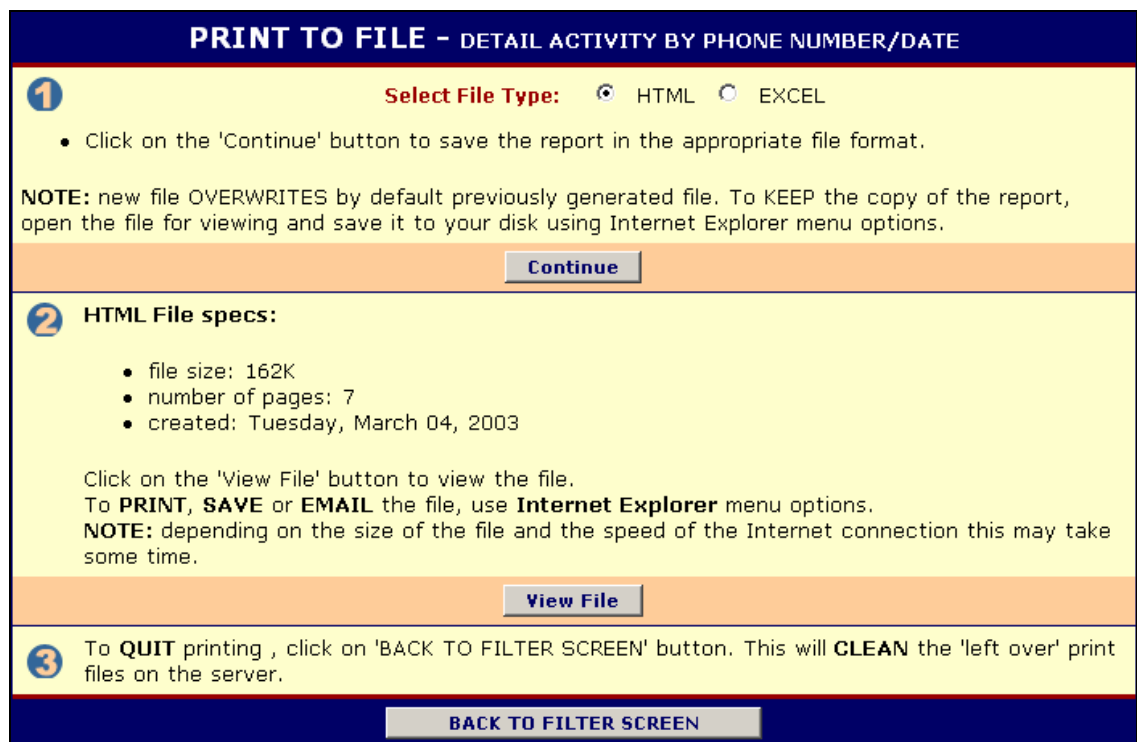
Click on the **View File** button to open the report. Some files may take few minutes to load –
depending on their size.
The report file opens in a new window. You can save this file to your disk, print or email it using
Internet Explorer menu options.
Note: once you leave the Print To File screen or generate a new file, the previously created file is
erased.

DRILL DOWN REPORTS

Summary reports contain links to the detail reports for the each record. For example clicking on a specific user name in the Summary by User report invokes a detail report for this user. Clicking on the name of state in the Summary by State – Map report displays the detail report for this state.

Most Active reports are summary reports. They display top 30 (for your filter selection) most active extensions/account codes/phone numbers. If you purchased TAPIT with Remote Manager you can run **Most Active** reports for all or selected locations.

GRAPH REPORTS

There are several graph reports available. They display the top 100 records for your filter selection and can be sorted by call volume or by cost.

TRUNK ANALYSIS REPORTS

1. To run one of the trunk analysis reports click on the **Trunk Analysis** group.
   The list of available reports appears.
2. Click on the required report. The filter screen appears.
   Note: It is important to set your trunks and your trunk groups before running reports.
   Refer to the sections below on "how to maintain trunks and trunk groups".
3. When your trunks and trunk groups are set up, correctly enter the required criteria on the filter screen and click on **Create Report**.

The report screen appears.

```
To ensure the integrity of the Web Reports, navigate using the buttons provided in the application.
HOURLY ALL TRUNKS BUSY BY TRUNK GROUP                          FILTER SCREEN
Location: MAIN
from 01/01/2003 through 01/01/2003
```

Trunk Group	ATB Time	ATB CCS Time	ATB %	Calls		
				In	Out	All
DATE: 1/1/2003						
● Hour: 10:00						
TR001	00:05:00	3	8.33%	17	2	19
TR002	00:04:00	2.4	6.67%	4	31	35

```
Wednesday, July 16, 2003 09:59
```

To see field descriptions point to each columns header.

Note: The Trunk Group reports produce no data unless trunk groups are set up.

Hourly All Trunks Busy By Trunk Group accounts only for the time when all trunks are unavailable for use.

Setting Up Trunk Groups:

1. From the main menu click on the Trunk Analysis report group to display the list of available reports.
2. Select one of the Trunk Analysis reports.
3. The report filter screen appears.

```
HOURLY ALL TRUNKS BUSY BY TRUNK GROUP FOR "MAIN" LOCATION

                            Location:  MAIN    ▼

             enter the Date:  01/01/2003  –  01/01/2003
              or select the   today       ▼  date range

            Time Window:  [      ]  –  [      ]  hh:mm

            Trunk Group:  [      ]  –  [      ]

                 Trunk :  [      ]  –  [      ]

   Create Report    Print To File    Clear    Setup Trunks    Setup Trunk Groups
```

4. Click on the Setup Trunk Groups button located on the bottom of the screen.
    The Trunk Group Setup Screen appears.

5. *To add a new group*:

   Click on the **New** button. Enter group's name/id in the **New Group** text box.

   Note: When opened for the first time this screen displays the New Group text field by default.

   Select trunk/trunks from the **Available Trunks** list.

   Click on the **Add** button to add selected trunks to the **Assigned Trunks** list.

   If you need to remove any trunks from **Assigned Trunks** list, select trunk/trunks from the **Assigned Trunks** list and click on the **Remove** button.

   Click on the **Save** button to save the new group.

   The **New Group** field changes into **Available Trunks** list.

6. **To edit a trunk group**:

   Select a trunk group from the **Available Groups** list.

Select trunk/trunks from the **Assigned Trunks** list and click on the **Remove** button to remove them from a trunk group. Select trunk/trunks from the **Assigned Trunks** list and click on the **Add** button to add them to a trunk group.

Click on the **Save** button to save the changes.

7. To delete an unwanted trunk group:

   Select a trunk group from the **Available Groups** list and click on the **Delete** button.

   Click **OK** on the confirmation message. A trunk group has been deleted.

8. Click on **Filter** to go back to the filter screen.

Setting Up Trunks:

1. Click on the **Trunk Analysis** report group to display the list of available reports.
2. Select one of the **Trunk Analysis** reports.

3. The report filter screen appears.

4. Click on the **Setup Trunks** button located on the bottom of the screen.
5. The **Trunk Setup Screen** appears.

6. **To add a new trunk**:
    Enter trunk's name/id in the text box provided and click on the **Add** button.
    The entry is added to the Trunks list. You may have to scroll to the bottom to see it.
    Click on **Save**.
7. **To remove unwanted trunks**:
    Select trunk/trunks from the Trunks list and click on the **Remove** button.
    Click on the **Save** button to save the changes.
    Click on **Filter** to go back to the filter screen.

PASSWORDS

<u>Password screen is available to a user with the administrator password ONLY if the location/department level permissions have not been set up.</u>

Tapit Web reports has two levels of passwords:
- administrator is able to set/change passwords, view **Authorization Code** and **Trunk Analysis** reports
- user is able to view all reports but authorization code group and does not have access to password setup screen.

Initially passwords are set during the installation, however they can be changed later using the password screen.

1. Open **Tapit Web Reports** application with your administrator password.
2. The **Main Menu** screen appears.

3. Click on **Passwords**.
4. The **Password** screen is displayed.

5. To verify your privileges enter your password in the **Enter your current password** text box.
   Password screen is divided into **Administrator Password** and **User Password** sections.
   Each section has the **New password** and **Confirm new password** text boxes. Enter the new
   password in the **New password** field and confirm it by reentering the same password in **Confirm new**
   password box.
6. Click on **Save**.
7. You will obtain a confirmation message on your screen.

If you receive the following message: "The administrator password has not been changed. This problem
may be related to your Tapit Web Reports virtual web folder security settings. Please refer to the
readme.doc file or the Tapit manual for further instructions. Follow instructions from section "Changing
IIS permissions" on page 7.

PERMISSIONS

IMPORTANT NOTE:

Once permissions are created, the Tapit Web Reports login process changes.
Only users with permissions are able to access Tapit Web Reports.

If a **Full Control** password or user id is lost, an administrator can use the generic password (old Administrator Password) to open Tapit Web Reports with full control. The generic password needs to be entered in both **Login User Id** and **Password** fields on the **login** screen.

The generic administrator password should be available only to Tapit Web Reports administrator/s. If users other than administrator/s know it, the Administrator Password should be changed using the Passwords option from the Main Menu before permissions are set up.
The Passwords option is not available once permissions are set up.

BEFORE SETTING UP PERMISSIONS: Tapit EX must be installed and set up. Remote Manager, if you have purchased this option, must be installed and set up. Each remote site and the main location must have at least one department assigned to it.

1. Open Tapit Web Reports.
    Login screen appears.
2. If no permissions have yet been created, login screen has only one entry field - **Password**.
    Enter your administrative password.

    If permissions have already been set up, login screen displays two entry fields – **Login User Id** and **Password**.
    Enter your **Full Control** user id and password.

    You must be a Tapit Web Reports administrator to access Permissions.
3. The main menu screen appears.
    If no permissions have yet been created, this screen displays the following options: **View Reports, Passwords, and Set up Permissions**.
    If permissions have already been set up, this screen displays the following options: **View Reports, Permissions**.

Setting up Permissions for the first time.

1. Click on **Set Up Permissions** on the **Main Menu** screen.
    The **User List** screen appears.
    Since no permissions are set up yet, this screen displays instructions.
2. Click on the **Add User** button.
    The **User Profile** screen appears.

3. Enter the following user information:

    Login User Id - enter the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. The entry must be a unique value and must be different from the generic password (old Administrator password). If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

    Password - enter the password that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. This field is required.

    Confirm Password – re-enter your password here. This field is required.

    Full Name - enter a name identifying a user. This name appears on the **User List** screen. It may be a first and a last name, or a name of a user group. This field is required.

    Default Location – select a value from a list of available locations.
    TAPIT EX Multi-User WITHOUT Remote Manager option - only one location is available - MAIN.
    TAPIT EX WITH Remote Manager option - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.
    For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen.
    This field is required.

    Description - enter a short description of a user/user group. This field is optional.

    In case Replay TX Server is already installed on the same computer this screen will display a check box □ **allow access to voice records**. If you want this user to be able to listen to the recorded conversations you have to check **allow access to voice records**.

4. If all required information has been entered, click on **Continue**.

5. The **Location/Department Security Setup** part of the **User Profile** screen is displayed.

To set the same permissions for each location, use one of the preset permission options (◼) located below user information part of the screen.

To set custom permissions for each location use the location/department tree located in the left pane of the screen (see **Using Location/Department Tree** section below).

6. When you are finished setting up a user, click on **Save**.
User Profile screen is brought back by the browser with the appropriate status message.

If the record is NOT SAVED the appropriate message appears on the screen.
In our case we have entered a duplicate **Login User Id** (another Tapit Web Reports user already has this User Id). The record has not been saved. To save this record we need to enter a different **Login User Id** and click on **Save** again.

USER PROFILE

This record HAS NOT BEEN SAVED.
User Id already exists or matches the generic password. Please enter a different User Id.

Login User Id: `agnes`   Password: `•••`   Confirm Password: `•••`

Full Name: `Agnes Litak`   Default Location: `MAIN`

Description: ``

This record HAS NOT BEEN SAVED.

Location/Department Security Setup for Agnes Litak

☒ Full Control	☒ View ALL Reports	☒ View All EXCEPT Trunk Analysis	☒ Deny All
Assign **FULL CONTROL** over all locations.	Allow viewing **AUTHORIZATION CODE** reports and reports for **ALL DEPARTMENTS** for all locations.	Allow viewing reports for **ALL DEPARTMENTS**, but **NO TRUNK ANALYSIS** reports for all locations.	**DENY ALL** access to all locations.

✗ - access denied   ✓ - loc. options open   ⊖ - unavailable

☑ **Agnes Litak is ALLOWED** to view reports for the **selected TAPIT User ONLY**.

TAPIT Users for the 'Default Location'- **MAIN**:

`Litak Agnes`

Tapit User name must be selected.
To select TAPIT User from **a different remote site**, switch to a desired location using 'Default Location' field above.

! NSTRUCTIONS

Open printable version of Instructions.

Permissions Overview

Setting up Permissions for the first time

Using User List Screen

Using User Profile Screen

Using Location/Department Security Preset Options

| Main Menu | Back To User List | Save |

If the record is SAVED the **Record has been SAVED** message is displayed.

USER PROFILE

Login User Id: ALITAK   Password: ●●●   Confirm Password: ●●●

Full Name: Agnes Litak   Default Location: MAIN

Description:

Record has been SAVED

Location/Department Security Setup for Agnes Litak

☒ Full Control	☒ View ALL Reports	☒ View All EXCEPT Trunk Analysis	☒ Deny All
Assign **FULL CONTROL** over all locations.	Allow viewing **AUTHORIZATION CODE** reports and reports for **ALL DEPARTMENTS** for all locations.	Allow viewing reports for **ALL DEPARTMENTS**, but **NO TRUNK ANALYSIS** reports for all locations.	**DENY ALL** access to all locations.

✗ - access denied ✓ - loc. options open ⊖ - unavailable

!NSTRUCTIONS

☑ **Agnes Litak is ALLOWED** to view reports for the **selected TAPIT User ONLY**.

TAPIT Users for the 'Default Location'- **MAIN**:

Litak Agnes

Tapit User name must be selected.
To select TAPIT User from **a different remote site**, switch to a desired location using 'Default Location' field above.

Open printable version of Instructions.

Permissions Overview

Setting up Permissions for the first time

Using User List Screen

Using User Profile Screen

Using Location/Department Security Preset Options

| Main Menu | Back To User List | Save |

7. To set up another user click the **Go back to User List** button and repeat steps 2 to 6.
   To quit, simply close the browser window.
   To go to the main menu, click on the **Main Menu** button.

Using User List Screen

User List screen is a list of the current Tapit Web Report users. It allows you to add/edit/remove users. The list can be sorted by clicking on the **Full Name**, **Default Location** or **Description** headers correspondingly.

USER LIST

Select	Full Name	Default Location	Description
☐	Angela Biderman	ATLANTA	Management
☐	Debra Brown	CHESTERFIELD	Accounting
☐	Derek Collman	MAIN	ITS
☐	Sales Glendale	GLENDALE	Sales Group - Glendale
☐	Sales in Main	MAIN	Sales Group - Main Site

| Main Menu | Edit User | Remove User | Add User |

To enter the User List screen click on the **Permissions** option on the **Main Menu**. **User List** screen appears.

To add a new user click on the **Add User** button. The **User Profile** screen is displayed.

To edit a user double click on users **Full Name**. The **User Profile** screen is displayed. You can also select this user by checking the **Select** box for the required record. The record is highlighted. Click on the **Edit User** button to bring up the **User Profile** screen

To remove a user, select a user by checking the **Select** box for the required record. The record is highlighted. Click on the **Remove User** button. Click **OK** to the confirmation message. The user is removed from the list.

Using User Profile Screen

User Profile screen allows you to enter user's information and set up user's permissions. To open the **User Profile** screen, depending on what you want to do, use the **Edit User** or **Add User** options from the **User List** screen.

If you are adding a new user, only user's information part of the screen is displayed at first.
To add a new user, follow instructions from the section above - Setting up Permissions for the first time.

If you are editing a user, user's information as well as **Location/Department Security Setup** is displayed.

Entering user information

Login User Id - enter the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long and it has to be a unique value. If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

Password - enter the password that is going to be used to log in to the Tapit Web Reports. It can be up to

8 char long. This field is required.

Confirm Password – renter your password here. This field is required.

Full Name - enter a name identifying a user. This name appears on the User List screen. It may be a first and a last name, or a name of a user group. This field is required.

Default Location – select a value from a list of available locations.
<u>TAPIT EX Multi-User WITHOUT Remote Manager option</u> - only one location is available - MAIN.
<u>TAPIT EX WITH Remote Manager option</u> - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.
For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen.
A user must be allowed access to his default location - a location must be open (✔) and appropriate permission options within a location must be checked. If no permission boxes are checked, a location is interpreted as denied.
This field is required.
Description - enter a short description of a user/user group. This field is optional.

Using Location/Department Security Setup

<u>Using preset options</u>

Location/Department Security Setup for Debra Brown			
Full Control	**View ALL Reports**	**View All EXCEPT Trunk Analysis**	**Deny All**
Assign **FULL CONTROL** over all locations.	Allow viewing **AUTHORIZATION CODE** reports and reports for **ALL DEPARTMENTS** for all locations.	Allow viewing reports for **ALL DEPARTMENTS**, but **NO TRUNK ANALYSIS** reports for all locations.	**DENY ALL** access to all locations.

There are four preset options located below the user information part of the screen (they are not displayed right away when entering a new user). You can set the same permissions for each location by clicking the icon for the appropriate option. Each option has a description displayed below it.

<u>Using the location/department tree:</u>
By default the location/department tree displays permission options for all available departments. When adding a new user, the top **Restrict..** and **Full Control** boxes are unchecked and access is denied ✖ to all locations.

✖ - access denied ✔ - loc. options open ⛔ - unavailable

☐ RESTRICT Debra Brown to view reports for ONLY ONE TAPIT USER.
   or set permission options below.

☐ ALLOW Debra Brown FULL CONTROL over all locations.
   or set permissions for locations below.
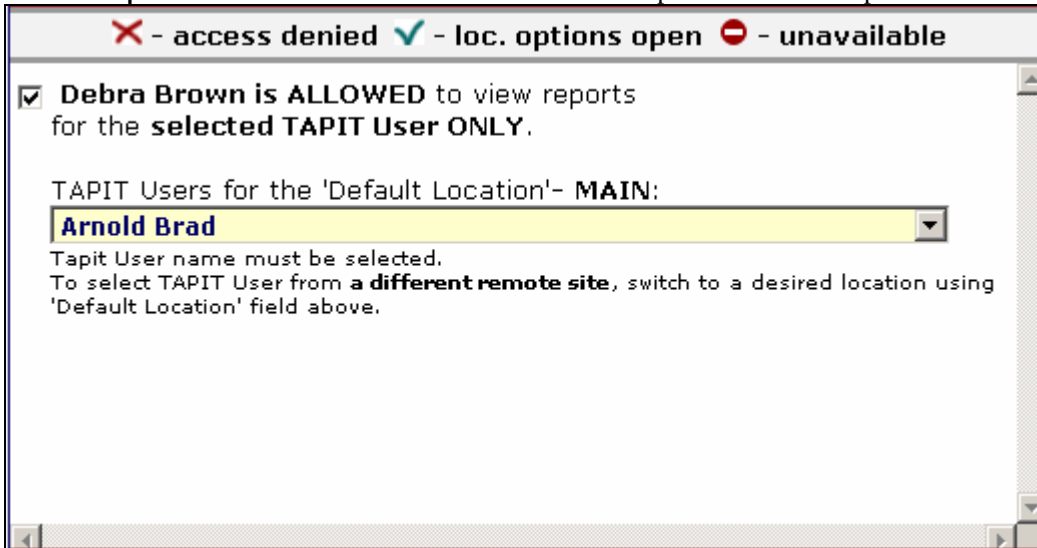✖ MAIN (location)
✖ ATLANTA (location)
✖ CHESTERFIELD (location)
✖ CINCINNATI (location)
✖ GLENDALE (location)
✖ GRAND RAPIDS (location)
✖ GREENVILLE (location)
✖ KANSAS CITY (location)
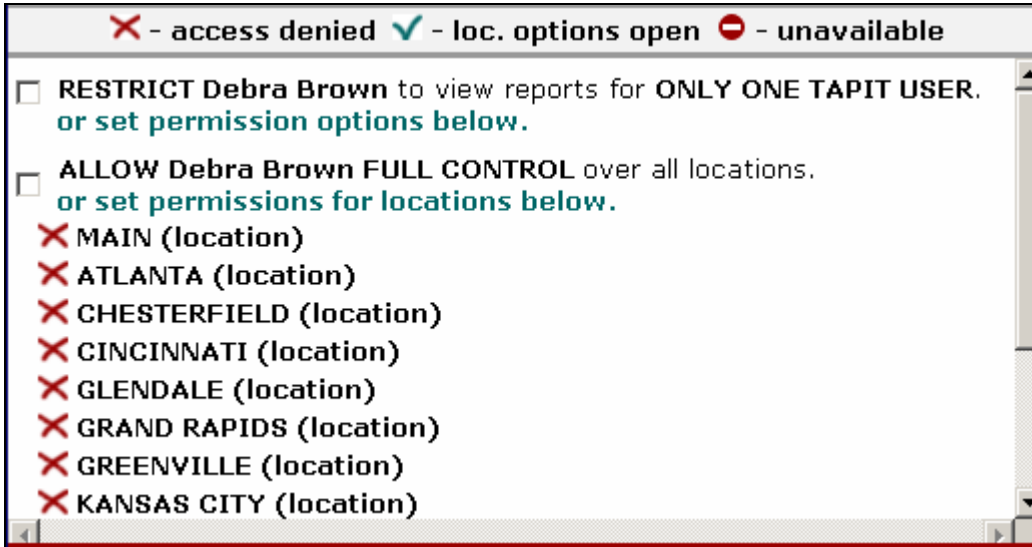
<u>To restrict user to view reports for ONLY ONE TAPIT USER</u>, check the **Restrict … to view reports for ONLY ONE TAPIT USER** box on the top of the location/department tree.

✖ - access denied ✔ - loc. options open ⛔ - unavailable

☑ Debra Brown is ALLOWED to view reports
   for the selected TAPIT User ONLY.

   TAPIT Users for the 'Default Location'- MAIN:
   [Arnold Brad   ▼]
   Tapit User name must be selected.
   To select TAPIT User from **a different remote site**, switch to a desired location using 'Default Location' field above.

The box description changes to **...is ALLOWED to view reports for the selected TAPIT User ONLY**.
Select the TAPIT User name from the list below. This list contains user names for TAPIT installed at the **Default Location**. In our case the default location is MAIN.

If we select another **Default Location**

Default Location: [CHESTERFIELD ▼]
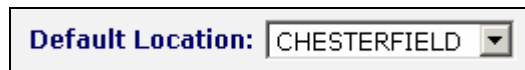
the user list populates with TAPIT Users for that location.

The TAPIT User must be selected. In our case (for the Main location above) Debra Brown can view reports ONLY for Brad Arnold.
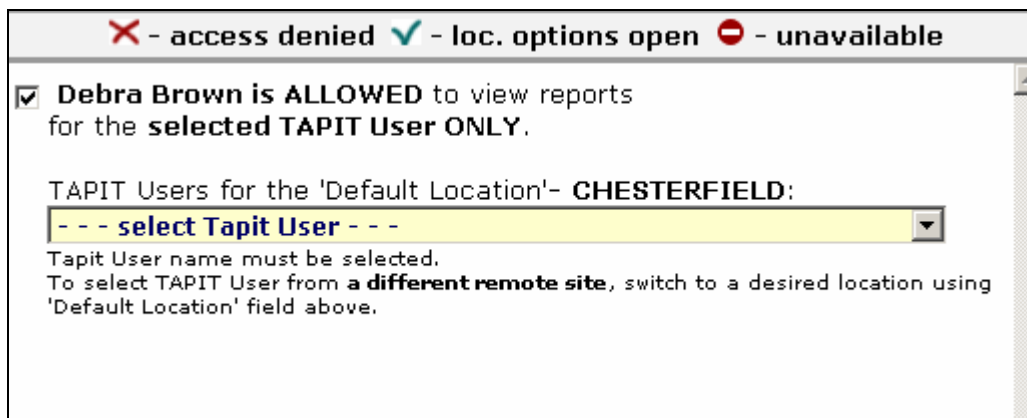Note: Tapit Web Reports user restricted to view reports for only one TAPIT User does not have access to Trunk Analysis, Most Active and Consolidated Locations (Remote Manager only) reports.

<u>To assign full control rights to a user</u>, check the **Allow** … **Full Control** box located below the **Restrict** … **to view reports for ONLY ONE TAPIT USER** option.

<u>To allow access to a location</u> open a location by clicking on a ✕ icon to the left of its name. Location options are displayed and a ✕ changes to a ✓.
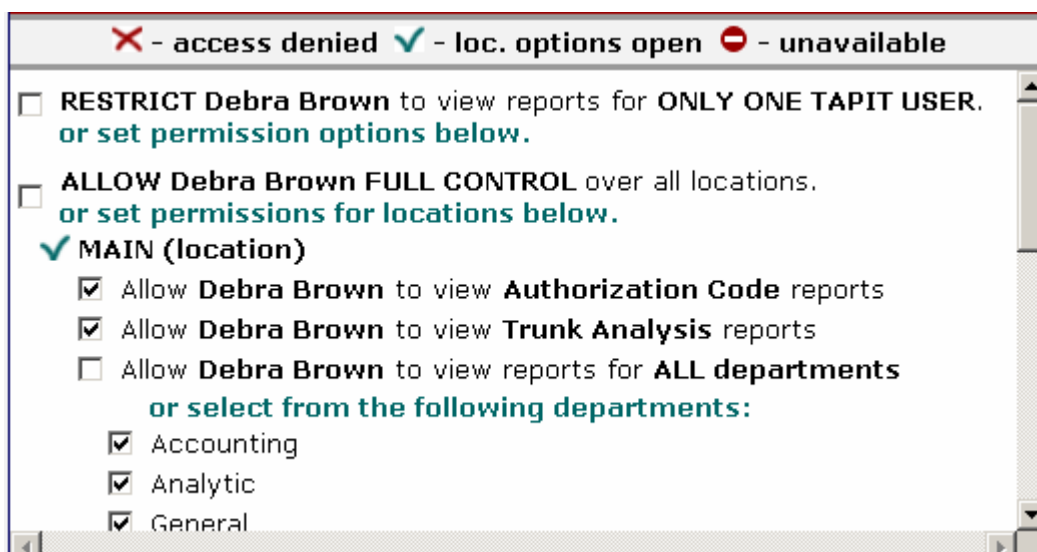
Set up permissions for a location by checking appropriate location options.
If a location is open (✓) but has NO permission options checked, it is interpreted as a denied location.
The permission options for each location include: **Allow ... to view Authorization Code reports**, **Allow ... to view Trunk Analysis reports**, **Allow ... to view reports for All Departments** and a list of locations departments.
Check the **Allow to ... view Authorization Code reports** box if you want a user to be able to view this kind of reports for a location. The same applies to the **Allow ... to view Trunk Analysis reports** option.

Note: to prevent fraud, **Authorization Code** reports should not be accessible to everyone. **Trunk Analysis** group reports on call traffic. Such reports are NOT of interest to everyone and since they take time and resources to generate, you may decide to deny access to average users.

Note: if a location name has a ⛔ to the left of it, then this location has no departments. A location must have at least one department, otherwise no permissions can be assigned to it and it is not accessible for users.

<u>To let a user view reports for all departments</u> within a location click on **the Allow ... to view reports for All Departments** box. Otherwise, check the appropriate department boxes within a location.
<u>To deny access to a location</u> close it by clicking on ✔ icon to the left of it. The icon changes to ✖.
Note: when you deny access to a location all previously set permissions for this location are cleared.

Forgot Password?

1. If a user forgets the user id/password then an administrator (user with full control) has to create a new user id/password for this user.
2. If a full control password or user id is forgotten or lost, an administrator can use the generic password (old Administrator Password) to open Tapit Web Reports with full control. The generic password needs to be entered in both **Login User Id** and **Password** fields on the **Login** screen.

Glossary of terms

Login User Id is the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long and it has to be a unique value. If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

Password is the password that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. This field is required.

Confirm Password - renter your password here. This field is required.

Full Name is a name identifying a user. This name appears on the User List screen. It may be a first and a last name, or a name of a user group. This field is required.

Default Location is a list of available locations.
TAPIT EX Multi-User WITHOUT Remote Manager option - only one location is available - MAIN.
TAPIT EX WITH Remote Manager option - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.
For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen.
A user must be allowed access to his default location - a location must be open (✔) and appropriate permission options within a location must be checked. If no permission boxes are checked, a location is interpreted as denied.
This field is required.

Description is a short description of a user/user group. This field is optional.

Restrict … to view reports for ONLY ONE TAPIT USER option
check this box to restrict user to view reports for ONLY ONE TAPIT USER.

Note: Tapit Web Reports user restricted to view reports for only one TAPIT User does not have access to Trunk Analysis, Most Active and Consolidated Locations (Remote Manager only) reports.

Full Control option gives a user full control over all locations. A full control user is the Tapit Web Reports administrator. Full control user can maintain passwords/permissions for all users and view all available reports for all available sites. Check the preset **Full Control** option ◪ or the **Full Control** box on the top of the location/department tree to assign full control to a user. If a full control password or user id is lost, an administrator can use the generic password (which is the administrator password used before permissions were set up) to open Tapit Web Reports with full control. The generic password needs to be entered in both Login User Id and Password fields on the Login screen.

Allow to ... view Authorization Code reports - check this box if you want a user to be able to view **Authorization Code** reports for a location. To prevent fraud, **Authorization Code** reports should not be accessible to everyone.

Allow ... to view Trunk Analysis reports - check this box if you want a user to be able to view **Trunk Analysis** reports for a location. These are call traffic reports. Such reports are NOT of interest to everyone and since they take time and resources to generate, you may decide to deny access to average users.

Deny All - click on this preset option if you don't want to delete user information and at the same time you want to prevent this user from entering Tapit Web Reports.

✕ = access denied. Click on ✕ to open permission options for a location.

✔ = location permission options are opened. Access is allowed to this location provided appropriate option boxes are checked. Clicking on ✔ denies access to a location as well as clears and hides its permission options.

⛔ = unavailable location. Location is unavailable because it does not have any departments assigned to it. A location must have at least one department to allow access. You can save user information. After departments for a location are set up in TAPIT EX, you can go back to this record in Tapit Web Reports to set up permissions.

DNIS/Campaign

DNIS Entry Screen

<u>The DNIS Entry screen is available to a user with the Web Reports administrative permissions ONLY.</u>

The DNIS Entry screen is used to enter all available DNIS Numbers. These numbers are then assigned to the campaigns created via the **Campaign Manager** screen.

To Add a DNIS number
1. Click on the **DNIS Entry** option located on the Web Reports **Main Menu**.
2. The **DNIS Entry Screen** is displayed.
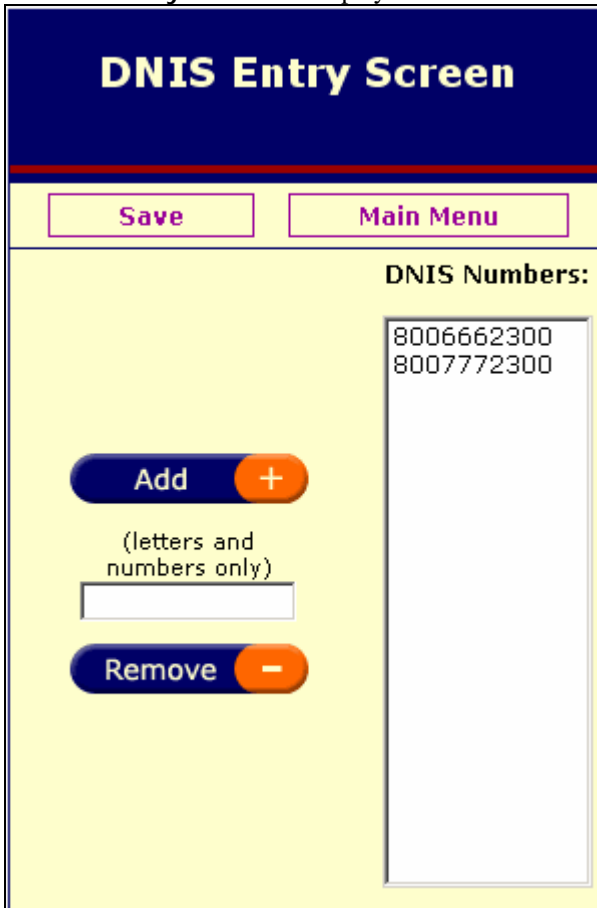
3. Enter a DNIS number into the text box located below the **Add** button.
4. Click on the **Add** button.
5. The number is added to the **DNIS Numbers** list.
6. Click on **Save**.

To Remove a DNIS number

1. Click on the **DNIS Entry** option located on the Web Reports **Main Menu**.
2. The **DNIS Entry Screen** is displayed

3. Select the DNIS number you want to remove from the **DNIS Numbers** list by clicking on it.
4. Click on the **Remove** button. The number is removed from the list.
5. Click on **Save**.

Campaign Manager Screen

<u>The Campaign Manager screen is available to a user with the Web Reports administrative permissions ONLY.</u>

The **Campaign Manager** screen is used to enter new campaign information for the desired DNIS numbers and to view/edit existing campaigns.
Provided the campaign/DNIS information is entered through the DNIS Entry and the Campaign Manager screens, the user can run Detail Activity by DNIS number, Summary by DNIS/Campaign or Summary by Campaign/DNIS reports to see DNIS/campaign information corresponding to the call records.

To create a new Campaign

1. Click on the **Campaign Manager** option located on the Web Reports **Main Menu**.
2. The **Campaign Manager** menu screen is displayed

3. Click on the **New Campaign** button.
    The **New Campaign** screen appears

4. Enter the campaign name into the **Campaign Name** field.
5. Select an available DNIS number from the **Vacant DNIS Number** list.
    Note: If this list is empty it means that no DNIS numbers where entered via the DNIS Entry screen.
    To populate this list you need to click on the **Back to the Campaign Manager** button and then on the

Go back to the Main Menu button. Once at the **Main Menu**, please follow the instructions from page 27 on how to add DNIS numbers.

6. Enter the start and end date into the corresponding fields.
7. Enter the campaign description into the **Description** field.
8. Click on **Save**.

To edit a campaign

1. Click on **Campaign Manager** located on the Web Reports **Main Menu**.
2. The **Campaign Manager** menu screen is displayed

3. Click on the **Find Campaign** button.
   The **Find Campaign** screen appears.

You can search for the campaign by a campaign name, a DNIS number assigned to it, start or end dates, or any date falling within the duration of the campaign.

4. You can also use predefined search:
   click on **Show Vacant DNIS Numbers ONLY** button to see all available DNIS numbers, or click on the **Show Currently Running Campaigns ONLY** to see all campaigns that are still in progress.

5. When you click on the **Search** button, or one of the predefined search buttons the **Find Results** screen appears.

Find Results

2 records found.			Back to Find Screen	Back to Campaign Manager

Sorted by: Campaign Name (Ascending)
Click on the 'Campaign Name' field to edit Campaign information.

Campaign Name	DNIS Number	Start Date	End Date	Description
Star Ledger Add	8006662300	1/1/2008	1/15/2008	Advertisement in Star Ledger Newspaper
Yahoo Ad	8006662300	1/16/2008	1/31/2008	Advertisement on-line

6. Click on the desired **Campaign Name** to bring up the **Edit Campaign** screen.

Edit Campaign

Save	Find		New	Delete		Back to Campaign Manager

Campaign Name:
Star Ledger Add

DNIS Number:
(this field is read-only)
8006662300

Start Date (mm/dd/yy):
1/1/2008

End Date (mm/dd/yy):
1/15/2008

Description:
Advertisement in Star Ledger Newspaper

7. You can use this screen to change the name, start and end dates, and the description of the campaign. DNIS number cannot be changed. It is read-only.

DNIS Reports

DNIS Reports are a part of the Misc report group. They provide detail and summary information on the inbound phone calls made to the DNIS numbers. Provided the DINS number is entered into TAPIT Web Reports via DNIS Entry screen and the Campaign is created for it via the Campaign Manger, these reports reflect the Campaign\DNIS relationships.

The following DNIS reports are available:

Summary by DNIS
You can click on the DNIS number to Drill down to the Detail Activity by DNIS for that number.

SUMMARY BY DNIS
FILTER SCREEN
Location: MAIN
from 01/01/2008 through 01/10/2008
Display Detail Filter Criteria
Click on the "DNIS" field to open the detail report.

DNIS	In	Out	Internal	Calls	Duration	Avg Dur	Cost	Avg Cost
8006662300	193	0	0	193	7:52:10	0:02:27	$8.00	$0.04
8007772300	181	0	0	181	6:25:56	0:02:08	$0.00	$0.00
9999	3	0	0	3	0:02:27	0:00:49	$12.50	$4.17
REPORT TOTALS:	**377**	**0**	**0**	**377**	**14:20:33**	**0:02:17**	**$20.50**	**$0.05**

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Detail Activity by DNIS number

DETAIL ACTIVITY BY DNIS
FILTER SCREEN
Location: MAIN
from 01/01/2008 through 01/10/2008
Display Detail Filter Criteria

DNIS Number   Campaign Name

page ◀◀ 1 2 3 4 5 6 7 8 9 **10** ▶▶ of 10 pages

Date	Call Time	Dir	Duration	Cost	Campaign	User Name	Extension	Trunk	Client Name
8007772300									
01/03/08	13:28:00	I	00:00:01	$0.00	New Year Holiday Sale	Smith George	106	0001	

Summary by DNIS/Campaign

SUMMARY BY CAMPAIGN/DNIS
FILTER SCREEN
Location: MAIN
from 01/01/2008 through 01/31/2008
Display Detail Filter Criteria

DNIS	In	Out	Internal	Calls	Duration	Avg Dur	Cost	Avg Cost
New Year Holiday Sale / 8007772300	181	0	0	181	6:25:56	0:02:08	$0.00	$0.00
Star Ledger Add / 8006662300	193	0	0	193	7:52:10	0:02:27	$8.00	$0.04
Yahoo Ad / 8006662300	198	0	0	198	11:16:40	0:03:25	$0.00	$0.00
REPORT TOTALS:	**572**	**0**	**0**	**572**	**25:34:46**	**0:02:41**	**$8.00**	**$0.01**

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Replay Web Player

Replay Web Player is an add-on to Tapit Web Reports. It enables you to listen to voice files generated by Replay Boxes and processed by Replay TX Server. **To use Replay Web Player you have to purchase Replay TX and install Replay TX Server on the PC where the Web Reports application is located.**
Once Replay TX Server is installed and configured it will process voice files created by Replay Boxes and make them available for reporting.

NOTE: Replay Web Player plays files located in the central Replay Files folder (where the files are moved from all boxes by Replay TX Server). If you would like to play archived files (files that are outside of the central Replay Files folder), use Replay TX Server Import feature to import back voice files for the required time frame. Once imported you can listen to them via Replay Web Player.

NOTE: In order to protect your recordings from security breach, we recommend installing Web Reports on your Intranet. If you need to listen to the recorded phone conversations from outside, use VPN connection.

Replay Web Player and Tapit Web Reports Permissions

A user must have appropriate permissions to access voice records. Checking the **allow access to voice records** enables a user to view and listen to voice files generated by Replay Boxes. **For example**: a user has permissions to view reports for the Sales department only. Extensions 101,103 and 105 belong to the Sales department. Therefore a user is able to listen to conversations for ext. 101, 103, 105. However, since each voice file contains a phone call in its entirety it is possible other extensions (not permitted for this particular Web Reports user) participate in this phone call as well. If the Tapit phone record does not contain Caller Id or Number Dialed information, Replay Web Player may find more than one possible voice recording match. In that case one of the recordings may belong to the department that is not permitted to that user.
The **allow access to voice records** check box is available only when Replay TX is installed and set up on the PC where Tapit Web Reports resides.

For instructions on how to set up user permissions see **Permissions** section of this manual.
Once a user is permitted to access Replay voice files, he can do it via Web Reports detail activity reports.

To access Replay file corresponding to the specific Tapit call record

1. Open Tapit Web Reports.

2. Open one of the detail activity reports. In our example we use the Detail Activity by User/Date report. If you are
    permitted to listen to voice recordings (see section above) the first column of the detail report displays a picture of
    a speaker.
    Go to the phone record you would like to hear and click on the speaker icon.

    | 10:40:42 | 6035294777 | I | 00:00:33 | $0.00 | Litak Agnes | | 114 | | 5 |

3. The **Replay Web Player** screen is displayed.

    If Replay Web Player displays a voice record located in central Replay Files folder (where voice files from all
    Replay Boxes are moved) the **KEEP** buttons are available.
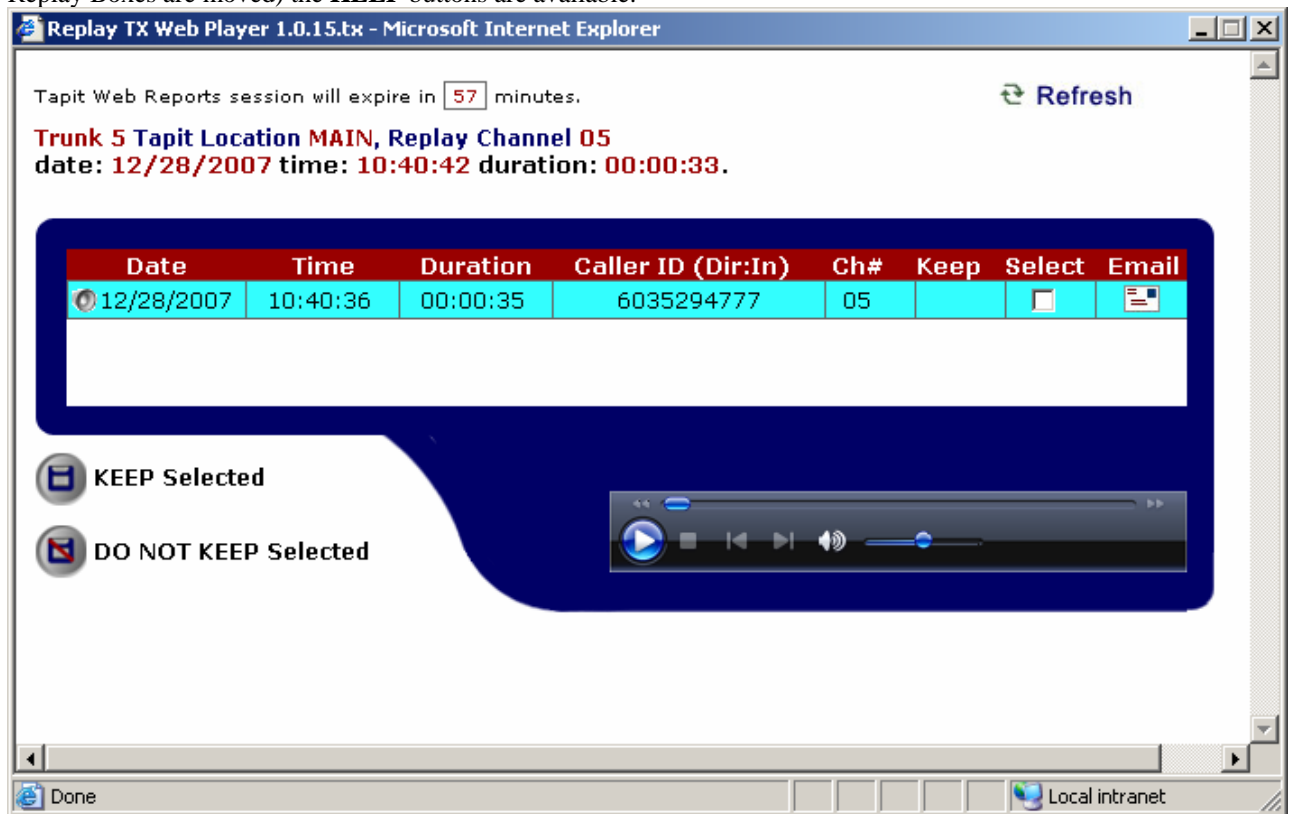
    In case Replay Web Player displays a voice record located on the Replay Box the **KEEP** buttons are NOT
    available. If you want to mark this file **KEEP** (prevent it from being automatically archived) you have to wait until
    it is moved to the central Replay Files location.
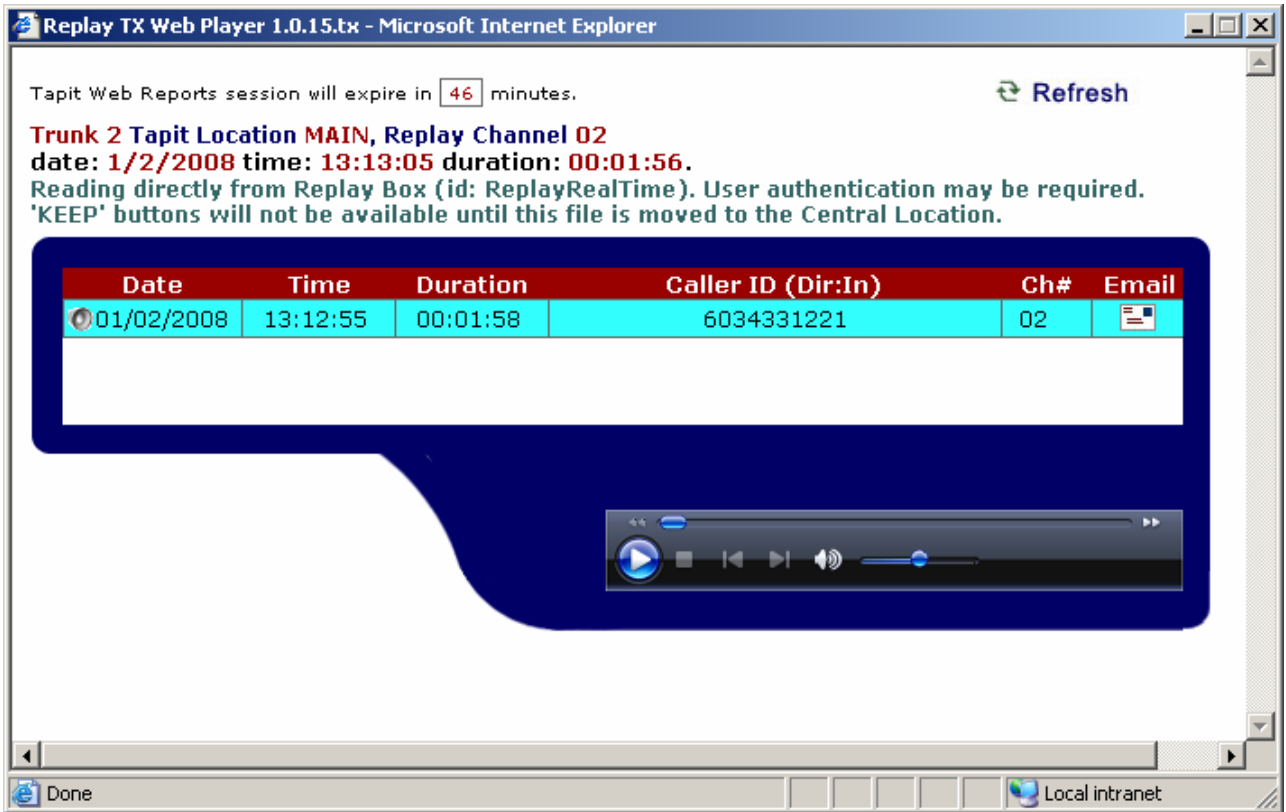
You may also be prompted to authenticate your connection with the Replay Box so have the Replay Box user name and password ready.
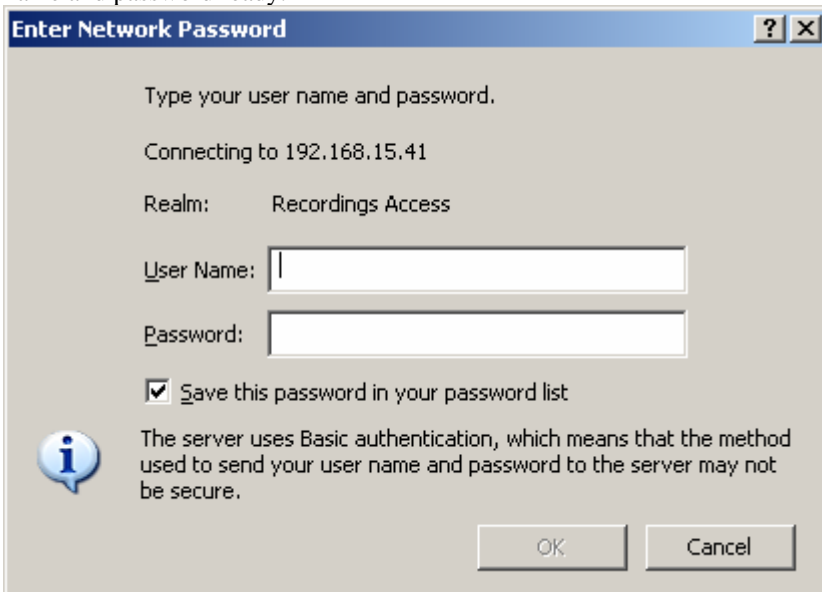
4. The top of the screen contains information about the TAPIT call record you have clicked on.

    Trunk 5 Tapit Location MAIN, Replay Channel 05
    date: 1/2/2008 time: 11:21:28 duration: 00:00:19.

    First line shows the Tapit trunk number and the associated to it Replay channel number.

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The following line contains the Tapit call record date, time and duration.

The Replay Web Player brings back voice file corresponding to the Tapit Call record.
In our example we clicked on a call record for trunk 05 with date 01/02/08 and time 11/21/28 and phone number 6035294777.

🕐11:21:28	6035294777	I	00:00:19	$0.00	Undefined				5

Replay finds and automatically plays the voice record best matching the requested phone record.

Date	Time	Duration	Caller ID (Dir:In)	Ch#	Keep	Select	Email
🕐01/02/2008	11:21:18	00:00:21	6035294777	05		☐	📧

NOTE:
Many times there is no exact date/time match between a voice file and a TAPIT phone record because in most cases Replay starts recording before the corresponding TAPIT phone record is created, or the Replay clock is not synchronized with the Tapit clock.
In some cases, especially if there is no Caller Id, or no one-to-one trunk-to-channel matching, a list of multiple recordings, best matching TAPIT record, may appear.
IMPORTANT:
All Replay Boxes clocks should be synchronized with either TAPIT Server, or PBX (depending which is date/time stamping TAPIT phone records) within the same Tapit location*. Each Replay Box clock has to be set at **exactly the same time** or **behind** (up to 5 seconds) the clock Tapit is using to date/time stamp call records (PC or PBX). Replay box clock **cannot be faster** than the clock Tapit is using.

*If you purchased Remote Manager you most likely have more than one location (Main and remote sites), otherwise you have only one location (Main).

To change Replay Box time:
Replay T1 Box - use the box's web interface to change time (see ReplayT1BoxAdminManual.pdf on your Replay CD for instructions).
Replay ATS Box is a PC. Use this PC clock to change time.

Replay Web Player starts playing voice file automatically using the embedded Windows Media Player.
There may be a few seconds delay if you are listening over the Internet.
You can use Windows Media Player controls to manipulate currently played recording (stop, pause and play).

To play voice records

When you open **Replay Web Player** from Tapit Web detail report it finds a matching voice file and starts playing it automatically.
You can stop or pause the recording by double clicking on the play, pause, stop buttons provided by embedded Windows Media Player.

In case Replay Web Player brings up more than one voice recording, click on the speaker icon next to the date of the voice desired voice file to play it.
Windows Media Player control panel may look differently on your screen depending on a version of Windows Media Player on your PC.

How to exclude Replay voice files from automatic delete/archive

Replay Web Player plays files from the Replay Files folder (central location where voice files are moved from all Replay Boxes). Replay TX Server is scheduled to archive or delete files from the Replay Files folder periodically. Occasionally, you will find voice files you would like to keep from being removed from the Replay Files folder by the delete/archive program. In such cases you need to mark the file as **KEEP**.
Files marked as **KEEP** are not deleted and even though they are archived a copy still stays behind so you are able to access them via Web Reports. NOTE: Replay Web Player cannot access archived files. However, you can use Import feature of Replay TX Server to bring back voice files from archive location to the Replay Files folder so Replay Web Player can play them.

In case Replay Web Player displays a voice record located on the Replay Box the **KEEP** buttons are NOT available. If you want to mark this file **KEEP** (prevent it from being automatically archived/deleted) you have to wait until it is moved to the central Replay Files location.

1. Find a record you want to mark as **KEEP**.
2. Select it by checking the **Select** check box corresponding to this record. The whole record is highlighted in yellow.

Date	Time	Duration	Number Dialed (Dir:Out)	Keep	Select	Email
⊙ 01/12/2007	10:14:39	00:01:29	19734779811		☑	≡

3. Click on **Keep Selected** button.

 KEEP Selected

4. Page refreshes and returns with the same record marked with KEEP

Date	Time	Duration	Number Dialed (Dir:Out)	Keep	Select	Email
⊙ 01/12/2007	10:14:39	00:01:29	19734779811	KEEP	☐	≡

How to mark voice records DO NOT KEEP

1. Open your Replay Web Player and find the record your want to release from **KEEP**.
2. Select it by checking the **Select** check box corresponding to this record. The whole record is highlighted in yellow.

Date	Time	Duration	Number Dialed (Dir:Out)	Keep	Select	Email
⊙ 01/12/2007	10:14:39	00:01:29	19734779811	KEEP	☑	≡

3. Click on **DO NOT KEEP Selected** button.

 DO NOT KEEP Selected

4. Page refreshes and returns with the same record without KEEP word in it.

Date	Time	Duration	Number Dialed (Dir:Out)	Keep	Select	Email
⊙ 01/12/2007	10:14:39	00:01:29	19734779811		☐	≡

How to email a voice file

Each voice record has an envelope icon next to it.

Date	Time	Duration	Phone # (Dir:Out)	Ch#	Keep	Select
09/23/2008	08:04:07	00:01:09	18008414000	01	☐	

1. Click on the envelope icon to email the particular voice file.
   The **Email Form** screen appears.

Email Form

File Name: 09_20061218_140116_000253_I_6035294777.wav
File Size: 0.44 MB

Sender email address: *

Recipient email address: *
(To send this email to more than one recipient separate email addresses with semicolon i.e. adress1@email.com;addres2@email.com)

Email subject:

Email Text:

[Send Email]   [Go Back to Replay Player]

The top of this screen displays the file name and size.

2. Enter your email address into the **Sender** email address field (required).
3. Enter the email address for the recipient into the **Recipient** email address field (required).
   If you want to send this email to more than one recipient you need to separate email addresses with the semicolon i.e. address1@email.com;address2@email.com.
4. Enter the subject for this email and add email body text if you wish.
5. Click on **Send Email**.
6. The screen refreshes and goes back to the voice file lists.
   Email has been sent directly by your SMTP email server and will not appear in your send box.

Email Form

File Name: 09_20061218_140116_000253_I_6035294777.wav
File Size: 0.44 MB

Sender email address: *
sender@corporation.com

Recipient email address: *
(To send this email to more than one recipient separate email addresses with
semicolon i.e. adress1@email.com;addres2@email.com)
recipient@corporation.com

Email subject:
The subject of the email message

Email Text:
Body text

Send Email   Go Back to Replay Player

How to download voice files

Each voice record has a down-arrow icon next to it.

Date	Time	Duration	Phone # (Dir:Out)	Ch#	Keep	Select
09/23/2008	08:04:07	00:01:09	18008414000	01		

1. Click on the **green down-arrow** icon to download the particular voice file.
   The **File Download** window appears:

   File Download - Security Warning

   Do you want to open or save this file?

   Name: ...8008414000_506589541p000201498589p11.wav
   Type: Wave Sound, 109 KB
   From: agnestestpc

   Open   Save   Cancel

   While files from the Internet can be useful, this file type can
   potentially harm your computer. If you do not trust the source, do not
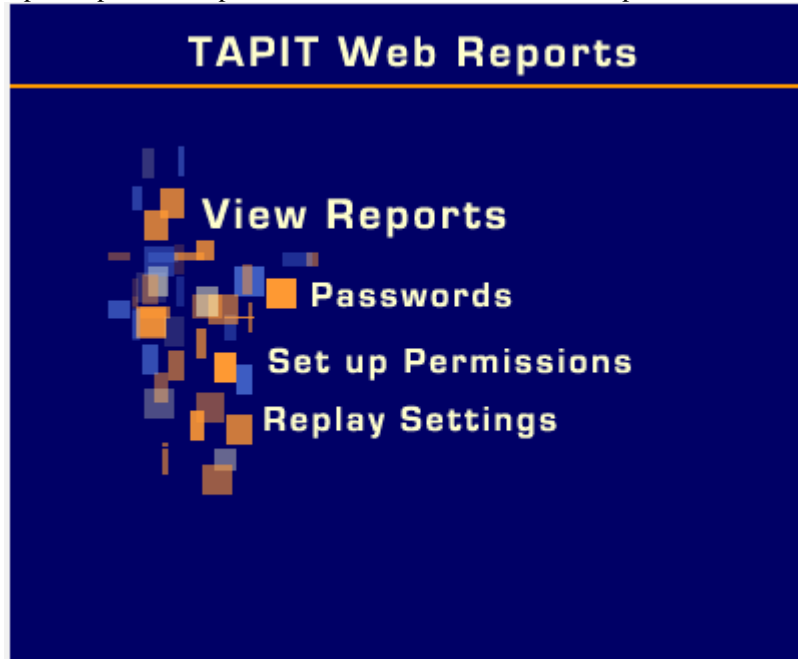   open or save this software. What's the risk?

2. Click on **Save** to save the voice file to the disk.

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Replay TX Settings

Email settings and the IIS virtual directory settings for voice file access are available for setup to the Web Reports administrator.

1. Open Tapit Web Reports. The main menu screen comes up.

2. Click on **Replay Settings**.

3. **The path to the IIS virtual folder:**
   By default this folder is created by the installation program under TapitReps folder and points to the default local ReplayFiles folder.
   In case you would like to store Replay Files on a different PC you need to create an IIS folder on that PC following the instructions from page no. 50. Once the IIS folder is created you need to enter the folder's UNC path here.
   The SMTP Email fields are initially set up during installation. You can modify them here. If any of the SMTP Server information is missing Tapit Web Reports will not be able to email voice files. **Enable SSL** is unchecked by default. However, if you would like to use SSL certificate you need to check the box.
4. Use this screen to change any of the entries.
5. Click on **Save** to save changes.
6. Close the screen.
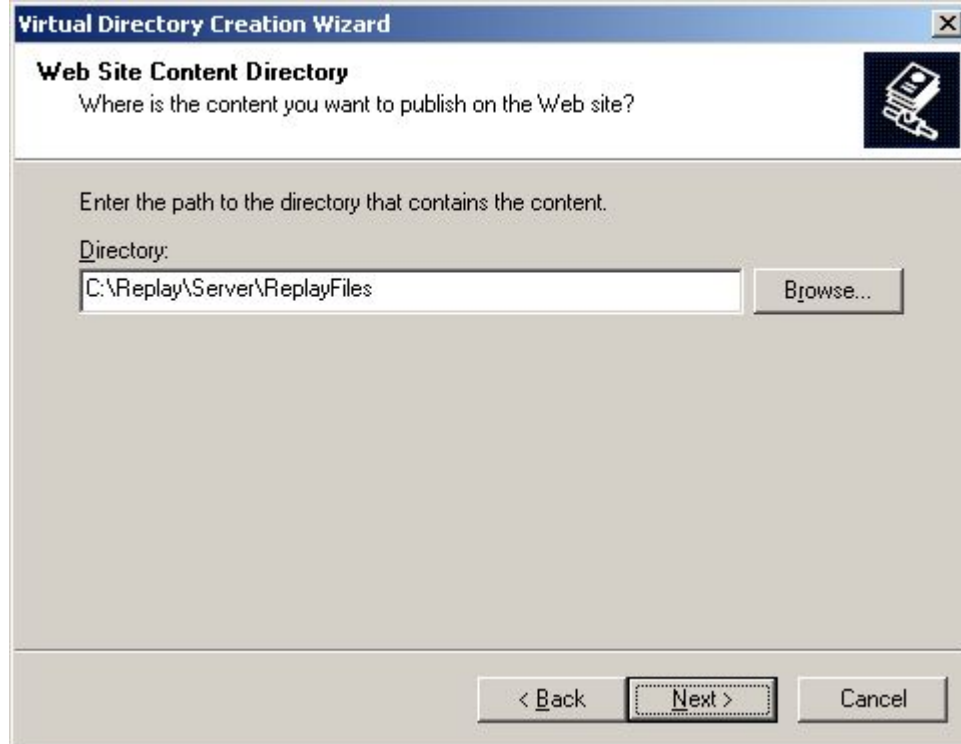
Creating ReplayFiles virtual folder in IIS

The IIS virtual folder has to be created on the computer where Replay Files (voice files from Replay Boxes) are stored. This folder points to the physical folder where voice files from Replay Boxes are stored and it is used by Web Reports to play recordings. If this folder does not exist Web Reports will not be able to play phone conversations.

By default this folder is created by the installation program and points to the default local ReplayFiles folder.
In case you would like to store Replay Files on a different PC you need to create an IIS folder on that PC following the instructions below. Once the IIS folder is created you need to enter the folder's UNC path into **Replay Settings** via Web Reports (page no. 49).

1. Open IIS on the computer where Replay Files are stored.

2. Right click on **Default Web Site**.

3. Select **New** and then the **Virtual Directory** option.

4. The **Virtual Directory Creation Wizard** screen comes up.
   Enter **ReplayFiles** into the **Alias** field. Click on **Next**.
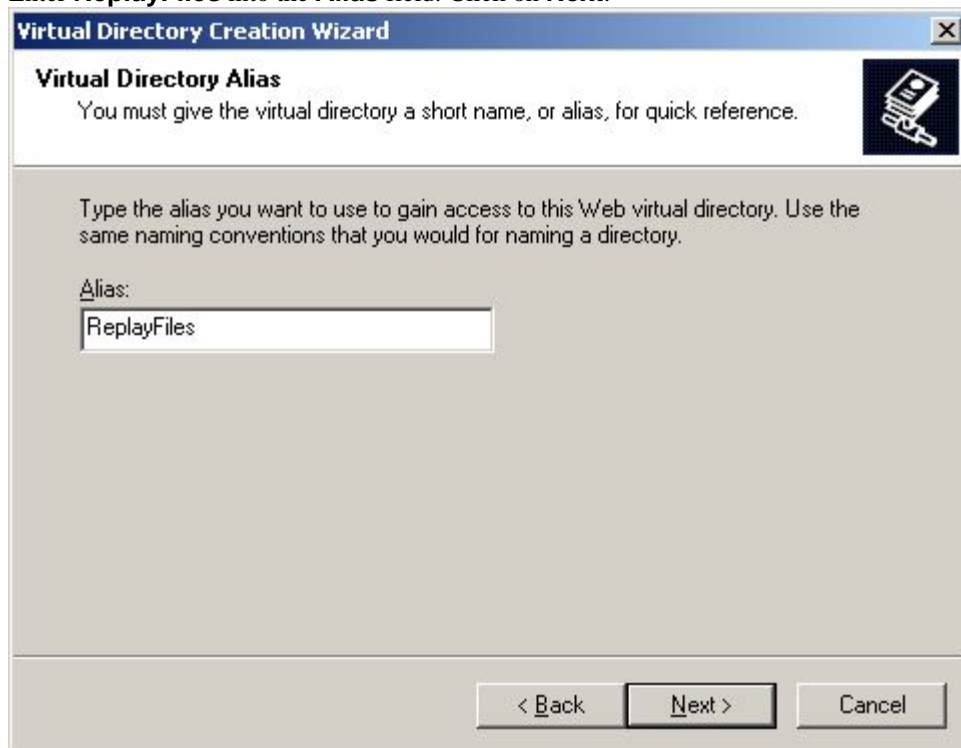
5. Enter the path to the Replay Files folder (where Replay Files are stored) into the **Directory** field.

6. Next set the **Access Permissions** for this folder.

7. Click **Next** to complete the wizard.

8. You can test if you can play voice files via the **ReplayFiles** virtual folder.
    Open your Internet Explorer and type the path to one of the voice files into the Address field using IIS

virtual folder.
Create the path as follows:
http://*ComputerName*/**ReplayFiles**/*the path to the voice files how it appears in the ReplayFiles IIS Server starting with extension number folder*

For example: http://*computername*/**ReplayFiles**/*boxId*/*01/2006/12/27/01_20061227_12283_000018.wav*

9. Go to Web Reports and enter the path to the virtual folder i.e. http://*computername*/**ReplayFiles** into the **Replay Settings** screen.

10. Click on **Save**.

Trisys Screen Logger

This software add-on is available if you purchased Trisys Screen Logger.

NOTE:
Screen Logger Viewer must by installed on each PC used for viewing PC activity.

To use Screen Logger you need to enable Initialize and script ActiveX controls not marked as safe in the Internet Explorer options on each PC used for viewing.

1. Open **Internet Explorer** and go to **Internet Options**

2. Click on **Security Tab**

3. Select the **Trusted Sites** icon and click on the **Sites** button

4. At the Trusted Sites screen, verify **Require server verification…** check box is unchecked

   ☐ Require server verification (https:) for all sites in this zone
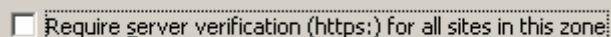
5. Add the url of the web server where Tapit Web Reports is installed (i.e. http://server name) to the Trusted Sites group

6. Click on **OK**

7. Back at the **Security Tab**, with **Trusted Sites** still selected, click on **Custom Level** and ENABLE **Initialize and script ActiveX controls not marked as safe**

8. Save the changes

NOTE:
In order to protect your network from security breach, we recommend installing Web Reports on the Intranet. If you need to view screens from outside of your network, use VPN connection.

Using Trisys Screen Logger you can view screens from the employee's PC at the time of the phone call.

This option is available via detail reports of Tapit Web Reports.

Setting up Screen Logger in Web Reports

In order to view the activity of the monitored PC, you need to point Web Reports to the PC where Screen Logger Server is installed and provide Screen Logger account credentials to access Screen Logger Viewer.

1. Open Tapit Web Reports with the Web Reports account that has full privileges (Web Reports administrative account).
2. The **Main Menu** screen appears.
3. Click on the **Screen Logger Setup**. The **Setup Screen Logger** page opens in a new window.
4. Enter the **IP Address of the Screen Logger Server PC**.
5. Enter the **Port** number, or if you want to use default port 4456, leave this entry blank. This value should match the port number entered during Screen Logger Server installation.
6. Enter the **Screen Logger User Name**. This is the user name for one of the accounts created in Screen Logger Server for the Screen Logger Viewer.
7. Enter the **Screen Logger Password**. This is the password for the user account entered above.
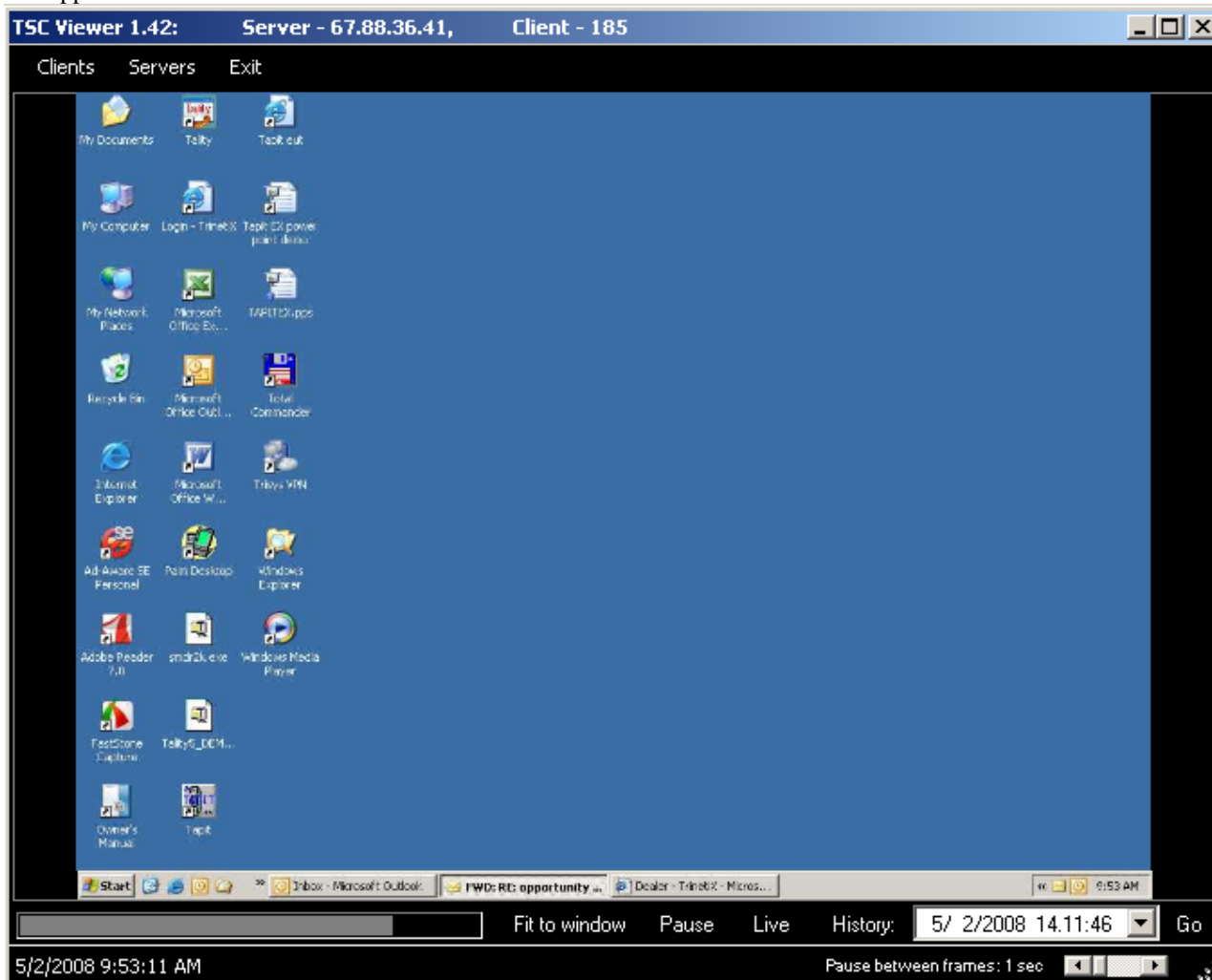8. Click on **Save**.

To view PC activity for an extension

1. Run a detail report.

2. Click on the "eye" icon for a desired call record. (eye icon is only displayed for records with extension numbers).

In our example we selected the call record for ext 185.

3. Screen shots taken around the time of the phone call from the PC belonging to an employee at ext. 185 appear.

4. Screen Logger displays the best match for the time of the phone call.
    The screens change at the rate they have been recorded. The Viewer shows new frames for the duration of the phone call. When the phone call is over the Call Ended status is displayed in the lower right corner of the screen.
    To pause the transmission – click anywhere on the Viewer screen. Click again to resume it. Alternately, you can click on the **Pause** link on the bottom of the Viewer screen.
    The lower left corner of the Viewer console show Date and Time when the currently displayed screen shot has been taken.
    To see the same screen in a higher resolution click on the **Fit to window** link. The screen shot is displayed in full size. When in full size, you can use vertical and horizontal scrollbars to navigate the image. Click on the link again to resize it back to the original size.

    For more information on how to use Screen Logger Server and Screen Logger Viewer outside of Tapit Web Reports see the manual distributed on the Screen Logger CD.

TROUBLESHOOTING WEB REPORTS

For troubleshooting information see the TapitWebReports.pdf on Trisys Software CD in Tapit Web Reports folder.

You can also find most current information on the Web at
http://www.trisys.com/documents/WebRepsDoc/TapitWebReports.pdf