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Follow the steps below to install and run TapitEX with Altigen System:

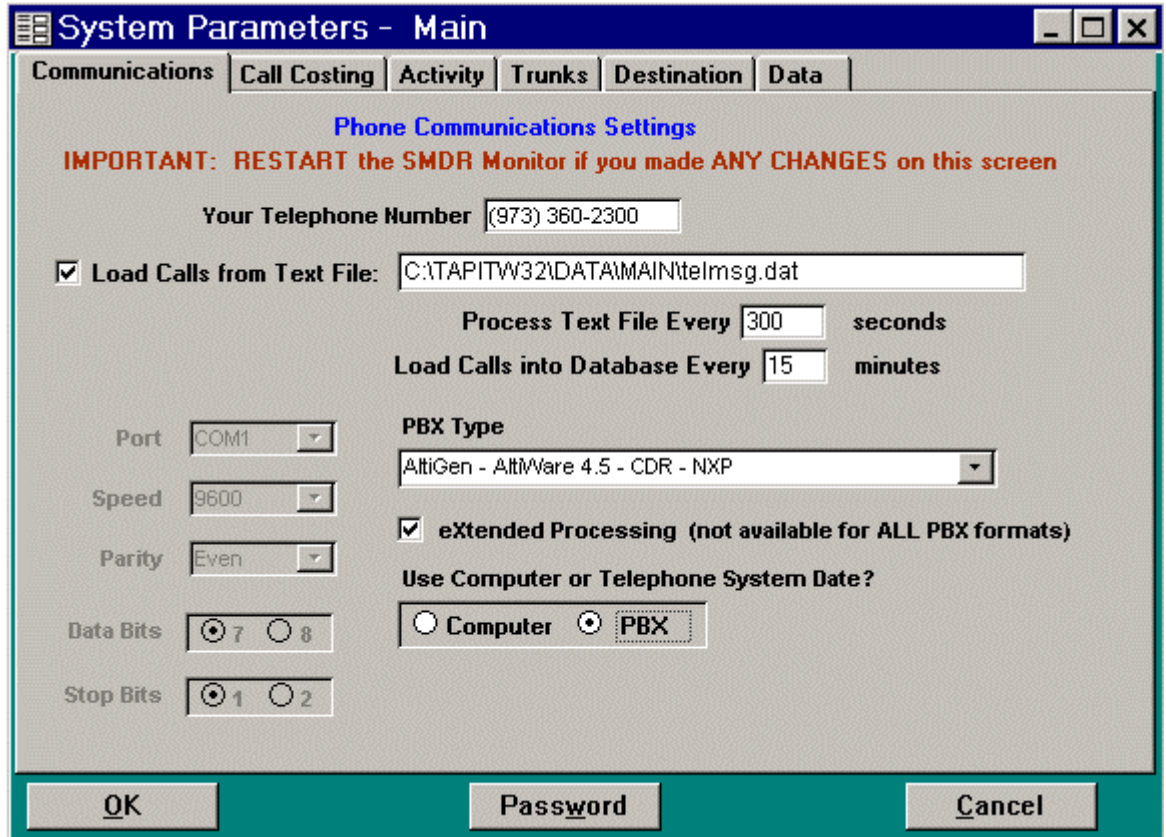
1. Install and set up TapitEx Multi-User – see instructions in the TapitEX manual or the Readme file.
2. If you are installing Tapit CDR Loader for **multiple nodes** with SQL Server Database install and set up Remote Manager – refer to the Remote Manager manual on the CD.
3. Install CDR Loader from the Tapit CDR Loader folder on the TapitEX CD. See Tapit CDR Loader Readme file for instructions.
4. Setup CDR Loader - refer to the instructions below.

Setting up Tapit CDR Loader for Altigen

Tapit Setup

Note: The Node data will be stored in the Main location database.

1. Open **Tapit** application (**Start/Programs/Tapit/Tapit**).
Go to the **System Maintenance/System Parameters/Communications** screen.



System Parameters - Main

Communications | Call Costing | Activity | Trunks | Destination | Data

Phone Communications Settings

IMPORTANT: RESTART the SMDR Monitor if you made ANY CHANGES on this screen

Your Telephone Number: (973) 360-2300

Load Calls from Text File: C:\TAPITW32\DATA\MAIN\telmsg.dat

Process Text File Every: 300 seconds

Load Calls into Database Every: 15 minutes

Port: COM1

Speed: 9600

Parity: Even

Data Bits: 7 8

Stop Bits: 1 2

PBX Type: Altigen - AltWare 4.5 - CDR - NXP

eXtended Processing (not available for ALL PBX formats)

Use Computer or Telephone System Date?

Computer **PBX**

OK Password Cancel

2. Check the **Load Calls** from **Text File** box. The default path field (i.e. *C:\TAPITW32\DATA\MAIN\telmsg.dat*) is activated. Accept the default.
3. Verify the **Use Computer or Telephone System Date** option. It must be set to **PBX**.
4. Check **eXtended Processing** and make sure the correct **PBX Type** is selected.
5. Click on **OK**.
6. Close Tapit.

Remote Manager Setup – ONLY for multiple nodes with SQL Server

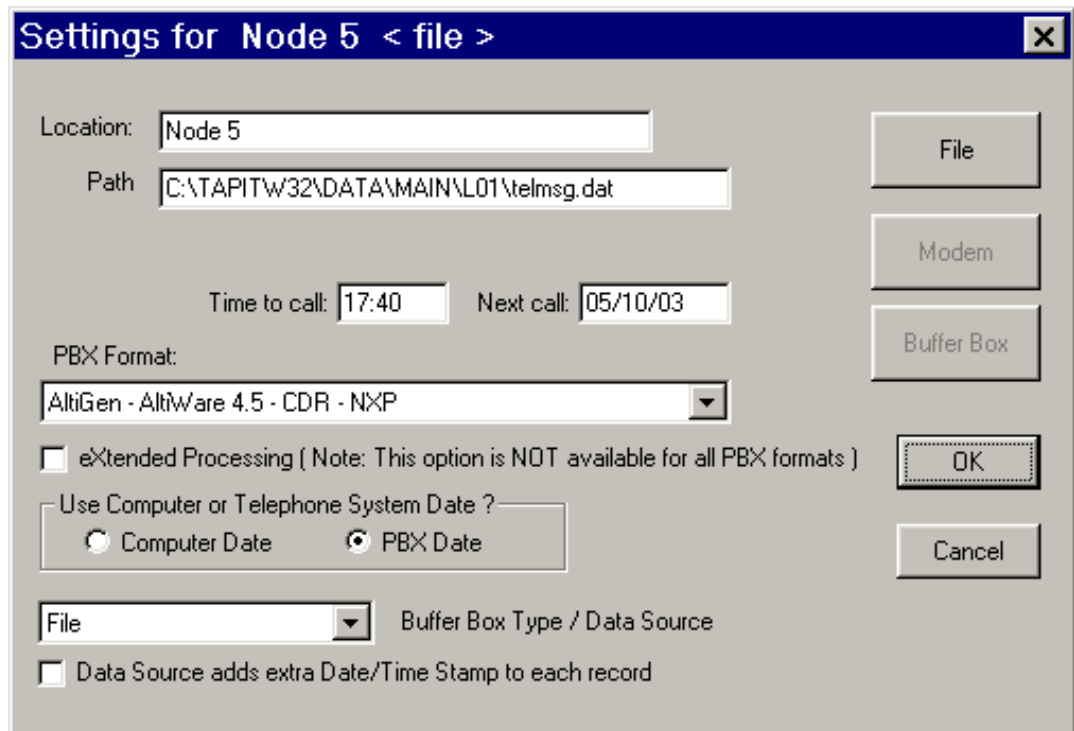
Note: Each node requires one location (the Main location can be used too).

I.e. The example below is setup for 4 nodes:

Data from first node (node 1) is collected in the Main location, data from the remaining three nodes (nodes 3, 5, 8) is collected in corresponding remote locations (Node 3, Node 5, Node 8 – we named our locations to reflect node numbers for clarity of this example).

Note: By default one node is set as the Main location. All other nodes are set as remote locations.

1. Open **Remote Manager (Start/Tapit/Remote Manger)**.
2. If Remote Manager is opened for the first time, you need to create locations (see the Remote Manager manual for instructions) otherwise open each location to verify settings. Make sure the Remote Manager settings follow the guidelines below.



Each location should have the following options set:

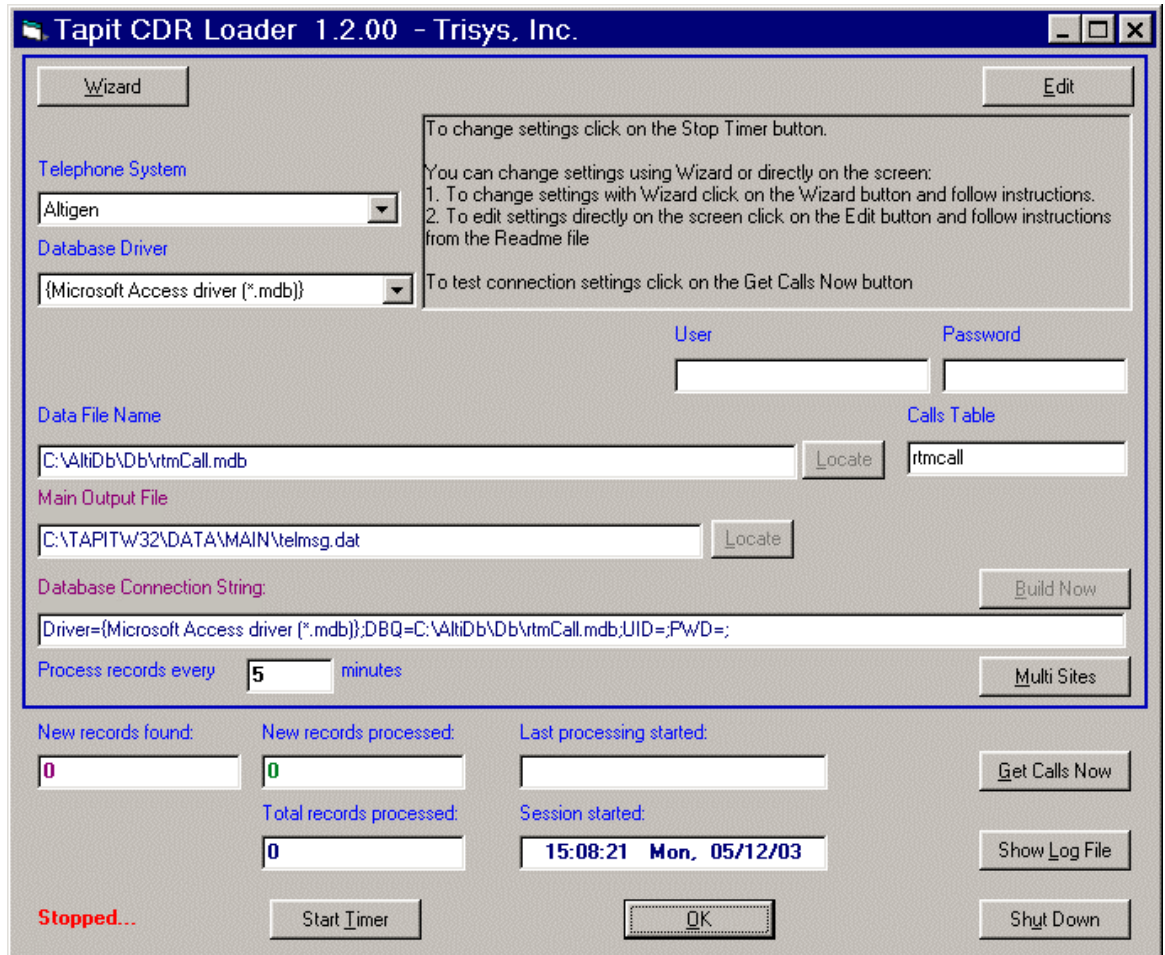
- a) **Buffer Box Type** – select the **File** option. When this option is set to **File** the **Path** text box appears.
- b) **Path** – accept the default value.
- c) **Time to call** and **Next call** fields – these values pertain only to a buffer box. When the **CDR Loader** is used they are ignored.
- d) **PBX Format** - make sure the appropriate PBX format is selected.
- e) Uncheck **Buffer Box adds extra Date/Time stamp to each record**.

Tapit CDR Loader Setup

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**. The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Wizard**. The Wizard will take you step by step through Tapit CDR Loader setup.
4. When the **Wizard** is finished your **Tapit CDR Loader** screen will resemble the screen below.

Settings for Access Database:

(Click [here](#) for SQL Server Settings)



The screenshot shows the 'Tapit CDR Loader 1.2.00 - Trisys, Inc.' application window. The 'Wizard' tab is active, displaying configuration options for the database connection and processing. A text box provides instructions: 'To change settings click on the Stop Timer button. You can change settings using Wizard or directly on the screen: 1. To change settings with Wizard click on the Wizard button and follow instructions. 2. To edit settings directly on the screen click on the Edit button and follow instructions from the Readme file. To test connection settings click on the Get Calls Now button.'

Configuration fields include:

- Telephone System:** Altigen
- Database Driver:** {Microsoft Access driver (*.mdb)}
- User:** (empty)
- Password:** (empty)
- Data File Name:** C:\AltIdb\Db\rtmCall.mdb (with 'Locate' button)
- Calls Table:** rtmcall
- Main Output File:** C:\TAPITW32\DATA\MAIN\telmsg.dat (with 'Locate' button)
- Database Connection String:** Driver={Microsoft Access driver (*.mdb)};DBQ=C:\AltIdb\Db\rtmCall.mdb;UID=;PWD=; (with 'Build Now' button)
- Process records every:** 5 minutes (with 'Multi Sites' button)

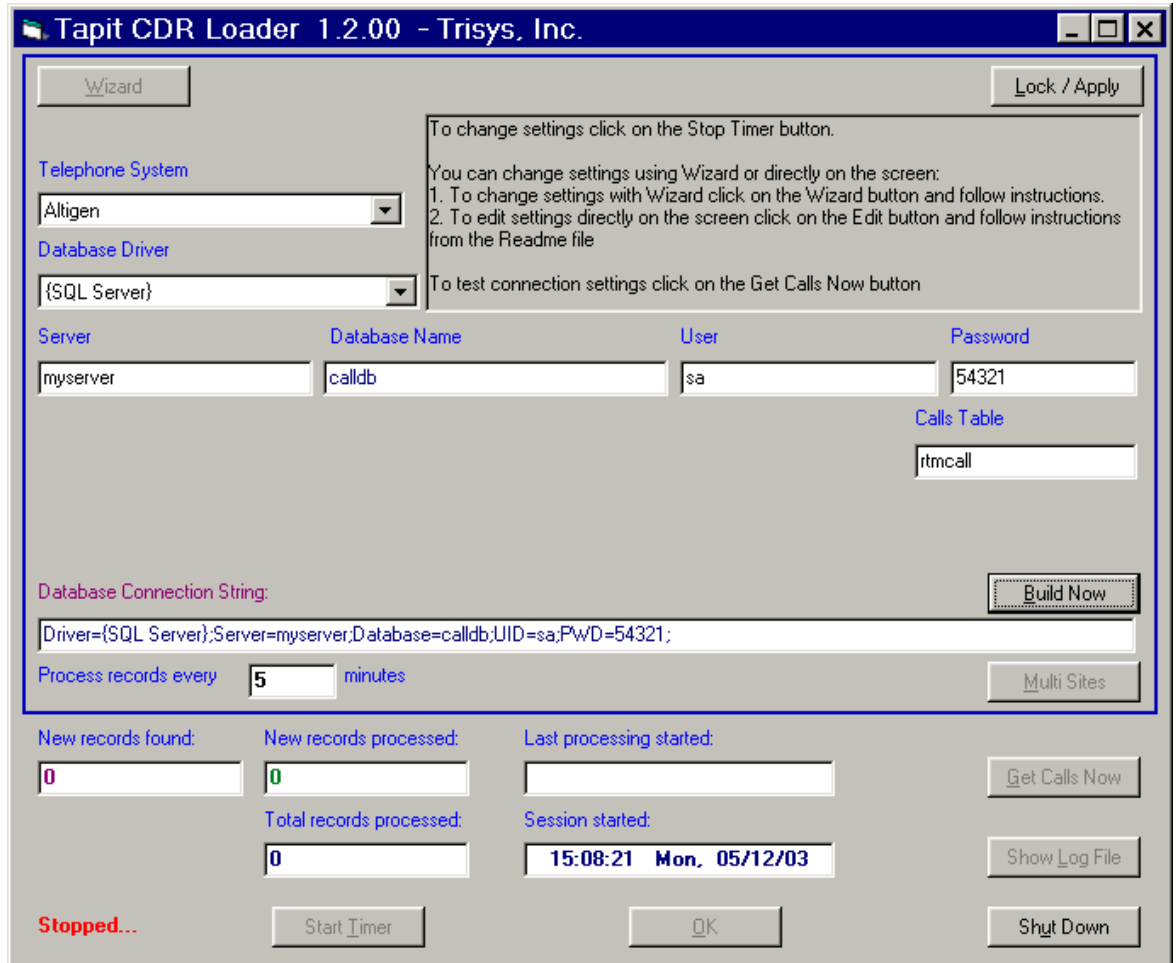
At the bottom, there are status indicators and control buttons:

- New records found:** 0
- New records processed:** 0
- Last processing started:** (empty)
- Total records processed:** 0
- Session started:** 15:08:21 Mon, 05/12/03
- Buttons:** Get Calls Now, Show Log File, Start Timer, OK, Shut Down
- Status:** Stopped...

Tapit CDR Loader Start-Up file for Altigen

Settings for SQL Server Database:

(Click [here](#) for Access Database instructions.)



The screenshot shows the 'Tapit CDR Loader 1.2.00 - Trisys, Inc.' application window. It features a 'Wizard' button at the top left and a 'Lock / Apply' button at the top right. A text box in the upper right corner provides instructions: 'To change settings click on the Stop Timer button. You can change settings using Wizard or directly on the screen: 1. To change settings with Wizard click on the Wizard button and follow instructions. 2. To edit settings directly on the screen click on the Edit button and follow instructions from the Readme file. To test connection settings click on the Get Calls Now button.'

The main configuration area includes:

- Telephone System:** A dropdown menu set to 'Altigen'.
- Database Driver:** A dropdown menu set to '{SQL Server}'.
- Server:** A text field containing 'myserver'.
- Database Name:** A text field containing 'calldb'.
- User:** A text field containing 'sa'.
- Password:** A text field containing '54321'.
- Calls Table:** A text field containing 'rtmcall'.
- Database Connection String:** A text field containing 'Driver={SQL Server};Server=myserver;Database=calldb;UID=sa;PWD=54321;'. A 'Build Now' button is located to the right of this field.
- Process records every:** A text field containing '5' followed by the label 'minutes'. A 'Multi Sites' button is located to the right.

At the bottom, there are several status and control elements:

- New records found:** A text field showing '0'.
- New records processed:** A text field showing '0'.
- Last processing started:** An empty text field.
- Total records processed:** A text field showing '0'.
- Session started:** A text field showing '15:08:21 Mon, 05/12/03'.
- Buttons:** 'Get Calls Now', 'Show Log File', 'Start Timer', 'OK', 'Shut Down', and 'Build Now'.
- Status:** The text 'Stopped...' is displayed in red.

Note: If you need to adjust settings run the Wizard again or edit this screen manually – refer to Appendix A for instruction on manual editing.

Appendix A

Manual Editing – Setting Up CDR Loader for Single Node (Access and SQL Server Database)

If you need to adjust the TAPIT CDR Loader screen settings and the wizard outcome is not what you want, you can edit the settings manually.

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**.
The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Edit**. The name of this button changes to **Lock/Apply**.
4. **Access Database:**

If needed make the appropriate changes to the following fields:

Telephone System - select Altigen

Database Driver - must be "{Microsoft Access driver (*.mdb)}"

User – leave it blank

Password – leave it blank

Data File Name – enter the **default** value, *C:\AltIdb\Db\rtmCall.mdb* for the path to the data file.

Calls Table – the default value is **rtmcall**.

Main Output File - enter the **default** value, *C:\TAPITW32\DATA\MAIN\telmsg.dat*, for the path to the main output file in the Tapit database folder.

NOTE: By default **User** and **Password** entries are empty.

NOTE: If Access MDB file is located on another machine the path to this file (**Data File Name** field) must be accessible from the Tapit computer through a mapped drive or a network path with appropriate permissions. Typically the database file is located on the Altiserv machine with the local path *C:\AltIDB\DB\rtmCall.mdb*.

SQL Database:

If needed make the appropriate changes to the following fields:

Telephone System - select Altigen

Database Driver - must be "{SQL Server}"

Server – SQL Server name

Database Name - the default value is **calldb**

User – SQL Server **User Name**

Password – SQL Server **User Password**

Calls Table – the default value is **rtmcall**

5. Click on the **Build Now** button to create the **Database Connection String** entry. This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the entries above and click on **Build Now**.
Do not modify this field manually.



Tapit CDR Loader Start-Up file for Altigen

6. If required, enter new values in **Process record every__minutes** and **Main Output File** fields.
It is recommended to accept defaults.
7. To save changes, click on the **Lock/Apply** button.
8. Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.
9. Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file. Copy the following settings into this file.

```
[Multi_S]
Max_S = 1
S_001=1,Main_99
;where S_xxx=Node_id,Loc_name
```

Save and close this file.

10. Click on the **Tpremmon.ini** button. Your default text editor opens the **Tpremmon.ini** file.
Assuming the file is empty, copy the following settings into this file.

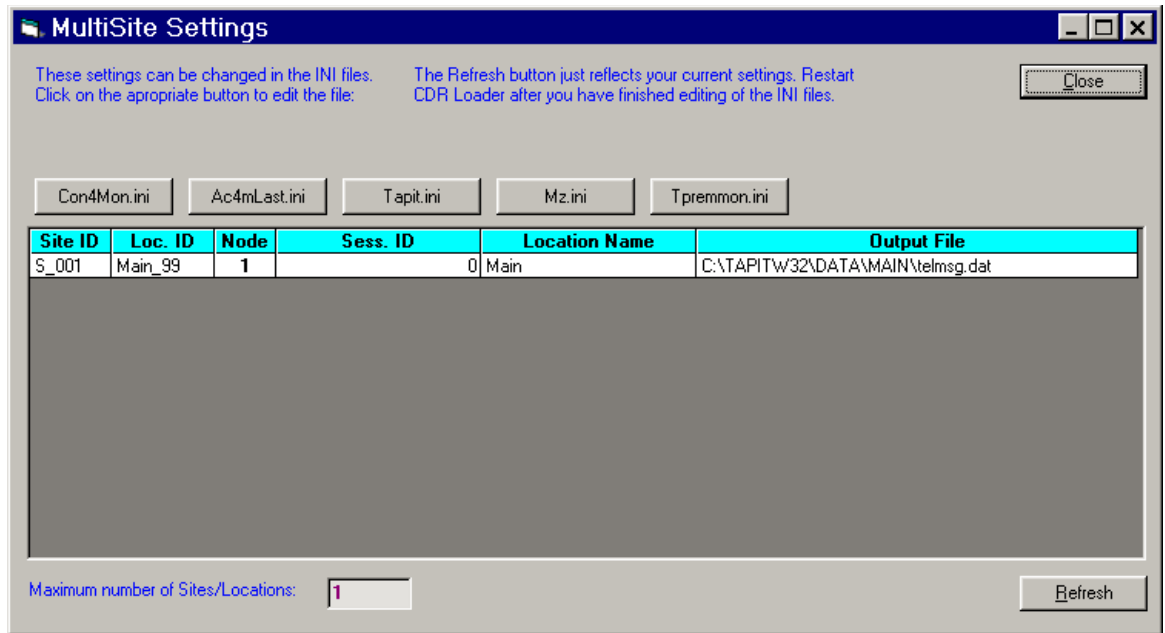
```
[Common]
TapitDir=C:\TAPITW32\DATA\MAIN
CurrLoc=0
RemTimer=0

[Main_99]
Location=Main
LocActive=1
LocDatPath=C:\TAPITW32\DATA\MAIN\telmsg.dat
```

11. Save the **Tpremmon.ini** file and close it.

Tapit CDR Loader Start-Up file for Altigen

- Click on the **Refresh** button. Your **MultiSite Settings** screen should look like the screen below.



- Click on the **Close** button.
- Restart the **SMDR Monitor** application.
- To test the connection, click on the **Get Calls Now** button. Keep in mind if the **CDR Loader** application is running for the first time **it loads all (!) available call records**.
- Click on **Start Timer** to turn on the automatic mode.
- Click on the **OK** button to minimize **CDR Loader**.
- After **SMDR Monitor** loads call records, run reports to verify the program works fine.

Manual Editing – Setting Up CDR Loader for Multiple Nodes (SQL Server Database)

If you need to adjust the Tapit CDR Loader screen settings and the wizard outcome is not what you want, you can edit the settings manually.

- Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**. The **CDR Loader** screen appears.
- Click on **Stop Timer**. The name of this button changes to **Start Timer**.
- Click on **Edit**. The name of this button changes to **Lock/Apply**.



Tapit CDR Loader Start-Up file for Altigen

- If needed make the appropriate changes to the following fields:
 - Telephone System** - select Altigen
 - Database Driver** - must be "{SQL Server}"
 - Server** - SQL Server name
 - Database Name** - the default value is **calldb**
 - User** - SQL Server **User Name**
 - Password** - SQL Server **User Password**
 - Calls Table** - the default value is **rtmcall**
- Click on the **Build Now** button to create the **Database Connection String** entry. This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the entries above and click on **Build Now**.
Do not modify this field manually.
- If required, enter new values in **Process record every ___minutes** and **Main Output File** fields.
It is recommended to accept defaults.
- To save changes, click on the **Lock/Apply** button.
- Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.
- Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file. Copy the following settings into this file. Edit site entries to reflect your node numbers.

Note: The Max_S entry reflects the number of your nodes. Each S_xxx entry must correspond to existing node and appropriate location code.

For example: We created location with a default name "New Location 02" and then renamed it to "Node 5". Remote Manager automatically assigned Comm_1 code to that location.

The "S_003=5,Comm_01" entry (in the example below) associates node 5 and location code Comm_01 with site S_003.

;Reference table to handle multiple nodes:

[Multi_S]

;must be = total/max number of locations used

;(if last S_xxx is S_004 then Max_S=4)

Max_S = 4

S_001=1,Main_99

S_002=3,Comm_00

S_003=5,Comm_01

S_004=8,Comm_02

;where S_xxx=Node_id,Loc_name

Save and close this file.

- Click on the **Tpremmon.ini** button.

Tapit CDR Loader Start-Up file for Altigen

- Your default text editor opens the Tpremmon.ini file. Make sure this file contains the following settings.

[Common]

TapitDir=C:\TAPITW32\DATA\MAIN

CurrLoc=0

;RemTimer - timer setting required for multiple nodes/locations

;value is in seconds... minimum=300 sec.

RemTimer=300

[Main_99]

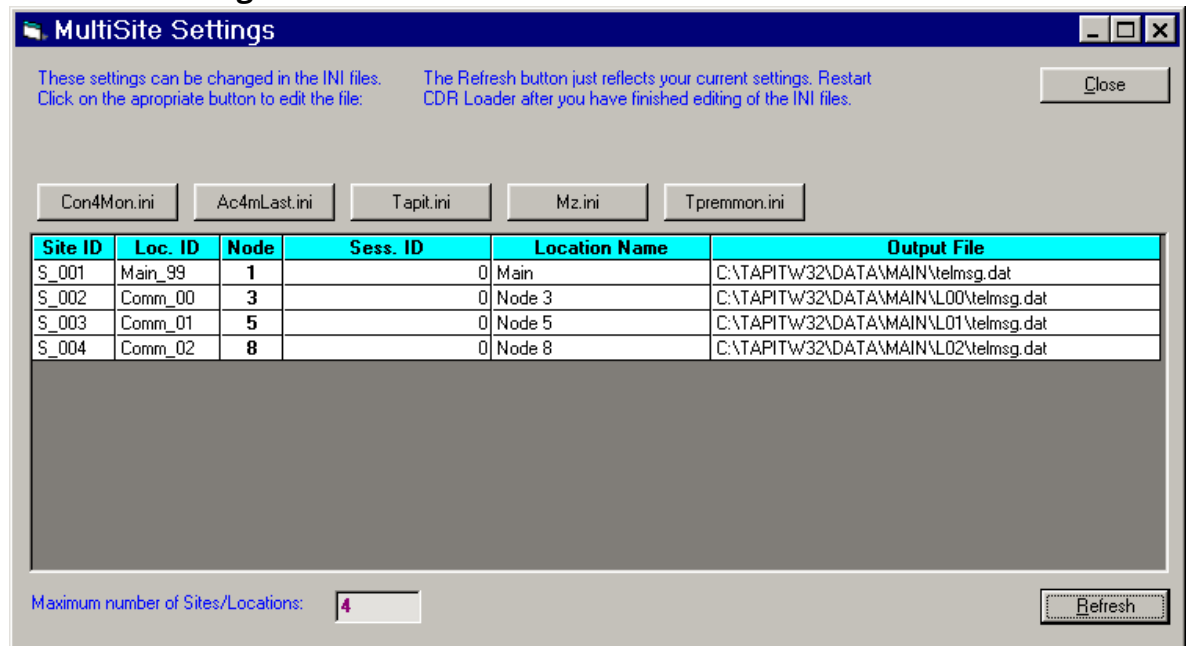
Location=Main

LocDir=C:\tapitw32\Data\Main\TAPITDB.MDB

LocActive=1

LocDatPath=C:\TAPITW32\DATA\MAIN\telmsg.dat

- Save the **Tpremmon.ini** file and close it. Click on the **Refresh** button. Your **MultiSite Settings** screen should look like the screen below.



- Click on the **Close** button.
- Restart **Remote Manager**.
- Restart the **SMDR Monitor** application.
- To test the connection, click on the **Get Calls Now** button. Keep in mind if the **CDR Loader** application is running for the first time it **loads all (!) available call records for all nodes**.



Tapit CDR Loader Start-Up file for Altigen

17. Click on **Start Timer** to turn on the automatic mode.
18. Click on the **OK** button to minimize **CDR Loader**.
19. After **SMDR Monitor** and **Remote Manager** load call records, run reports in Tapit for each location to verify that everything works.

Note: Sample con4mon.ini file is located in the C:\CDR Loader\ini_files folder.

Note: CDR Loader will also create file ac4mlast.ini. This file always will be created automatically in the current Tapit Database folder. Do NOT delete this file.



TRISYS INC.

Tapit CDR Loader Start-Up file for Altigen

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