



# **Tapit 6**

Call Accounting  
Software  
Installation Manual



**TRISYS INC.**



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## Document Revision Record

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<b>ABV</b>	<b>Description</b>
160920	New Template
180530	Updated Minimum Requirements

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## Related Documentation

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<b>Document Name</b>
Tapit 6 Call Accounting Read Me First

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## Tapit 6 Call Accounting Manual

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### Minimum System Requirements

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- Windows 7/8.1/10 Pro/2008 R2\*/2012\*/2016\* (\* required for 10+ concurrent users)
- Intel Core 2 DUO processor or AMD equivalent
- 4 GB of RAM
- 40 GB of free space on C: Drive
- IIS (IIS 7 and higher requires IIS 6 compatibility enabled for Windows)
- Monitor Resolution 1440 x 900 recommended
- HTML5 compatible browser
- IP or RS 232 port for CDR/SMDR collection (if required for PBX interface)

**NOTE:** In order to use **e-mail features** of the software, obtain your company's **SMTP Server configuration** information from your network administrator.

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## Installation

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### Before Installing Tapit 6

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- ❖ Before installation, please disable all anti-virus and other security (i.e. Firewalls, End-Point protection, etc.) software you may have running on your PC.
  - ❖ Installation may require one or more system reboots.
- ❖ Tapit 6 cannot be installed on Domain Controllers and we do not recommend installing it on any other servers already running resource-intensive applications.

**The following components MUST be installed before Tapit 6 installation:**

- Disable **UAC** (User Account Control) in Control Panel
- Enable **MS .NET Framework 3.5** (on Win 10 / Win 2012 OS)
- Install **IIS** (On Windows Server OS assign Web Server role, also for all operating systems **Web Management Tools, IIS 6 Compatibility, ASP.NET, ASP.NET 4.5 or higher** and **WebDAV Publishing** must be enabled)

**The following components are going to be installed from Tapit 6 download:**

- Adobe PDF Reader
- SQL Server 2012 Express with Advanced Services (**specifically configured** for Tapit 6). You **must** allow it to be installed from Tapit 6 download.
- No other SQL Server software should be installed on the PC.

**NOTE: When installing or using Tapit 6 you must right-click on any Tapit 6 related application shortcuts or components and select 'Run as Administrator' even if you are logged in as an Administrator.**

**Setting Up IIS and System Features**

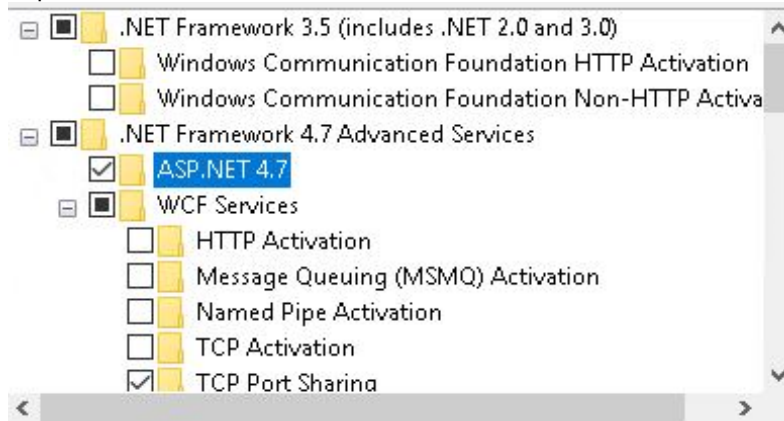
1. Open **Control Panel**.
2. Click on **Programs and Features** or **Programs/Programs and Features**.
3. Click on the **Turn Windows features on or off** link.



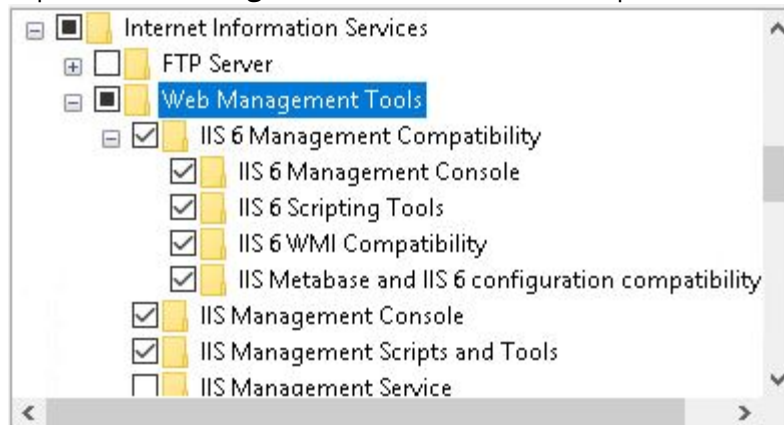
**NOTE:** In Windows 10, if User Account Control is not disabled, accept the warning to elevate privileges for the Windows Features dialog to appear.

4. Your options should be checked as shown on the example screen below.

Expand **Internet Information Services**.



Expand **Web Management Tools** and check all options underneath this node.



Expand **IIS 6 Management Compatibility** and check all boxes underneath this node.

For example: the image below illustrates how the settings look on Windows 7:



- .NET Framework 3.5 (includes .NET 2.0 and 3.0)
  - Windows Communication Foundation HTTP Activation
  - Windows Communication Foundation Non-HTTP Activation
- .NET Framework 4.6 Advanced Services
  - ASP.NET 4.6
- WCF Services
  - Active Directory Lightweight Directory Services
  - Embedded Shell Launcher
- Hyper-V
- Internet Explorer 11
- Internet Information Services
  - FTP Server
- Web Management Tools
  - IIS 6 Management Compatibility
  - IIS Management Console
  - IIS Management Scripts and Tools
  - IIS Management Service
- World Wide Web Services
  - Application Development Features
    - .NET Extensibility 3.5
    - .NET Extensibility 4.6
    - Application Initialization
    - ASP
    - ASP.NET 3.5
    - ASP.NET 4.6
    - CGI
    - ISAPI Extensions
    - ISAPI Filters
    - Server-Side Includes
    - WebSocket Protocol
- Common HTTP Features
  - Default Document
  - Directory Browsing
  - HTTP Errors
  - HTTP Redirection
  - Static Content
  - WebDAV Publishing
- Health and Diagnostics
  - Custom Logging
  - HTTP Logging
  - Logging Tools
  - ODBC Logging
  - Request Monitor
  - Tracing
- Performance Features
  - Dynamic Content Compression
  - Static Content Compression
- Security
  - Basic Authentication
  - Centralized SSL Certificate Support
  - Client Certificate Mapping Authentication
  - Digest Authentication
  - IIS Client Certificate Mapping Authentication
  - IP Security
  - Request Filtering
  - URL Authorization
  - Windows Authentication
- Internet Information Services: Hostable Web Core
  - Isolated User Mode
- Legacy Components
- Media Features
  - Windows Media Player
- Microsoft Message Queue (MSMQ) Server
- Microsoft Print to PDF
- MultiPoint Connector
- Print and Document Services
  - Internet Printing Client
  - LPD Print Service
  - LPR Port Monitor
  - Scan Management
  - Windows Fax and Scan
- RAS Connection Manager Administration Kit (CMAK)
- Remote Differential Compression API Support
- RIP Listener
- Simple Network Management Protocol (SNMP)
- Simple TCP/IP services (i.e. echo, daytime etc)
- SMB 1.0/CIFS File Sharing Support
- Telnet Client
- TFTP Client
- Windows Identity Foundation 3.5
- Windows PowerShell 2.0
  - Windows PowerShell 2.0 Engine
- Windows Process Activation Service
  - Windows TIFF IFilter
  - Work Folders Client
  - XPS Services
  - XPS Viewer

5. Click on **OK**. System will process your request and turn **IIS 6 Management Compatibility** and other required settings on.

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## Installing Tapit 6 Prerequisites

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**NOTE:**

**You have to have administrative privileges on this PC. When installing on Windows 10 or Windows 2012 please install this software 'As Administrator'.**

**When installing or using Tapit 6 you must right-click on any Tapit 6 related application shortcuts or components and select 'Run as Administrator' even if you are logged in as an Administrator.**

**IIS, MS .NET Framework 3.5 SP1, MS .NET Framework 4.62 or higher and current version of Windows PowerShell must be already installed on this PC.**

Tapit 6 Prerequisites Installation will install **SQL Server 2012 Express Advanced with Reporting Services** on your PC.

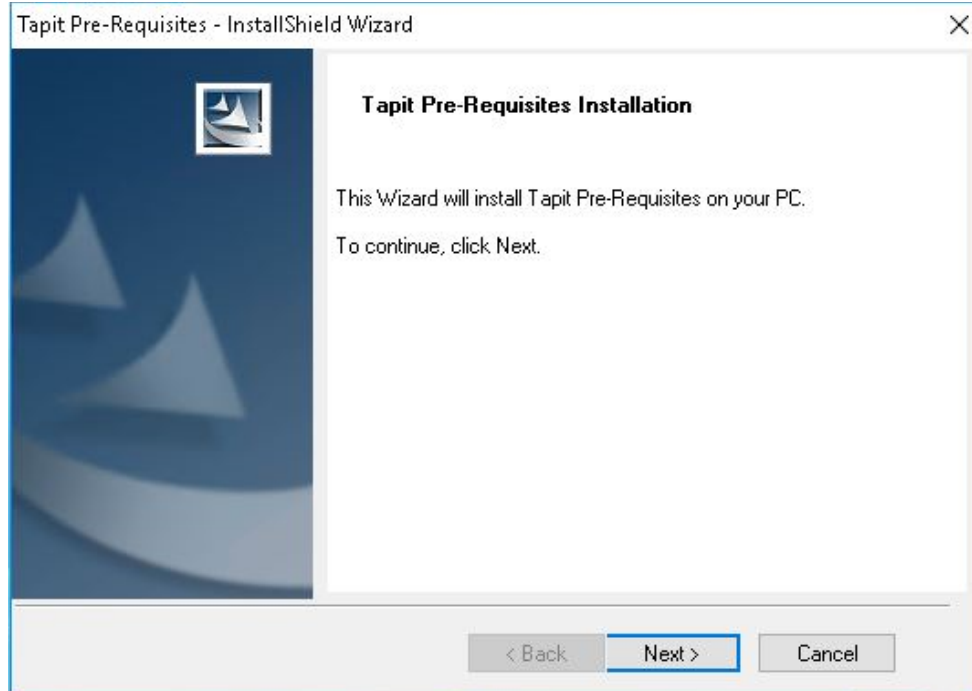
1. When installing from a downloaded Tapit 6 Download, First, right-click on the downloaded file and check Properties to make sure the file is unblocked. Next, extract the file and browse to the folder where the download was extracted, right-click on STARTUP6.exe and select 'Run as Administrator'.

The **Trisys Installation Manager** screen is displayed.

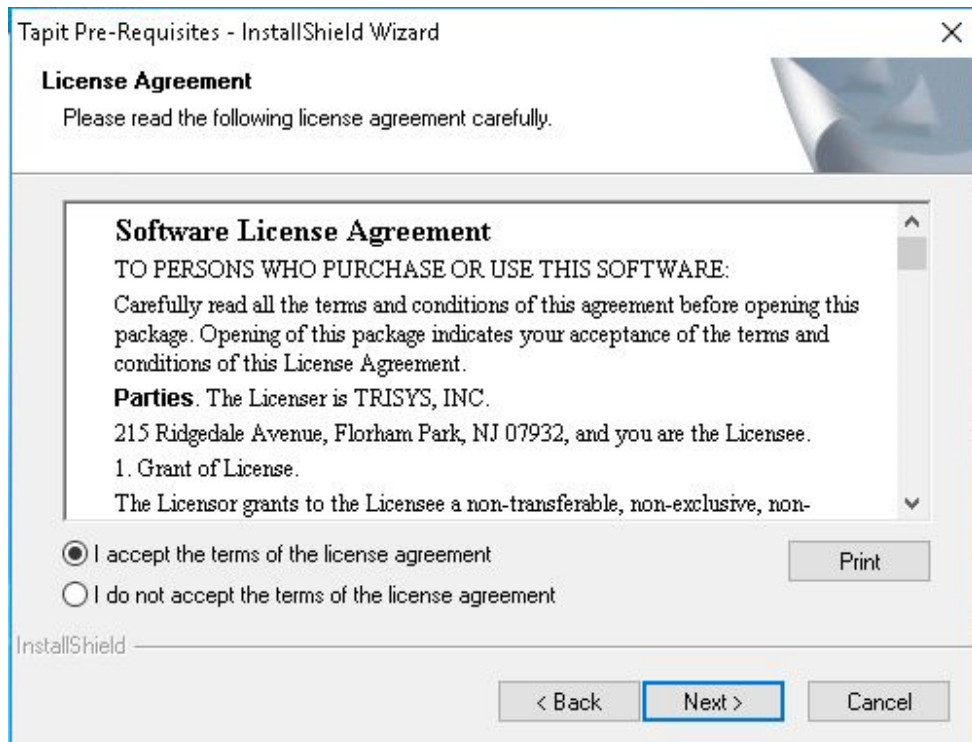
2. Click on **Install Prerequisites**.
3. Tapit 6 Prerequisites installation starts up automatically.
4. Click on **Next** to continue Tapit 6 Prerequisites Installation.



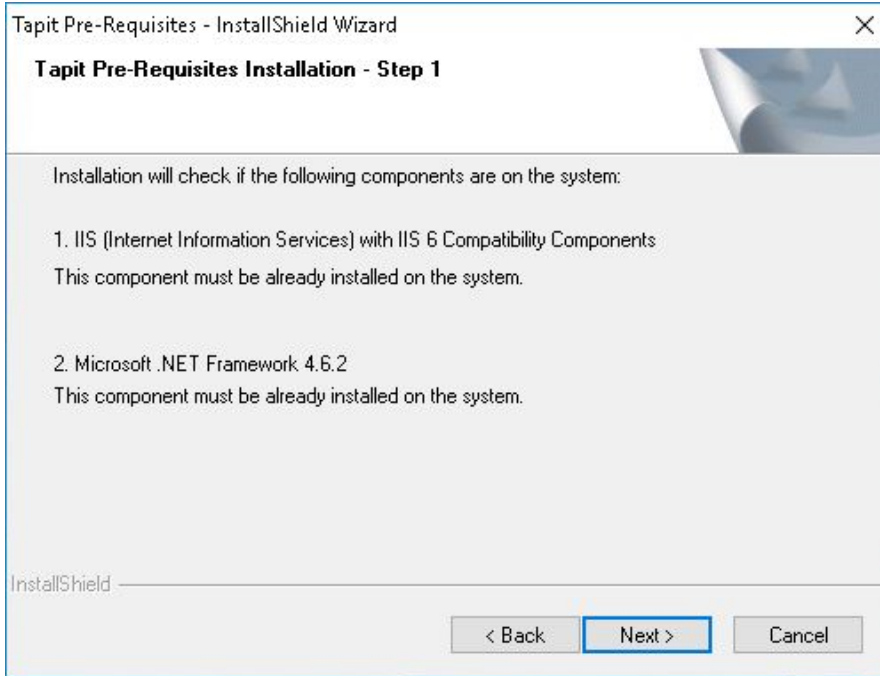




Select **I accept the terms of the license agreement** option and click on **Next**.

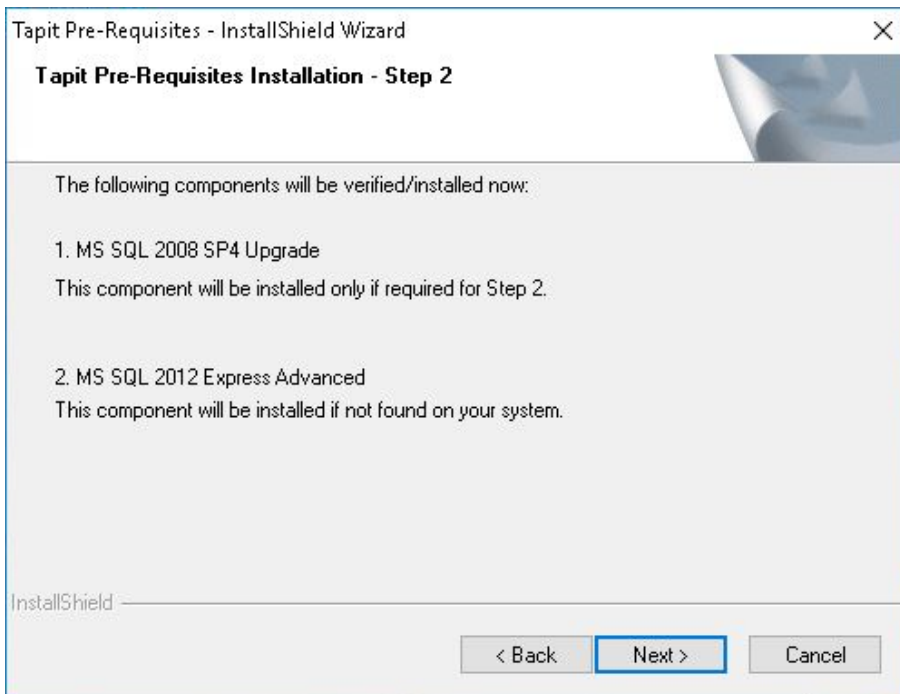


5. The **Tapit 6 Prerequisites Installation – Step 1 – Details** screen is displayed. Click on **Next**. Setup program checks for the required components: **IIS, MS .Net Framework**. This may take some time. Please wait.

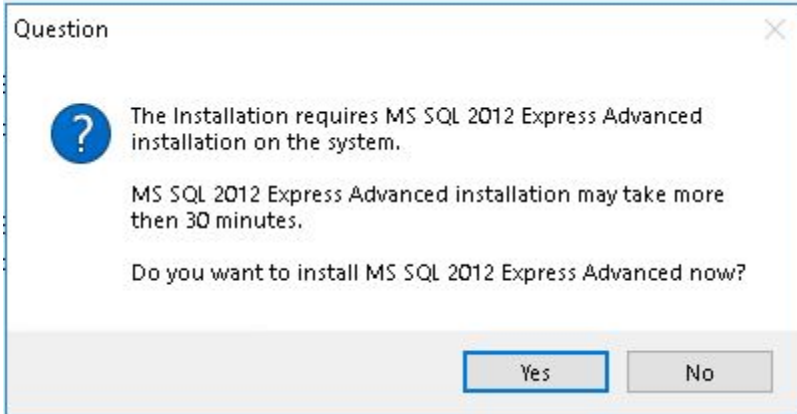


6. If all required components are found, the **Tapit 6 Prerequisites Installation – Step 2 – Details** screen is displayed. Click on **Next**. Setup will begin installation of **MS SQL 2012 Express Advanced**.

**NOTE:** MS SQL 2008 SP4 Express Advanced Upgrade won't be installed unless it is required by SQL 2012 Upgrade installation.

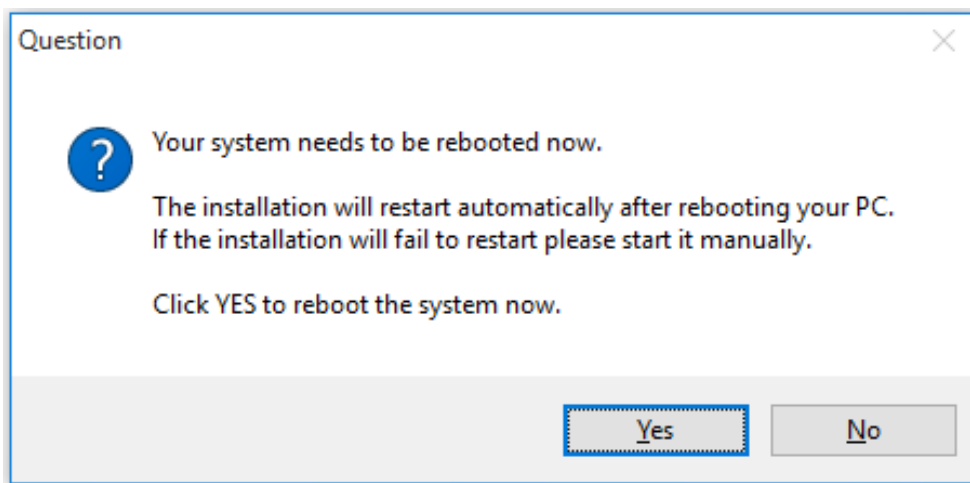


7. Click **Yes** to confirm the installation of **MS SQL 2012 Express Advanced**.

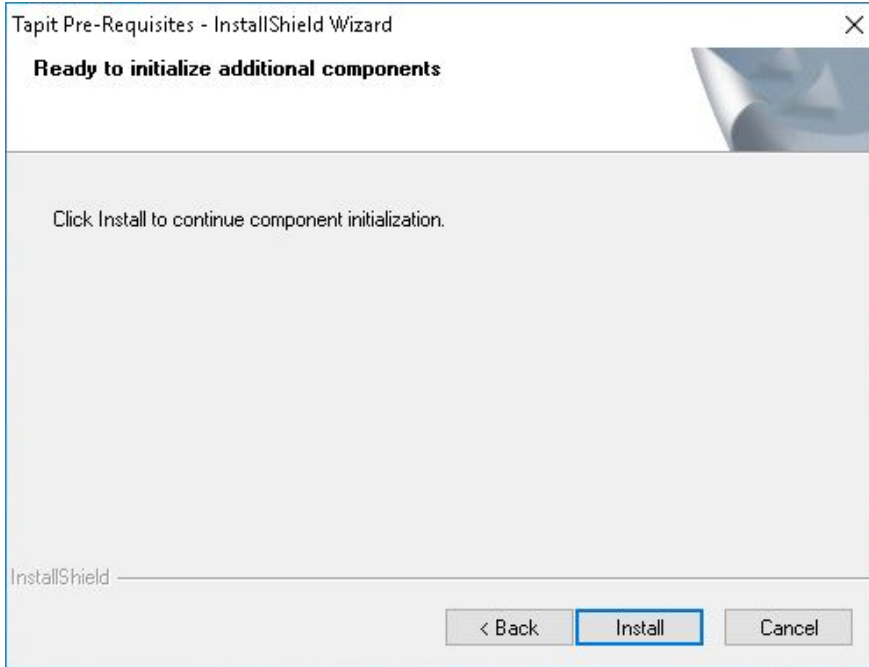


Installing **MS SQL 2012 Express Advanced** may take some time. Typically 15-20 minutes. Please wait.

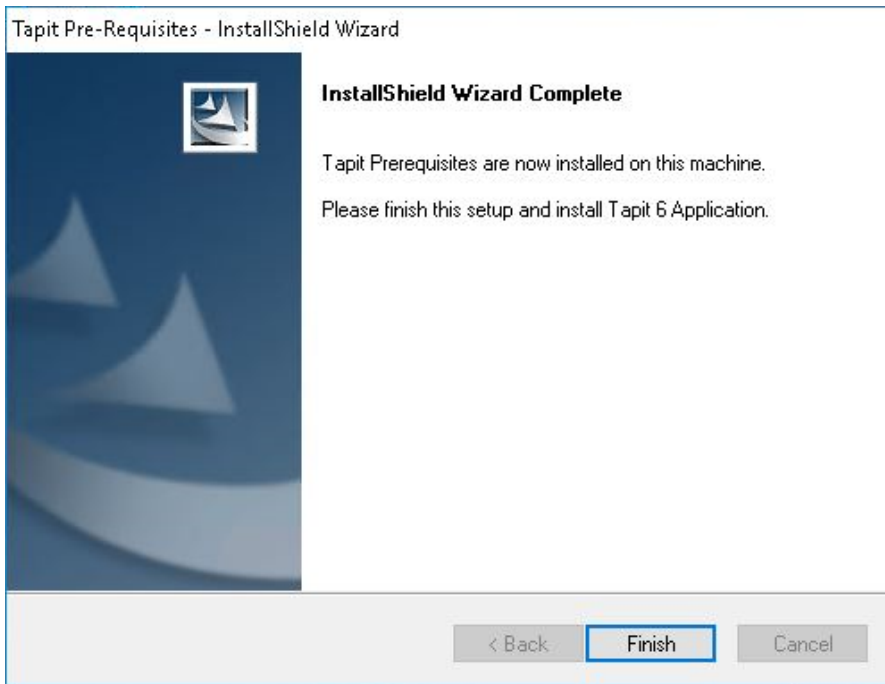
8. SQL Server Installation requires you to reboot the PC. You will be prompted by setup program with the message below. Click on **Yes** to restart the PC.



9. The system comes back up and Tapit 6 Prerequisites installation continues automatically. Once the screen returns, please redo steps 3 through 6 as listed above. In step 6 click **Next** and resume at step 10, see below.
10. Click on **Next** to continue Tapit 6 Pre-Requisites Installation.
11. The Tapit 6 Installation Manager screen comes up. Click on **Install**.



Setup program will finish installation of prerequisites.



12. Please proceed with the section below to install Tapit 6.



Installing Tapit 6

**NOTE:**

**You have to have administrative privileges on this PC. When installing on Windows 10 or Windows 2012 please install this software 'As Administrator'.**

**When installing or using Tapit 6 you must right-click on any Tapit 6 related application shortcuts or components and select 'Run as Administrator' even if you are logged in as an Administrator.**

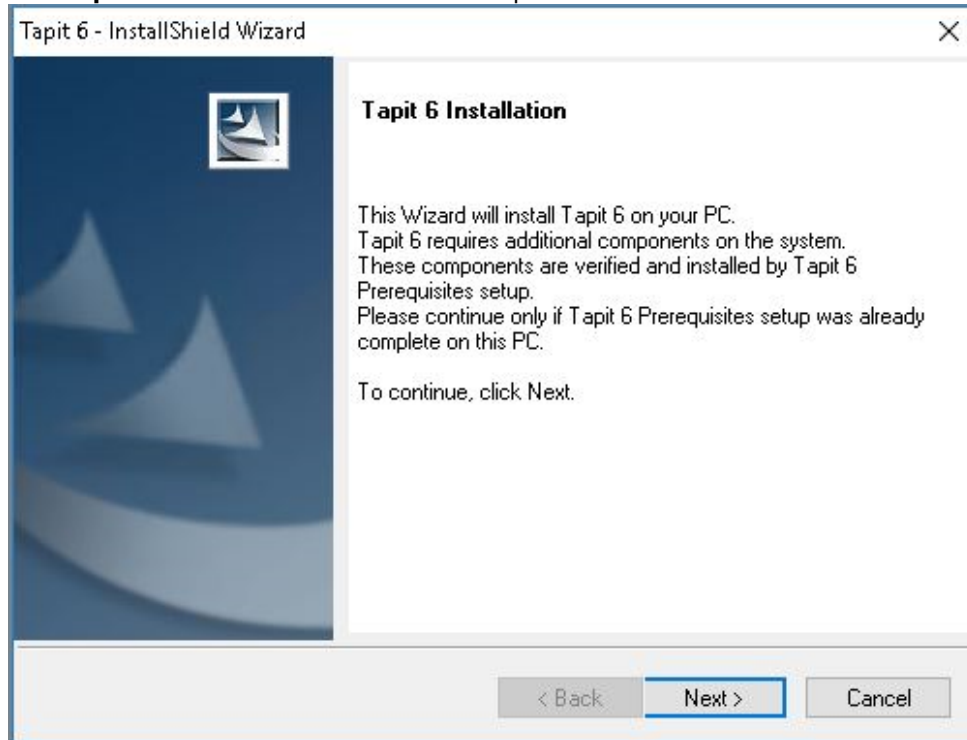
**IIS, MS .NET Framework 3.5 SP1, MS .NET Framework 4.62 or higher and current version of Windows PowerShell must be already installed on this PC.**

**Installation of Tapit 6 Prerequisites has to be successfully completed.**

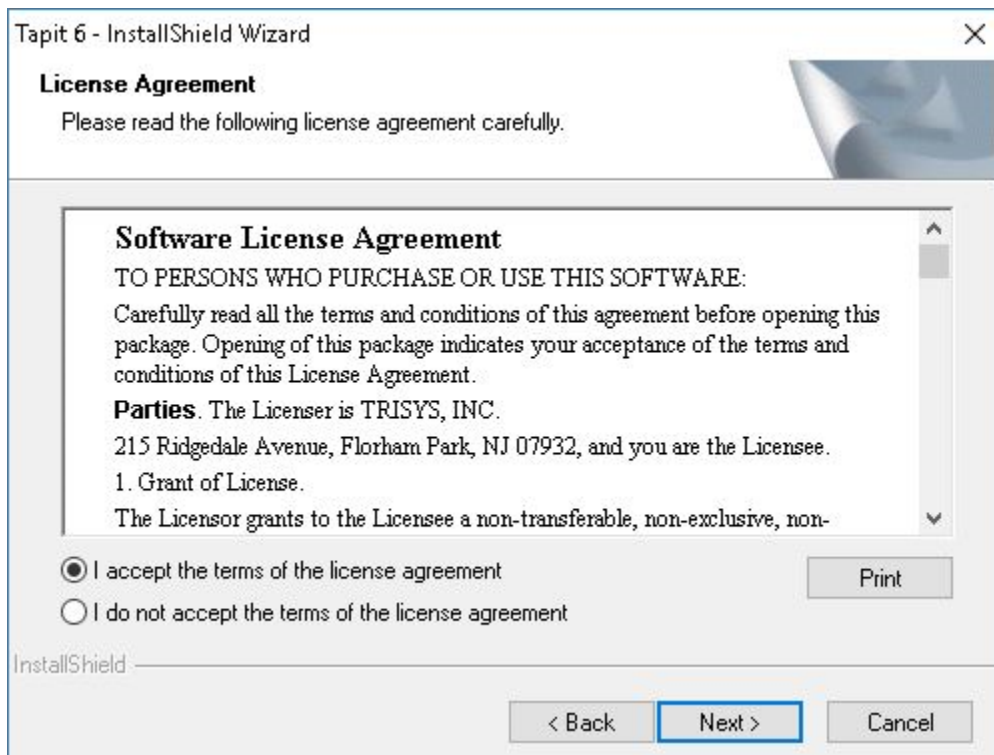
1. When installing from a downloaded Tapit 6 Download, First, right-click on the downloaded file and check Properties to make sure the file is unblocked. Next, extract the file and browse to the folder where the download was extracted, right-click on STARTUP6.exe and select 'Run as Administrator'.

The **Trisys Installation Manager** screen is displayed.

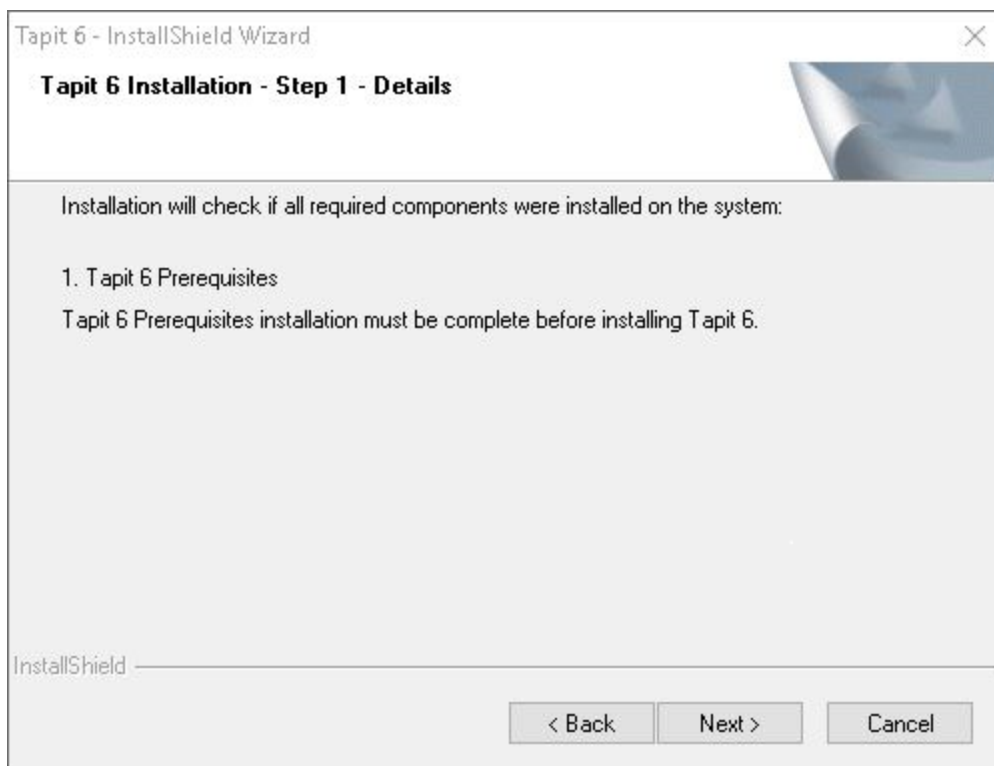
2. Click on **Install Tapit 6**.
3. The **Tapit 6 Installation** screen comes up. Click on **Next**.



4. The **License Agreement** screen is displayed. Read the license agreement and click on **I accept the terms of the license agreement** to continue. Click on **Next**.



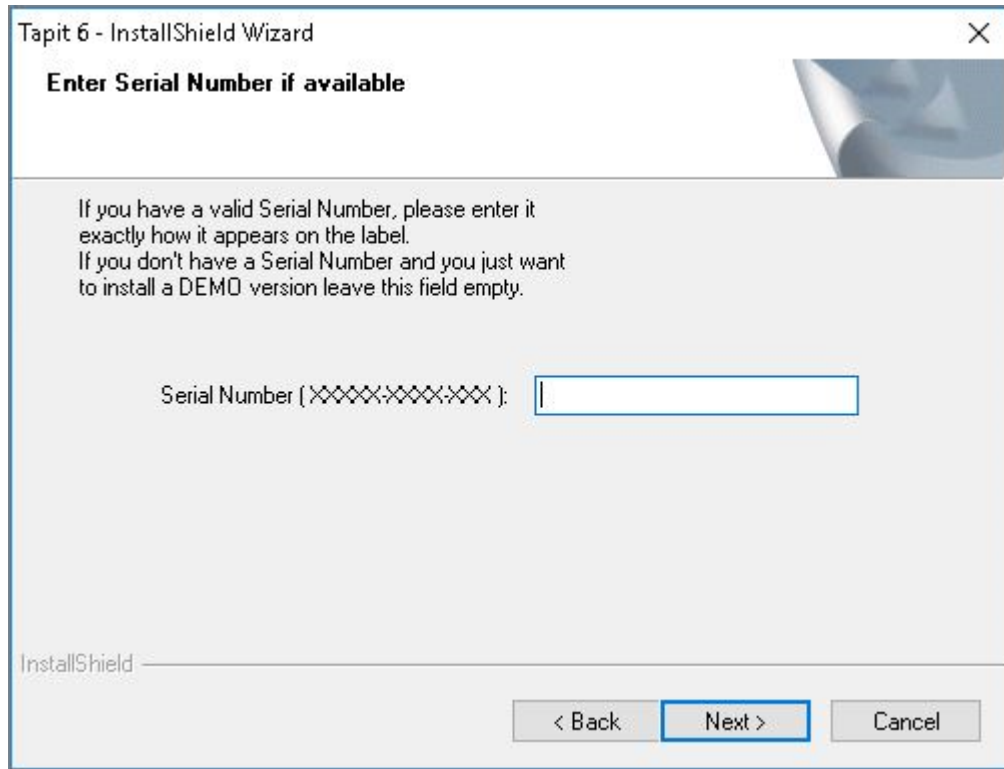
5. The **Tapit 6 Installation – Step 1 - Details** screen shows up. Click on **Next**. Installation program is verifying that **Tapit 6 Prerequisites** are installed on the PC. Please wait, this may take a few minutes. In case a message appears stating prerequisites are not installed, please see section above for information on Installing Tapit 6 Prerequisites.



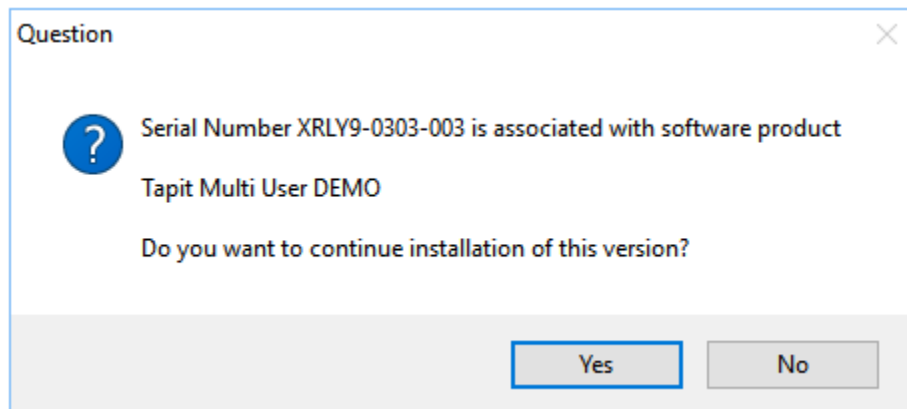




- 6. If you have a serial number enter it into the **Serial Number** field exactly how it appears on the Serial Number label provided, otherwise leave this field empty and Tapit 6 will be installed as a 30-day trial version.



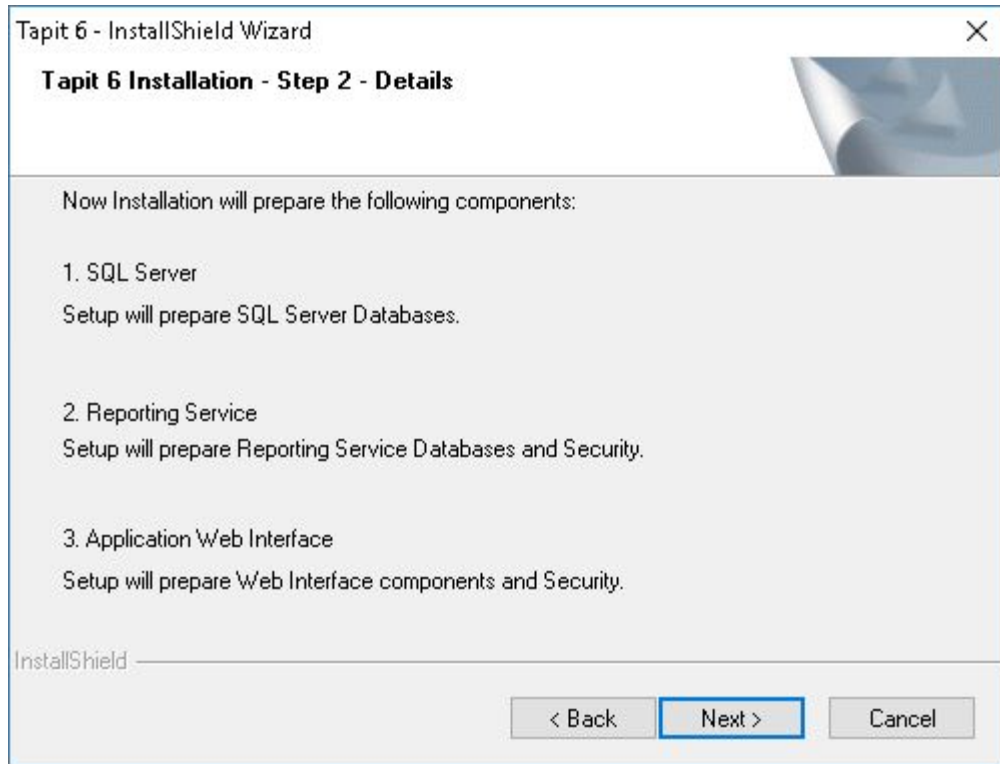
- 7. Click on **Next**. Tapit processes the Serial Number. Product information message is displayed. Click on **Yes**. In case you have not entered any Serial Number, Tapit 6 will install as a 30-day trial version and the following message will be displayed. Click on **Yes**.



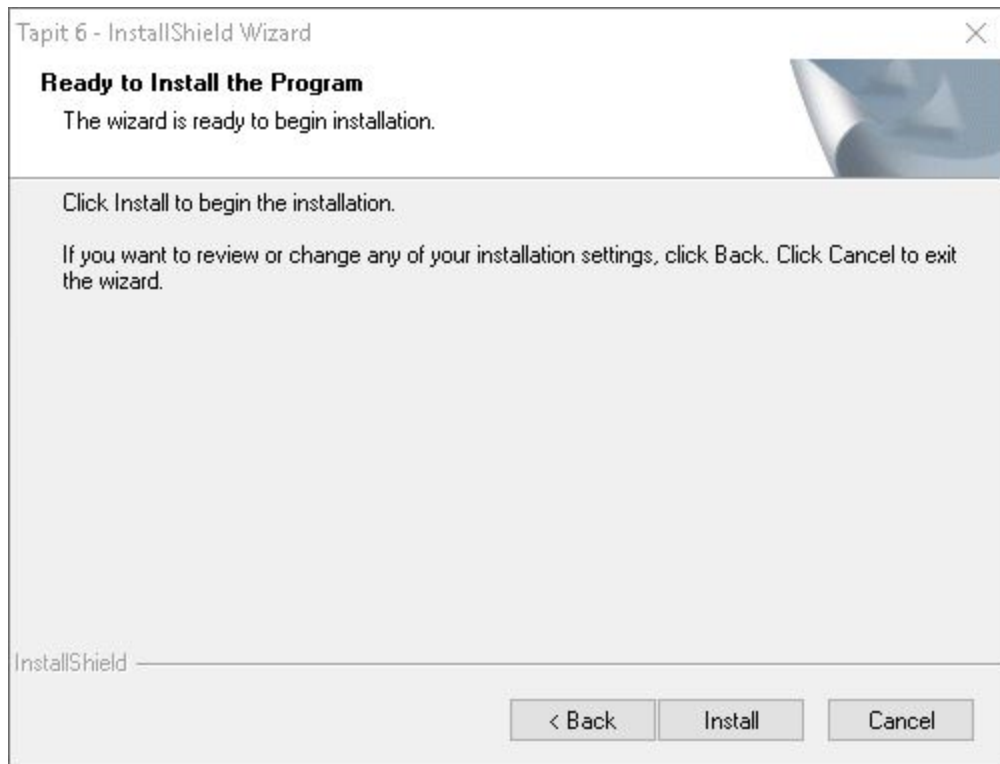




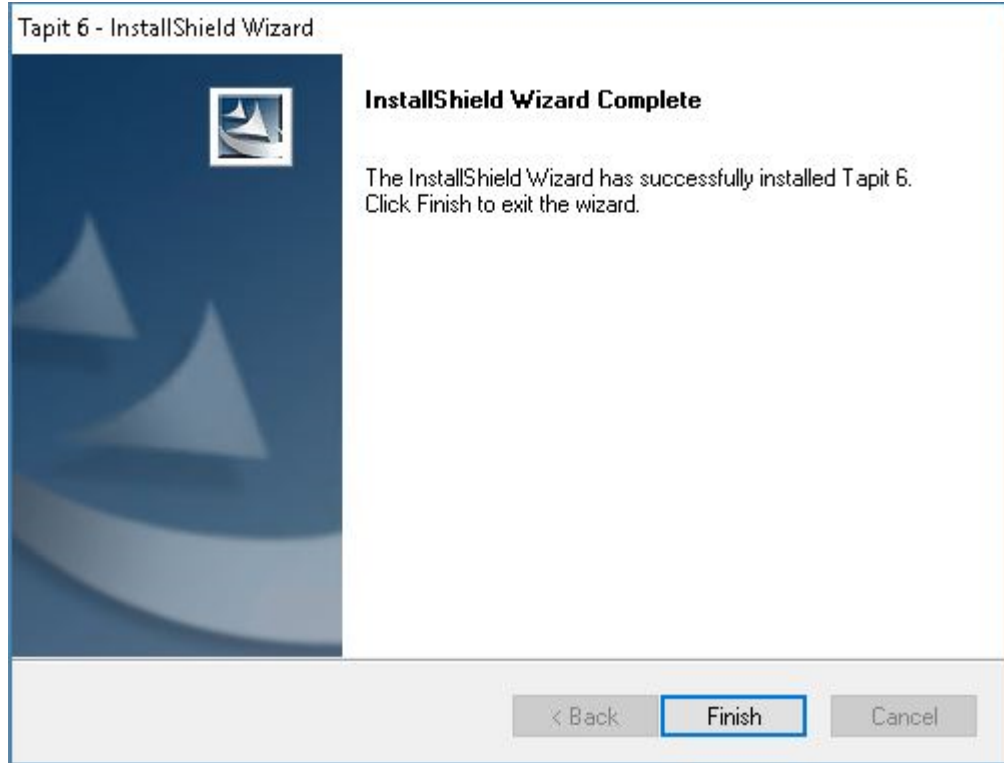
- The **Tapit 6 Installation Detail - Step 2** screen shows up. Click on **Next**. Installation program prepares Tapit 6 components for installation. Please wait, this may take some time.



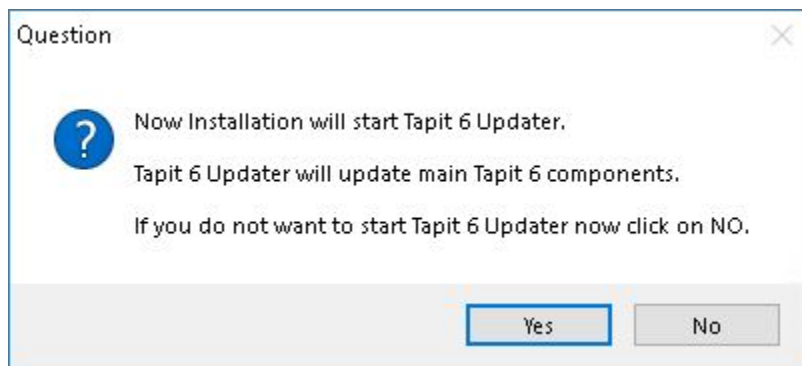
- The **Ready to Install the Program** screen comes up. Click on **Install**.



10. Installation is in progress. Please wait until it is completed. Do not interrupt this process. It may take some time.
11. Tapit 6 files have been installed. Click on **Finish**.



12. Tapit 6 Installation will prompt you to download the latest application update via internet. Click on **Yes** to continue.



The update begins. Do not interrupt this process. It may take some time.

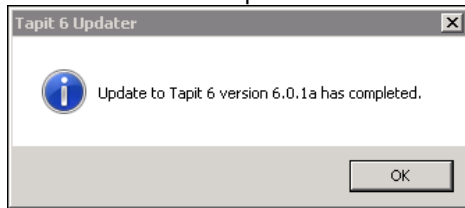


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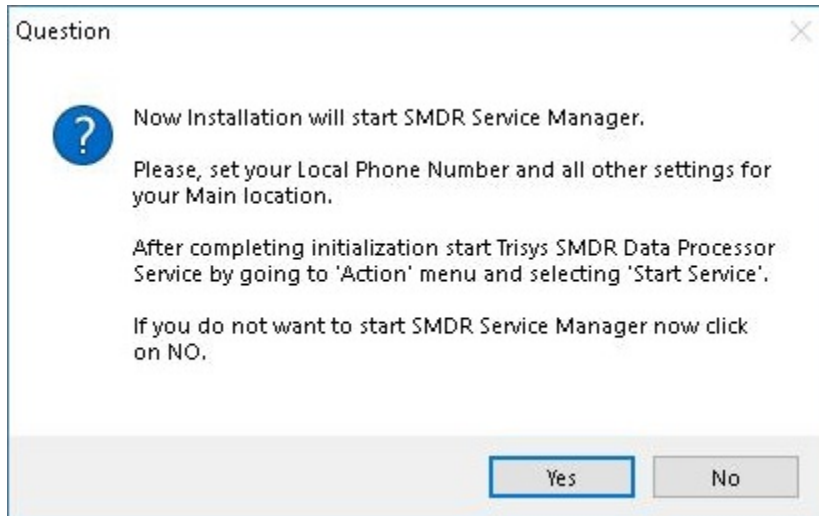
C:\Trisys_Software\Tapit6Updater\UpgradeTapit6.exe
Tapit 6 Updater started

Shutting off task scheduler. This might take up to 2 minutes ...
Service status is currently set to Stopped
Skip stopping. Note: If service fails later machine might need rebooting!
Service status is currently set to Stopped
Checking database connection using default credentials.
Database connection was successfully established using default credentials.
Checking MS .NET Framework version on the System. Minimum requirement is ver. 4.6.2
Required MS .NET Framework version: 4.6.2
Detected MS .NET Framework version: 4.6.2
Detected MS .NET Framework ver. 4.6.2 is greater than or equal to required ver. 4.6.2
Detected MS .NET Framework ver. 4.6.2 meets the minimum requirement of ver. 4.6.2
Checking IIS version...
MajorVersion value = 7
MinorVersion value = 5
Detected IIS version 7.5
MS .NET 4.5 or newer is enabled for IIS.
Preparing (cleaning up) backup directory...
Deleting Backup directory c:\TapitNova\UpgradeTools\Backup\TaskService
Deleting Backup directory c:\TapitNova\UpgradeTools\Backup\TpLoader
Deleting Backup directory c:\TapitNova\UpgradeTools\Backup\WebRoot6
Backup directory preparation (clean up) is complete.
Upgrading current version 6.0.1a to version 6.0.1a
Taking application OFFLINE.
Unzipping updates...
Fixing loader tasks for early TapitNova releases.
...Adding new reports to the catalog.
...Finished adding new reports to the catalog.
AllCalls view modified
Upgrading database to new reports
AnySummary procedure modified
AllCallsCharts procedure modified
AllCallsDetail procedure modified
AllCallsChartsCallsByHour procedure modified
Preparing to reset TaskLog Table
TaskLog Table was reset and modified
Adding custom report Header/Footer capability.
Checking to see if the feature is already installed. Please wait ...
    
```

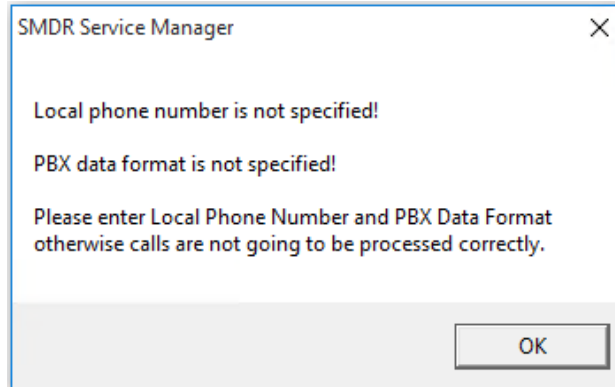
When installation completed you be informed via a pop up box. Click OK when completed.



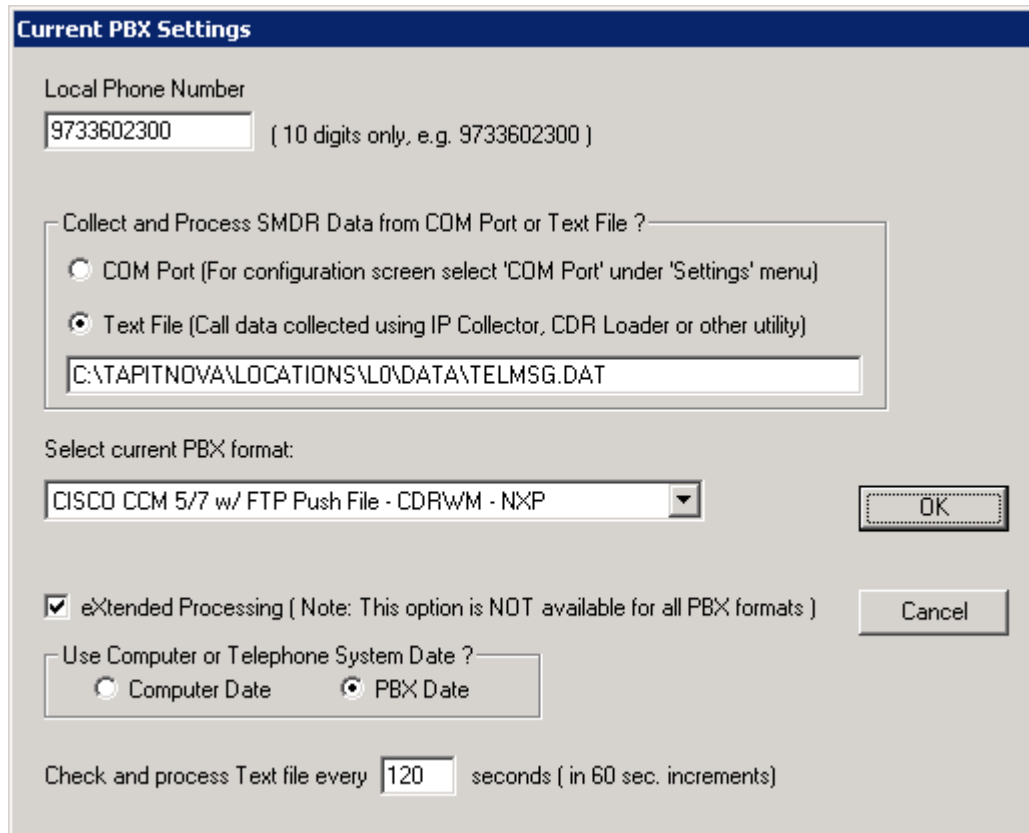
- Tapit 6 Installation program will display a message regarding **SMDR Service Manager**. We recommend clicking on **Yes** to this message and setup **SMDR Service Manager** at this time. However, if you would like to do it later, click on **No**. If you have clicked on **No** you will have to setup **SMDR Service Manager** before using Tapit 6 application. To open **SMDR Service Manager** at a later time go to the **Start/Programs/Tapit 6/SMDR Service Manager**.



- If you clicked on **Yes**, the **SMDR Service Manager** opens and the message is displayed asking you to specify the **Local Phone Number** and **PBX Output Format**. Click on **OK**.



- The **Current PBX Settings** screen comes up.



**NOTE:** In case you have more than one location (i.e. you've purchased Remote Manager) this screen pertains to the Main location only. All other Locations should be added and configured after this setup is complete.

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

Depending on how Tapit is obtaining SMDR data, click on one of the options under **Collect and Process SMDR Data from COM Port or Text File?**



- **COM Port** – select this option if SMDR data is collected via COM Port.
- **Text File** – select this option if SMDR data is collected via IP Collector, CDR Loader, NEC Collector or another utility.

**Select current PBX format** – select the PBX format you are using.

**Extended Processing** - this option is checked by default for most of the current PBX formats. Only some legacy PBX formats require it unchecked. If the box is not checked by default, check it only when you are certain Tapit supports extended processing format, or when suggested by Trisys Technical Support.

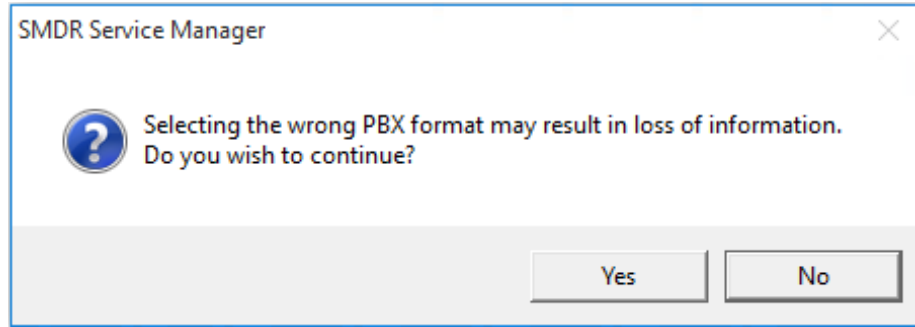
**NOTE:** Format names ending in either XP or NXP should have this option checked.

**Use Computer or Telephone System Date?** - click on the **PBX** or the **Computer** option to specify whether date information for the call records is going to be processed based on the computer or PBX date.

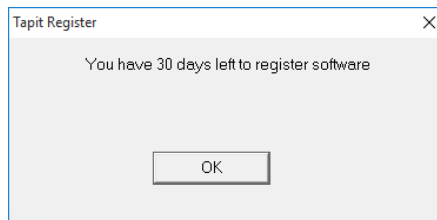
You must check the **Computer** date option if your phone system is not generating the following date information: day, month and year. Otherwise, we recommend you use the PBX date.

**Check and process Text file every...seconds** – this option becomes available when the **Load Calls from Text File** box is checked. The value entered in this box determines how often Tapit processes raw data from the text file and prepares it for the further loading it into the Database (as opposed to the Call Load task in Tapit, that loads the prepared data into Tapit Database and makes it available for reporting).

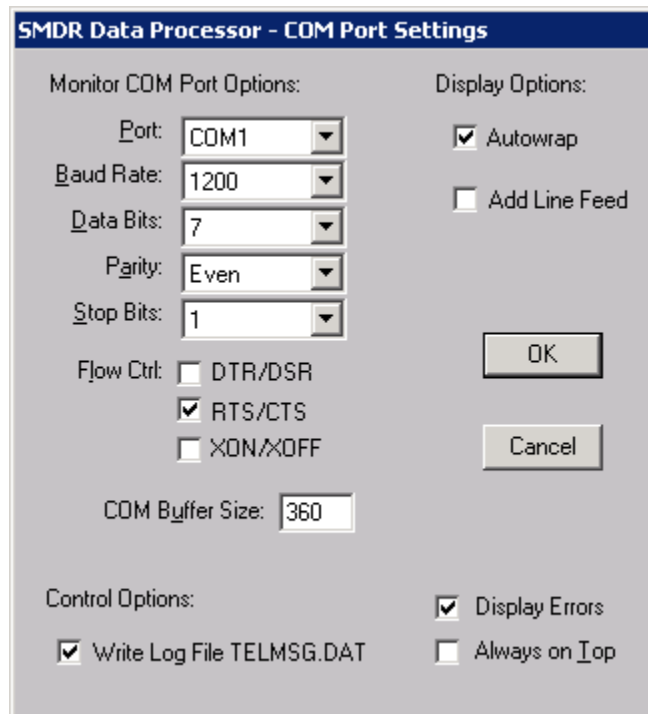
16. Click on **OK** to save changes.
17. **Trisys SMDR Service Manager** displays a message asking you to verify that selected PBX format you have selected is the correct format for your phone system.
18. Inaccurate PBX format may result in incorrectly processed call records and therefore loss of vital information. If you are certain that you have selected the correct PBX format for your phone system click on **Yes** to continue.



19. **Trisys SMDR Service Manager** is open and a registration message is displayed as a reminder to register Tapit software. It is very important to register your Tapit promptly. Tapit will stop functioning if you do not register it within 30 days from the date of installation. See page 25 for REGISTRATION instructions. Click on **OK**.



20. If Tapit 6 is collecting SMDR data via COM Port, open **Settings/Com Port** on the **Trisys SMDR Service Manager** screen. However, if Tapit 6 is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader, NEC Collector or another utility) please refer Trisys website or contact Technical Support.



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

**Baud Rate** - click on the down arrow icon in the **Baud Rate** field to select a transmission speed the phone system is set at.

**Data Bits** - click on the down arrow icon in the **Data Bits** field to select a data bits setting of the phone system.

**Parity** - click on the down arrow icon in the **Parity** field to select a parity setting of the phone system.

**Stop Bits** - click on the down arrow icon in the **Stop Bits** field to select a stop bits setting of the phone system.

**Flow Ctrl.** - check an appropriate box to select a flow control parameter that may be required by the PBX (refer to PBX's documentation).

**Com Buffer Size** - a number of characters SMDR Monitor will hold in the memory buffer before saving data to the hard disk (recommended value is **360**).

**Control Options**

**Write Log File TELMSG.DAT** check this box if you wish Tapit to save raw SMDR information in the separate file (TELMSG.DAT in directory for the Mail Location under \Locations\LO\Data where CDR data for this location gets processed).

**Display Errors** - check this box if you wish Tapit to display communication errors in the SMDR Monitor window. (Legacy Application version only)

**Always on top** - check this if you wish SMDR Monitor icon or window to be always on the foreground of the desktop. (Legacy Application version only)

**Display Options**

**Autowrap** - some PBX SMDR strings are longer than can fit on the screen, check this option to force the string to wrap to the next string when the right edge of the SMDR Monitor window is reached. (Legacy Application version only)

**Add Line Feed** - check this box if you wish to have a blank line inserted between SMDR call records (it may improve readability of SMDR records displayed on the SMDR Monitor). (Legacy Application version only)

21. Click on **Action** and then **Start Service**.

```

SMDR Service Manager < Nova > < Service Stopped > < Application Closed > < Console Closed > < File mode >
Action Settings Test About
-----
Checking if Test Console is open...
Result: Test Console not detected.

Checking if SMDR Monitor is open...
Result: SMDR Monitor not detected.

Info about current statuses of Service, Console and Monitor is Refreshed.

Application Started and Ready now.

Select Settings->Info to see current Information.

Note: When running in 'Nova' mode SMDR Monitor processes data and
prepares it for loading, but it does not load call records into the database.
Call records are loaded by Tapit Nova web application services.

To edit settings first go to Action menu and stop Service or close Test Console,
also make sure SMDR Monitor Application is closed.
  
```

22. The **SMDR Data Processor Service** has started and is ready to process call data.



```

SMDR Service Manager < Nova > < Service Running > < Application Closed > < Console Closed > < File mode >
Action Settings Test About
Checking if SMDR Monitor is open...
Result: SMDR Monitor not detected.

Info about current statuses of Service, Console and Monitor is Refreshed.

Application Started and Ready now.


Select Settings->Info to see current Information.

Note: When running in 'Nova' mode SMDR Monitor processes data and
prepares it for loading, but it does not load call records into the database.
Call records are loaded by Tapit Nova web application services.

To edit settings first go to Action menu and stop Service or close Test Console,
also make sure SMDR Monitor Application is closed.

Service start pending.
....
Service is running now.
SMDR Data Processor Service started.

```

23. Open Tapit 6 by double-clicking on the Tapit 6 icon  on your desktop or from **Start/Programs/Tapit 6/Tapit 6**.
24. **Tapit 6 Login** screen is displayed. Enter default passcode, **tapit\_manager**, into both user name and password fields.

**“tapit\_manager” is the default username and password to Tapit 6. This user account cannot be deleted. You can create additional user logins under Security (see Tapit 6 Manual). If you chose to change the default password to the tapit\_manager account please be sure to make note of it as there is no alternative master password to gain access to Tapit 6.**

The first time you open Tapit 6 you will get a message suggesting you set up a Location Name, Phone Number and E-mail Settings.

25. The Location and Phone Number settings can be found under System->Locations. The default Location name is Main. The displayed phone number should match the one set in Step 15. If you wish to change the phone number – it can be changed at this screen. After completing desired changes, you must restart Trisys SMDR Data Processor Service (TapitDPS).





## Locations

[Status](#) / [Call Costing](#) / [Activity](#) / [Dialing Patterns](#) / [Pricing](#) ,

**Location**

---

Change Location Name:

Number:

Location Status:     **Active**

PBX Format:

26. SMTP E-mail settings can be found under System->System->E-mail

**NOTE:** SMTP settings used below should be provided by your IT Department or E-mail Provider

- **Host** – enter the name of the SMTP Server.
- **Port** – enter the port you would like to use to send email from Tapit 6.
- **SSL** – check this option if your SMTP server requires an SSL Certificate.
- **Use Default Credentials** – check this option if you would like to use Default Network Credentials. Otherwise, email will be sent anonymously.
- **From Email Address** – This should be a valid email address. It will display as the 'From address' on e-mails sent from Tapit 6.
- **From Email Name** – if your SMTP server requires login credentials put the login name here. Often this will be an email address.
- **Password** – if your SMTP server requires login credentials put the password here.
- **To Email Address** – this email address will receive notifications from Tapit 6 when certain errors occur during Tapit 6's processes. If you have multiple recipients, separate them using a semicolon (;) without spaces between addresses.

To test email settings, click on **Send Test Email** and verify that an email message has been delivered to the recipient's email address.

# System

Status / **Email** / Destination Codes

## Email Settings

SMTP Server:

Port:\*

Use SSL: Use Default Credentials: 

From Email Address:

From Email Name:

Password:

To Email Address (Separate multiple addresses with ; ):

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## Registration

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1. Go to where the **Tapit 6** server is installed.
2. Go to **Start -> Programs -> Tapit 6 -> Register**.
3. The product information window comes up. Click **Get Registration Number** and then follow the online instructions.