Remote Manager Manual

TRISYS INC.

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Document Revision Record

ABV	Description
161003	New template

Related Documentation

Document Name
TapitNOVA Call Accounting Manual

Remote Manager Manual

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Before Installing

Requirements for Main (Host) Location

- Pentium III
- 256 MB of RAM
- Microsoft™ Windows 98/NT/2000/XP Professional
- Modem 2400 bps or faster
- Tapit installed on the system.
- Minimum of 200 MB of free disk space for host location
- Minimum 100 MB of free disk space per remote location (amount of locations vary)

Requirements for Each Remote Location

- Telephone equipment with SMDR port
- Buffer box
- Cable connecting a buffer box to PBX's SMDR port
- The following buffer box switches have to be set manually:
  For Buffer Box Pollcat II Jr. with external modem, MPC 500, Pollcat III
  Sw1 – down   Sw2 – down   Sw3 – down
  Sw6 – down   Sw7 – down   Sw8 – down
  Settings for Sw4 and Sw5 depend on the PBX Port Baud Rate.
  For buffer box Pollcat II Jr with internal modem settings for switches are as above except switch no. 2 is up.
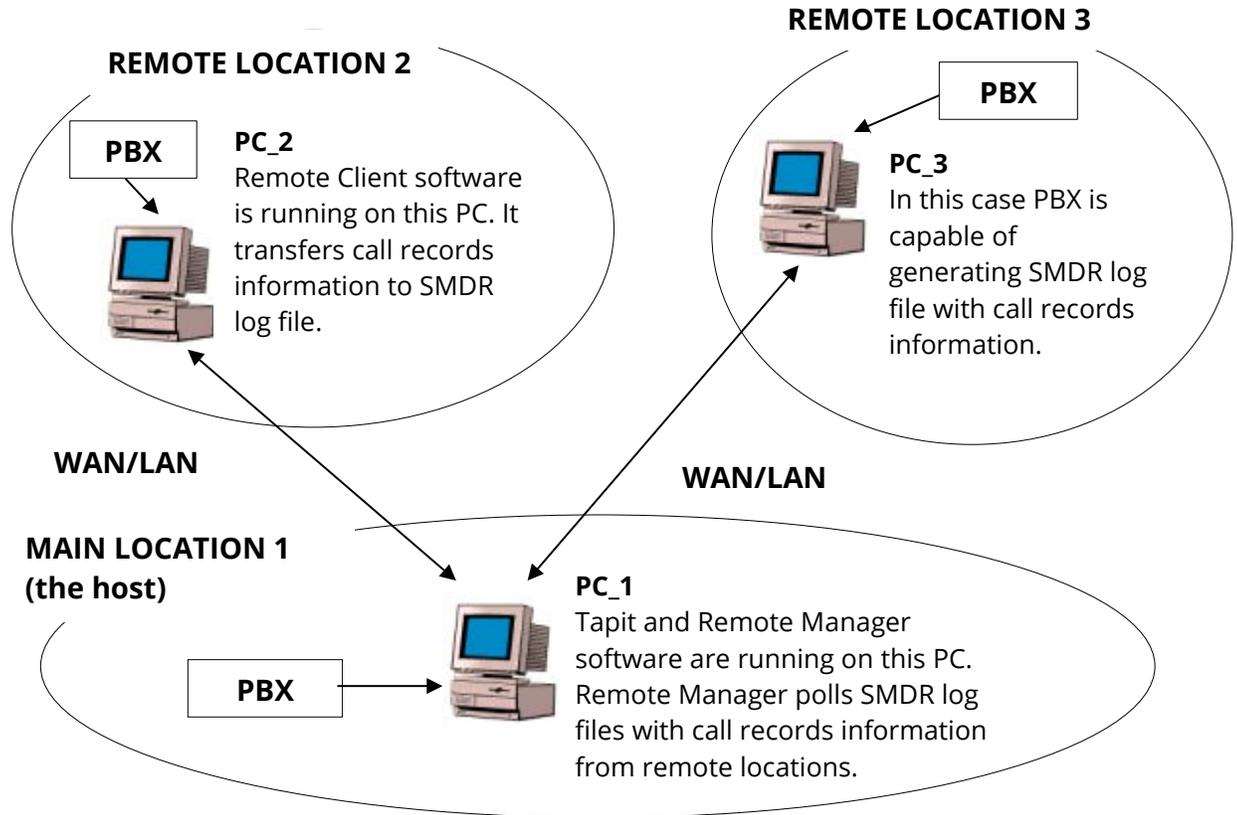 **Please, refer to your buffer box user guide "Hardware Installation" part.**

Buffer box input port is a 25 pin, female RS-232 port for connection to PBX SMDR port.
In case your PBX cable connector is a female, you will need a gender changer.

How Remote Manager Works

Scenario 1: Remote Manager uses Remote Client via WAN/LAN

REMOTE LOCATION 3

REMOTE LOCATION 2

PBX

PBX

PC_2
Remote Client software is running on this PC. It transfers call records information to SMDR log file.

PC_3
In this case PBX is capable of generating SMDR log file with call records information.

WAN/LAN

WAN/LAN

**MAIN LOCATION 1
(the host)**

PC_1
Tapit and Remote Manager software are running on this PC. Remote Manager polls SMDR log files with call records information from remote locations.

PBX

How Call Records are Collected:

Remote Location 2 has a computer (**PC_2**) with Tapit Remote Client installed. **PC_2** is connected to the PBX. PBX generates call records information in SMDR format. Tapit Remote Client then transfers call records into SMDR log file. The log file is saved on **PC_2** and contains call records ready to be polled.
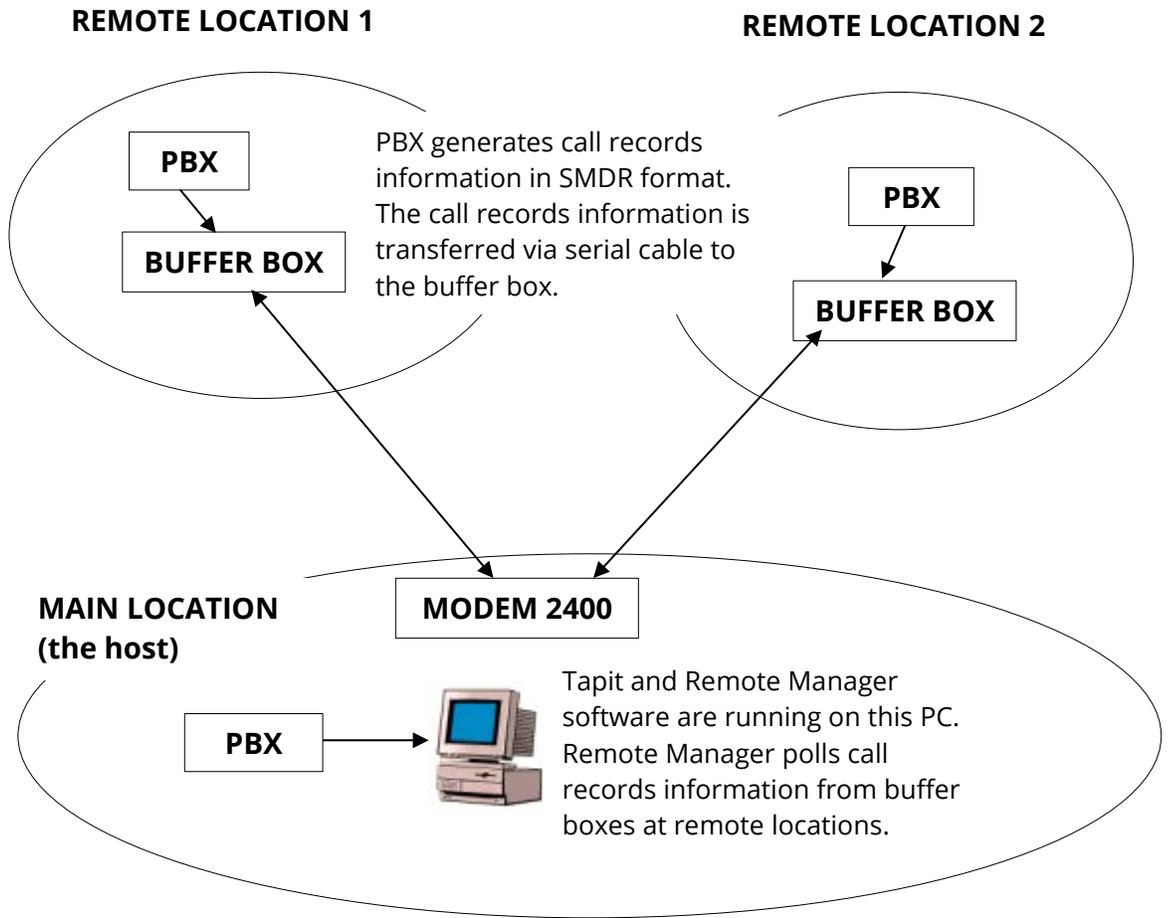
Remote Location 3 has a computer (**PC_3**) connected to PBX. The PBX at **Remote Location 3** has the ability to generate SMDR log file. The log file is saved on **PC_3** and contains call records ready to be polled.

Main Location 1 has the computer (**PC_1**) with Tapit and Remote Manager installed. **PC_1** is connected to the PBX. PBX generates call records information in SMDR format. Tapit processes call records and stores them in **Main Location** database.

How Call Records are Polled from Remote Locations:

Tapit Remote Manager (at **Main Location 1**) polls SMDR log files with call records information from both **Remote Location 2** and **Remote Location 3** via WAN/LAN. Call records are then processed and stored in appropriate locations databases on the **Main Location** computer – **PC_1**.

Scenario 2: Remote Manager uses Buffer Boxes via Modem

REMOTE LOCATION 1

REMOTE LOCATION 2

PBX

BUFFER BOX

PBX generates call records information in SMDR format. The call records information is transferred via serial cable to the buffer box.

PBX

BUFFER BOX

MODEM 2400

MAIN LOCATION (the host)

PBX

Tapit and Remote Manager software are running on this PC. Remote Manager polls call records information from buffer boxes at remote locations.
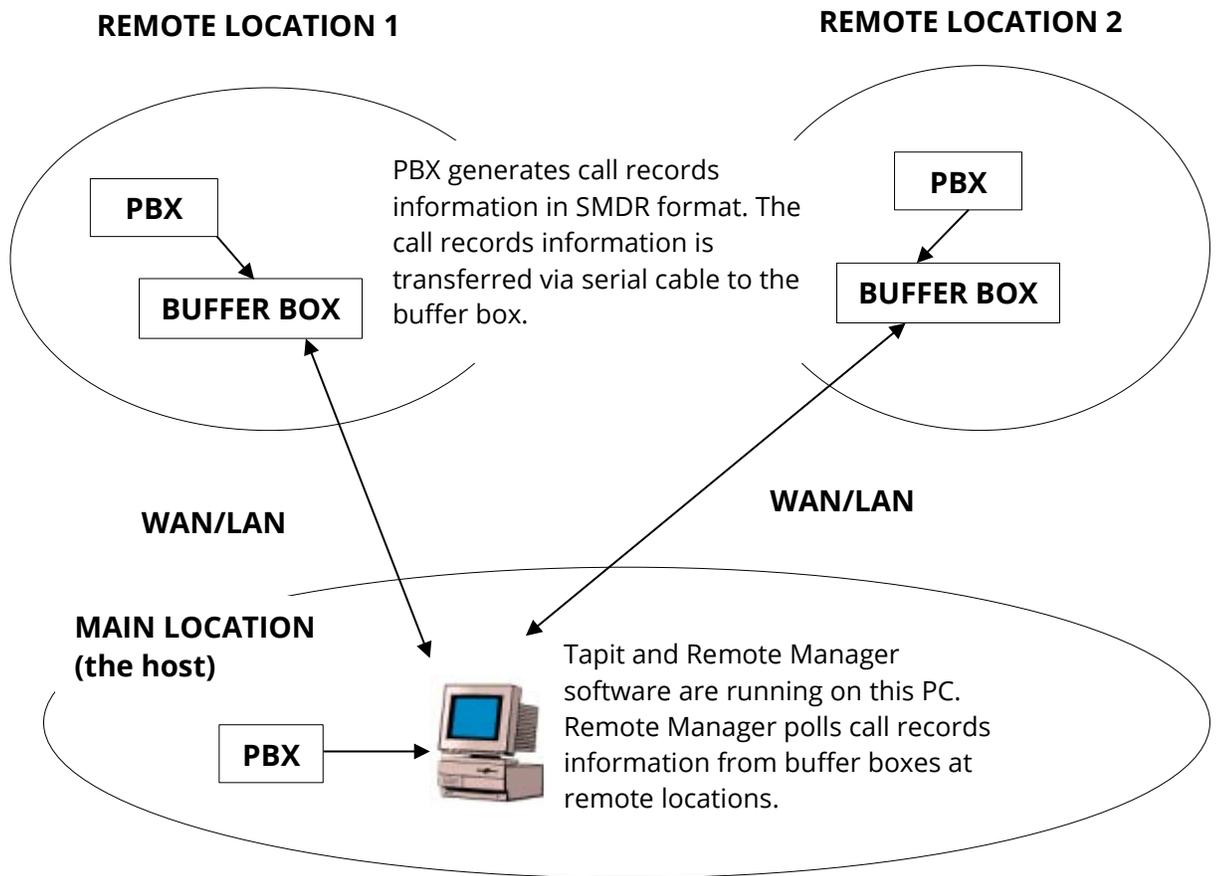
How Call Records are Collected:

Remote Location 1 and 2 have buffer boxes connected to the PBX.
At each location the corresponding PBX generates call records information in SMDR format.
The call records information is transferred via serial cable to the corresponding buffer boxes.
The buffer boxes contain call records ready to be polled
Main Location 1 has the computer with Tapit and Remote Manager installed. The computer is connected to the PBX. PBX generates call records information in SMDR format. Tapit processes call records and stores them in **Main Location** database.

How Call Records are Polled from Remote Locations:

Tapit Remote Manager (on **Main Location**) polls call records information from the buffer boxes at **Remote Location 1 and 2** via modem. Call records are then processed and stored in appropriate locations databases on the **Main Location** computer.

Scenario 3: Remote Manager uses Buffer Boxes via WAN/LAN

REMOTE LOCATION 1

REMOTE LOCATION 2

PBX generates call records information in SMDR format. The call records information is transferred via serial cable to the buffer box.

PBX

BUFFER BOX

PBX

BUFFER BOX

WAN/LAN

WAN/LAN

MAIN LOCATION (the host)

PBX

Tapit and Remote Manager software are running on this PC. Remote Manager polls call records information from buffer boxes at remote locations.

How Call Records are Collected:

Remote Location 1 and 2 have buffer boxes connected to the PBX.
At each location the corresponding PBX generates call records information in SMDR format.
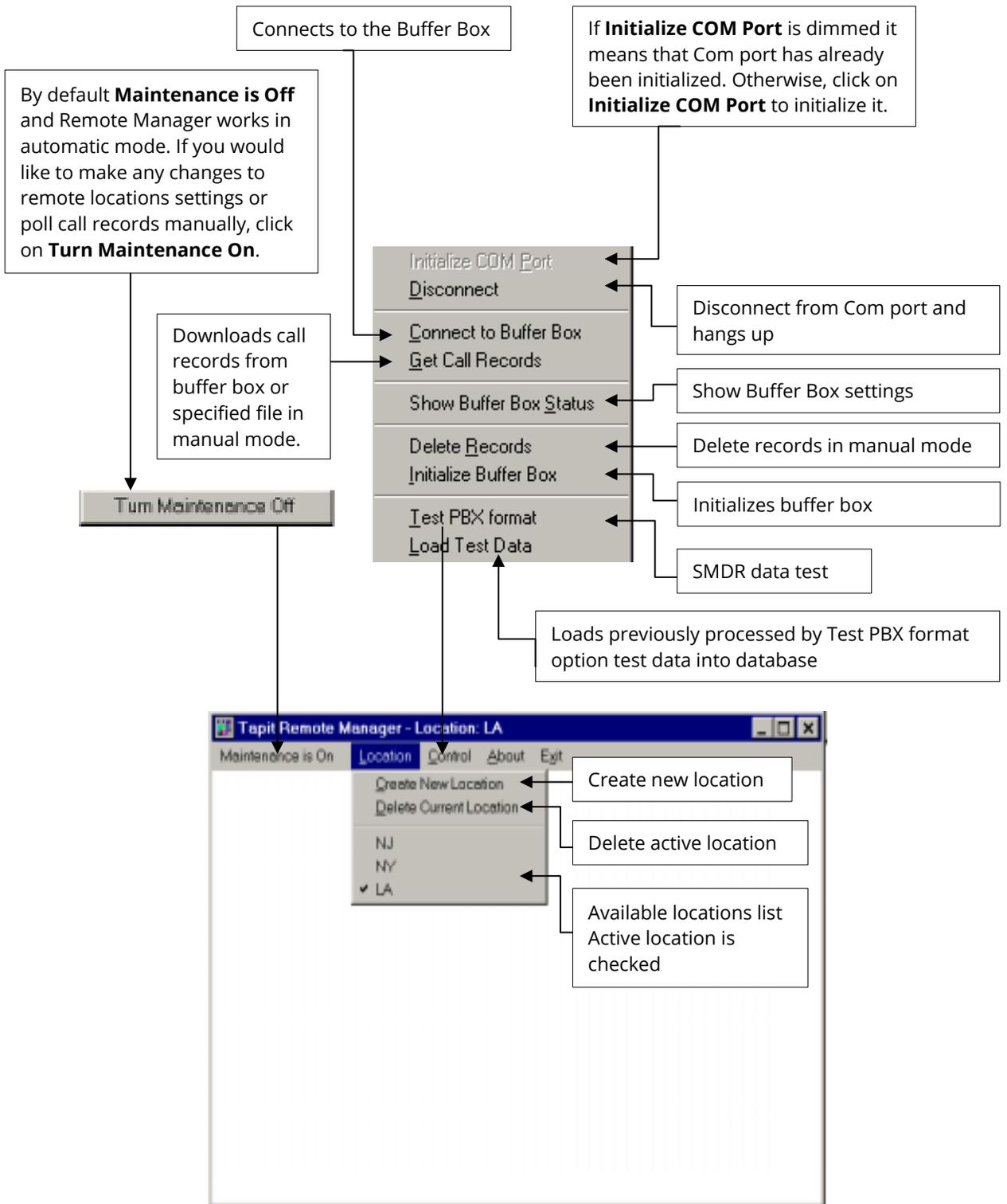The call records information is transferred via serial cable to the corresponding buffer boxes.
The buffer boxes contain call records ready to be polled
Main Location 1 has the computer with Tapit and Remote Manager installed. The computer is connected to the PBX. PBX generates call records information in SMDR format. Tapit processes call records and stores them in **Main Location** database.

How Call Records are Polled from Remote Locations:

Tapit Remote Manager (on **Main Location**) polls call records information from the buffer boxes at **Remote Location 1 and 2** via WAN/LAN. Call records are then processed and stored in appropriate locations databases on the **Main Location** computer.

Main Screen

Connects to the Buffer Box

If **Initialize COM Port** is dimmed it means that Com port has already been initialized. Otherwise, click on **Initialize COM Port** to initialize it.

By default **Maintenance is Off** and Remote Manager works in automatic mode. If you would like to make any changes to remote locations settings or poll call records manually, click on **Turn Maintenance On**.

Downloads call records from buffer box or specified file in manual mode.

Disconnect from Com port and hangs up

Show Buffer Box settings

Delete records in manual mode

Initializes buffer box

SMDR data test

Loads previously processed by Test PBX format option test data into database

Create new location

Delete active location

Available locations list Active location is checked

Minimum System Requirements

- Tapit EX installed on the system
- Minimum 9 MB of free disk space per remote location (amount of locations vary and depends on the purchase)
- Telephone equipment, which must have a CDR/SMDR port at each location
- Main (host) location needs **at least one of the following**:
  o Modem 2400 bps
  o WAN/LAN connection
- Each Remote location needs **one of the following**:
  o Buffer box
  o PC running Tapit Remote Client
  o PBX outputting SMDR log file to the PC

Installation

Installing Remote Manager

Install and setup Tapit (see Tapit Manual for instructions; if you do not have the hard copy of the manual you can find TapitManual.pdf file on your CD or Tapit Manual online at www.trisys.com).
Once Tapit is installed and set up, proceed with Remote Manager installation.

1. Insert Tapit CD into the CD ROM drive. Trisys Telecom StartUp Manager screen is displayed.
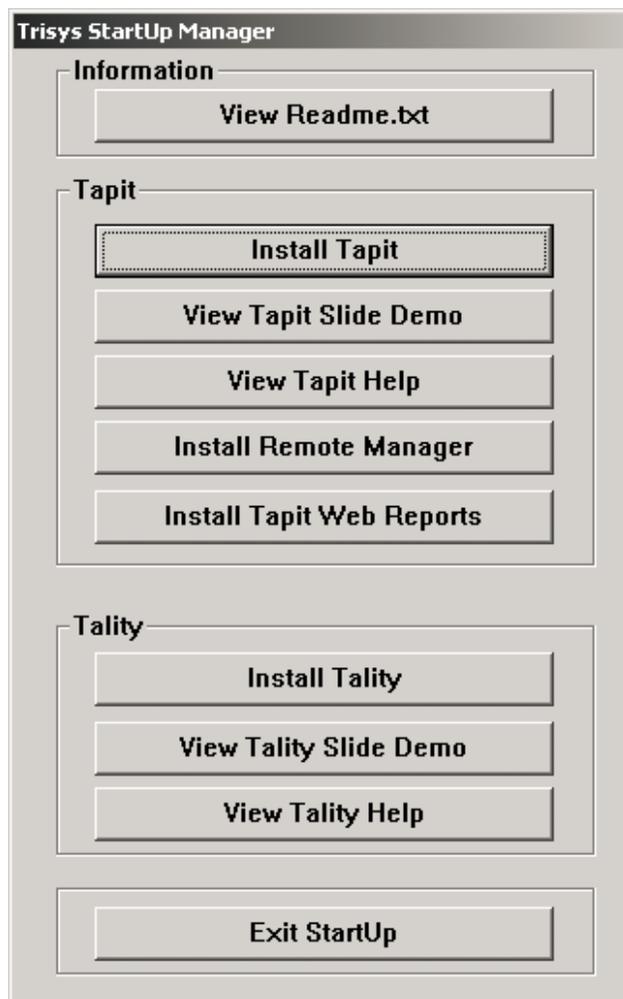
2. Click on Install Remote Manager. The Remote Manager Setup screen appears.
3. Click on **Continue** button. Setup program is searching for the installed components.
4. Click on the **OK** button on the next screen to install Remote Manager files in TapitRM folder on drive C: or click on **Change Folder** button to change a destination drive or folder.

5. **Remote Manager Setup** screen appears.
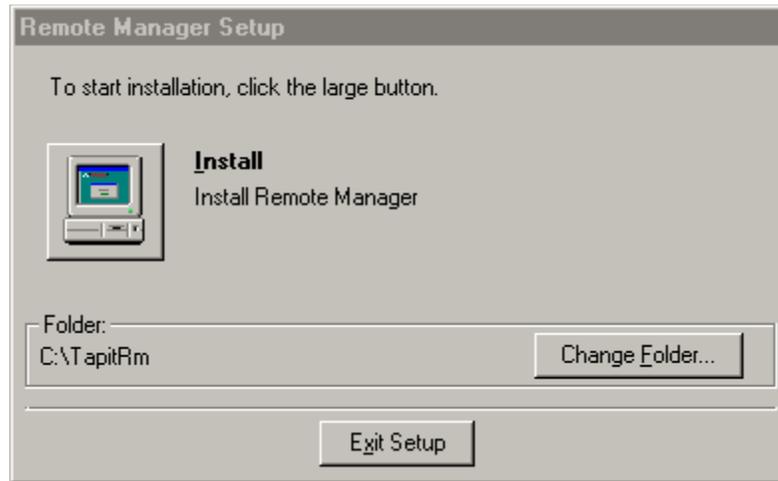
6. Click on **Install** button to continue (or click on **Change Folder** button to change a destination drive or folder).
    Program installs Remote Manager files and updates your system.
7. When installation is completed the Setup program displays a message "Remote Manager Setup was completed successfully".
    Click on **OK**.
    It is recommended to restart the computer.

Setting Up Remote Locations

Creating Remote Locations

It is recommended to create all locations before setting up their parameters. This manual follows the above order. For this reason user is instructed to make no changes to the remote locations settings at this stage.

1. Open Remote Manager (Start/Tapit/**Remote Manager**).
   When you open **Remote Manager** for the first time, it creates the first location.

   For all subsequent locations, click on **Location** and then click on **Create New Location**.
2. **This operation takes several minutes to complete. Please wait.**
3. Click on **OK.** Do not interrupt. Wait until **Operation completed** is displayed.
4. Click on **OK.** You may get the message **Port is not connected**. Click on **OK.**
5. Settings for New Location 01 screen appears.
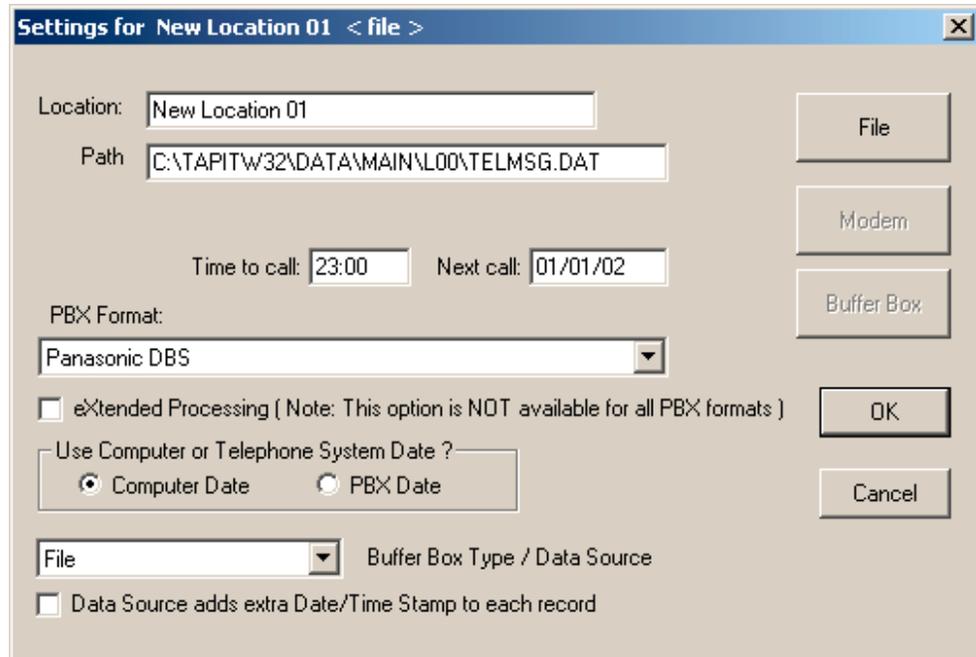
6. Click on **Cancel.** Message **Com port initialized successfully** appears.
7. Click on **OK.**
8. Repeat steps 1 – 7 for each new location.

You can create as many locations as you have purchased, but not more.

At the attempt of creating more locations than purchased, the program displays the message *Cannot create more than the (purchased number) locations.* **Click on OK.**
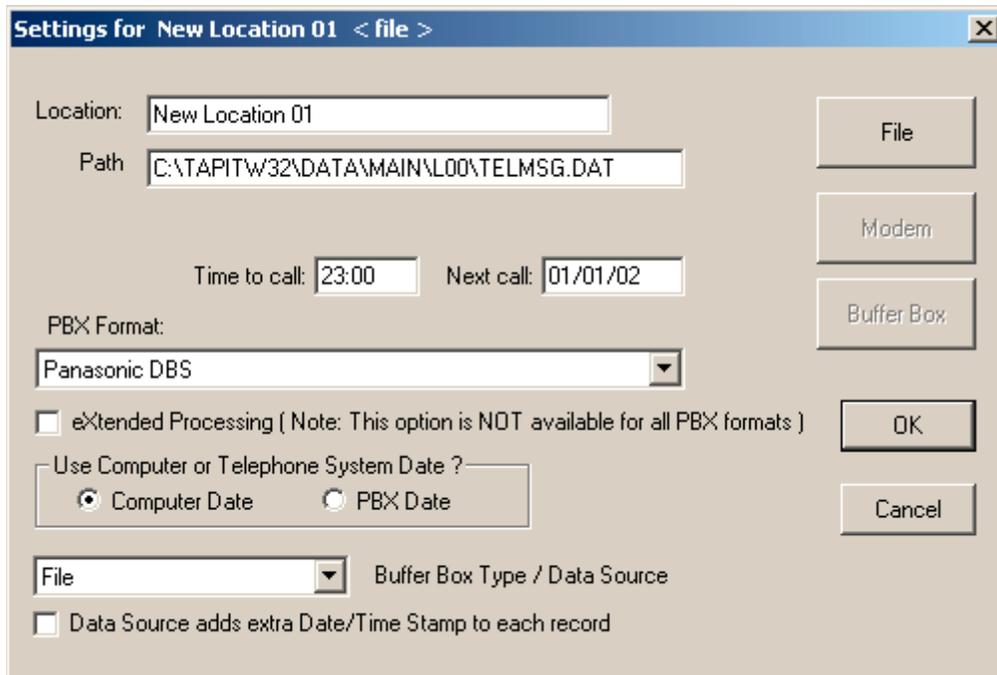
Initializing Locations

Scenario 1: call records polled from SMDR log file via LAN/WAN

1. Click on **Location**.
2. Click on the location you want to set the settings for.
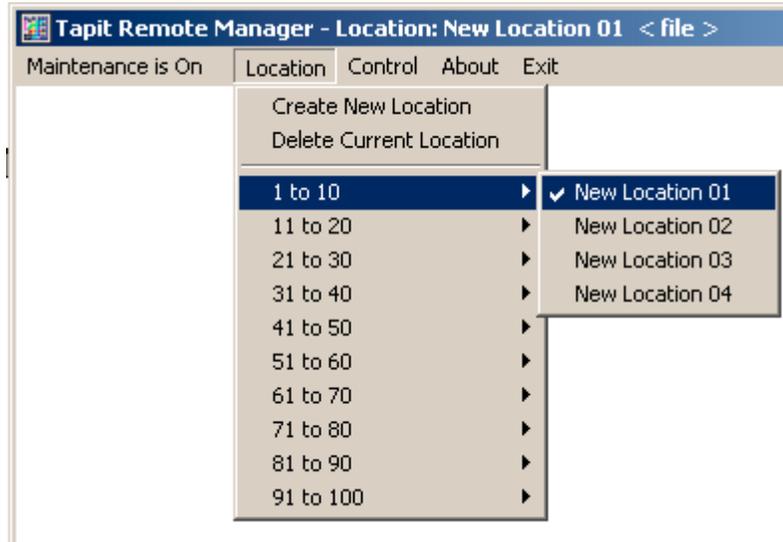
3. Settings for New Location 01 screen appears.
   By default this screen opens with **File** selected in the **Buffer Box Type/Data Source** field.

4. **Location: -** enter the name identifying the remote site.

5. **Buffer Box Type/Data Source** (located at the bottom of the screen)

File ▼ Buffer Box Type / Data Source

Select **File** from the list of options.

6. **Path**
Enter a path to the TELMSG.DAT at the remote site.

Path T:\TELMSG.DAT

Call records file is polled from the remote site via WAN/LAN.

7. **Time to call**
Enter the time (in military format) to set the scheduler. From now on, scheduler will poll call records from this particular remote location at the same time every day.

8. **Next Call**
Enter the date of the next polling. Suggested setting for this field is today's date. It is recommended to keep time settings for different remote locations at least one half hour apart from one another.

9. **PBX Format**
Select the PBX format of the remote location from the list.
Note: This setting must be entered in Remote Manager Settings screen. Do not attempt to enter/or change PBX format/type in Tapit/Maintenance/System Parameters/Communications settings screen.

10. **eXtended processing (not available for ALL PBX formats)**
Check this box if you are certain Tapit supports extended processing format or when suggested by Trisys Technical Support.

11. **Use computer or telephone system date?**
If your phone system is not generating the following date information: day, month and year, you must use the **Computer** date. Otherwise we recommend using the **PBX** date.

12. **Data Source adds extra Date/Time stamp to each record**

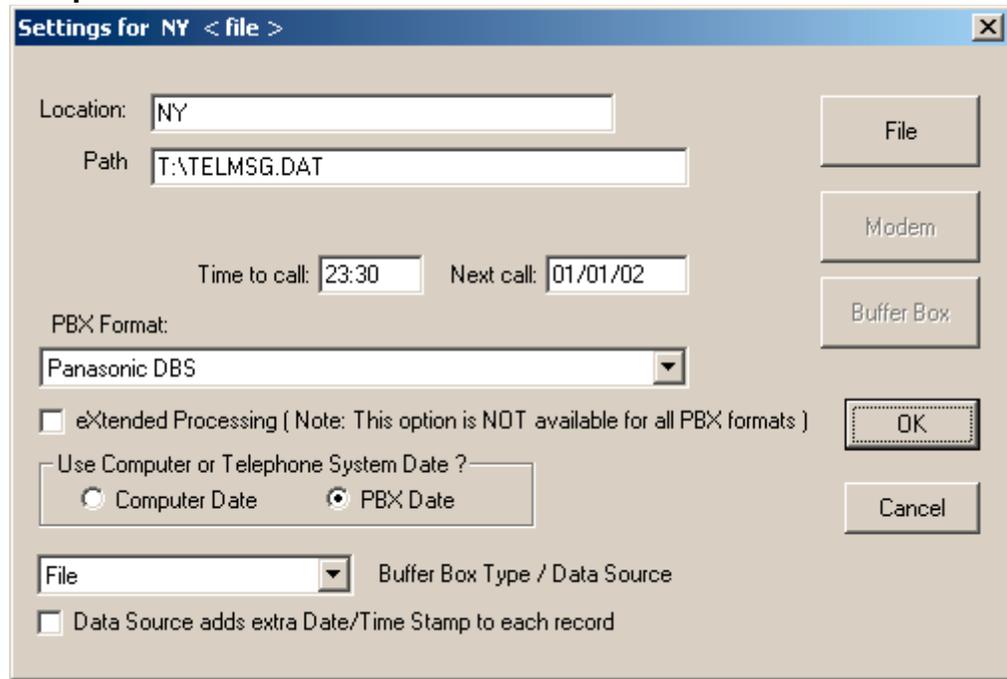*If SMDR records contain date:*
Leave this box unchecked.

If SMDR records do not contain date:
If Remote Client (running at that location) is set to collect call records data with date/time, check this option.

13. Click on **OK** at the **Settings for New Location 01** screen.
The location has been initialized.

**Sample screen for initialized location:**

14. Repeat step 1 through 12 for all the remote locations (you have already created) using SMDR log file to store call records.

Scenario 2: call records are polled from buffer box via modem.

1. Click on **Location**.
2. Click on the location you want to set the settings for.
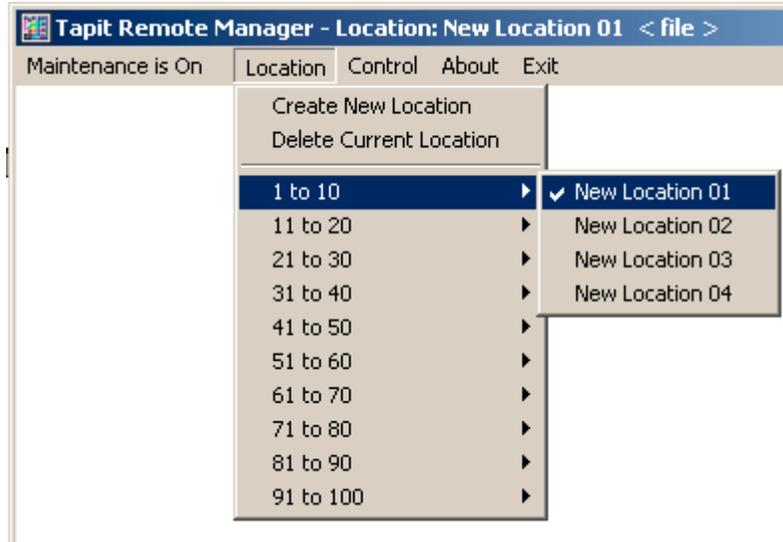
3. **Settings for New Location 01** screen appears.
   By default this screen opens with **File** selected in the **Buffer Box Type/Data Source** field.
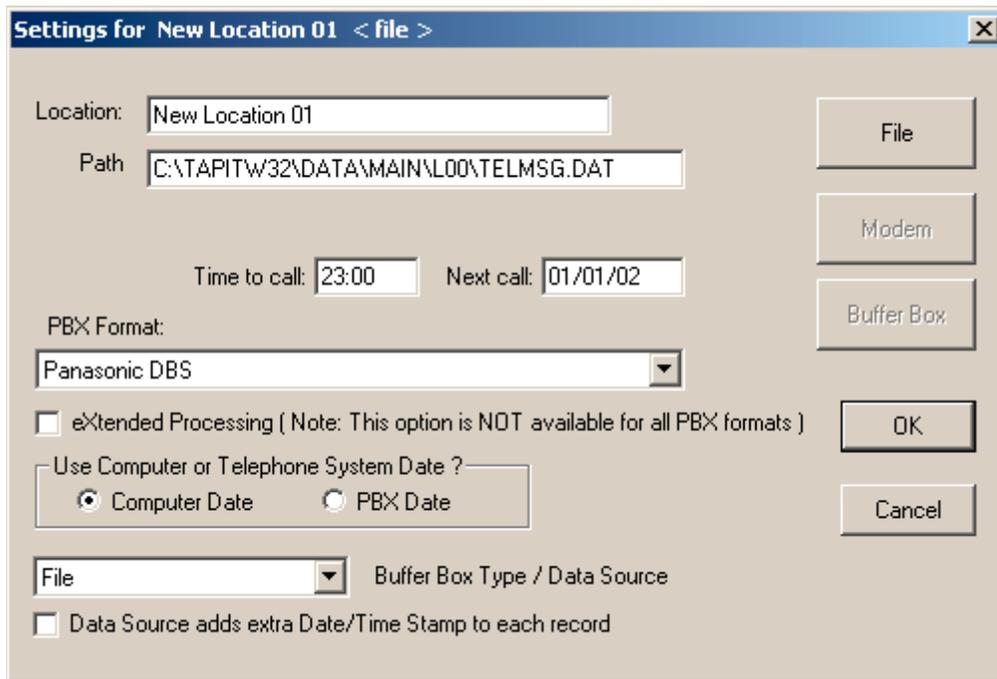
4. **Location**
   Enter the name identifying the remote site.

5. **Buffer Box Type/Data Source** (located at the bottom of the screen)
   Select appropriate buffer box name.

   | MPC 500 ▼ | Buffer Box Type / Data Source |

   Note: **Data Source adds extra Date/Time Stamp to each record** option disappears upon buffer box selection. This option is displayed only when File is selected.

6. **Phone**
   Enter a phone number used for dial up connection with the buffer box.
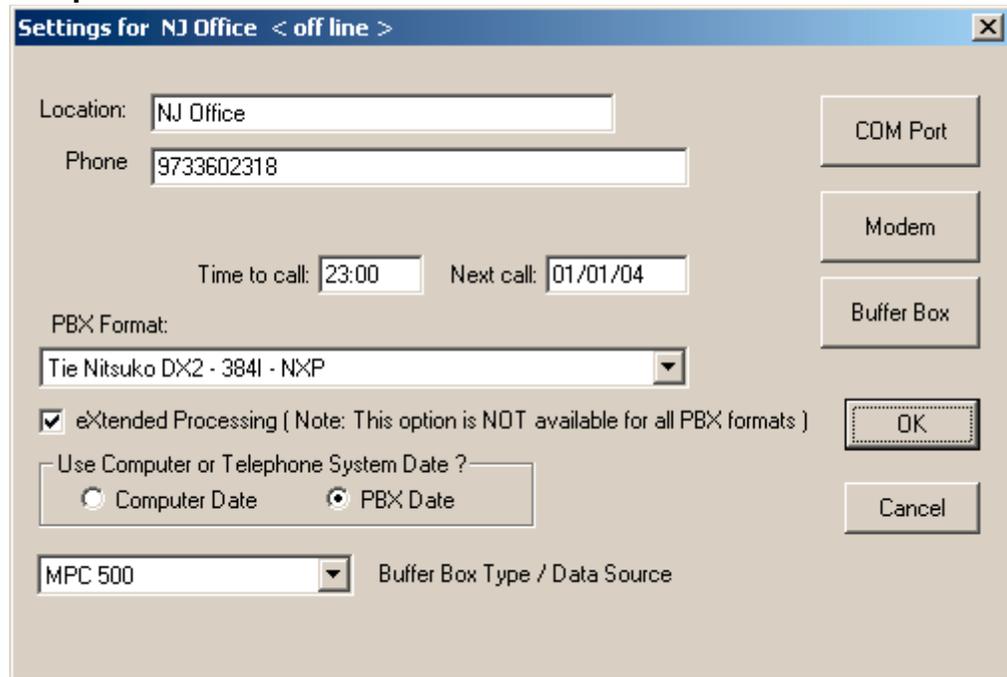
   | Phone | 9733602318 |

   Call records are polled from the remote site buffer box via modem.

7. **Time to call**
   Enter the time (in military time) to set the scheduler. From now on, scheduler will poll call records from this particular remote location at the same time every day.

8. **Next Call**
   Enter the date of the next polling. Suggested setting for this field is today's date. It is recommended to keep time settings for different remote locations at least one half hour apart from one another.

9. **PBX Format**
   Select the PBX format of the remote location from the list.
   Note: This setting must be entered in Remote Manager Settings screen. Do not attempt to enter/or change PBX format/type in Tapit/Maintenance/System Parameters/Communications settings screen.

10. **eXtended processing (not available for ALL PBX formats)**
    Check this box if you are certain Tapit supports extended processing format or when suggested by Trisys Technical Support.

11. **Use computer or telephone system date?**
    If your phone system is not generating the following date information: day, month and year, you must use the **Computer** date. Otherwise we recommend using the **PBX** date.

**Sample screen for initialized location:**

12. Click on the **COM PORT** command button located on the right side of the **Setting for New Location** screen.
13. The **Com Port** screen appears.
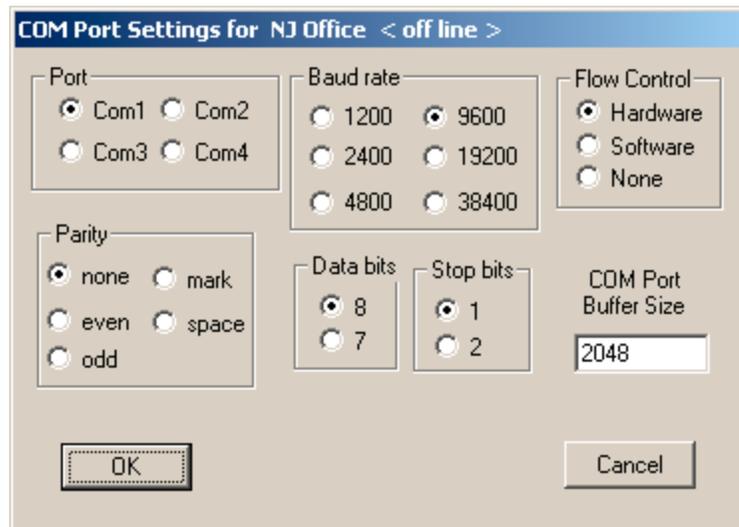
Go to the **Port** settings and select Com port that your modem is connected to. It is recommended to leave the rest of the settings on this screen at default. Click on **OK**.

14. The **MODEM** button.
    It is not necessary to change modem settings.
15. Click on the **BUFFER BOX** button.

16. The **Buffer Box Initialization** screen appears.
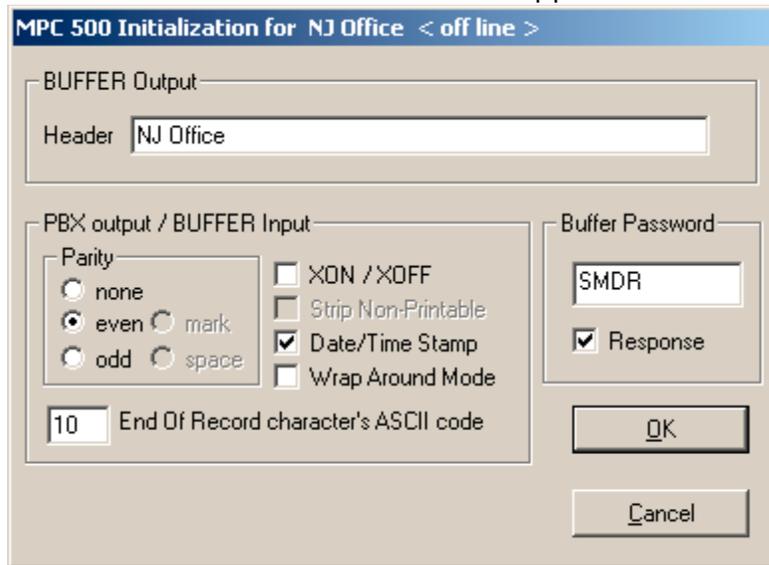
17. Go to the **Header** field and enter locations name (the name you have entered in step 4).
18. Go to the **Parity** settings and set them according to the PBX at the remote location.
19. Click on **OK**
20. Click on **OK** at the **Settings for (location name)** screen.
    The location has been initialized.
21. Repeat step 1 through 20 for all the remote locations (you have already created) polling records from buffer box via modem.

Scenario 3: call records are polled from buffer box IP address via LAN/WAN or Internet.

1. Click on **Location**.
2. Click on the location you want to set the settings for.
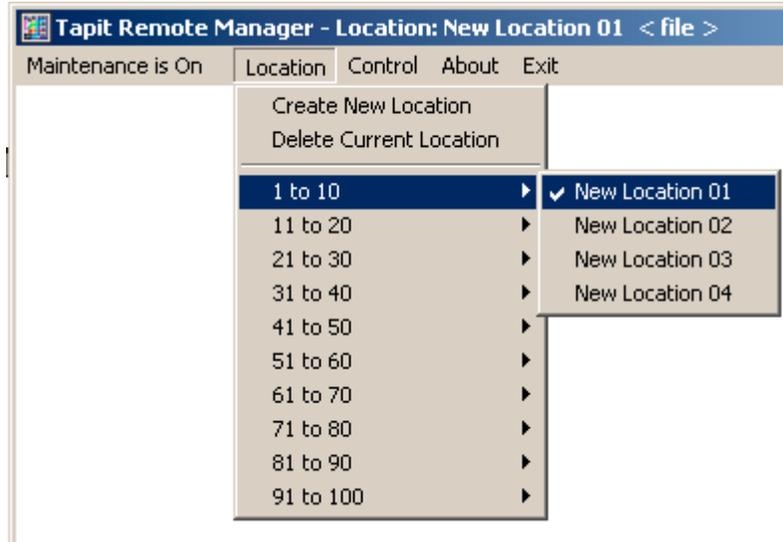
3. **Settings for New Location 01** screen appears.
   By default this screen opens with **File** selected in the **Buffer Box Type/Data Source** field.
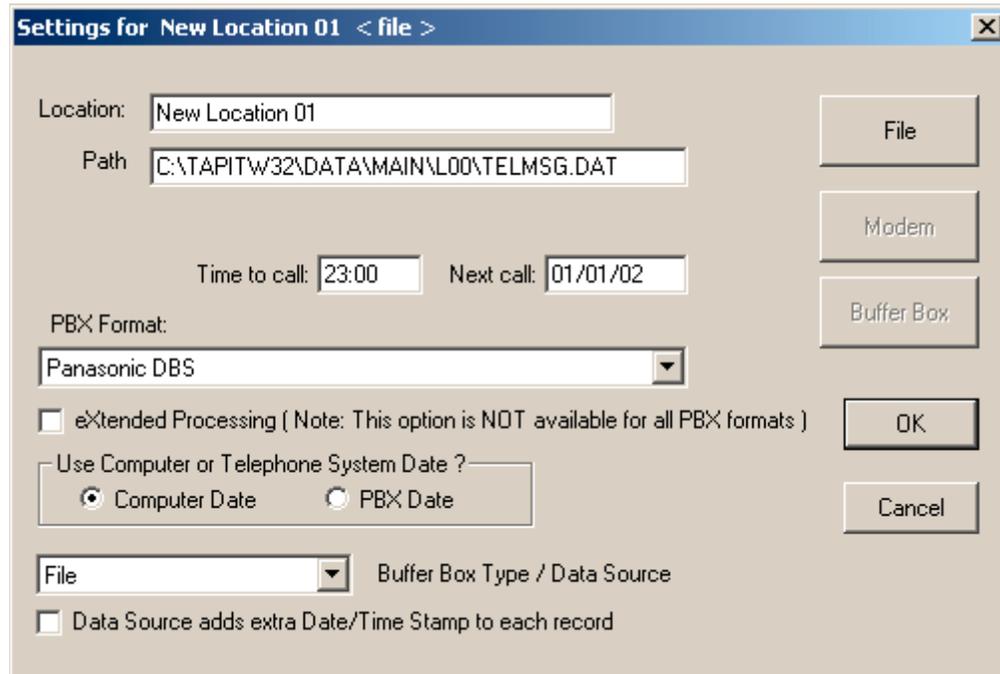
4. **Location**
   Enter the name identifying the remote site.

5. **Buffer Box Type/Data Source** (located at the bottom of the screen)
    Select **WTI NetLink(IP)** buffer box.

    | WTI NetLink (IP) | ▼ | Buffer Box Type / Data Source |

6. Go to the **IP** field and enter the buffer box IP address.
    Note: **Data Source adds extra Date/Time Stamp to each record** option
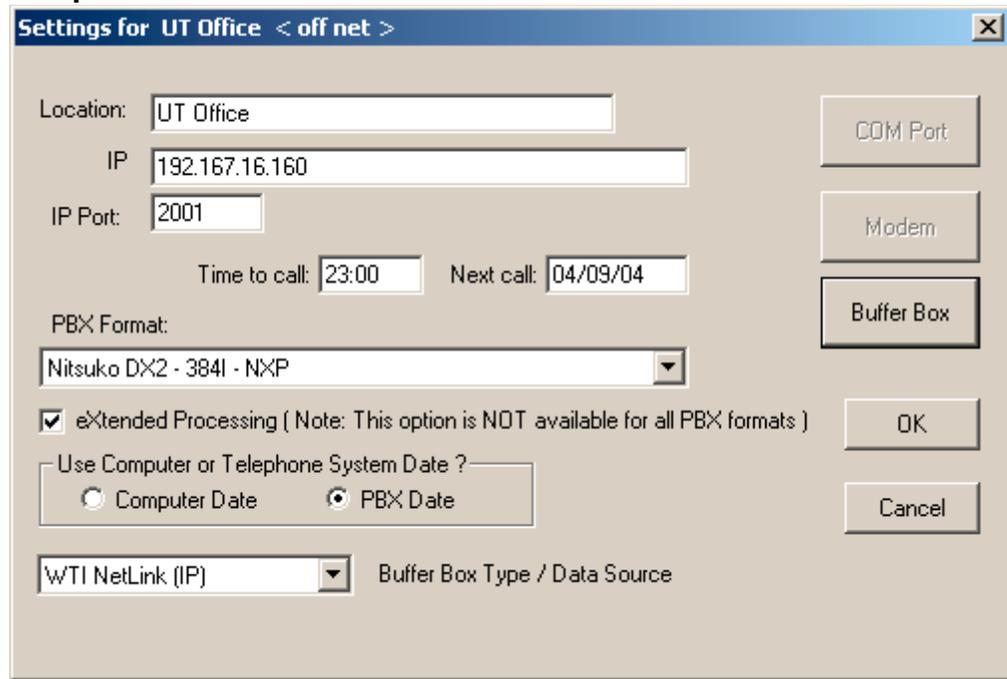   disappears upon buffer box selection.

    IP | 192.167.16.160
    IP Port: | 2001

    Call records are polled from remote site buffer box via WAN/LAN or Internet.

7. **Time to call**
    Enter the time (in military time) to set the scheduler. From now on, scheduler will
    poll call records from this particular remote location at the same time every day.

8. **Next Call**
    Enter the date of the next polling. Suggested setting for this field is today's date.
    It is recommended to keep time settings for different remote locations at least
    one half hour apart from one another.

9. **PBX Format**
    Select the PBX format of the remote location from the list.
    Note: This setting must be entered in Remote Manager Settings screen. Do not
    attempt to enter/or change PBX format/type in Tapit/Maintenance/System
    Parameters/Communications settings screen.

10. **eXtended processing (not available for ALL PBX formats)**
    Check this box if you are certain Tapit supports extended processing format or
    when suggested by Trisys Technical Support.

11. **Use computer or telephone system date?**
    If your phone system is not generating the following date information: day,
    month and year, you must use the **Computer** date. Otherwise we recommend
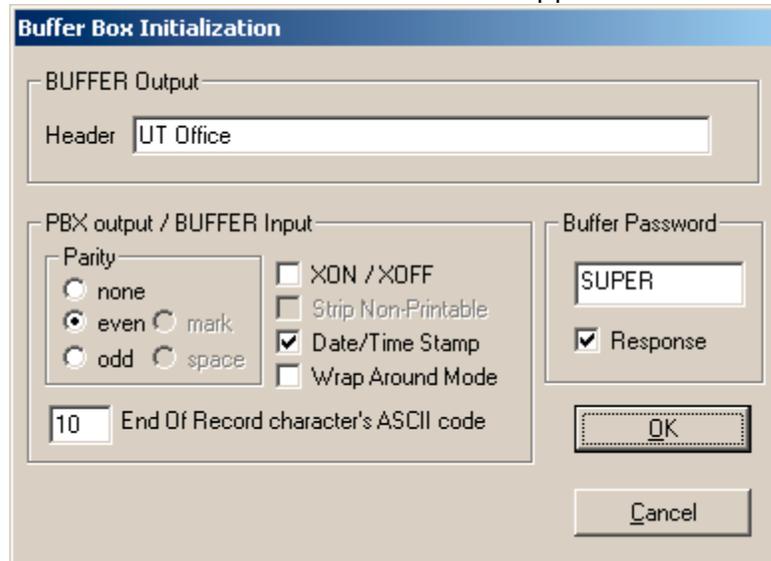   using the **PBX** date.

Sample screen for initialized location:

12. Click on the **BUFFER BOX** command button on the **Settings for New Location** screen.

13. The **Buffer Box Initialization** screen appears.

14. Go to the **Header** field and enter locations name (the name you have entered in step 4).

15. Go to the **Parity** settings and set them for the PBX at the remote location.

16. Click on **OK.**

17. Click on **OK** at the **Settings for New Location 01** screen.
    The location has been initialized.

18. Repeat step 1 through 17 for all the remote locations (you have already created) polling records from buffer box with the IP address.

Initialization Buffer Boxes

This section pertains only to locations using buffer boxes.

The buffer box is reset to default settings and then updated with the new settings set for the selected locations buffer box.

**Before you proceed, make sure that buffer boxes are connected to the PBX at each location.**

Take caution when typing. Type only when instructed by manual. Accidental use of keyboard will result in errors in connections or changes to the settings of the buffer box.

Each time you initialize buffer box all stored call records are deleted.
The buffer box is reset to default settings and then updated with the new settings set for the selected locations buffer box.

1. Select the remote location you want to initialize buffer box for.
   To do this, go to the **Location** menu and click on the name of the remote location. If you get the message **Port is not connected** click on **OK.**
2. The **Settings for (***location name)* screen appears. Make sure that all settings for this location are correct and click on **Cancel**. The location is selected.
   In our example we've selected the *NJ Office* remote location. To indicate that *NJ Office* is an active location the menu displays checkmark next to its name.
3. Click on **Control**.
4. Click on the **Connect to Buffer Box** menu option. **Com Port initialized** successfully message is displayed. Click on **OK**.
5. **Connection with remote modem established** message appears. Click on **OK**.
   You are connected to the buffer box located at the active remote site. Following our example we are connected to *NJ Office* buffer box.
6. Go to the **Control** menu.
   Click on **Initialize Buffer Box.**
7. The following message appears:
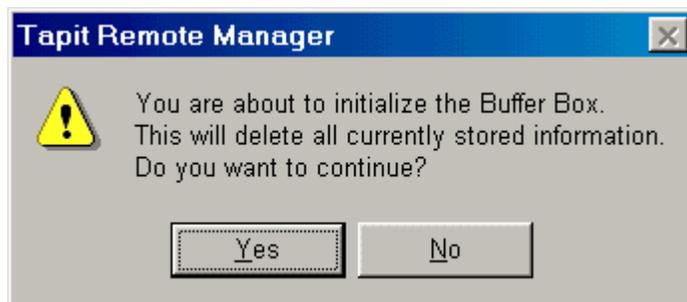
Each time you initialize buffer box all stored call records are deleted. The buffer box is reset to default settings and then updated with the new settings set for the selected locations buffer box.
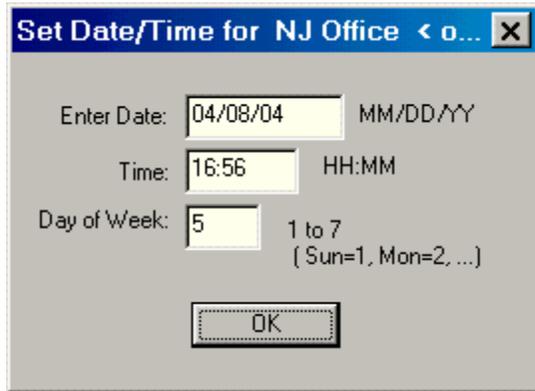
8. Click on **Yes** to continue.
9. **Set Date/Time for (selected location) Office** screen appears.

Enter current date, time and the day of the week for the remote location. In our case we would enter the current date/time settings for New Jersey.

10. This operation takes a few seconds. When it completes successfully, Remote Manager prints **COMPLETE** several times on the screen. Current buffer box date/time settings are displayed right underneath.

COMPLETE
COMPLETE
COMPLETE
16:26   6   04/08/04

Date/time settings are read as follows:

16:26	current time in **military format** (HH:MM)
6	current day of the week in the 1-7 format (6 stands for Friday)
04/08/04	current date (MM/DD/YY)

11. If all settings are accurate, go to the **Control** menu and click on **Disconnect.**
12. **Connection closed** message is displayed.
    Click on **OK.**
13. Initialize buffer boxes for all the set up locations in the same manner following steps 1 through 12.
14. If you finished initialization of all buffer boxes click on **Exit** on the menu bar.
    You will get the message: **You are about to interrupt scheduled work. Do you want to exit?**
    Click on **Yes.**

Setting up Remote Locations via Tapit Application

A user is able to change system parameter settings, pricing, report scheduling and other settings as well as run reports for the active location via Tapit application. By default **Main** is an active location. This means that all **Maintenance** screens pertain to the **Main** location and all reports are run based on the **Main** location call records. If you need to maintain or run reports for another location you need to activate it.
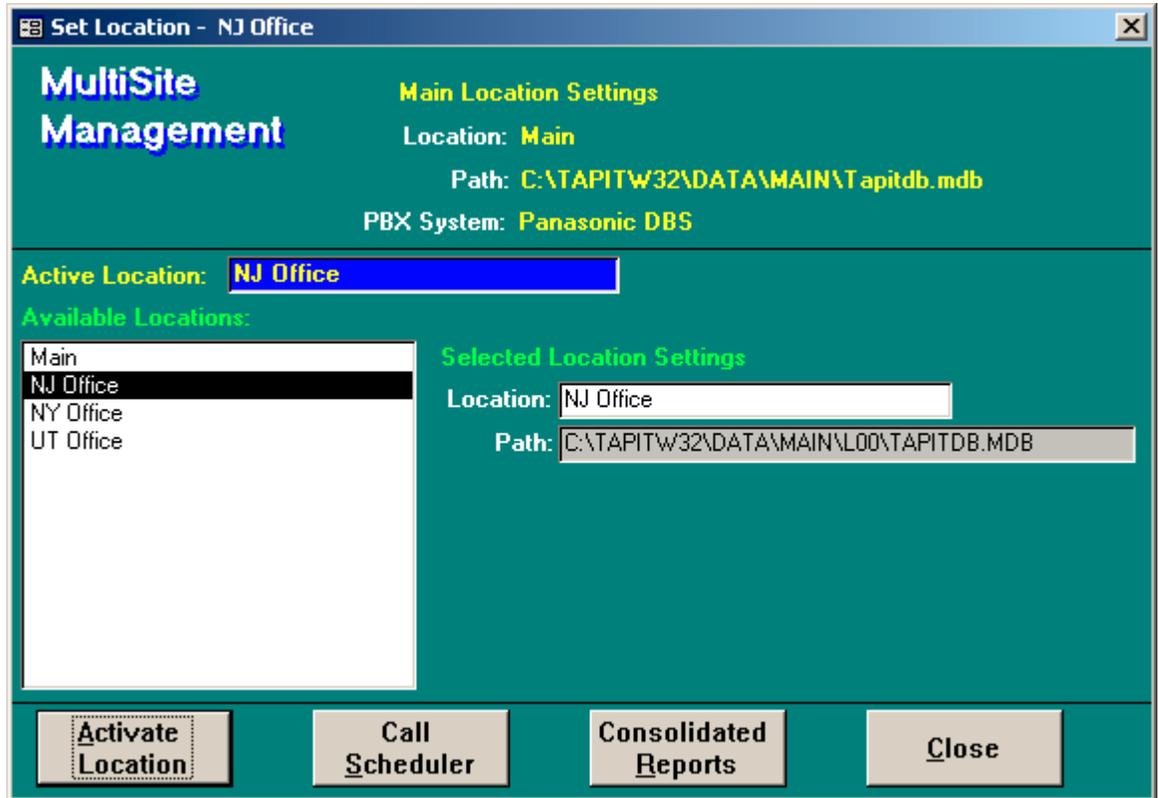
To Activate Remote Location

1. If Remote Manager is running, exit from it.
    Start Tapit application (Start/Tapit/Tapit).
2. The **Main Menu** screen appears
3. Click on the **Multi-Site** button.
    The **Set Location –Location:** *(name of the active remote location)* screen is displayed.
    Title bar of this screen displays the name of the currently active location.
    The default active location is **Main**.

4. You can switch between different locations using this screen.
    Only one location can be active at a time.
5. Select the desired location from the **Available Locations** list.
6. Click on the **Activate Location** button.

7. **Tapit will be connected to the location: (**_location name)_ message appears. Click on **OK**
8. The **Active Location** field value changes to the selected location name.

9. Click on **Close** to return to the **Main Menu.**
   The location is activated. Tapit application has switched to the selected location and all screens and reports pertain to this location.
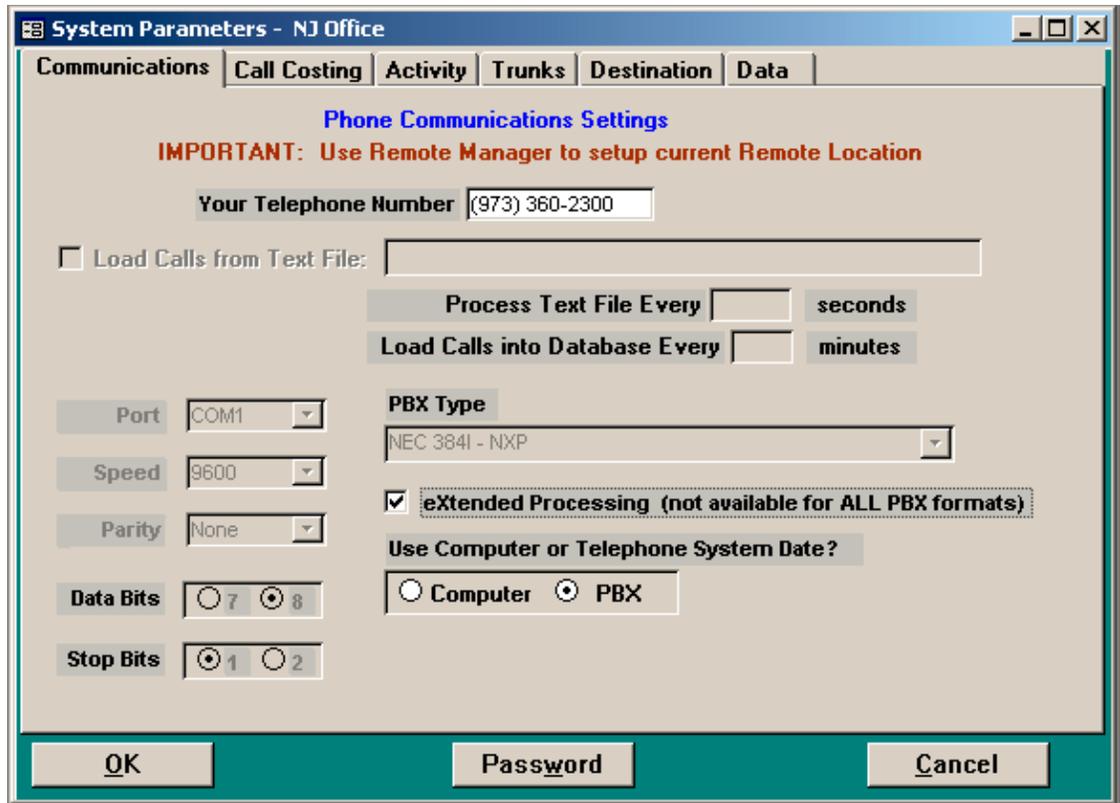
System Parameters

You are about to enter the System Maintenance screen. Before you do it, make sure that the Remote Manager is closed. Calls cannot be processed while performing any setting changes on this screen. Exit the Maintenance screen as soon as you finish working with it.

1. Click on the **Maintenance** button
   The program displays a message – read through it and click on **OK.**
2. You will find several command buttons on this screen.
   Go to the **System Parameter** button and click on it.
   The **System Parameters** screen is displayed. The name of the active location is displayed in a title bar (in our case it is _NJ Office_).

3.   **System Parameters** allows you to configure various settings of Tapit system. It consists of five different screens: **Communications, Call Costing, Activity, Trunks, Destination and Data.**
     The **Communications** screen is displayed first by default.
4.   Enter active location (*NJ Office* in our case) telephone number in the **Your Telephone Number** field.
     All other settings reflect settings previously set in Remote Manager for this location.
     If required, you can edit **eXtended Processing** field and **Use Computer or Telephone System Date** options.
5.   If required, proceed with setting up all **System Parameters** screens. Use Tapit Manual as a reference. Any settings you set up pertain to active location only (in our case *NJ Office*).
6.   The **Data** tab contains the **Create Backup on Exit** option**.**
     Check this box to create a backup copy of the active remote location's database when you exit the Tapit application.

Example: to create a backup of the *NJ Office* Tapit database.
First activate this location (see **To Activate Remote Location** section above).
When *NJ Office* becomes active (*NJ Office* is displayed in title bar for all Tapit screens) go to **System Parameters.** Click on the **Data** tab. Verify that the **Create Backup on Exit** option is checked. Go back to **Main Menu** screen and click on **Exit.** *NJ Office* Tapit database is backed up.

We recommend that you leave this box checked to secure the integrity of the database.

Note: depending on size of the database this process may take some time.

7. Click on **OK** to save changes.
8. To setup all remote location activate each of them and set the appropriate parameters as described in this section.

It is crucial to activate the main location after your finish working with any of the remote locations. Otherwise Tapit will not be able to process main location's call records automatically in the background.

**You have just finished installing and setting up of the Remote Manager. At this point we recommend testing its performance by polling call records manually from each remote location. For instructions on how to perform manual polling refer to the "Polling Records in Manual Mode" part of this textbook.
If test operations are completed successfully set Remote Manager to automatic Mode.**

Polling Records

Automatic Polling

To set the program for automatic polling, follow the instructions below:

1. If you did not exit from the Remote Manager screen do it now.
2. Restart Remote Manager and run it in the background. The program will poll call records automatically every day at a scheduled time
3. Please note Tapit Call Accounting application has to be running on your system (at the Main location) for the Remote Manager to function properly.

Polling Records in Manual Mode

Remote Manager allows you to poll call records manually when required.
The following step-by-step instructions will lead you through this process.

Choosing locations from Location menu may occasionally be followed by the message "Port is not connected". Click on OK and continue.

1. Open Tapit Remote Manager.
2. If the maintenance is turned off (menu displays **Maintenance is Off**) you need to turn it on by clicking on **Maintenance is Off** and then on **Turn Maintenance On**. Confirmation message is displayed. Click on **OK**. The menu should change to **Maintenance is On**.
3. Go to the **Location** menu.
   Click on the remote location's name you want to poll the call records from.
4. **Settings for** *location name* appears
   Click on **Cancel**. This location is now active.
5. Go to **Control** menu.
6. Click on the **Connect to Buffer Box** menu option. **Com Port initialized successfully** message is displayed. Click on **OK**.
7. **Connection with remote modem established** message appears. Click on **OK**. You are connected to the buffer box located at the currently active remote site.
8. Go to the **Control** menu.
9. Click on **Get Call Records.**
   System informs you of the number of records found in a buffer box. If a buffer box at a remote location is not empty it polls the call records stored in it.
   The polled call records are displayed on the screen.

Depending on initialization settings Buffer box may add to each call record the date and time indicating when the particular call record was transferred from PBX to a buffer box.
The appearance of the screen varies form system to system and does not indicate the outcome of polling operation.

10. Polling operation may take few minutes. Its duration depends on the amount of call records stored in the buffer box at the remote location. Wait until the program stops printing call data on the screen. Note that the following set of strings or a part of it will be displayed underneath call records data upon completion of polling process.

    END DATA
    INVALID CODE
    Program displays the message:
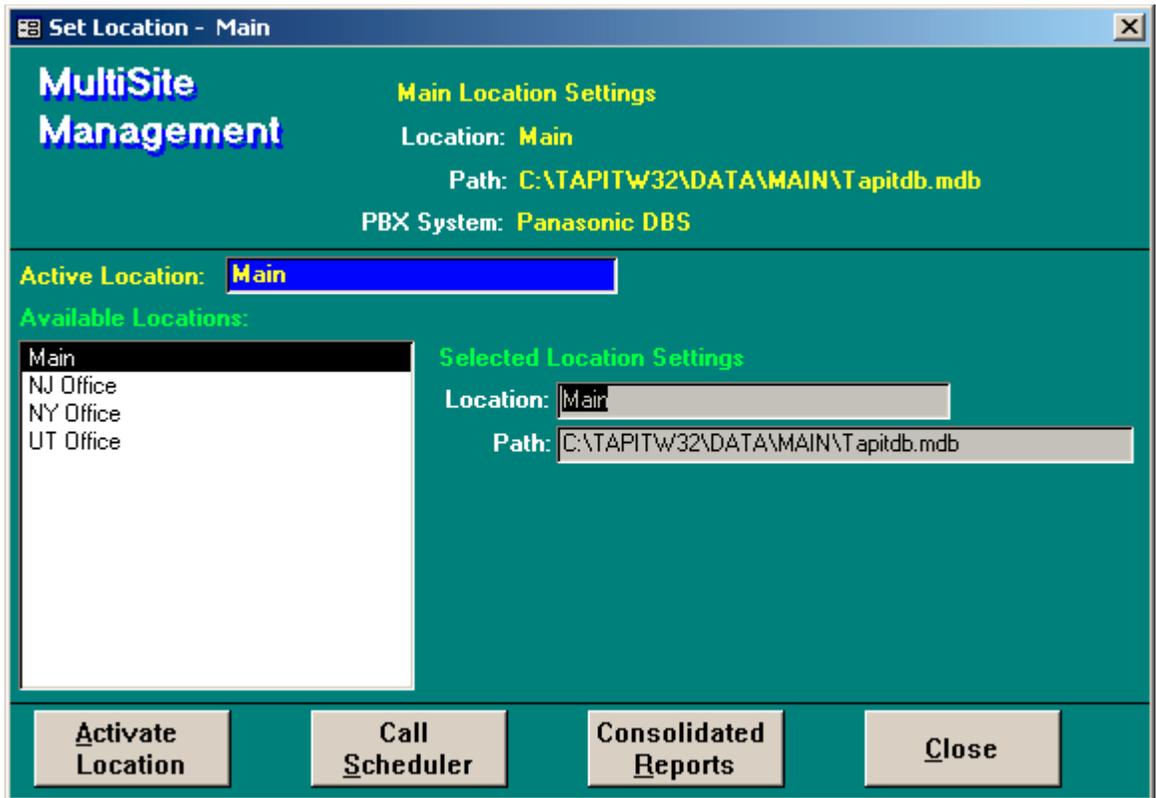

    Click on **OK**
    After calls are downloaded they are saved in text format on your computer
    Now you need to load the data to the location's database.

11. Go to the **Control** menu.
12. Select **Load Test Data.**
13. **Tapit Logo** screen appears.
    Tapit starts loading polled call records to the remote location's database.
    Do not interrupt.
14. You can manipulate loaded call records through Tapit application (run reports, etc.).
    If you do not have Tapit running open it now. **Main Menu** screen appears.
    To check if call records were collected run Detail Activity report in Tapit for this location.

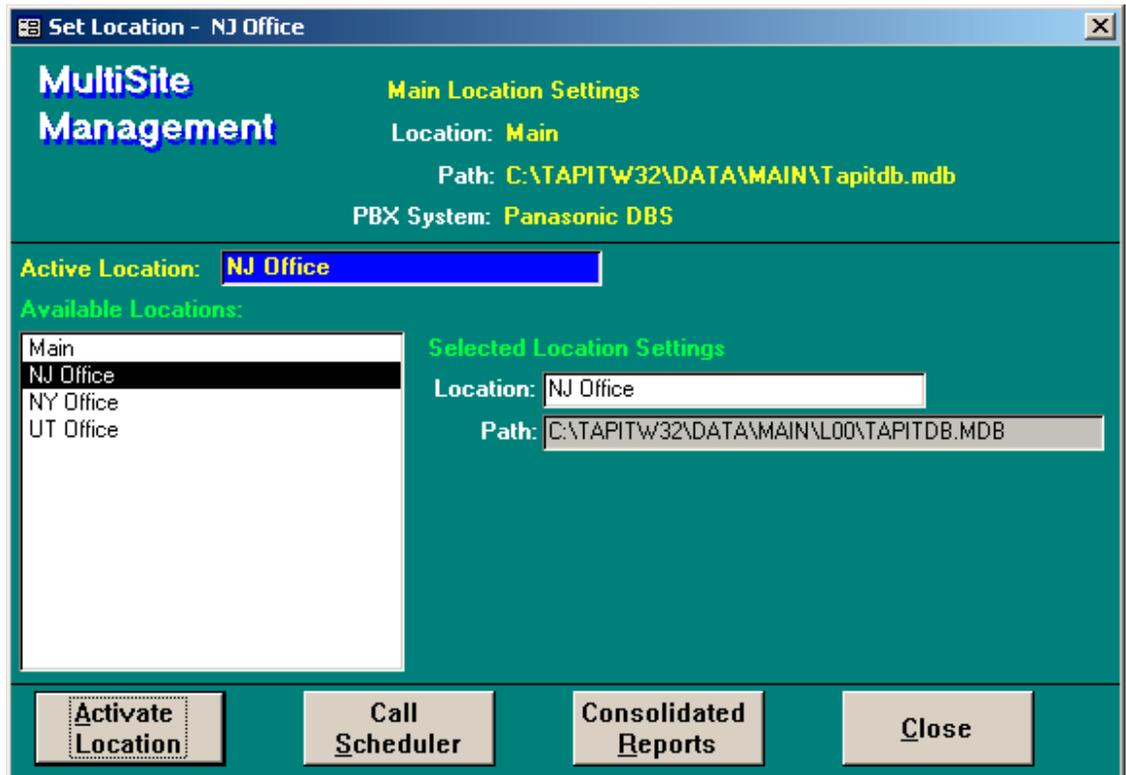   <u>**To run report in Tapit for the remote location**</u>

1. Start Tapit application (Start/Tapit/Tapit).
2. The **Main Menu** screen appears
3. Click on the **Multi-Site** button.
   The **Set Location –Location:** *(name of the active remote location)* screen is displayed.
   Title bar of this screen displays the name of the currently active location.

The default active location is **Main**.

4. You can switch between different locations using this screen.
   Only one location can be active at a time.
5. Select the desired location from the **Available Locations** list.
6. Click on the **Activate Location** button.
7. **Tapit will be connected to the location: (***location name)* message appears.
   Click on **OK**

8.   The **Active Location** field value changes to the selected location name.

9.   Click on **Close** to return to the **Main Menu.**
      The location is activated. Tapit application has switched to the selected location
      and all screens and reports pertain to that location.
10.   Click on the **Reports** button on the **Main Menu.**
11.   Run the **Detail Activity by Date** report.
      (See Tapit manual for instructions on how to run reports)
      Double check if the report reflects the calls polled from a buffer box at a remote
      location.

**Polling call records in manual mode does not automatically delete the
records stored in buffer box at the remote location. In order to do that, while
in manual mode, click on Control/Delete Records.**

**If the polled call records data is inaccurate or if you could not poll any data
at all, then your buffer box settings or PBX format selections are incorrect.**

Multi-Site Management via Tapit

Active Location

1. If Remote Manager is running exit from it.
   Start Tapit application (Start/Tapit/Tapit).
2. **Main Menu** screen appears.
3. Click on the **Multi-Site** button.
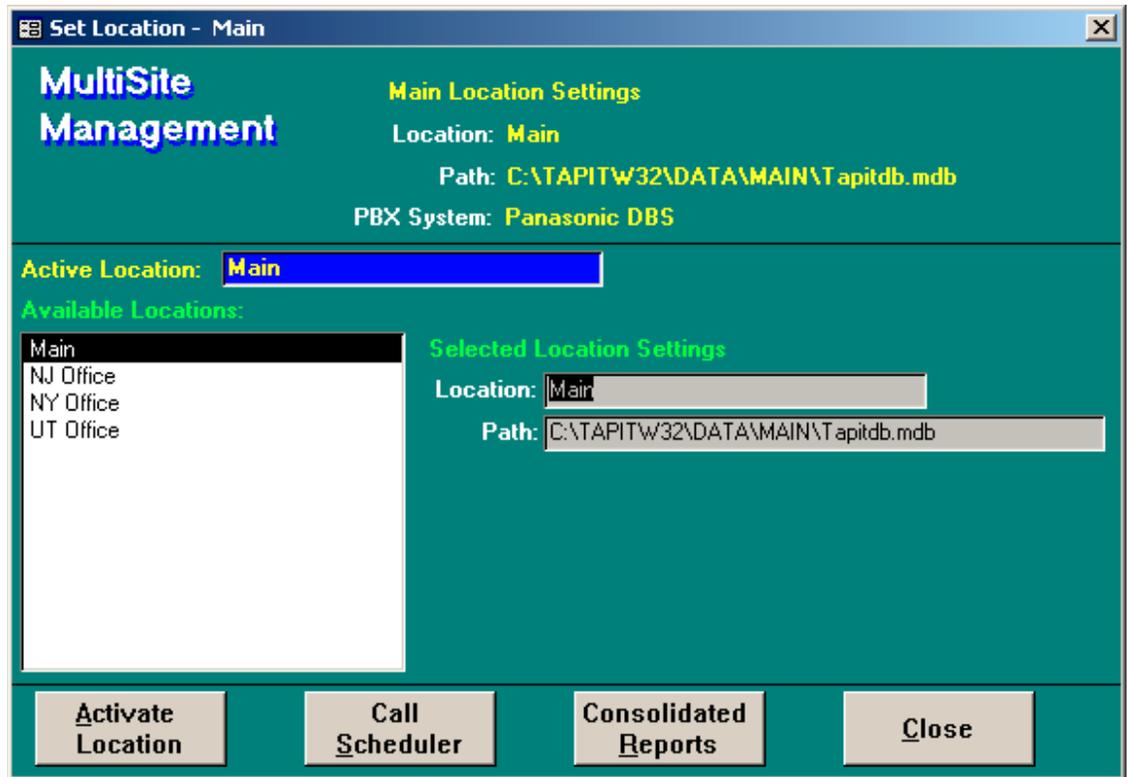
The **Set Location –Location:** *(name of the active remote location)* screen is displayed.
Title bar of this screen displays the name of the currently active location.
The default active location is Main.

4. This screen allows you to switch between different locations.
   Only one location can be active.
5. Select the desired location from the **Available Locations** list.
6. Click on the **Activate Location** button.
   Tapit will be connected to the location: *(location name)* message appears.

7.   Click on **OK**
       The **Active Location** field value changes to the selected location name.
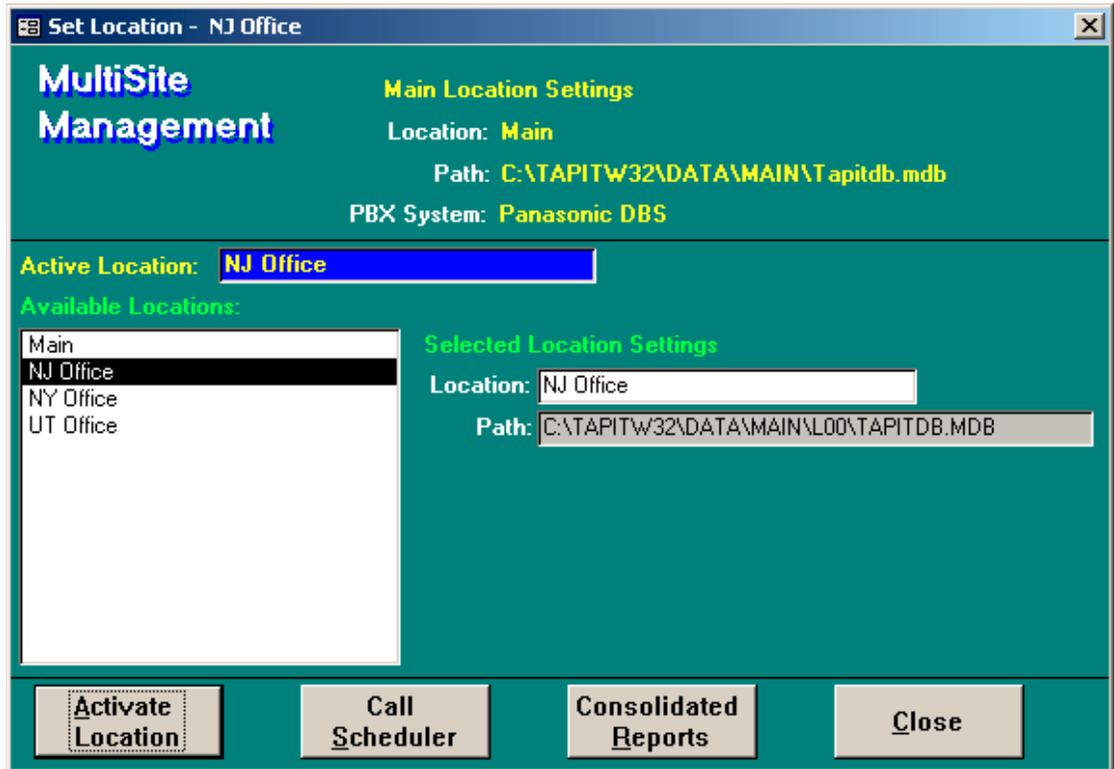
8.   Click on **Close** to return to the **Main Menu.**
       The location is activated. Tapit application has switched to the selected location and all screens and reports pertain to that location.

Call Scheduler

The **Call Scheduler** screen is located in Tapit application under the **Multi-Site** option.
The **Call Scheduler** screen enables you to view and edit the time and date settings for the call records polling for each remote location.
It is also used to view the **Log File** screen, which contains the regular notepad text file with information about the polling process. This file can be very handy when troubleshooting.
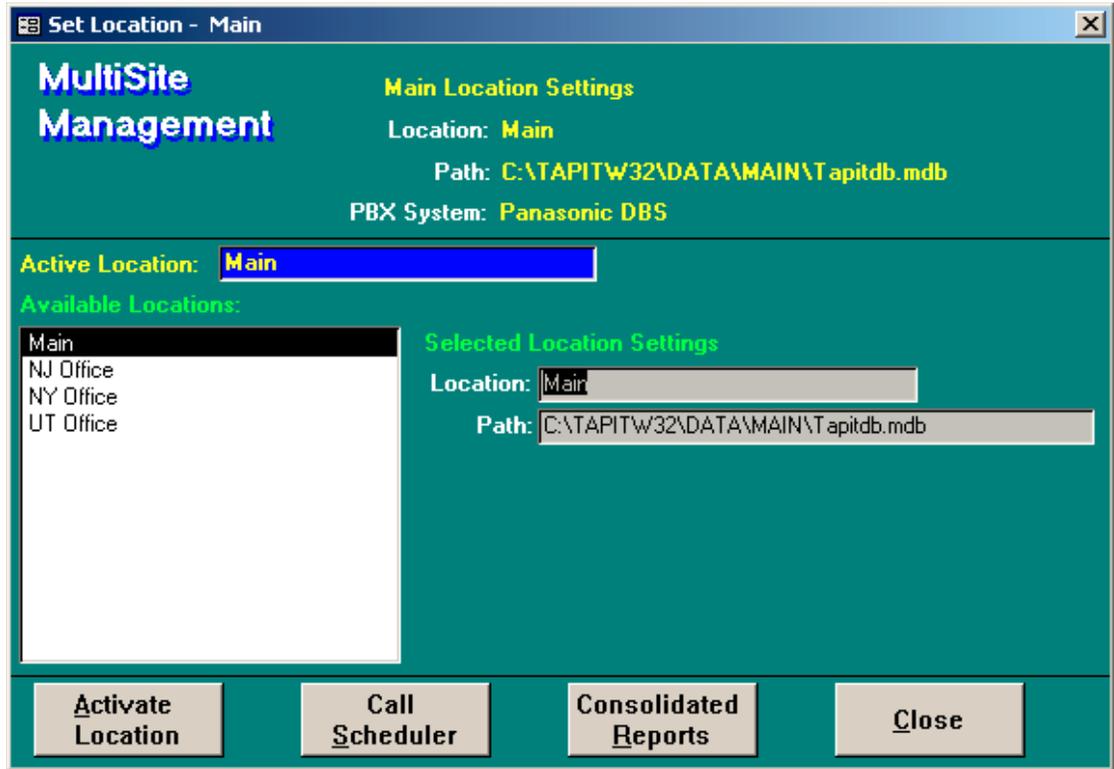
It is crucial to activate the main location after your finish working with any of the remote locations. Otherwise Tapit will not be able to process main locations call records automatically in the background.

To use Call Scheduler

1.   Start Tapit.
2.   The **Main Menu** screen appears.
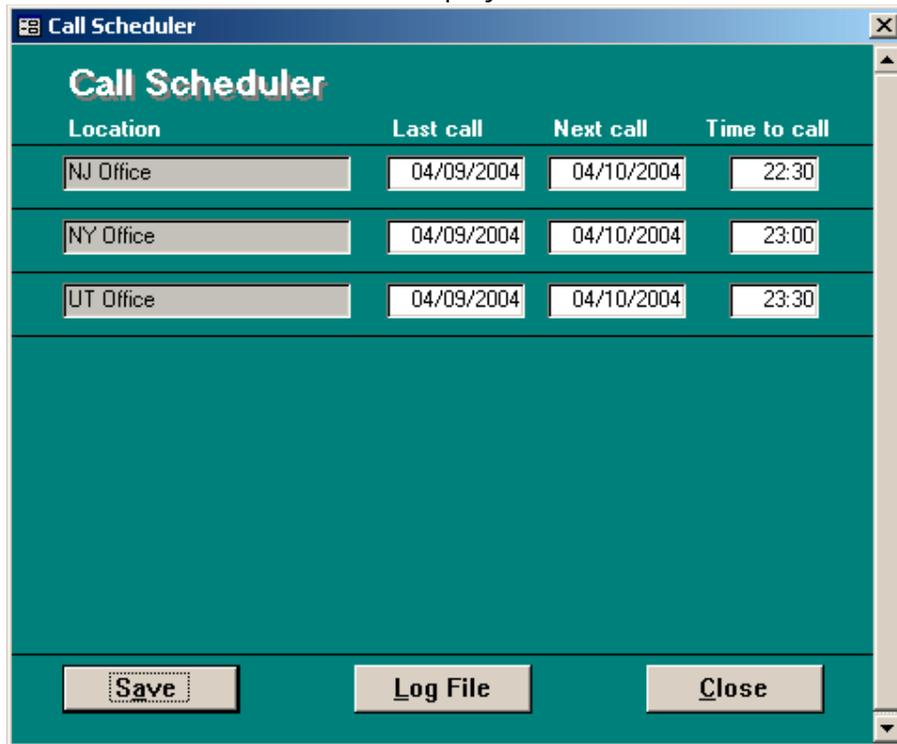
3. Click on the **Multi-Site** button.

The **Set Location –Location:** *(name of the active remote location)* screen is displayed.
Title bar of this screen displays the name of the currently active location.
The default active location is **Main**.

4. Click on **Call Scheduler**.
   The **Call Scheduler** screen is displayed.

5. To change any settings enter the new values in the appropriate fields and click on **Save**.
6. The message **If you want to keep changes you must restart Remote Manager. Do you want to continue?** is displayed.
7. Click on **Yes** if you want to save changes.
   You must restart the Remote Manager so the changes could take effect.

To access Log File

To access **Log File** screen, click on the **Log File** button.

The following text examples are the end parts of the log files for both successful and unsuccessful polling.
Example A - unsuccessful polling
```
04/09/04 11:05- NY Office
Unable to establish connection.

04/09/04 11:06 – NY Office
Dial phone first! Carrier not detected. Cannot connect to the Buffer.
```

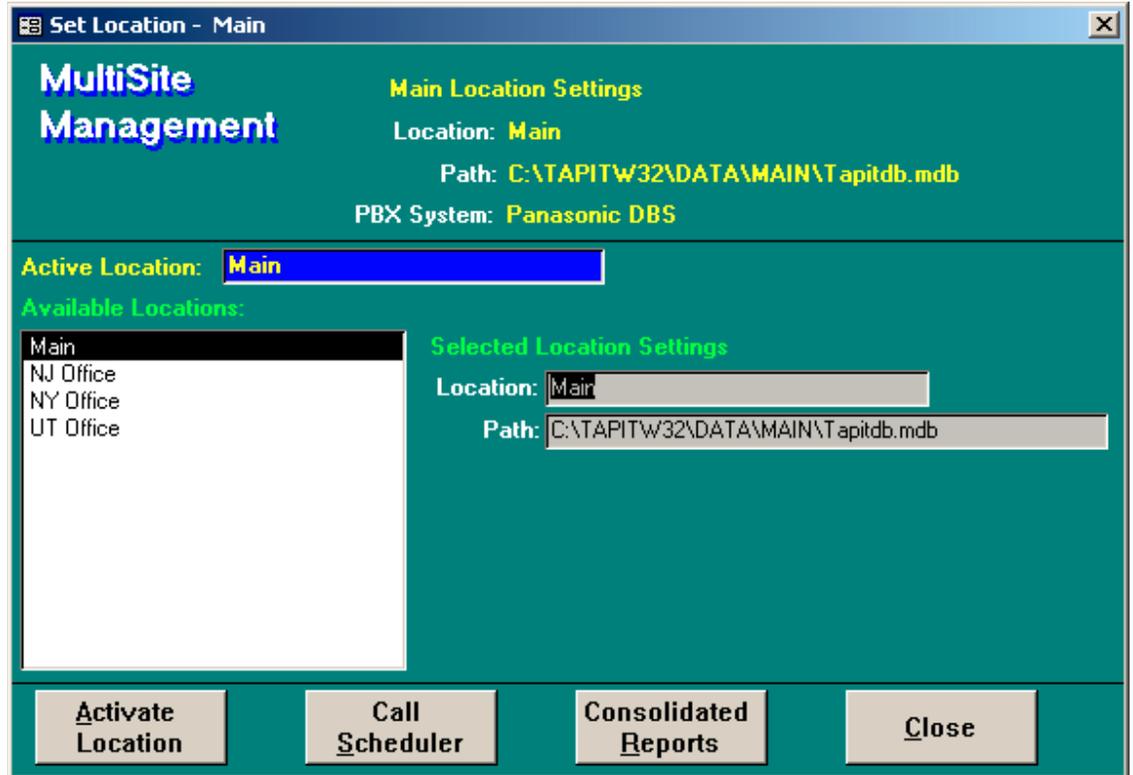**Example B – successful polling**
```
04/09/04 11:40 – UT Office
69 Call Records Processed and Loaded into the Database
  -=-=-=-=-=-=-=-=-=-=-=-=-=-=-=-=-=-=-=-=
```
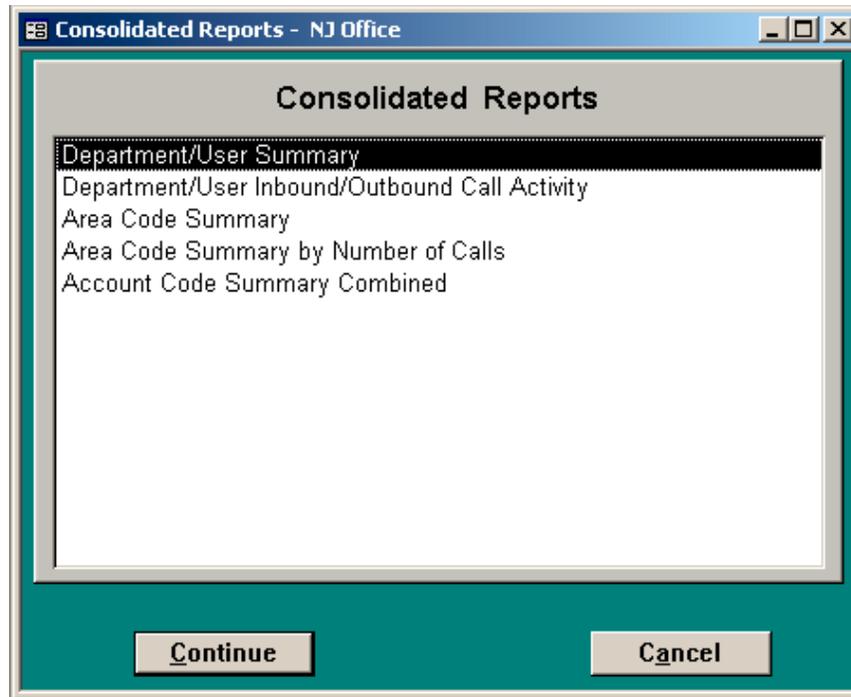
Consolidated Locations Reports

1. Start Tapit.
2. **Main Menu** screen appears.
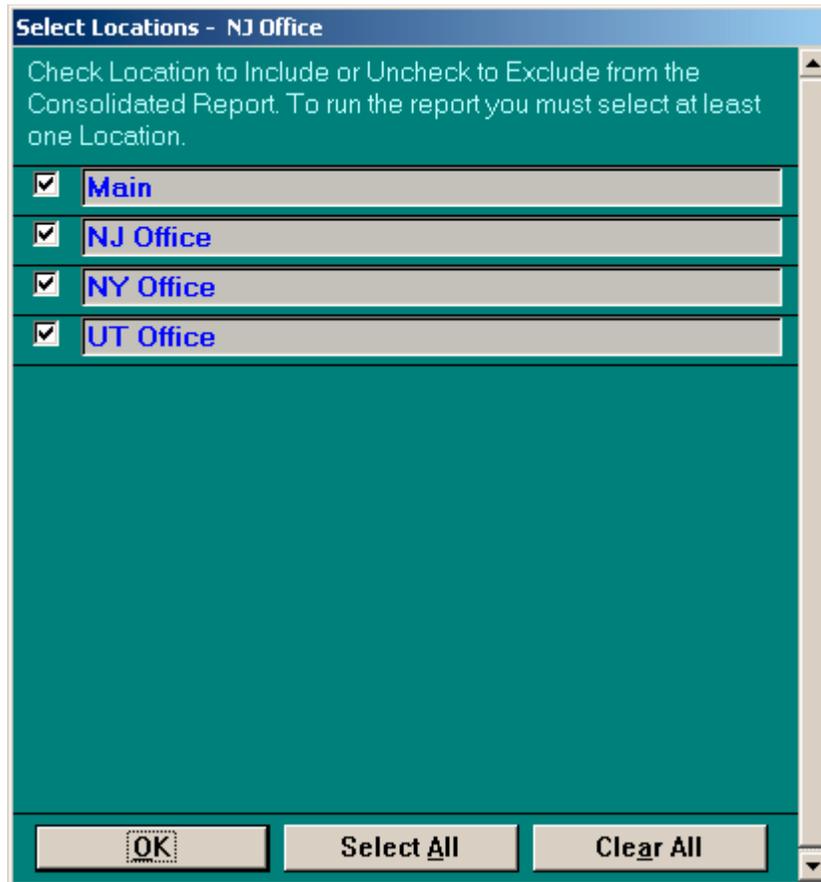3. Click on the **Multi-Site** button.

4. Click on **Consolidated Reports**.
    The **Consolidated Reports** screen appears.

5. To run a report, select the desired report from the list and click on **Continue**.

6. The **Select Locations** screen is displayed.

7. Select names of the remote sites you want to include in the report by clicking on the boxes adjacent to the names. The report will contain data from the checked locations only.
8. Click on **OK**.
9. The report filter screen appears.
10. Enter filter criteria. For instructions on how to run reports refer to the TapitNOVA Call Accounting Manual, the Reports section.

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