Tapit 6

Call Accounting Software Manual

Trisys Inc.

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Document Revision Record

ABV	Description
160920	New Template
160929	Added ShoreTel Integration
180530	Updated Minimum Requirements
181022	Updated Minimum Requirements

Related Documentation

Document Name
Tapit 6 Call Accounting Read Me First
Upgrading to Tapit 6 from Tapit NOVA*
Replay NOVA / Tapit 6 related *
Shore Tel integration *
SMDR section *

Tapit 6 Call Accounting Manual

For newest information and updates go to http://www.trisys.com

Minimum System Requirements

- 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.

Installation

Before Installing Tapit 6

- 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.
- This installation will 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 Win 2008/2012 assign Web Server role, also for all operating systems **Web Management Tools**, **IIS 6 Compatibility**, **ASP.NET 4.5** 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.

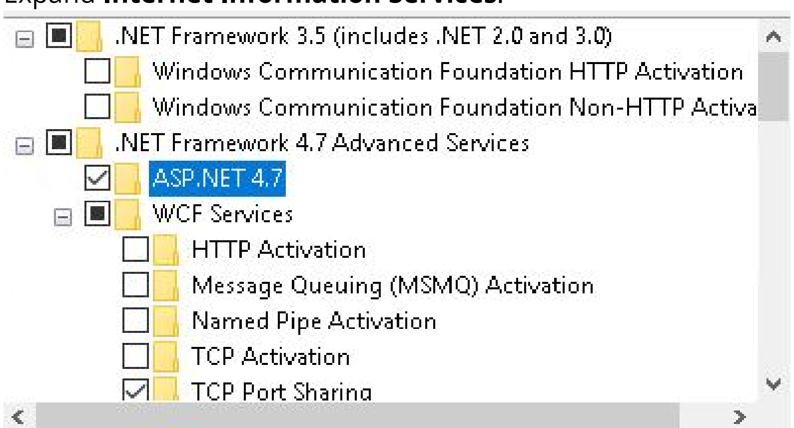
Setting Up IIS and System Features

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.

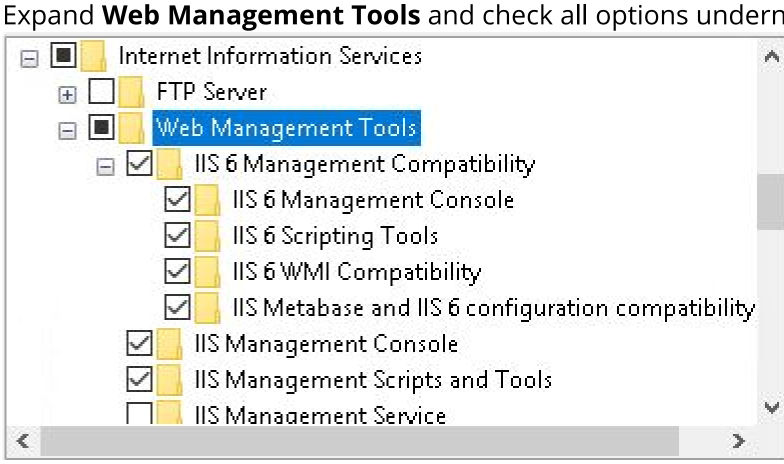
NOTE: In Windows 10, if User Account Control is not disabled, accept the warning to elevate privileges for the Windows Features dialog to appear.

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

Expand **Internet Information Services**.

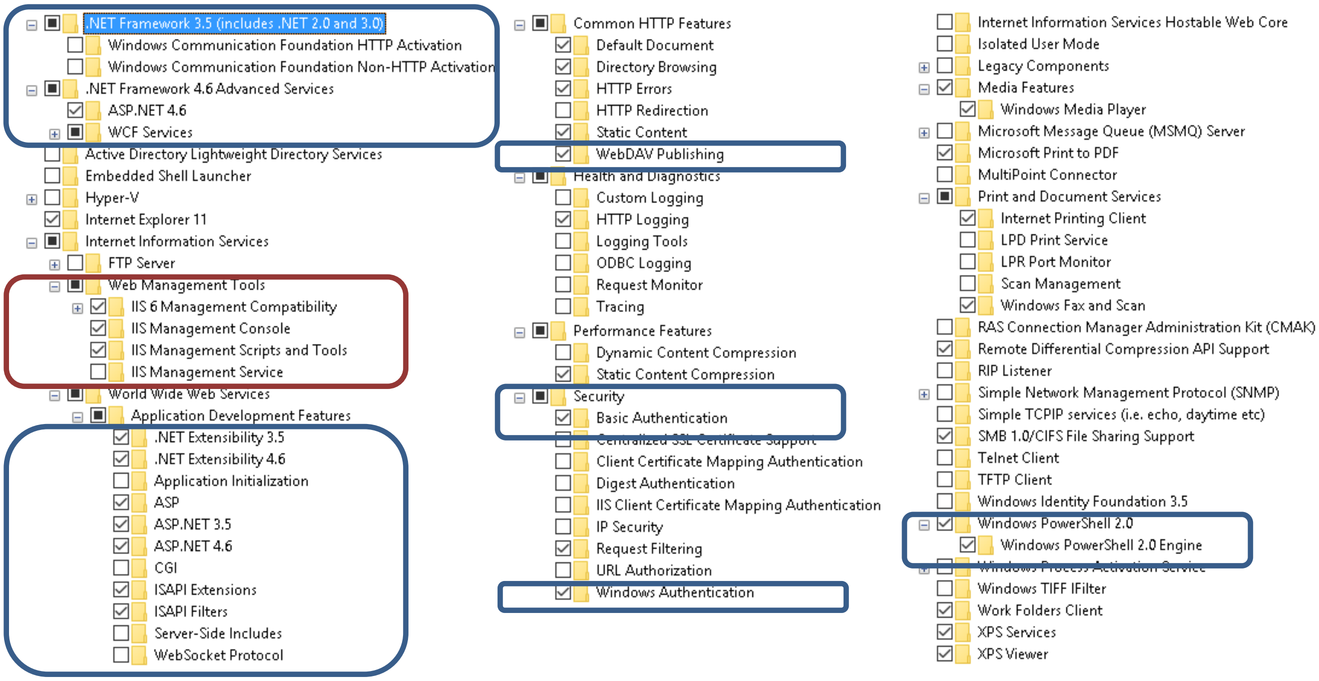


Expand **Web Management Tools** and check all options underneath this node.



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:



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

Installing Tapit 6 Prerequisites

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.

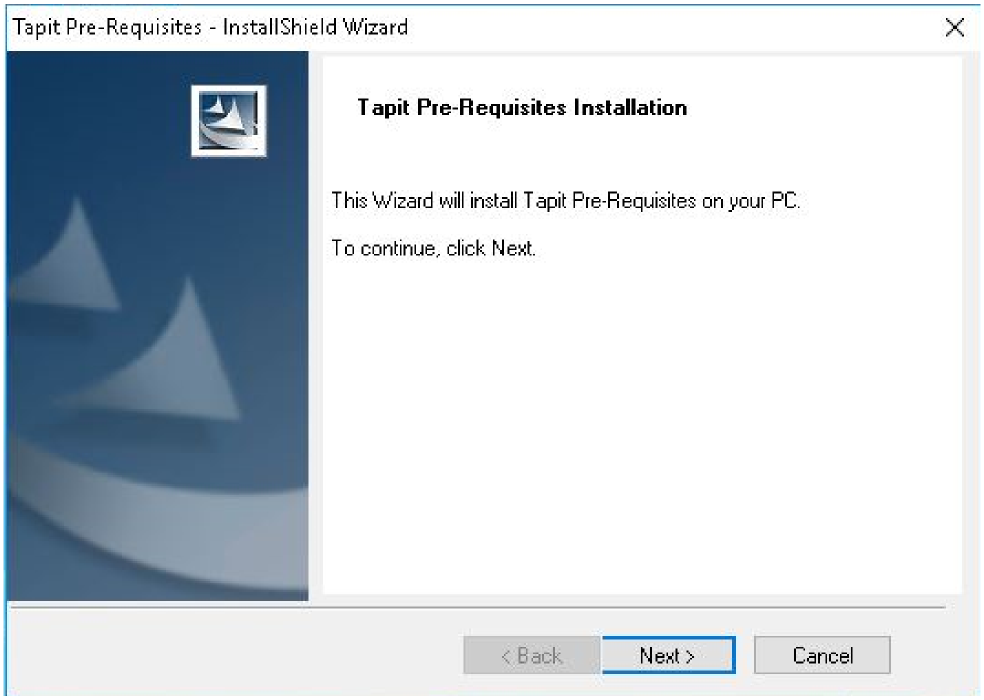
IIS, MS .NET Framework 3.5 SP1, MS .NET Framework 4.62 or higher and current version of Windows PowerShell must be already installed on this PC.

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

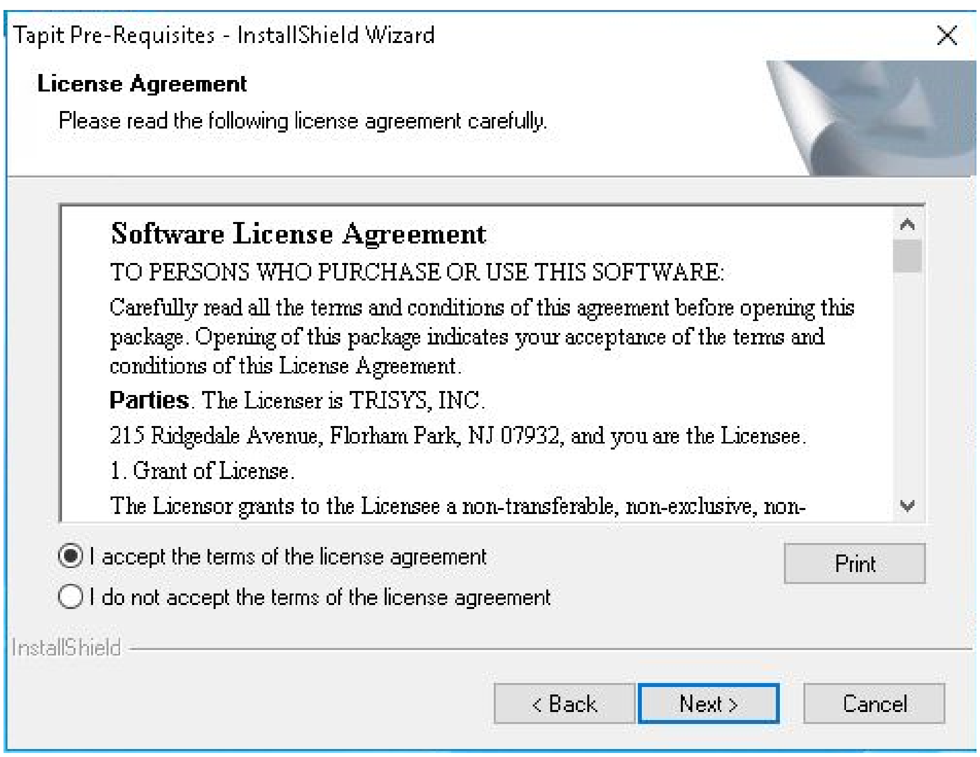
1. When installing from a downloaded Tapit 6 Download,
   First, right-click on the downloaded file and check Properties to make sure the file is unblocked. Next, extract the file and browse to the folder where the download was extracted, right-click on STARTUP6.exe and select 'Run as Administrator'.

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

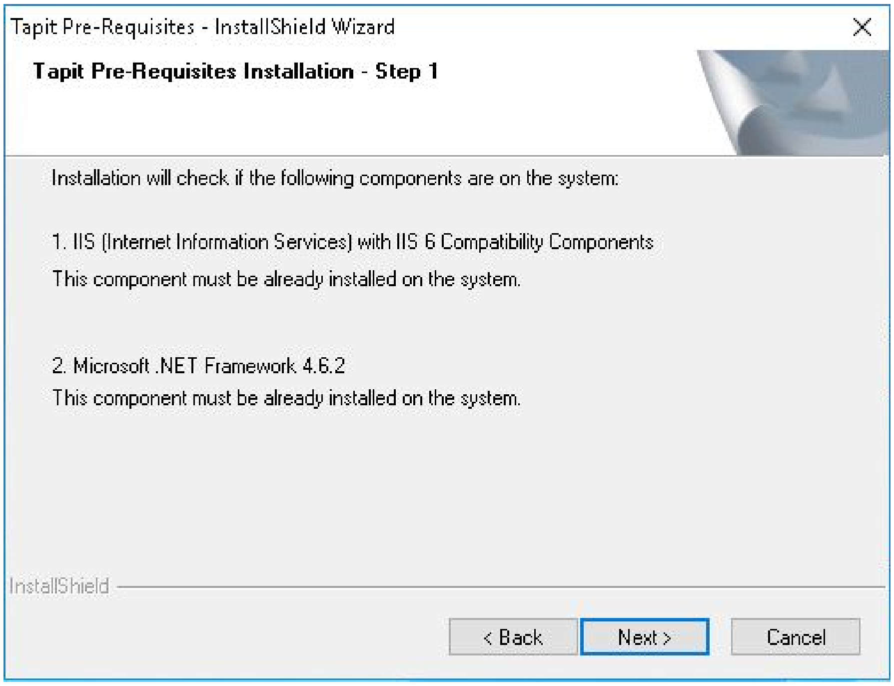
2. Click on **Install Prerequisites**.
3. Tapit 6 Prerequisites installation starts up automatically.
4. Click on **Next** to continue Tapit 6 Prerequisites Installation.



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

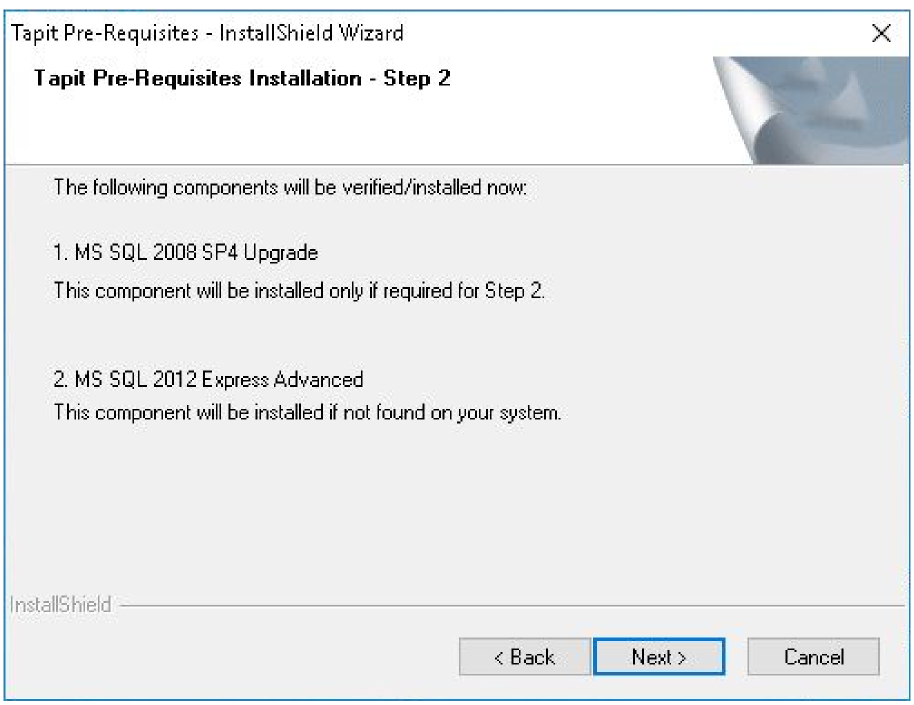


5. The **Tapit 6 Prerequisites Installation – Step 1 – Details** screen is displayed. Click on **Next**. Setup program checks for the required components: **IIS**, **MS .Net Framework**. This may take some time. Please wait.

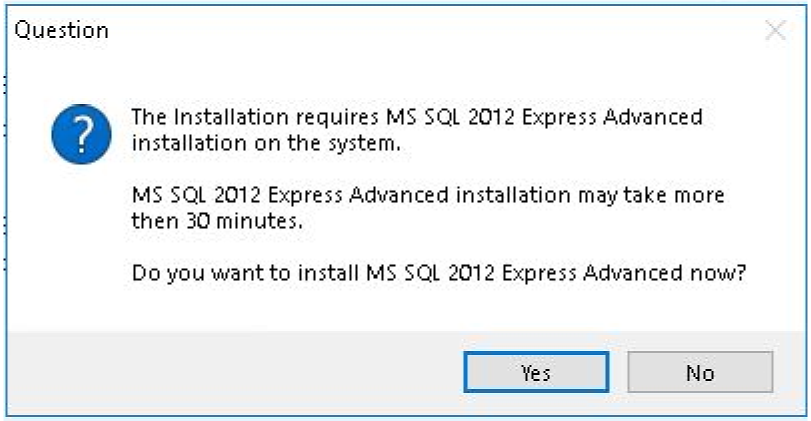


6. If all required components are found, the **Tapit 6 Prerequisites Installation – Step 2 – Details** screen is displayed. Click on **Next**. Setup will begin installation of **MS SQL 2012 Express Advanced**.

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

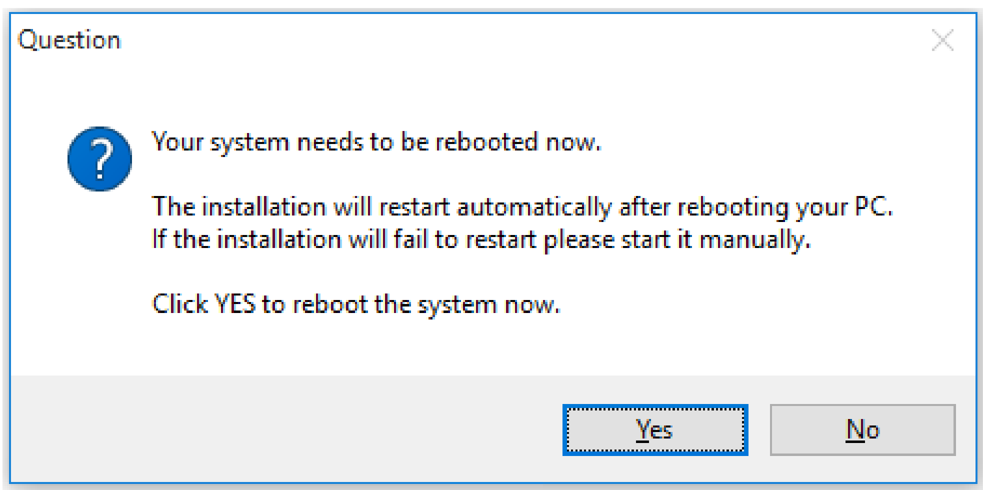


7. Click **Yes** to confirm the installation of **MS SQL 2012 Express Advanced**.

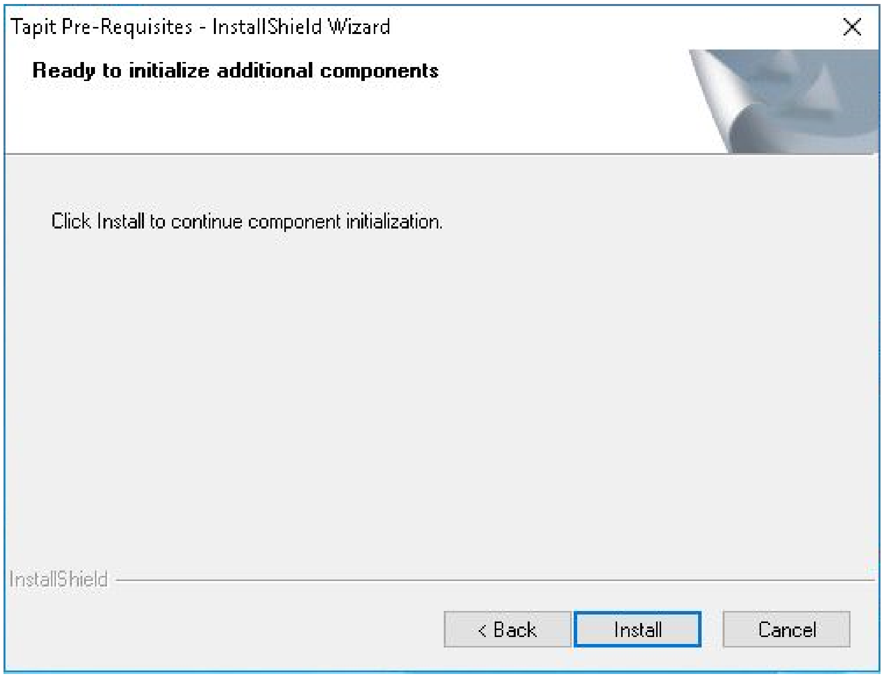


Installing **MS SQL 2012 Express Advanced** may take some time. Typically 15-20 minutes. Please wait.

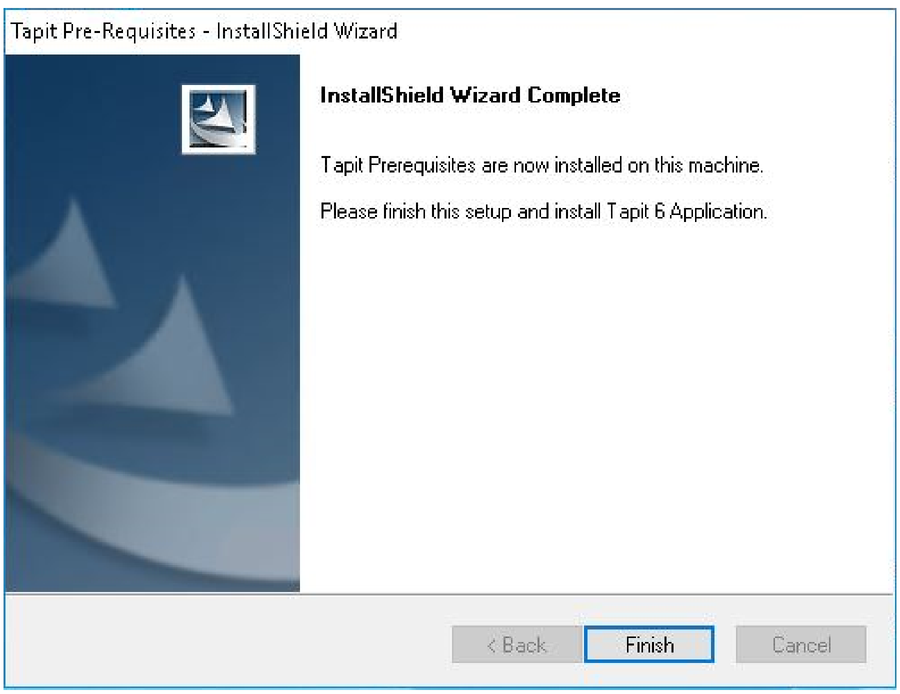
8. SQL Server Installation requires you to reboot the PC. You will be prompted by setup program with the message below. Click on **Yes** to restart the PC.



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.

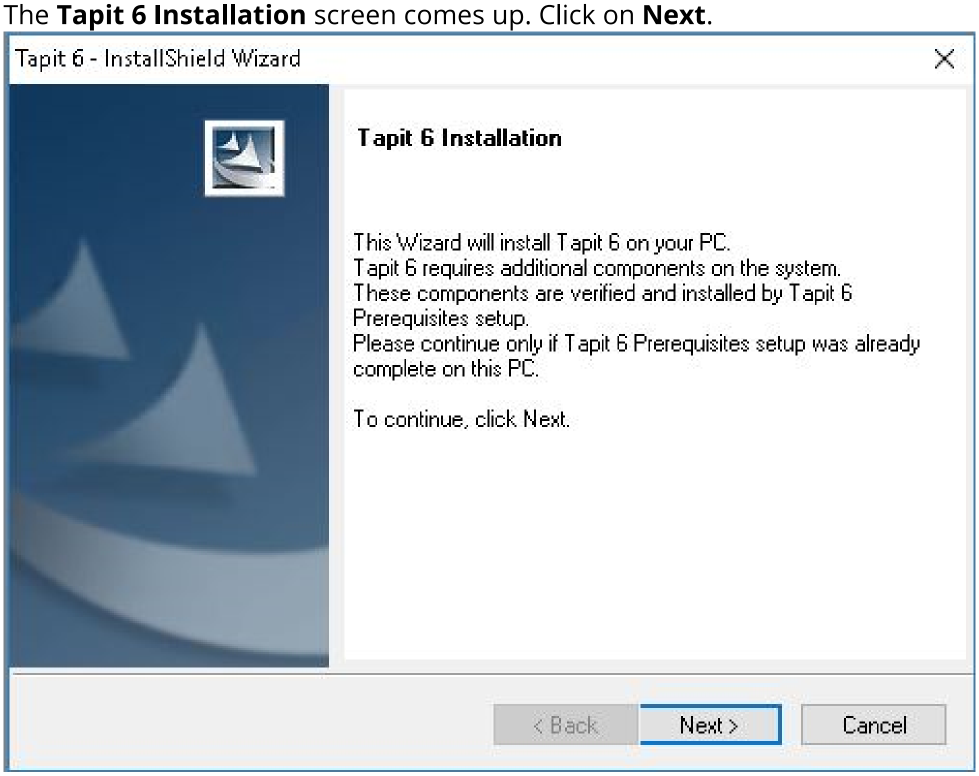
IIS, MS .NET Framework 3.5 SP1, MS .NET Framework 4.62 or higher and current version of Windows PowerShell must be already installed on this PC.

Installation of Tapit 6 Prerequisites has to be successfully completed.

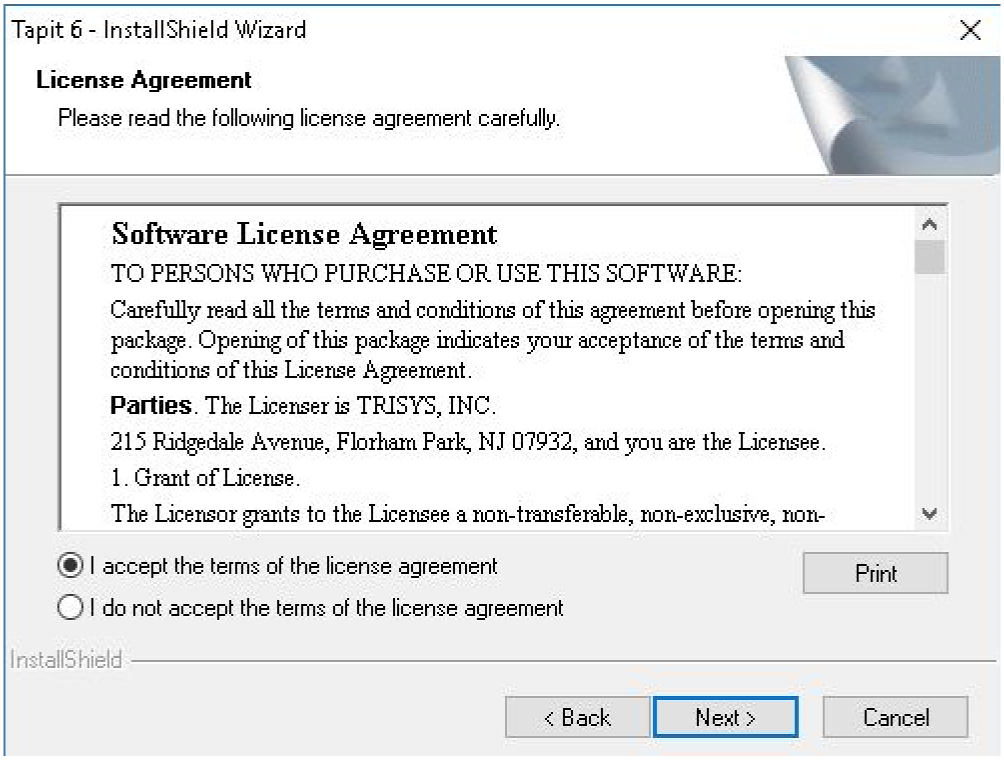
1. When installing from a downloaded Tapit 6 Download,
   First, right-click on the downloaded file and check Properties to make sure the file is unblocked. Next, extract the file and browse to the folder where the download was extracted, right-click on STARTUP6.exe and select 'Run as Administrator'.

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

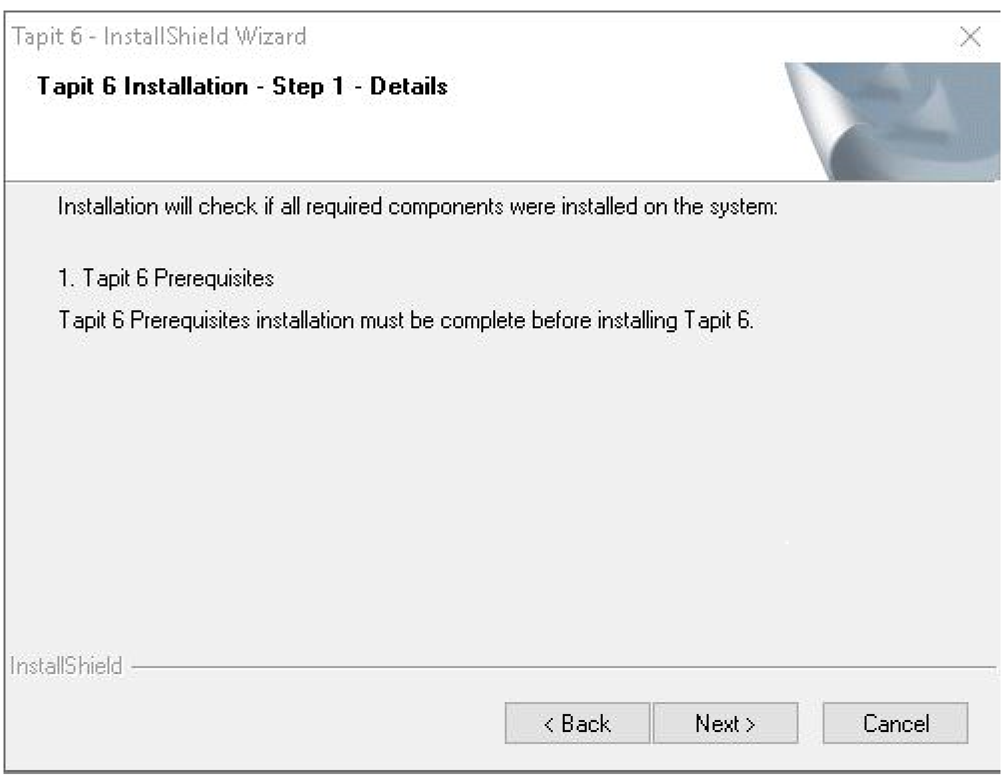
2. Click on **Install Tapit 6**.
3. The **Tapit 6 Installation** screen comes up. Click on **Next**.



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.**

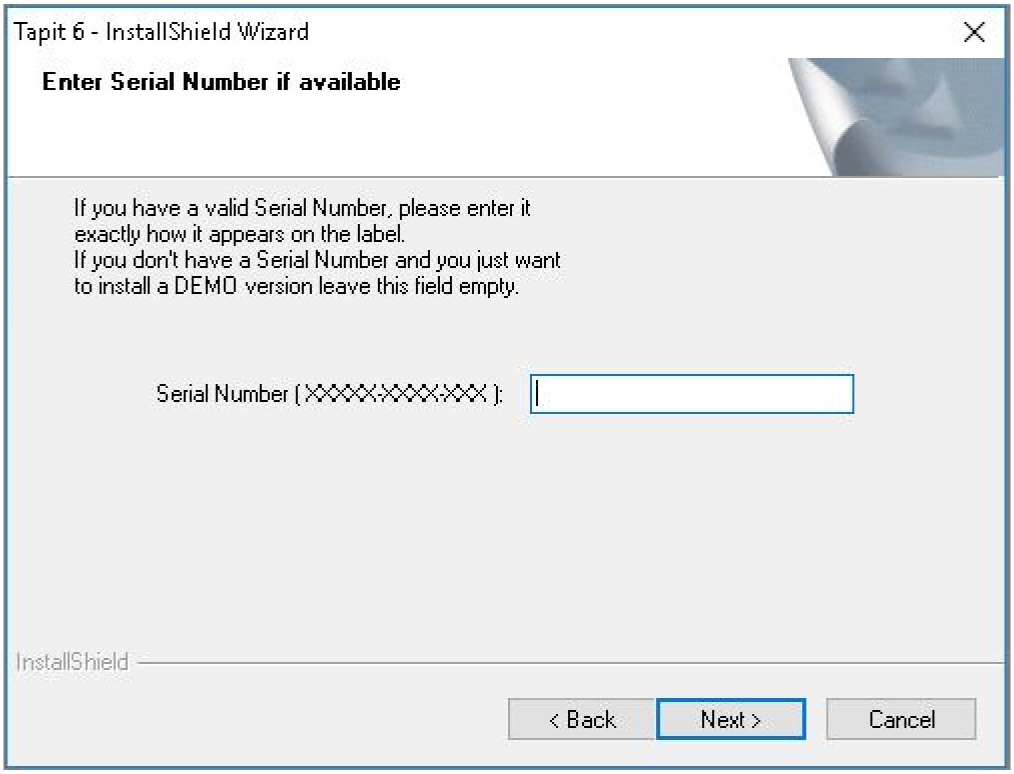


5. The **Tapit 6 Installation – Step 1 - Details** screen shows up. Click on **Next**. Installation program is verifying that **Tapit 6 Prerequisites** are installed on the PC. Please wait, this may take a few minutes.
In case a message appears stating prerequisites are not installed, please see section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

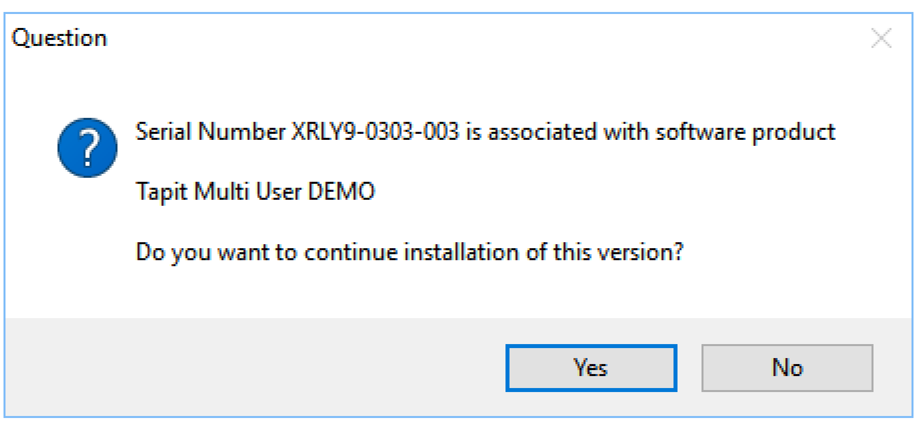



Continue Tapit 6 installation
TAPIT 6
InstallShield
< Back
Next >
Cancel

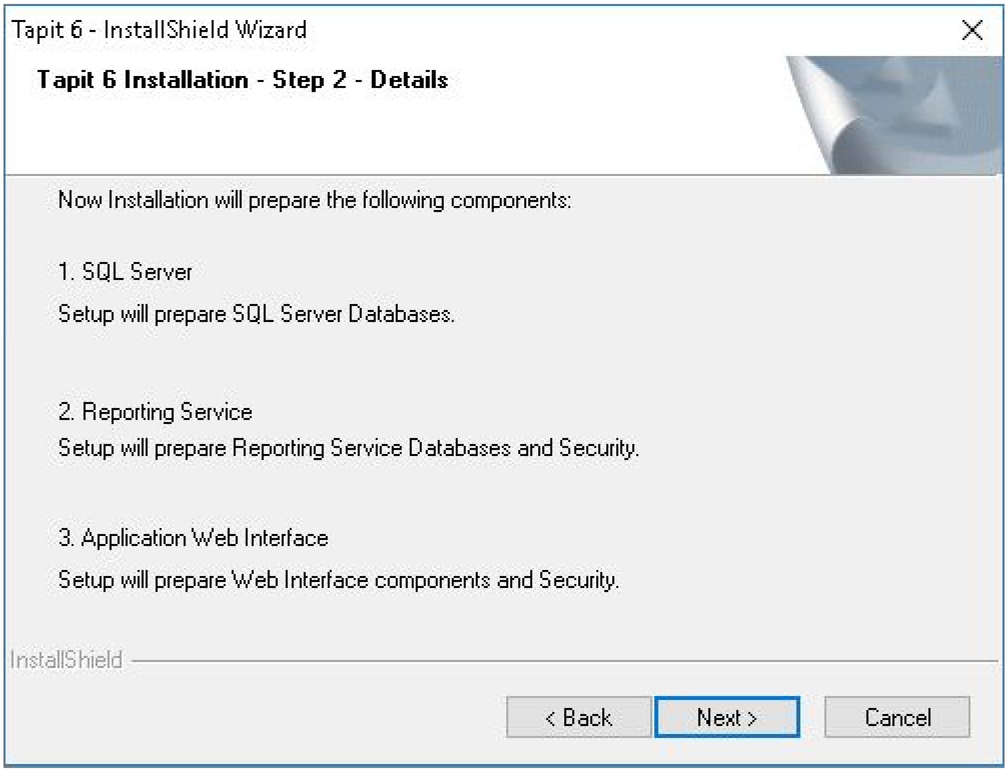
6. If you have a serial number enter it into the **Serial Number** field exactly how it appears on the Serial Number label provided, otherwise leave this field empty and Tapit 6 will be installed as a 30-day trial version.



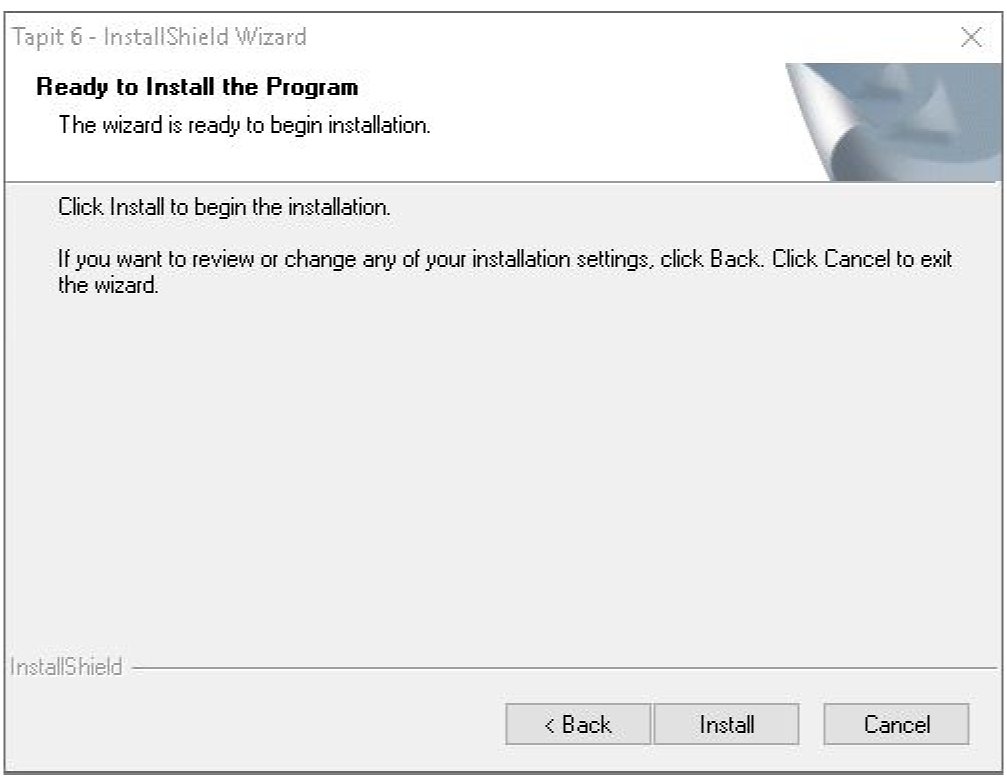
7. Click on **Next**.
Tapit processes the Serial Number. Product information message is displayed. Click on **Yes**. In case you have not entered any Serial Number, Tapit 6 will install as a 30-day trial version and the following message will be displayed. Click on **Yes**.



8. 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.

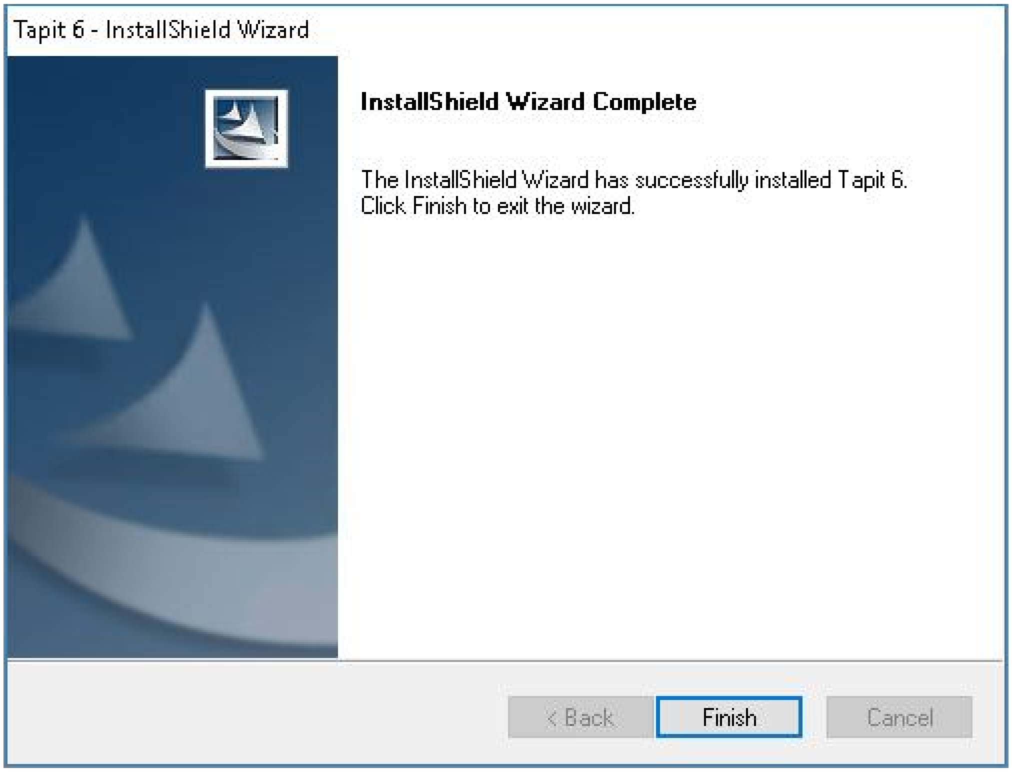


9. The **Ready to Install the Program** screen comes up. Click on **Install**.

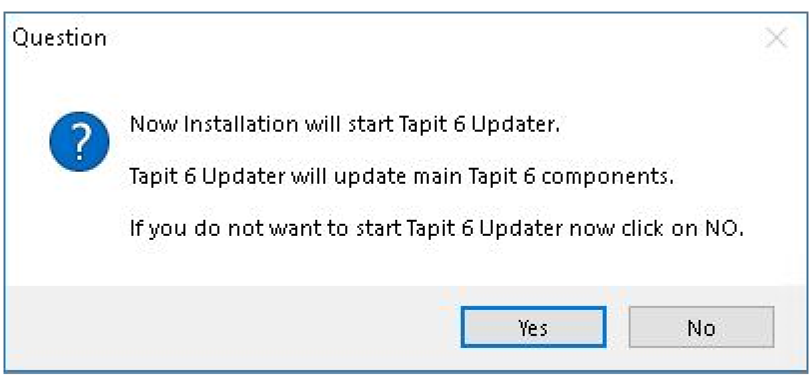


10. Installation is in progress. Please wait until it is completed. Do not interrupt this process. It may take some time.

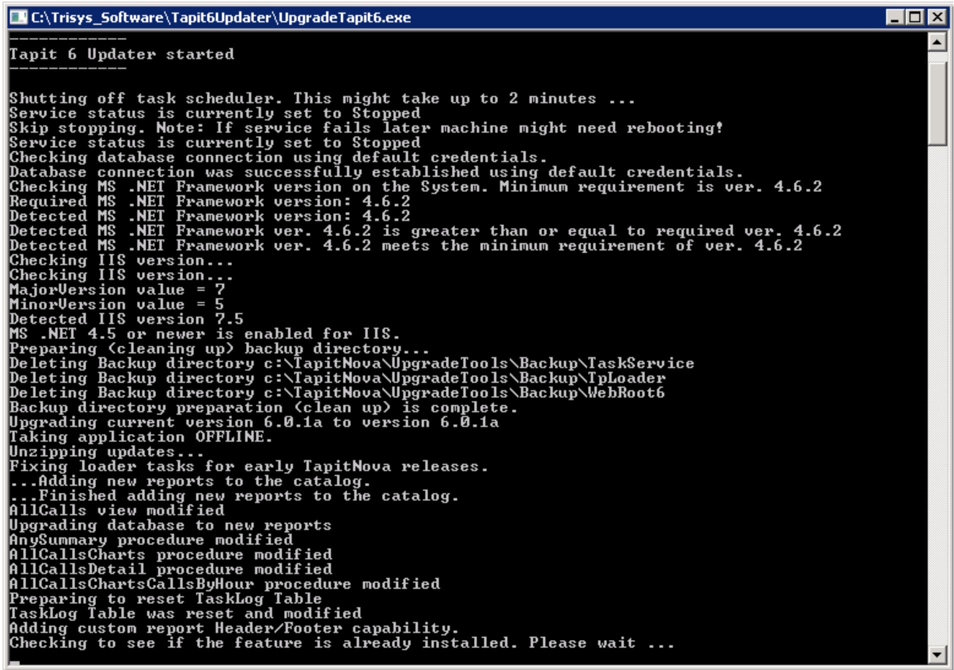
11. Tapit 6 files have been installed. Click on **Finish**.



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

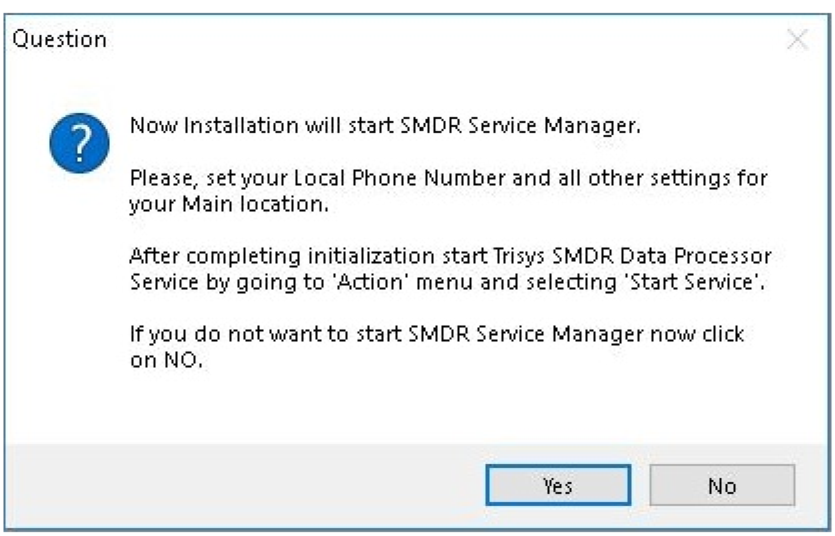


The update begins. Do not interrupt this process. It may take some time.

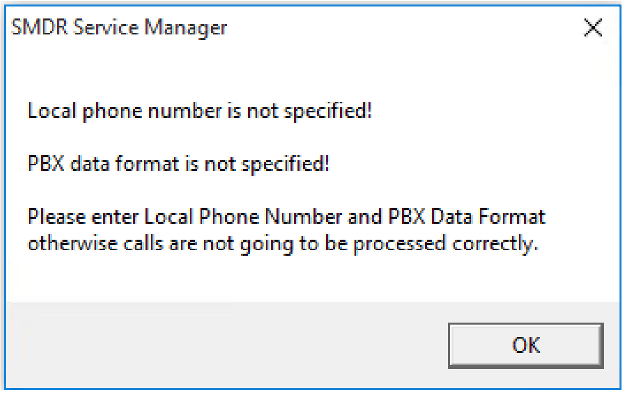


When installation completed you be informed via a pop up box.
Click OK when completed.

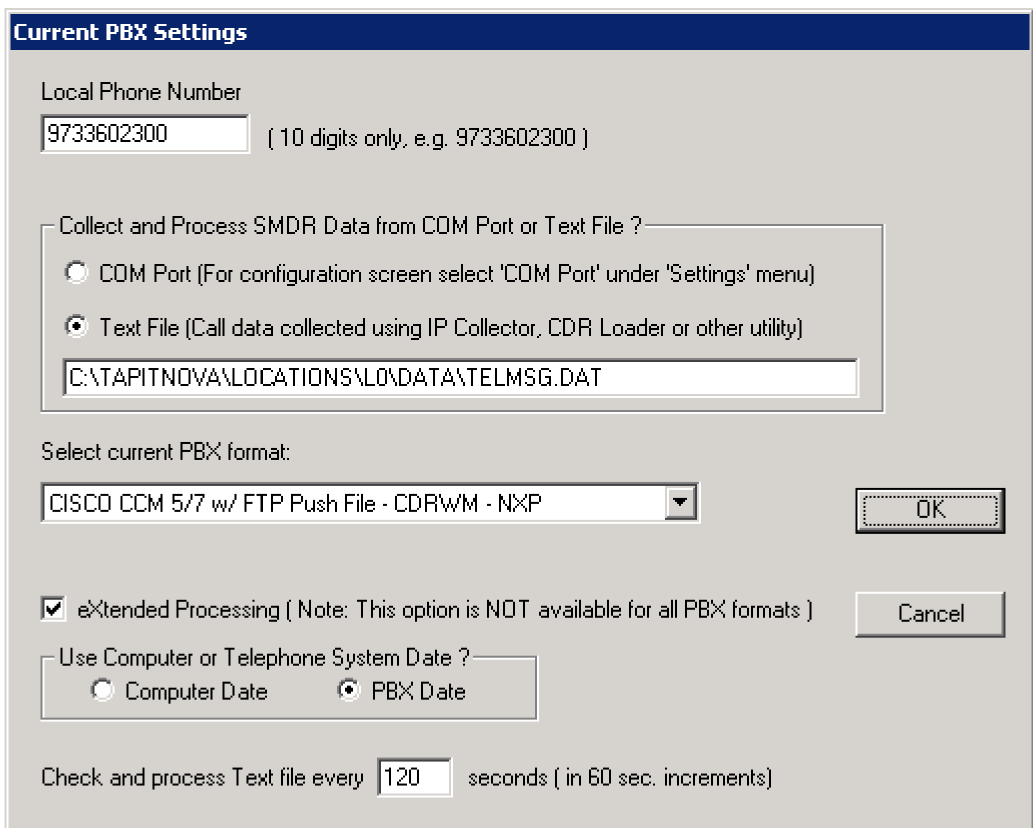
13. Tapit 6 Installation program will display a message regarding **SMDR Service Manager**. We recommend clicking on **Yes** to this message and setup **SMDR Service Manager** at this time. However, if you would like to do it later, click on **No**. If you have clicked on **No** you will have to setup **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**.



14. 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**.



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



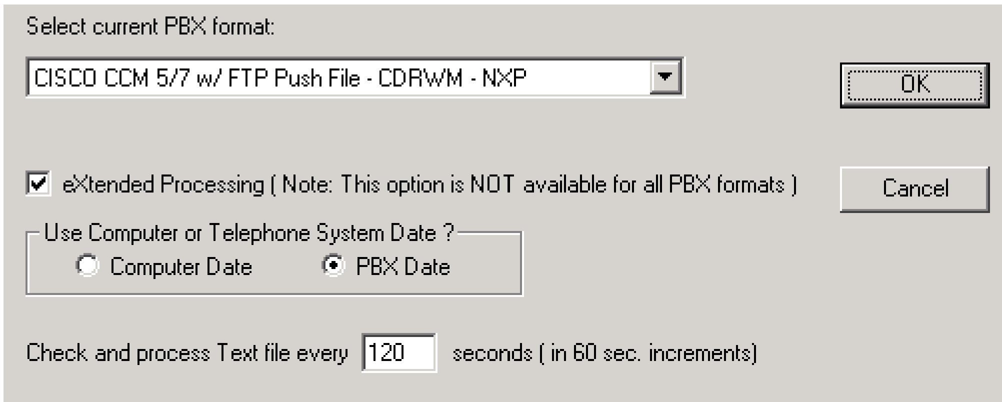
NOTE: In case you have more than one location (i.e. you've purchased Remote Manager) this screen pertains to the Main location only. All other Locations should be added and configured after this setup is complete.

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.

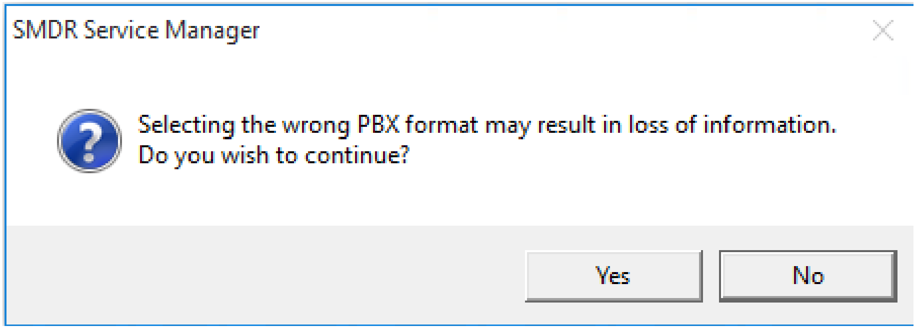
NOTE: Format names ending in either XP or NXP should have this option checked.

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.

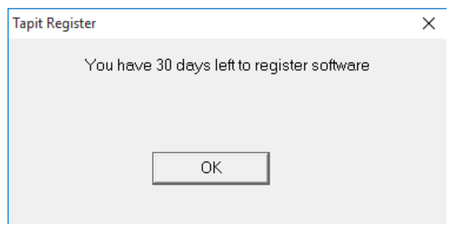
Check and process Text file every…seconds – this option becomes available when the **Load Calls from Text File** box is checked. The value entered in this box determines how often Tapit processes raw data from the text file and prepares it for the further loading it into the Database (as opposed to the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

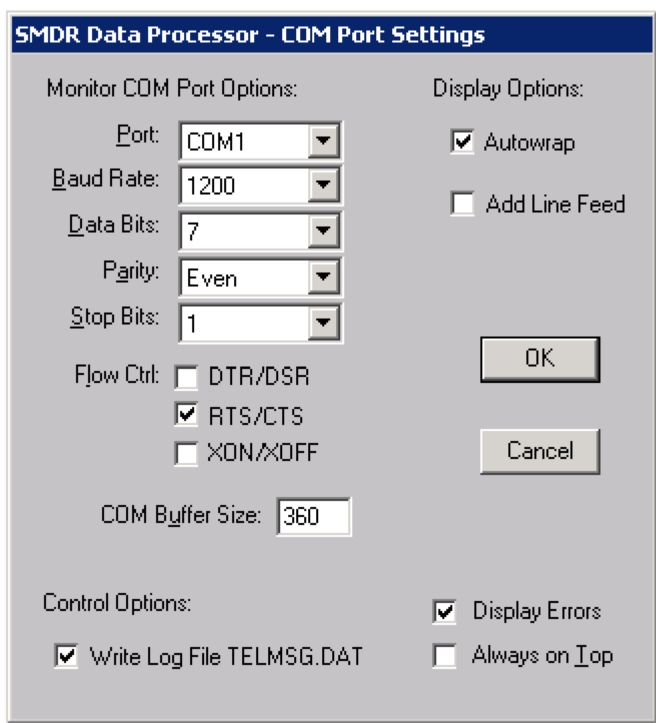
18. Inaccurate PBX format may result in incorrectly processed call records and therefore loss of vital information. If you are certain that you have selected the correct PBX format for your phone system click on **Yes** to continue.



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 30 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 Mange**r 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.

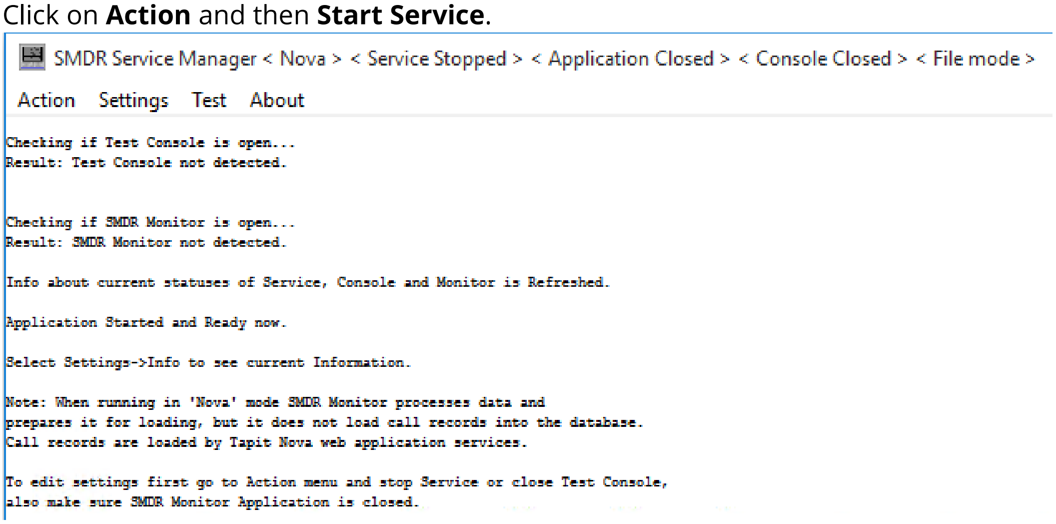


Port - click on the down arrow icon in the **Port** field to select a port on the computer the SMDR cable is connected to.

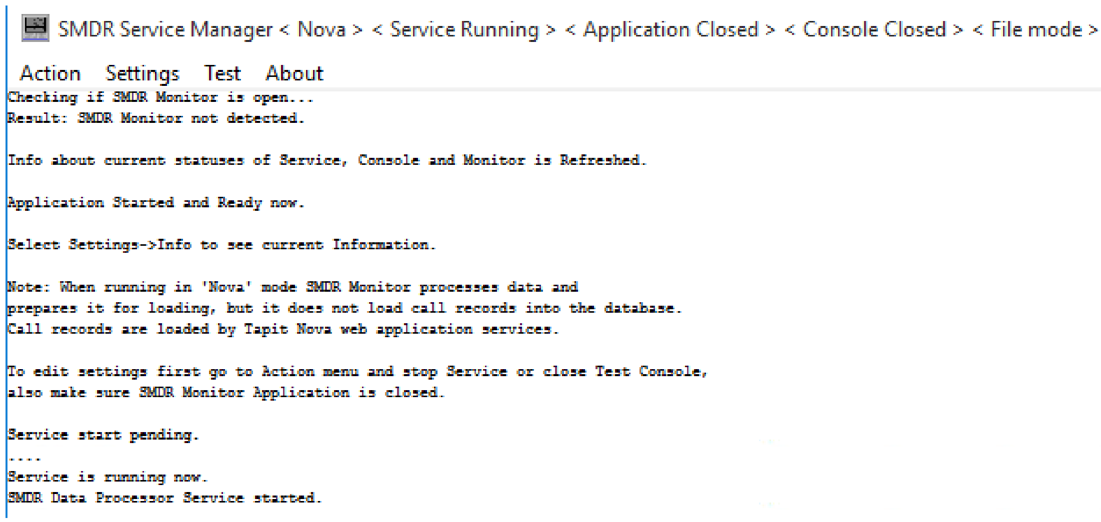
Baud Rate - click on the down arrow icon in the **Baud Rate** field to select a transmission speed the phone system is set at.
Data Bits - click on the down arrow icon in the **Data Bits** field to select a data bits setting of the phone system.
Parity - click on the down arrow icon in the **Parity** 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\L0\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**.



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

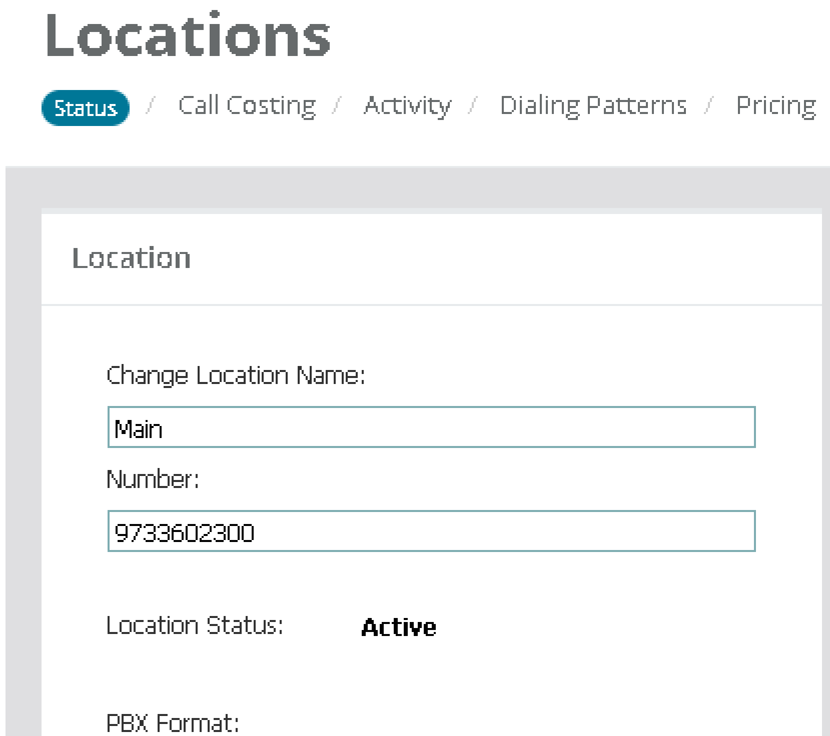


23. Open Tapit 6 by double-clicking on the Tapit 6 icon on your desktop or from **Start/Programs/Tapit 6/Tapit 6**.
24. **Tapit 6 Login** screen is displayed. Enter default passcode, **tapit_manager**, into both user name and password fields.

    "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).

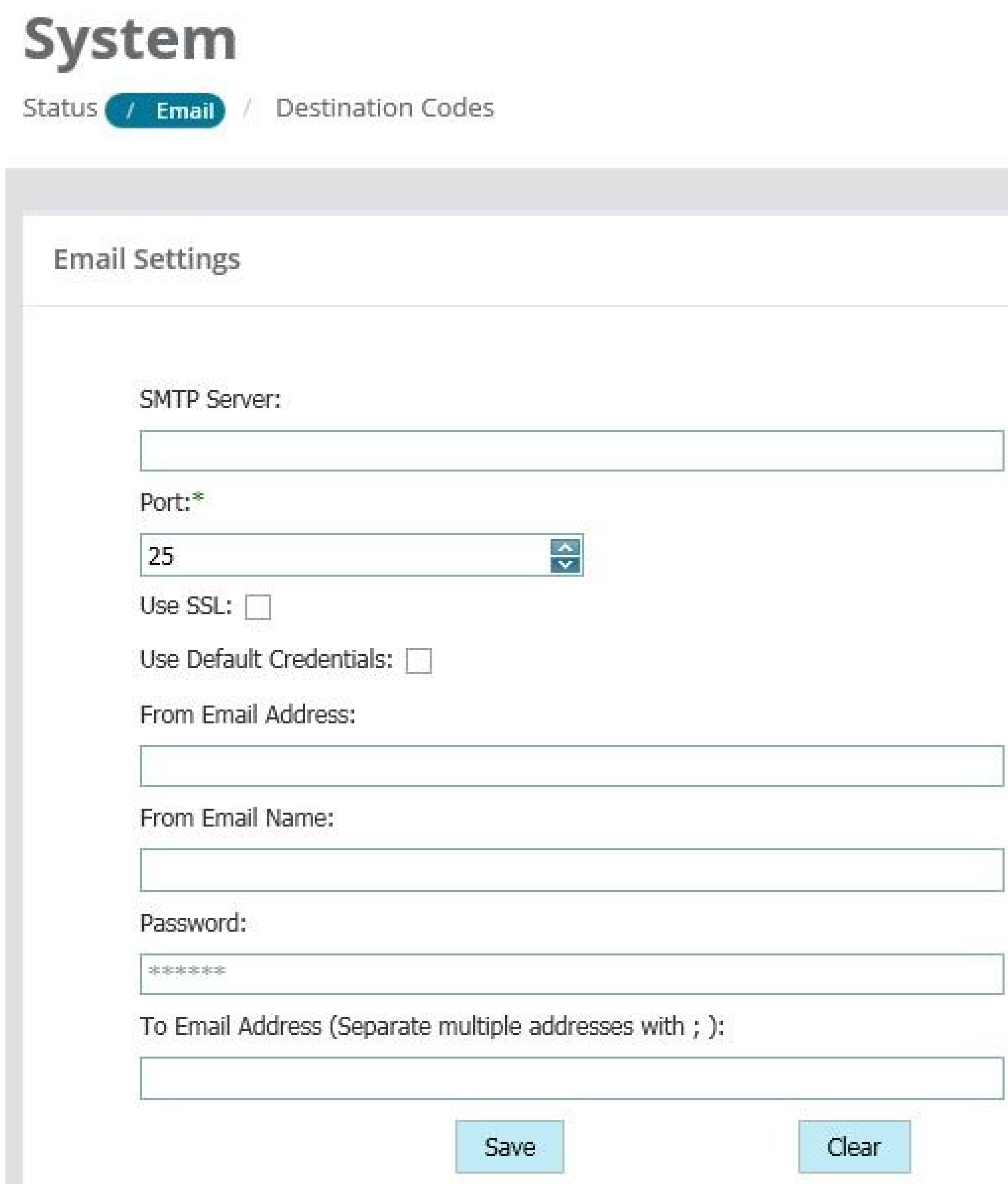


26. SMTP E-mail settings can be found under System->System->E-mail

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.



Registration

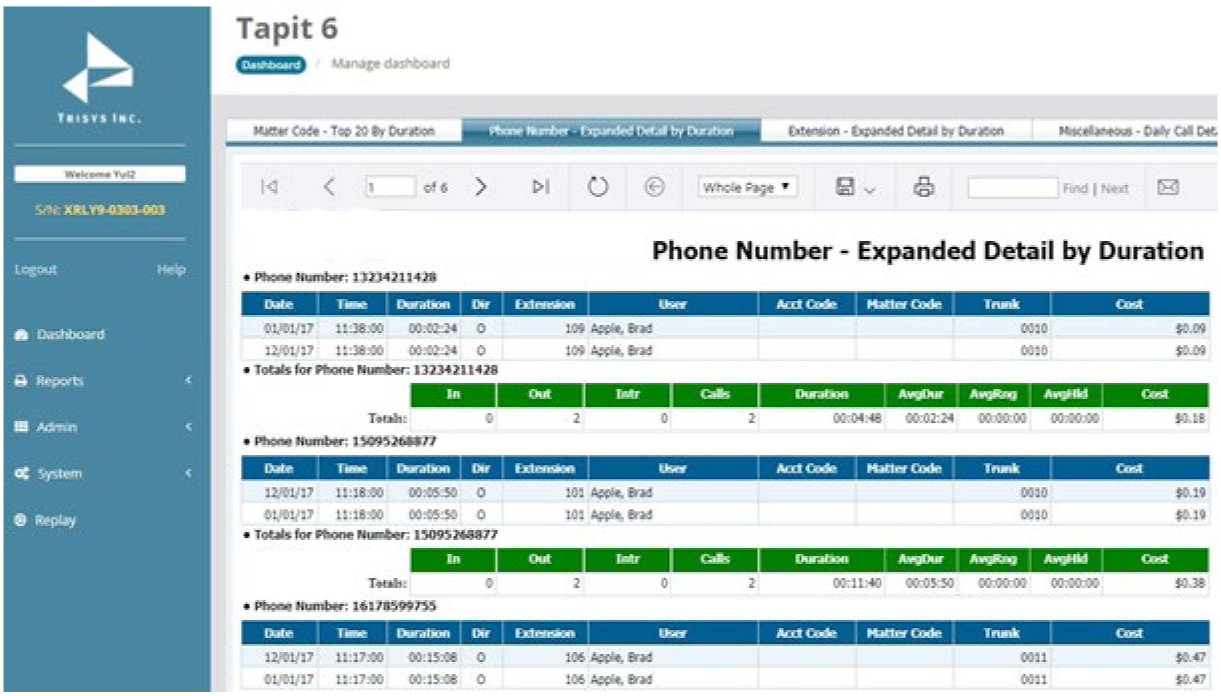
1. Go to where the **Tapit 6** server is installed.
2. Go to **Start** -> **Programs** -> **Tapit 6** -> **Register**.
3. The product information window comes up. Click **Get Registration Number** and then follow the online instructions.

Dashboard

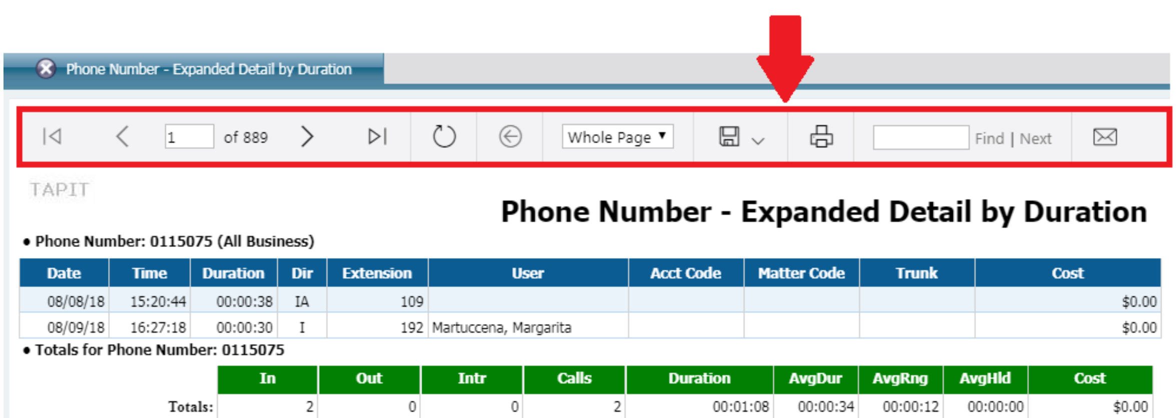
USING DASHBOARD

Dashboard is the first screen users see upon logging into the system. It can display up to four reports. Each report is refreshed within a desired time interval. This feature saves time for users who frequently review the same reports.

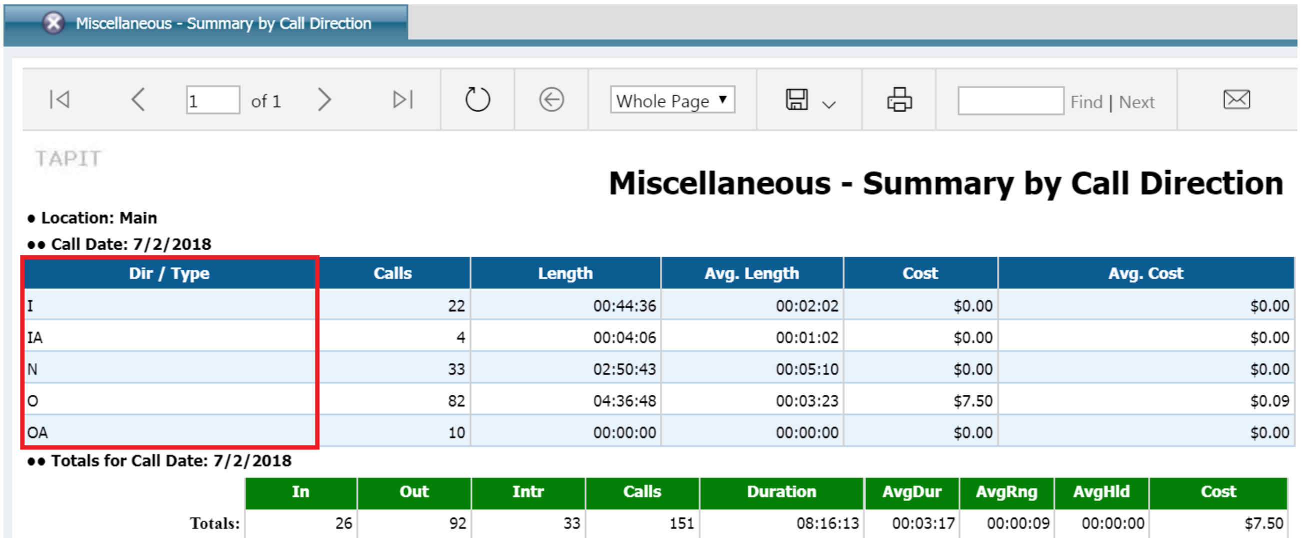
Reports can be added or removed to the **Dashboard** via the **Manage Dashboard screen**.



From **Dashboard screen** users can review all pages of a report by using the paging feature, choose first or last page, change zoom per page, download report in PDF/Excel/Word format, print or send as email.



Click the any row or record in first column to redirect user to **Details report screen**.



Miscellaneous - Summary by Call Direction

- Location: Main
  - Call Date: 7/2/2018

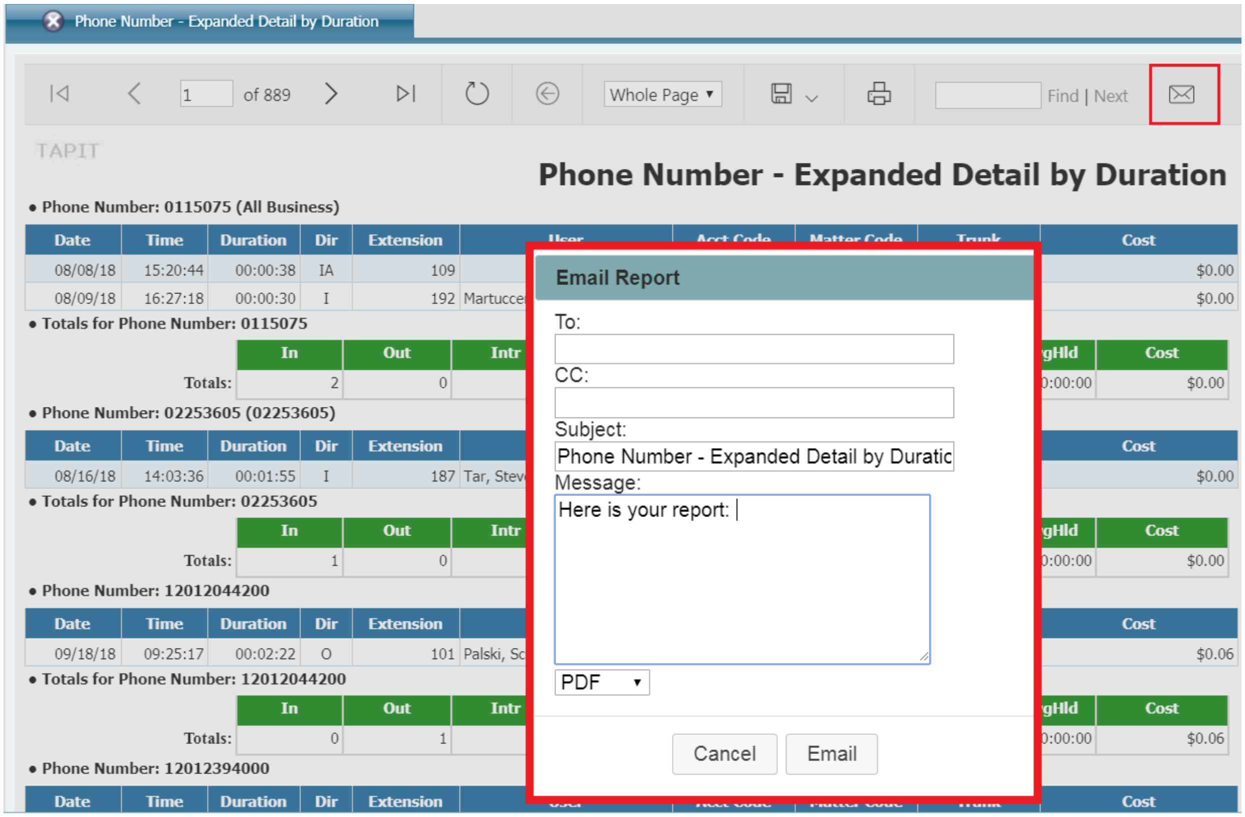
Dir / Type	Calls	Length	Avg. Length	Cost	Avg. Cost
I	22	00:44:36	00:02:02	$0.00	$0.00
IA	4	00:04:06	00:01:02	$0.00	$0.00
N	33	02:50:43	00:05:10	$0.00	$0.00
O	82	04:36:48	00:03:23	$7.50	$0.09
OA	10	00:00:00	00:00:00	$0.00	$0.00

- Totals for Call Date: 7/2/2018

	In	Out	Intr	Calls	Duration	AvgDur	AvgRng	AvgHld	Cost
Totals:	26	92	33	151	08:16:13	00:03:17	00:00:09	00:00:00	$7.50

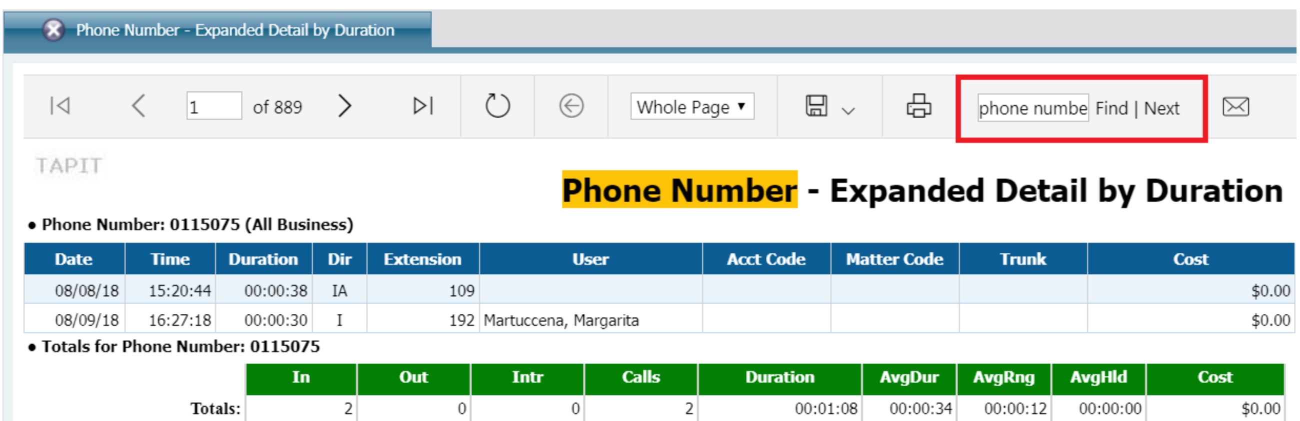
To go back to the parent report
Click the "Go to the parent report" button, to return back to general report.

To email the report
User can send any report via email in PDF/Excel/Word format.

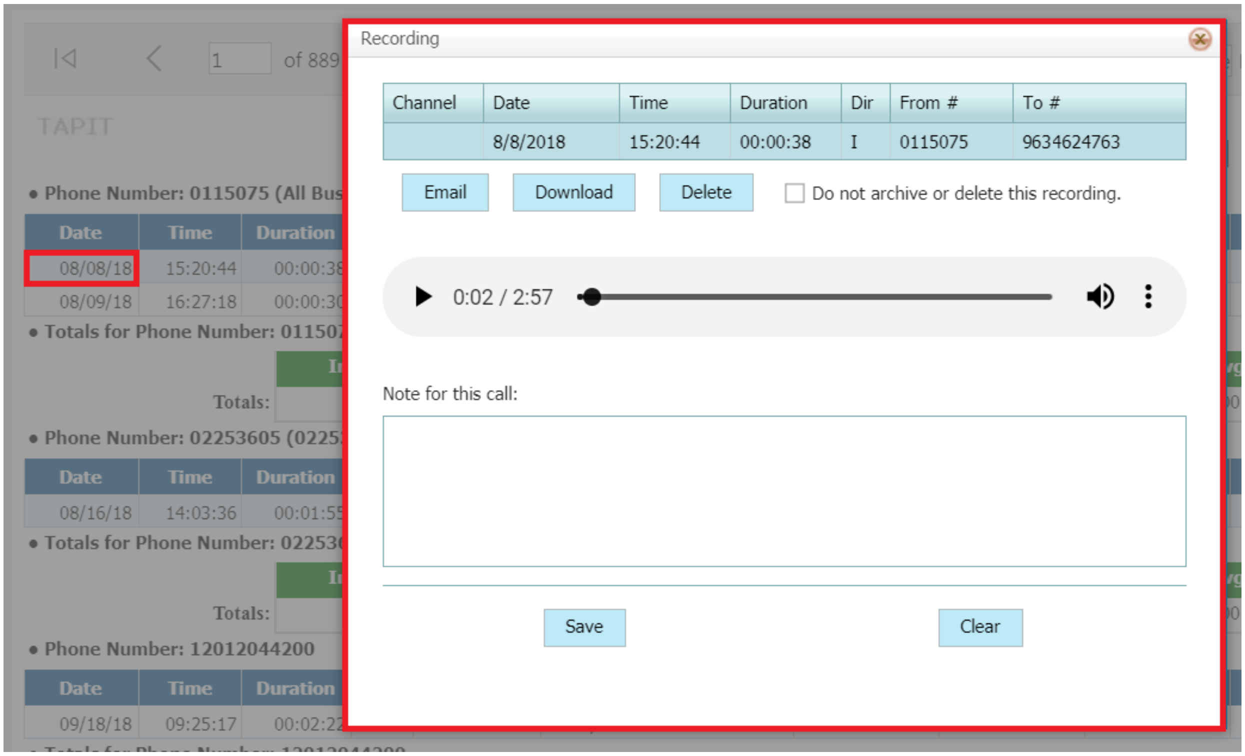


Search feature

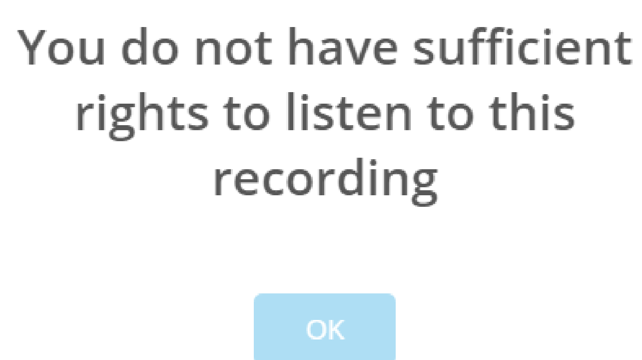
Search feature helps user to find suitable text, highlight next or previous item.



Click the any date from Date column and a pop-up with the recording will appear. On the pop-up user can listen a record, download, email, delete it or add note for this call. Any record can be marked as forbidden for archiving or deletion. Recordings are only available if you have our **Replay Call Recording** solution.

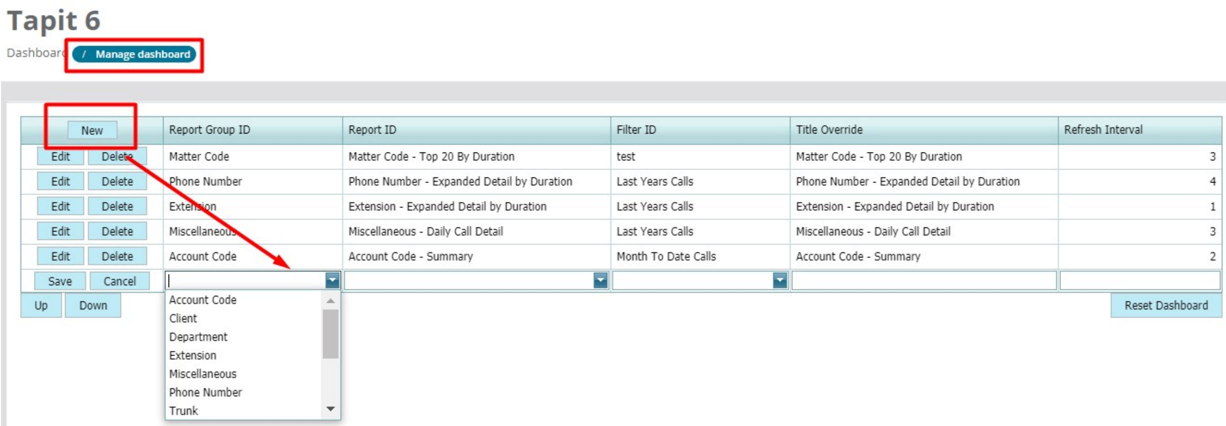


If user does not have permissions to listen to recordings they will receive a notification after clicking on the record.

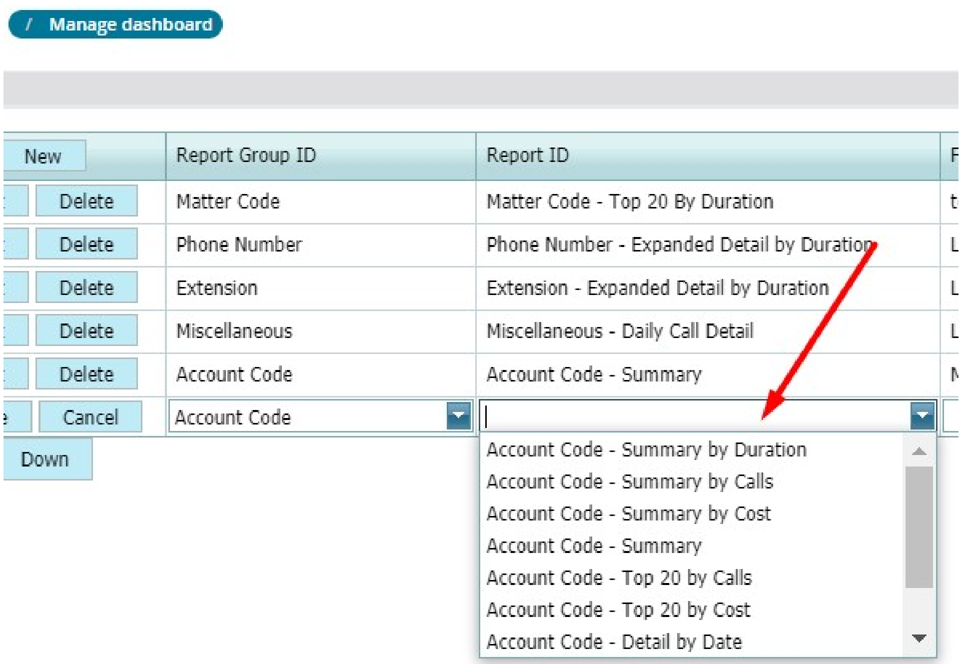


To add a new Dashboard item.

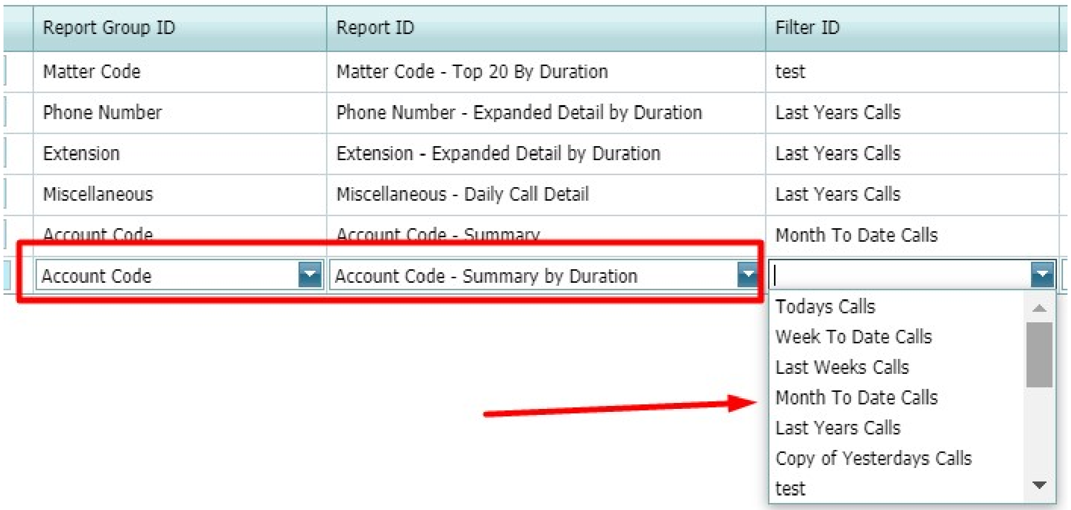
1. Login in to the application.
2. Click the **Dashboard** menu item, choose **Manage Dashboard** tab.
3. Click the “New” button.
4. Click on the down-arrow of the Report Group ID to pull down the list of available report groups.



5. Click on the down-arrow of the Report ID to pull down the list of available reports for the selected report group. Choose desired report.

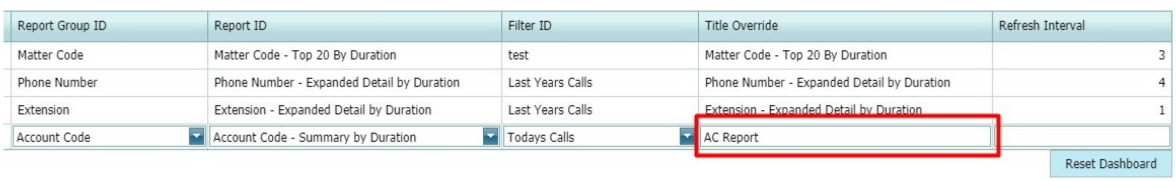


6. Click on the down-arrow of the Filter ID and select a predefined filter to be applied to the selected report. If there are no predefined filters, or if none of the existing filters reflects required search criteria, go to Reports and create one (Generating Reports for more information).



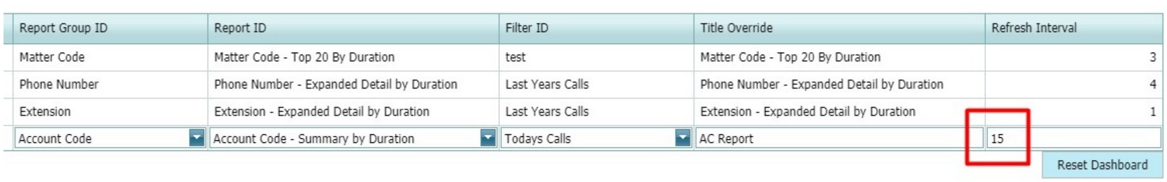
Report Group ID	Report ID	Filter ID
Matter Code	Matter Code - Top 20 By Duration	test
Phone Number	Phone Number - Expanded Detail by Duration	Last Years Calls
Extension	Extension - Expanded Detail by Duration	Last Years Calls
Miscellaneous	Miscellaneous - Daily Call Detail	Last Years Calls
Account Code	Account Code - Summary	Month To Date Calls
Account Code	Account Code - Summary by Duration	

7. If you would like the dashboard to display a different title than the report name, type a new title into the Title Override field.



Report Group ID	Report ID	Filter ID	Title Override	Refresh Interval
Matter Code	Matter Code - Top 20 By Duration	test	Matter Code - Top 20 By Duration	3
Phone Number	Phone Number - Expanded Detail by Duration	Last Years Calls	Phone Number - Expanded Detail by Duration	4
Extension	Extension - Expanded Detail by Duration	Last Years Calls	Extension - Expanded Detail by Duration	1
Account Code	Account Code - Summary by Duration	Todays Calls	AC Report	

8. Enter value for refresh interval, duration is in minutes.

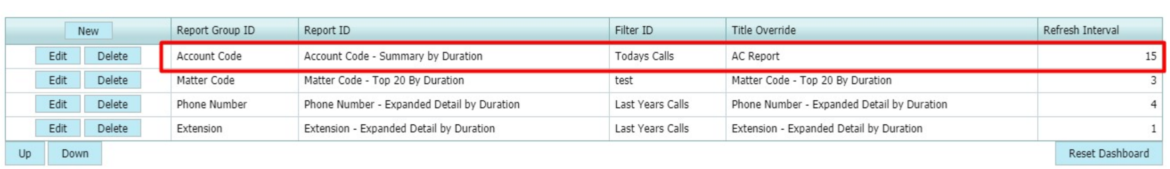


Report Group ID	Report ID	Filter ID	Title Override	Refresh Interval
Matter Code	Matter Code - Top 20 By Duration	test	Matter Code - Top 20 By Duration	3
Phone Number	Phone Number - Expanded Detail by Duration	Last Years Calls	Phone Number - Expanded Detail by Duration	4
Extension	Extension - Expanded Detail by Duration	Last Years Calls	Extension - Expanded Detail by Duration	1
Account Code	Account Code - Summary by Duration	Todays Calls	AC Report	15

9. Click the "Save" button or "Cancel" to start over.

The current report will appear in the table with options to edit, delete or move.

In our example, we have added "Account Code - Account Code - Summary by Duration". The report is based on the predefined filter "Todays Calls". The report displays detail today's data for account code summarized by duration refreshed every 15 minutes.

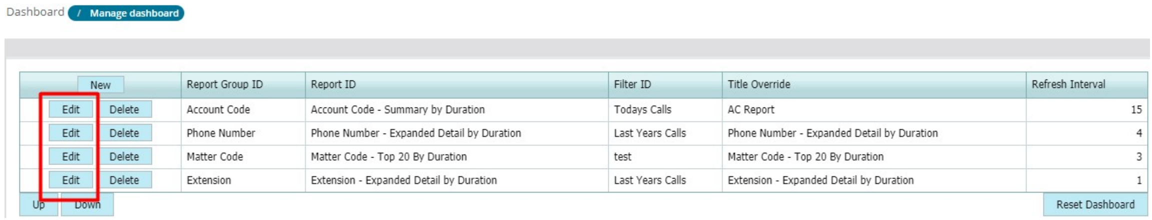


New	Report Group ID	Report ID	Filter ID	Title Override	Refresh Interval
Edit Delete	Account Code	Account Code - Summary by Duration	Todays Calls	AC Report	15
Edit Delete	Matter Code	Matter Code - Top 20 By Duration	test	Matter Code - Top 20 By Duration	3
Edit Delete	Phone Number	Phone Number - Expanded Detail by Duration	Last Years Calls	Phone Number - Expanded Detail by Duration	4
Edit Delete	Extension	Extension - Expanded Detail by Duration	Last Years Calls	Extension - Expanded Detail by Duration	1

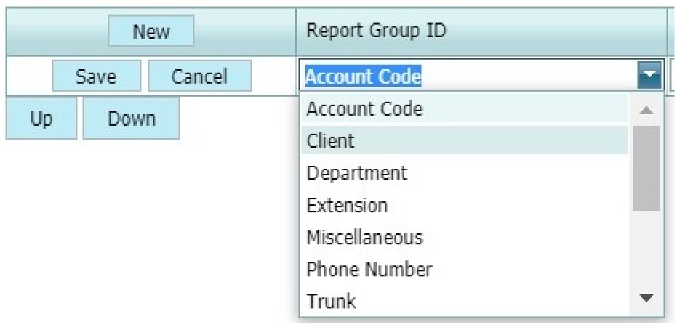
To edit a new Dashboard item.

1. Login in to the application.

2. Click the **Dashboard** menu item, choose **Manage Dashboard** tab.
3. Click the “Edit” button of any report.

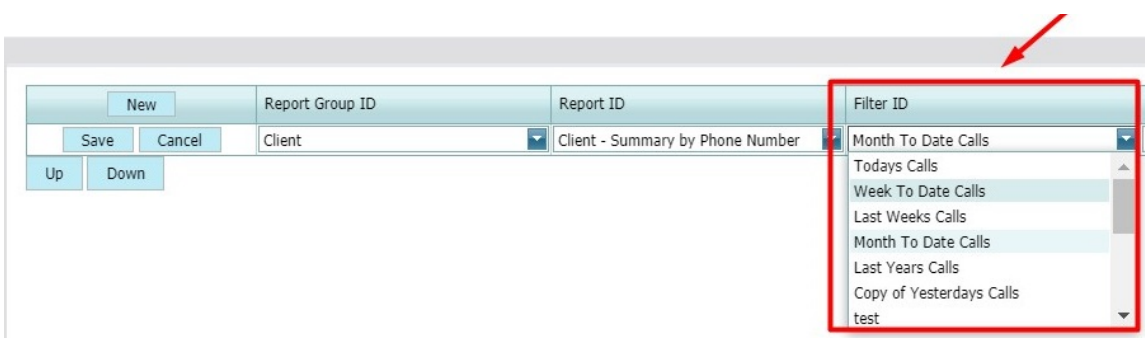


4. Click on the down-arrow of the Report Groups ID field to change a report group. Select the desired report group from the list.



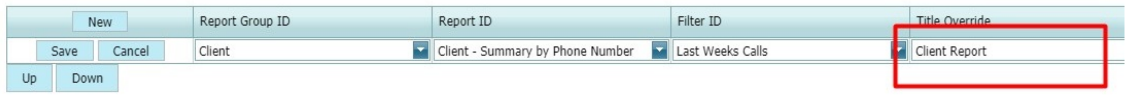
5. Click on the down-arrow of the Report ID to change a report. Choose desired report.

6. Click on the down-arrow of the Filter ID and choose any filter from drop down list.

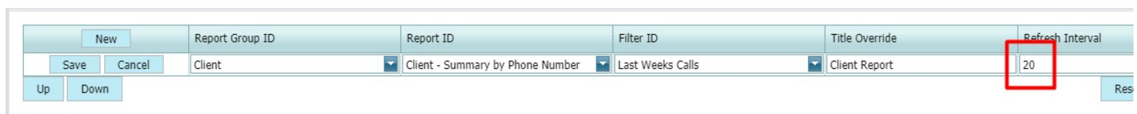


7. If you would like the dashboard to display a different title than the report

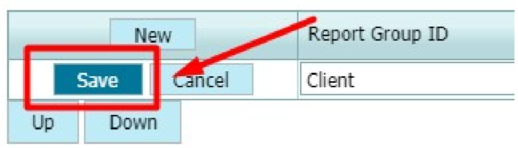
name, type a new title into the Report Title Override field.



8. Change value for refresh interval. The dashboard reports are refreshed with new data in minutes interval.



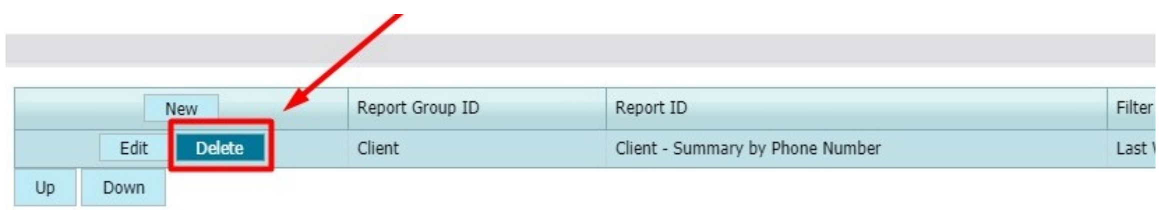
9. Once changes are completed, click the "Save" button, return to the **Dashboard screen** and refresh the page to view the new report.



To delete an existing Dashboard item.

1. Login in to the application.
2. Click the **Dashboard** menu item, choose **Manage Dashboard** tab.
3. Click the "Delete" button of any report, confirm operation.

The report will be removed from grid.



CHANGING DASHBOARD REPORT ORDER

You can change the order in which reports are displayed on the dashboard with move "Up" and move "Down" buttons. For example, you may want to view one of the dashboard items more frequently than others. In that case it would be a good idea to place it on the top.

1. Login in to the application.
2. Click the **Dashboard** menu item, choose **Manage Dashboard** tab.
3. Click on the report name you want to move. The selection in the table will be highlighted.
4. Click the "Up" or "Down" button to organize the order of reports.
5. Click the **Dashboard** tab to see the new order of reports on the

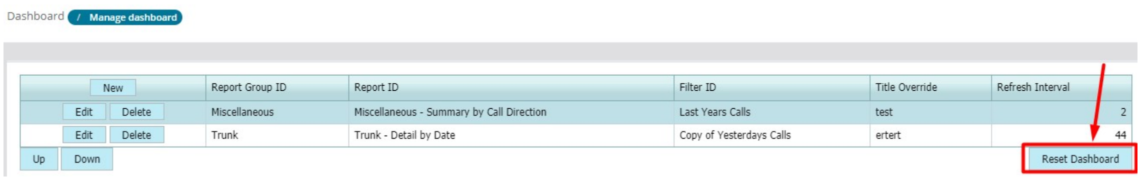
dashboard.

On **Manage Dashboard** tab user can click the "Refresh Dashboard" button and <u>user will</u> be redirected on **Dashboard screen**. All reports will be refreshed and any changes to Dashboard screen will be updated.

To reset dashboard

1. Login in to the application.
2. Click the **Dashboard** menu item, choose **Manage Dashboard** tab.
3. Click the "Reset Dashboard" button.

Reports data were updated on **Dashboard screen.**



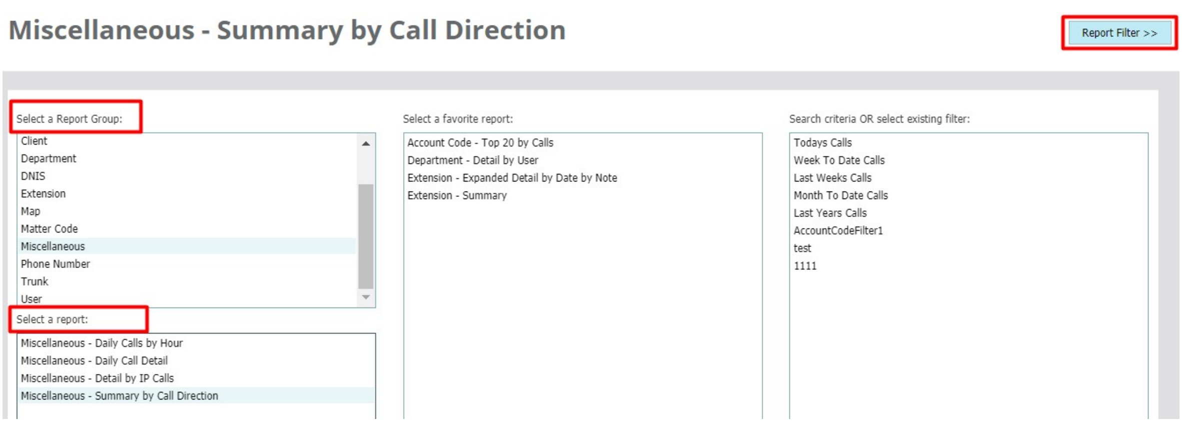
Reports

GENERATING REPORTS

Tapit 6 offers variety of reports. The reports can be created using the previously saved filters or by entering filter criteria manually. User can choose any group of reports and select a report from the chosen group.
A user can save search criteria for future use. **Report screen** displays saved filters. A user may select any of the predefined filters instead of entering search criteria manually when creating a report. The **Report Filter screen** offers a wide variety of search criteria to satisfy clients reporting needs.

To generate report

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names corresponding to the selected report group.
5. Click the "Report Filter" button.



User gets redirected on **Report Filter screen** for selection extra option for the report.

6. Change any options for the report.
7. Click the "View Report" button.

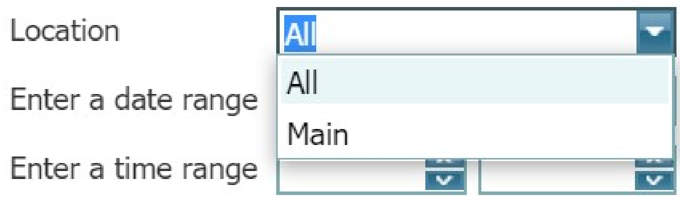
Report with selected options was generated.

Extra options for report generation

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group, select a report.
4. Click the "Report Filter" button.

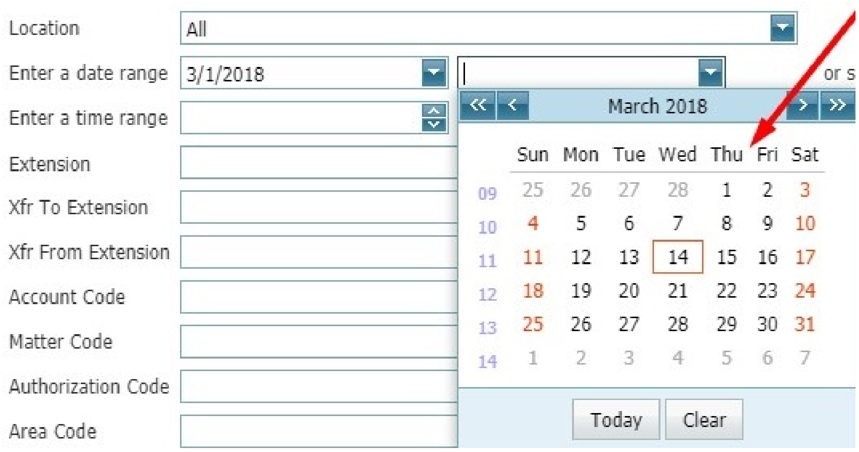
Location filter criteria

Provided user have purchased the Remote Manager software, user can generate a report for only one location. Otherwise, the report will be created for all locations. If user do not have Remote Manger, user have only one location – Main. Reports will always be created for Main location.



Date filter criteria

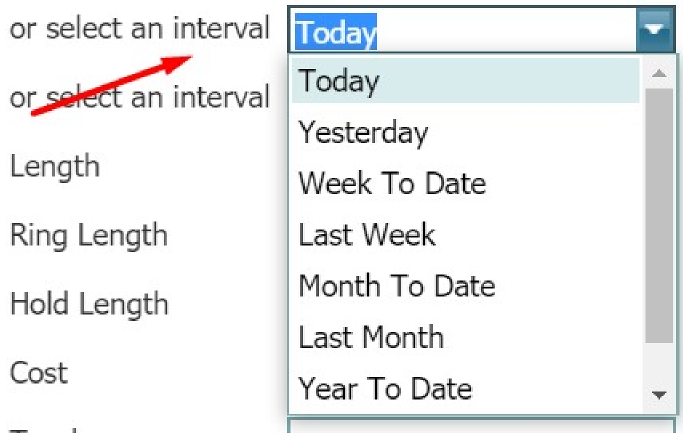
User can set up start date and end date for report.



NOTE: User can type a date range fields in MM/DD/YYYY format or choose it from the calendar controls.

Interval filter criteria

User can select interval of days.

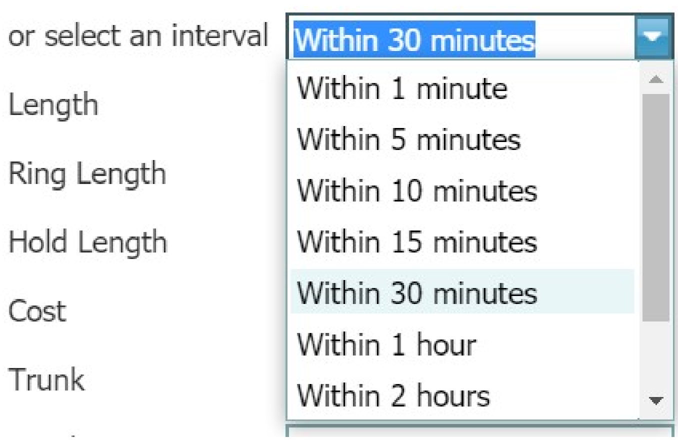


Time range filter criteria

User can set up time range.

Time interval filter criteria

User can select interval of time.



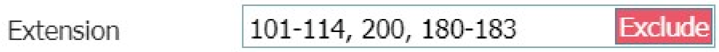
Extension filter criteria

The Extension field represents a telephone extension a call record is associated with. User can include or exclude definite individual extension, enter extension range, or both.

Click the button "Include/Exclude" to switch between options.

According to the example the report will include only displayed extensions: 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 180, 181, 183, and 200.

According to the following criteria the report will include all extensions except displayed extensions: 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 180, 181, 183, and 200.

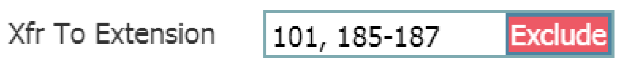


Xfr To Extension filter criteria

The Xfr To Extension filed represents extension the call was transferred to.
User can enter extension ranges or individual extensions.

According to the following criteria the report will be generated only for the following extensions from the Xfr To Extension field: 101, 185, 186, and 187.

According to the following criteria the report will include all extensions from the Xfr To Extension field except displayed extensions: 101, 185, 186, and 187.

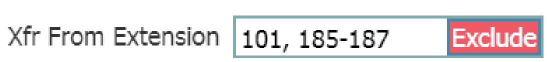


Xfr From Extension filter criteria

The Xfr From Extension field represents extension the call was transferred from. User can enter extension ranges or individual extensions.

According to the following criteria the report will be generated only for the following extensions from the Xfr From Extension field: 101, 185, 186, and 187.

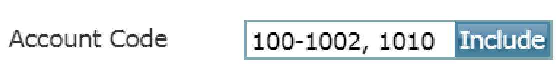
According to the following criteria the report will include all extensions from the Xfr To Extension field except displayed extensions: 101, 185, 186, and 187.



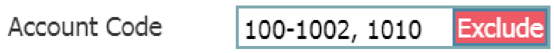
Account Code filter criteria

User can include or exclude account code ranges or individual account codes.

According to the following criteria the report will be generated only for the following account codes from the Account Code field: 1000, 1001, 1002, and 1010.



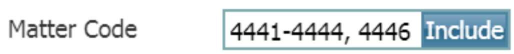
According to the following criteria the report will include all account codes from the Account Code field except displayed account codes: 1000, 1001, 1002, and 1010.



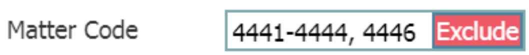
Matter Code filter criteria

User can include or exclude matter code ranges or individual matter codes.

According to the following criteria the report will be generated only for the following matter codes from the Matter Code field: 4441, 4442, 4443, 4444, and 4446.



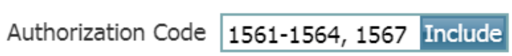
According to the following criteria the report will include all matter codes from the Matter Code field except displayed matter codes: 4441, 4442, 4443, 4444, and 4446.



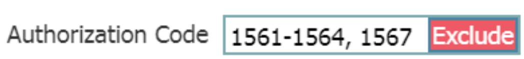
Authorization Code filter criteria

User can include or exclude authorization code ranges or individual authorization codes.

According to the following criteria the report will be generated only for the following authorization codes from the Authorization Code field: 1561, 1562, 1563, 1564, and 1567.



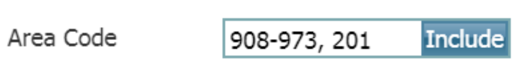
According to the following criteria the report will include all authorization codes from the Authorization Code field except displayed authorization codes: 1561, 1562, 1563, 1564, and 1567.



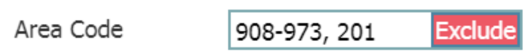
Area Code filter criteria

User can include or exclude area code ranges or individual area codes.

According to the following criteria the report will be generated only for the following area codes from the Area Code field: 908 through 973, and 2101.



According to the following criteria the report will include all area codes from the Area Code field except displayed area codes: 908 through 973, and 210.



Call Note filter criteria

A note can be added to each call record via any detail report. The **Report Filter screen** offers ability to search for call records using text associated with the Call Notes. User can include call records according to the assigned Call Notes.

According to the following criteria the report will be generated only for the call records with the Call Notes that contain: “Holiday Special” and/or “Promotion”.

To display filter on the report

If you would like the search criteria to be displayed on the actual report, check the Display filter on report box located under the filter selection list.

Length filter criteria

The Length field represents the duration of the call. User can run a report for call records with the particular call duration, shorter than, longer than or equal to the duration threshold.

User can choose an appropriate conditional sign:
greater than sign (>) – will include all call records with a duration above the entered threshold (> 00:01:00 - all longer than 1 minute calls will be included)

less than sign (<) – will include all call records with a duration below the entered threshold (< 00:01:00 - all shorter than 1 minute calls will be included)

equal sign (=) – will include all call records with a duration equal to the entered threshold (= 00:01:00 - all equal to exactly 1 minute calls will be included)

Ring Length filter criteria

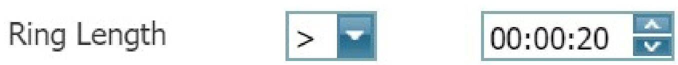
The Ring Length field represents the length of a ring period before a call is picked up.

User can run a report for call records with the particular ring duration, shorter than the specified ring duration, or longer than the ring duration threshold.

User can choose an appropriate conditional sign:
greater than sign (>) – will include all call records with a ring duration above the entered threshold (> 00:00:20 - all calls with a ring duration longer than 20 will be included)

less than sign (<) – will include all call records with a ring duration below the entered threshold (< 00:00:20 - all calls with a ring duration shorter than 20 seconds will be included)

equal sign (=) – will include all call records with a ring duration equal to the entered threshold (= 00:00:20 - all calls with a ring duration equal to 20 seconds would be included)



Hold Length filter criteria

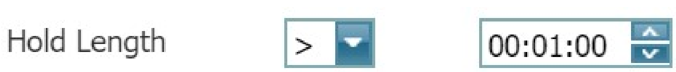
The Hold Length field indicates how long a call stayed on hold.
User can run a report for call records with the particular hold duration, shorter than the specified hold duration, or longer than the hold duration threshold.

User can choose an appropriate conditional sign:
greater than sign (>) – will include all call records with hold duration above the entered threshold (> 00:01:00 -all calls with a hold duration longer than 1 minute will be included)

less than sign (<) – will include all call records with a hold duration below the entered threshold (< 00:01:00 -all calls with a hold duration shorter than 1 minute will be included)

equal sign (=) – will include all call records with a hold duration equal to the entered threshold (= 00:01:00 -all calls with a hold duration equal to 1 minute will be included)

In our example, we have set the hold length criteria to bring ">00:01:00". The report will display call records for calls that stayed on hold longer than 1 minute.



Cost filter criteria

The Cost field represents the cost of the call. User can run a report for calls that cost the specified amount of money, cheaper than the specified cost, or more expensive than the cost threshold.

User can choose an appropriate conditional sign:
greater than sign (>) – will include all more expensive the entered threshold calls (> 1.00 - all calls more expensive than 1 dollar will be included)

less than sign (<) – will include all cheaper than the entered threshold calls (< 00:01:00 - all calls less expensive than 1 dollar will be included)

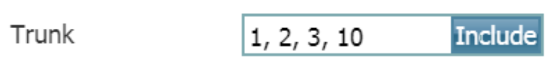
equal sign (=) – will include all call records with cost equal to the entered threshold (= 00:01:00 - all 1 dollar calls will be included).

Cost should be entered in one of the following formats:
1.00 or 1 – one dollar
0.50 or .50 – 50 cents
In our example, we have set the cost criteria to “>1.00”. The report will display only call records that are priced for more than one dollar.

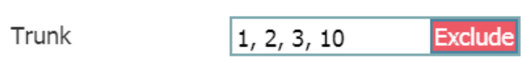
Trunk filter criteria

User can include or exclude trunk numbers from a report.

According to the following criteria, the report will be generated only for the call records for the following trunks: 1, 2, 3, and 10.



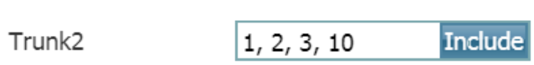
According to the following criteria the report will include all call records except call records for the following trunk numbers: 1, 2, 3, and 10.



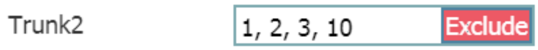
Trunk2 filter criteria

Some phone systems provide a second trunk number for calls that are redirected from one trunk to another. User can include or exclude call records associated with redirect trunk numbers from a report.

According to the following criteria the report will be generated only for the call records with the following redirect trunks2: 1, 2, 3, and 10.



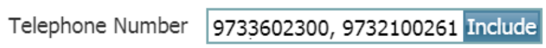
According to the following criteria the report will include all call records except the call records with the following redirect trunks2: 1, 2, 3, and 10.



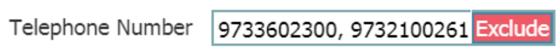
Telephone Number filter criteria

The Telephone Number field indicates the number dialed associated with a call record. User can filter a report on the Telephone Number by including or excluding call records with specified number dialed.

According to the following criteria the report will be generated only for call records associated with the following telephone numbers: 9733602300 and 9732100261.



According to the following criteria, the report will include all call records except the call records associated with the following telephone numbers: 9733602300 and 9732100261.



NOTE: To filter for partial phone numbers please use % as wild card character. For example %9733602300 will find both 19733602300 and 9733602300, or 973360% will find all phone numbers that start with 973360.

DNIS Number filter criteria

Phone systems featuring DNIS identify what telephone number was dialed by the caller on incoming calls. The DNIS Number field represents such telephone number. User can filter a report on the DNIS Number by including or excluding call records associated with specified DNIS Numbers.

According to the following criteria the report will be generated only for call records associated with the following DNIS numbers: 8005552222, 8005552223, and 8005552226.

According to the following criteria, the report will include all call records except the call records associated with the following DNIS numbers: 8005552222, 8005552223, and 8005552226.

NOTE: DNIS reports will only work in Tapit 6 if your phone system provides that information in the SMDR we receive.

Direction filter criteria

By default, all calls regardless of call direction are included in a report. There are three call directions: incoming calls, outgoing calls, internal calls. User can include them into the report or exclude them from it.

- [x] Incoming
- [ ] Outgoing
- [ ] Internal

Status filter criteria

User can check the Transfer option to include or exclude only transferred calls in a report. By default, all calls, regardless of a call status, are included in a report. To display calls with a specific status only, check the box corresponding to it. User can select multiple status options by checking multiple options.

- [x] Transfer
- [ ] Abandoned

Calls filter criteria

By default, all calls, regardless of their origin or destination, are included in a report (All options are selected). To create a report for only one type of calls click on the corresponding check box to include or exclude the option.

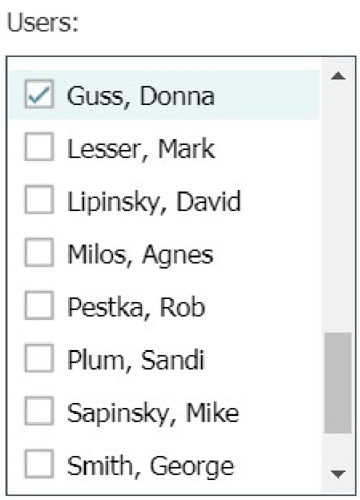
- [x] Local
- [ ] Long Distance
- [ ] International
- [ ] Operator

Users filter criteria

The Users field represents Tapit 6 users defined via **Users screen** and associated with telephone extensions and authorization codes.

User can select one user or a group of users from the Users list and thus narrow down report criteria to call records associated with selected users. To select one user, simply click on it. To select a group of consecutive users, click the first user, press and hold down SHIFT, and then click the last user. To select a group of inconsecutive users, press and hold down CTRL, and click on each user you would like to include in a report.

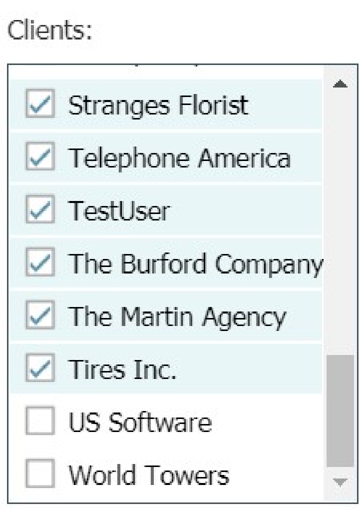
For example, we have selected the user “Guss, Donna” from the Users list. Our report will display call records only for user “Guss, Donna”.



Clients filter criteria

The Clients field represents client accounts defined via **Clients screen** and associated with telephone numbers and account codes.

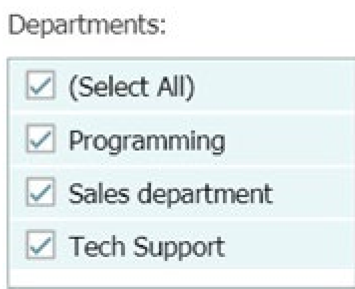
User can select one client or a group of clients from the Clients list and thus narrow down report criteria to call records associated with selected clients. To select one client, simply click on it. To select a group of consecutive clients, click the first client, press and hold down SHIFT, and then click the last client. To select a group of inconsecutive clients, press and hold down CTRL, and click on each client you would like to include in a report.



Departments filter criteria

The Departments field represents departments created via **Departments screen**. Departments consist of users and sub departments.

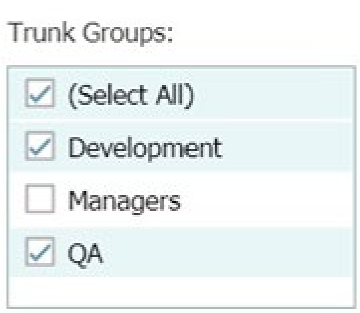
User can select one department or a group of departments from the Departments list and thus narrow down report criteria to call records associated with selected departments. To select one department, simply click on it. To select a group of consecutive departments, click the first department, press and hold down SHIFT, and then click the last department. To select a group of inconsecutive departments, press and hold down CTRL, and click on each department you would like to include in a report.



Trunk Groups filter criteria

The Trunk Groups field represents trunk groups created via **System/Locations/Trunk Group screen**. Trunk groups are collections of trunks and are location specific. When a location is selected from the Location list the Trunk Groups list populates with trunk group names associated with that location. Otherwise, if the Location list displays All the Trunk Groups list is empty.

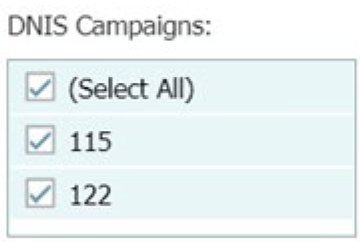
User can select one trunk group or a group of trunk groups from the Trunk Groups list and thus narrow down report criteria to call records associated with selected trunk groups. To select one trunk group, simply click on it. To select a group of consecutive trunk groups, click the first trunk group, press and hold down SHIFT, and then click the last trunk group. To select a group of inconsecutive trunk groups, press and hold down CTRL, and click on each trunk group you would like to include in a report.



DNIS Campaigns filter criteria

The DNIS Campaigns are defined via **DNIS Campaigns screen** and are associated with DNIS Numbers.

User can select one DNIS Campaign or a group of DNIS Campaigns from the DNIS Campaigns list and thus narrow down report criteria to call records associated with selected DNIS Campaigns.
To select one DNIS Campaign, simply click on it. To select a group of consecutive DNIS Campaigns, click the first DNIS Campaign, press and hold down SHIFT, and then click the last DNIS Campaign. To select a group of inconsecutive DNIS Campaigns, press and hold down CTRL, and click on each DNIS Campaign you would like to include in a report.



Click the “Generate Report” button to generate a report.

Click the “New Report” button to get back on **Run Report screen**.

Click the “Clear Filter” link to reset all controls on the screen.

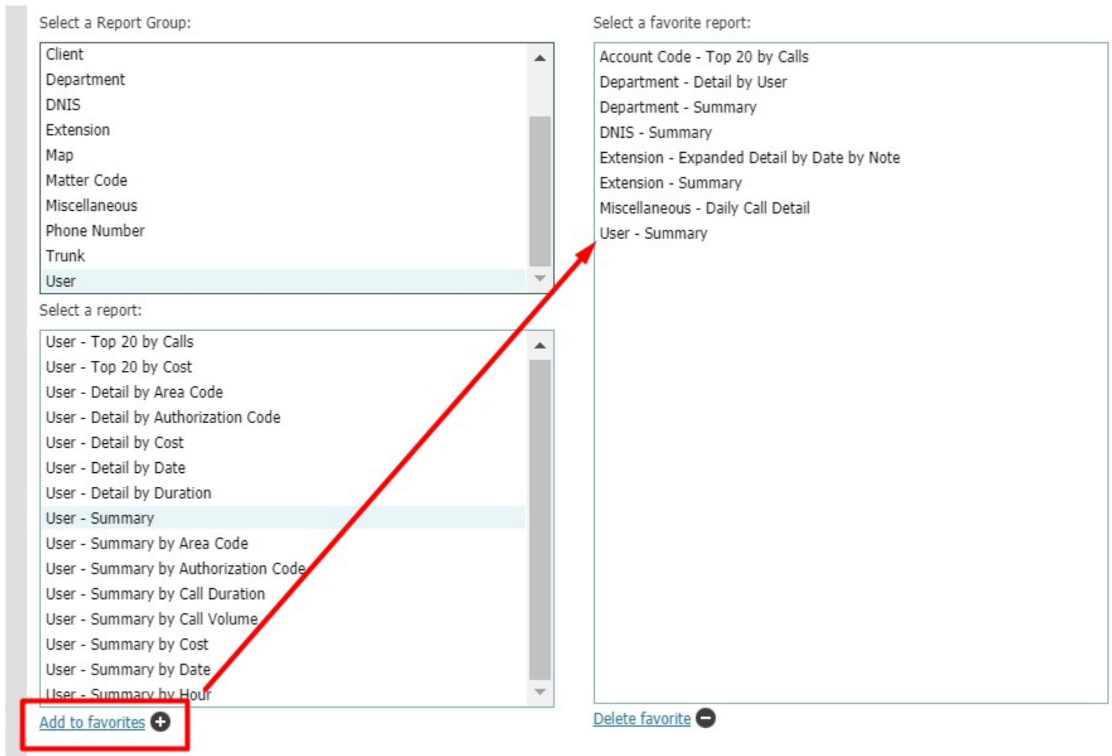
To choose a favorite report

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names corresponding to the selected report group.
5. Select a favorite report from favorite report list.
6. Click the “Report Filter” button. User gets redirected on **Report Filter screen**.
7. Click the “View Report” button. Report was generated.

To add report to favorites

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names corresponding to the selected report group.
5. Click the “Add to favorites” link, confirm operation.

Chosen report was added in favorite reports list.



To delete report from favorites list

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a favorite report in list.
4. Click the “Delete favourite” link, confirm operation.

Chosen report was removed from favourite reports list.

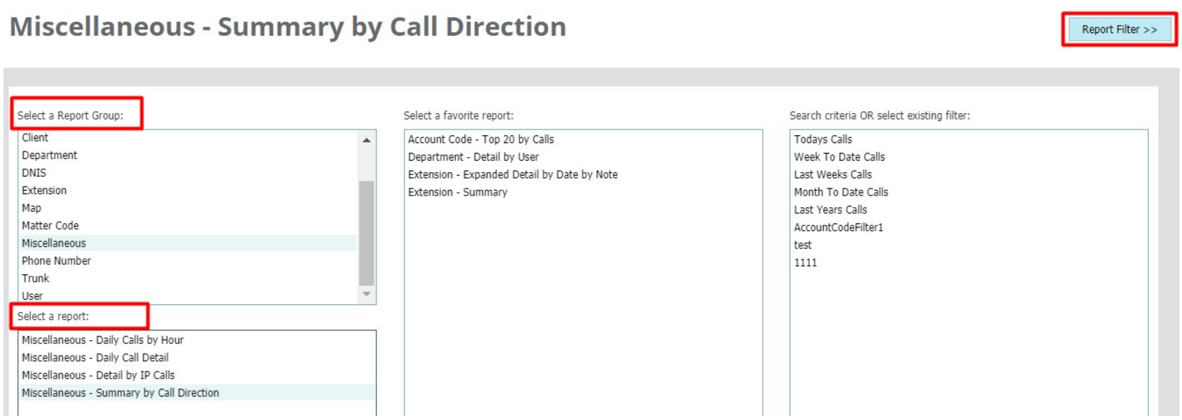
To save filter as

If you have set all desired search criteria, you can save your search as a predefined filter and reuse it in future.

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names

corresponding to the selected report group.

5.Click the "Report Filter" button. User gets redirected on **Report Filter screen**.



6.Change any options for the report.

7.Click the "Save Filter As..." link.

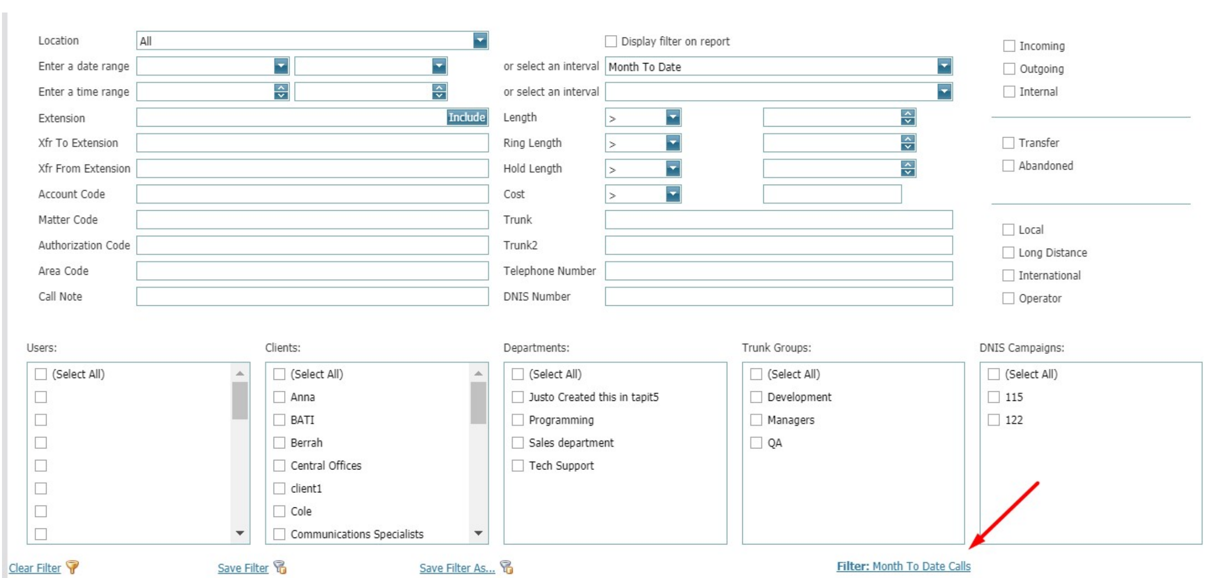
8.Enter Filter name.

9.Click the "Save" button.

The filter was saved and added in existing filters list on **Run Report screen**.

To choose an existing filter

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names corresponding to the selected report group.
5. Select any filter from existing filters list.
6. Click the "Report Filter" button. User gets redirected on **Report Filter screen**. Chosen filter has shown in right down corner of the **Report Filter screen**.
7. Click the "View Report" button. Report was generated.



To change an existing filter

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.
3. Select a report group.
4. Select a report. This list is dynamically populated with the report names corresponding to the selected report group.
5. Select any filter from existing filters list.

Click the “Report Filter” button. User gets redirected on **Report Filter screen**.

6. Change any options.
7. Click the “Save Filter” link, confirm operation.

Chosen filter was updated by new values.

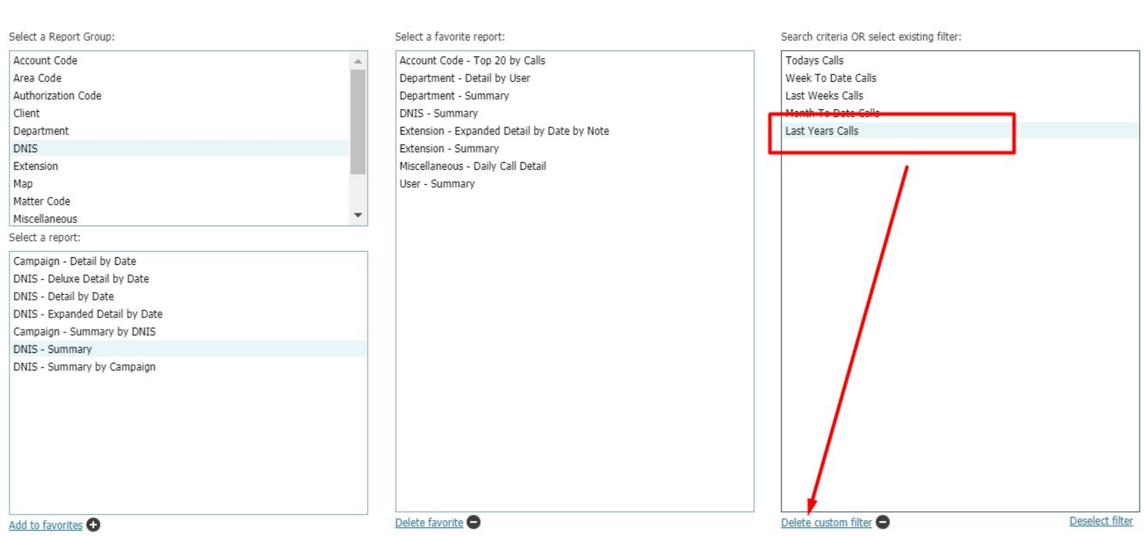
To delete custom filter

1. Login in to the application.
2. Click the **Reports** menu item, choose **Run Report** menu item.

Select a favorite report in list.

3. Select existing filter in list.
4. Click the “Delete custom filter” link, confirm operation.

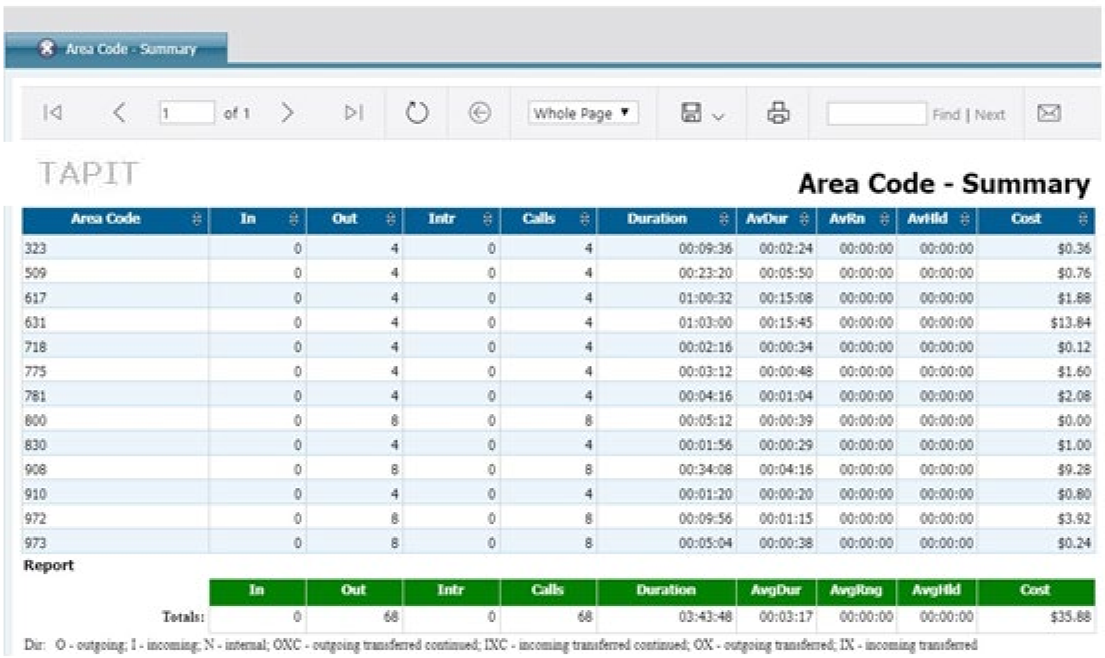
Chosen filter was removed from existing filters list.



Working with Report View Screen

When the report is generated it is displayed in the browser.

Area Code - Summary



Area Code	In	Out	Intr	Calls	Duration	AvDur	AvRn	AvHld	Cost
323	0	4	0	4	00:09:36	00:02:24	00:00:00	00:00:00	$0.36
509	0	4	0	4	00:23:20	00:05:50	00:00:00	00:00:00	$0.76
617	0	4	0	4	01:00:32	00:15:08	00:00:00	00:00:00	$1.88
631	0	4	0	4	01:03:00	00:15:45	00:00:00	00:00:00	$13.84
718	0	4	0	4	00:02:16	00:00:34	00:00:00	00:00:00	$0.12
775	0	4	0	4	00:03:12	00:00:48	00:00:00	00:00:00	$1.60
781	0	4	0	4	00:04:16	00:01:04	00:00:00	00:00:00	$2.08
800	0	8	0	8	00:05:12	00:00:39	00:00:00	00:00:00	$0.00
830	0	4	0	4	00:01:56	00:00:29	00:00:00	00:00:00	$1.00
908	0	8	0	8	00:34:08	00:04:16	00:00:00	00:00:00	$9.28
910	0	4	0	4	00:01:20	00:00:20	00:00:00	00:00:00	$0.80
972	0	8	0	8	00:09:56	00:01:15	00:00:00	00:00:00	$3.92
973	0	8	0	8	00:05:04	00:00:38	00:00:00	00:00:00	$0.24

Report

	In	Out	Intr	Calls	Duration	AvgDur	AvgRng	AvgHld	Cost
Totals:	0	68	0	68	03:43:48	00:03:17	00:00:00	00:00:00	$35.88

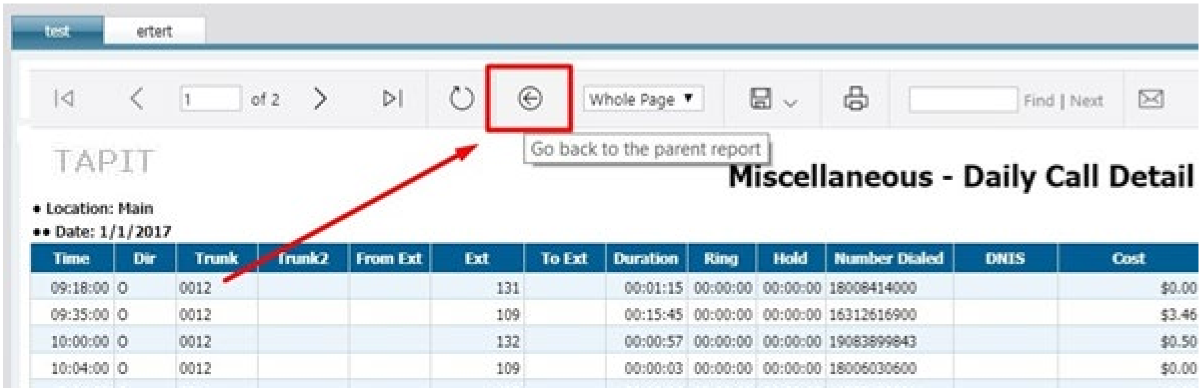
Dir: O - outgoing; I - incoming; N - internal; OXC - outgoing transferred continued; IXC - incoming transferred continued; OX - outgoing transferred; IX - incoming transferred

To navigate through report pages

Arrows located in the upper left corner of the **Report screen** helps user to navigate through pages. If you would like to go to a specific page, enter the page number into the text box and press the Enter key.

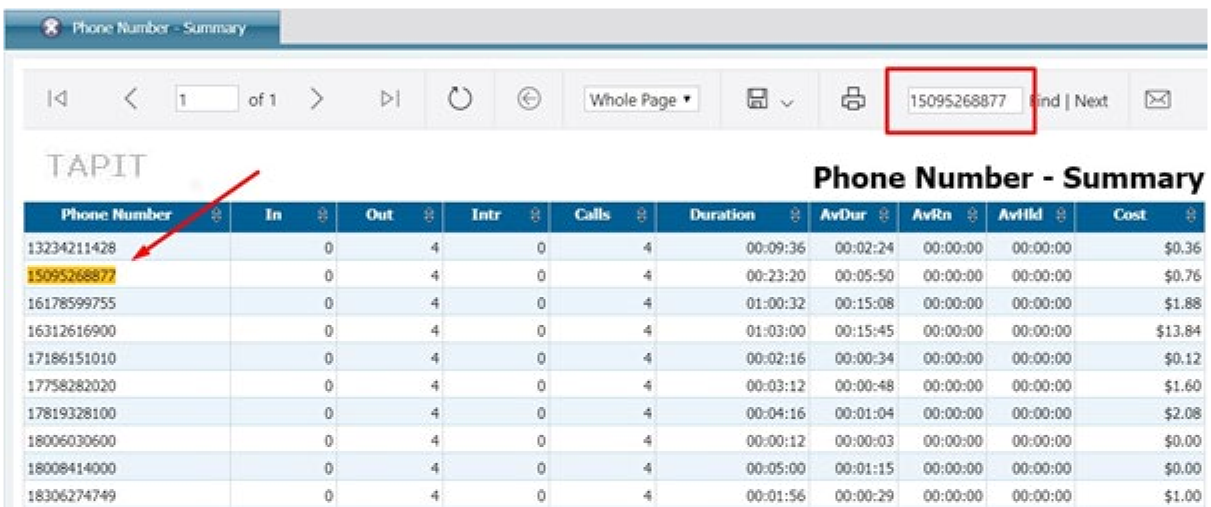
To go back to the parent report

Summary reports have a drill-down capability to view corresponding detail reports. When on the detail report, use this tool to go back to the parent summary report.



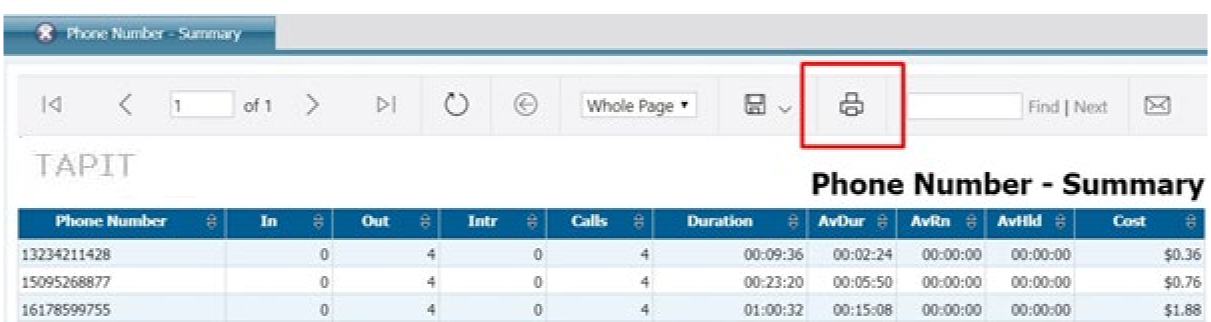
To search for a specific feature in report

Search feature helps user to find a specific value in the report. The phone number 15095268877 has been highlighted. Click on Next beside the search field for the next instance or specific search result of 15095268877.



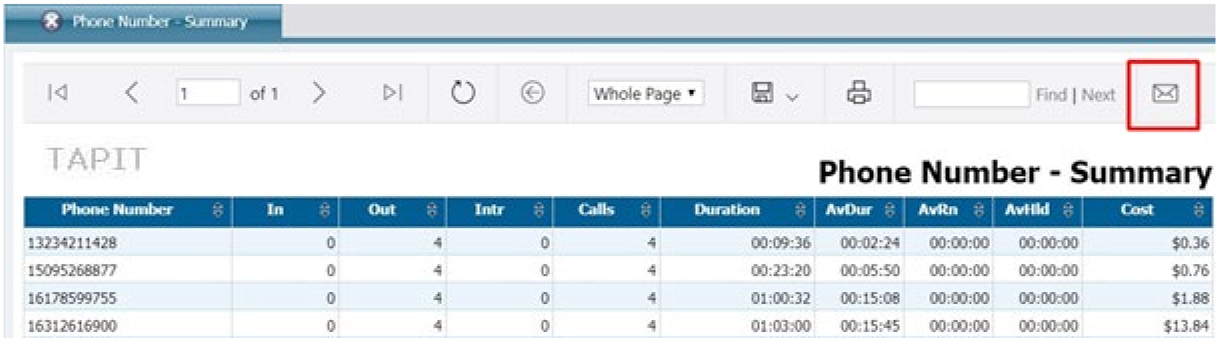
To print the report

Click on the printer icon to print the report.



To email the report

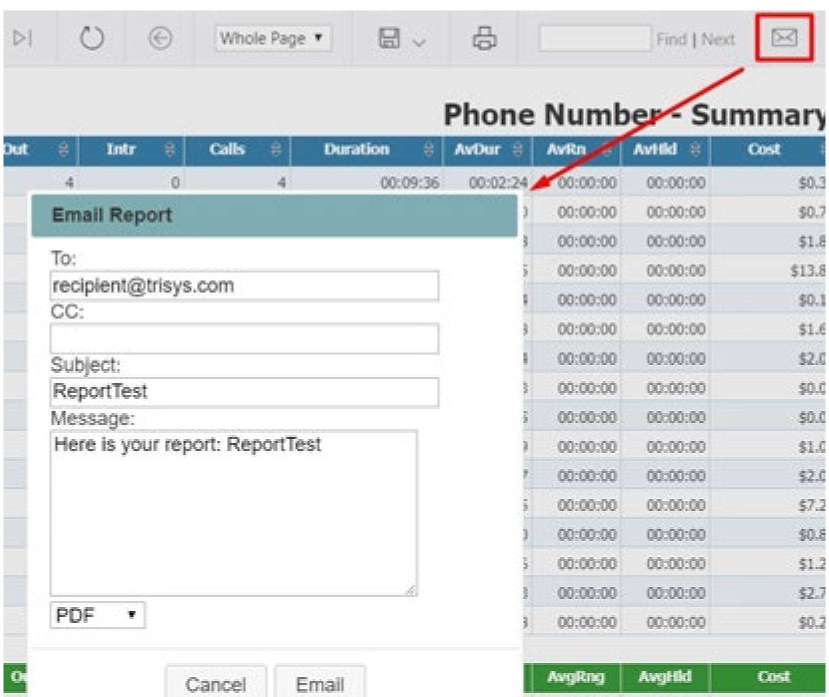
Click on the envelope icon to email the report.



The **Email Results screen** comes up.

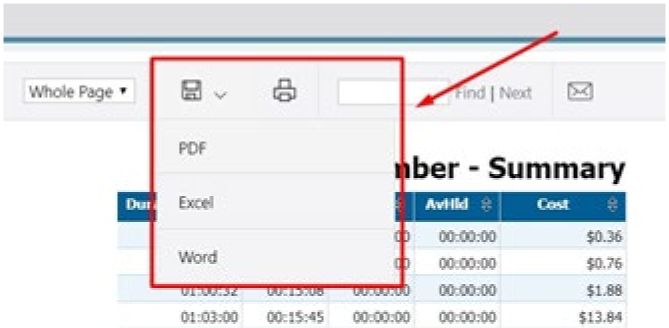
1. Enter the recipient's email address into the To field. If required, enter email addresses into CC and BCC fields.
2. Enter the email subject into the Subject field.
3. Enter the email text into the Message field.
4. Click on the Email button.
5. The report will be emailed as an attachment in chosen (PDF/Excel/Word) format.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



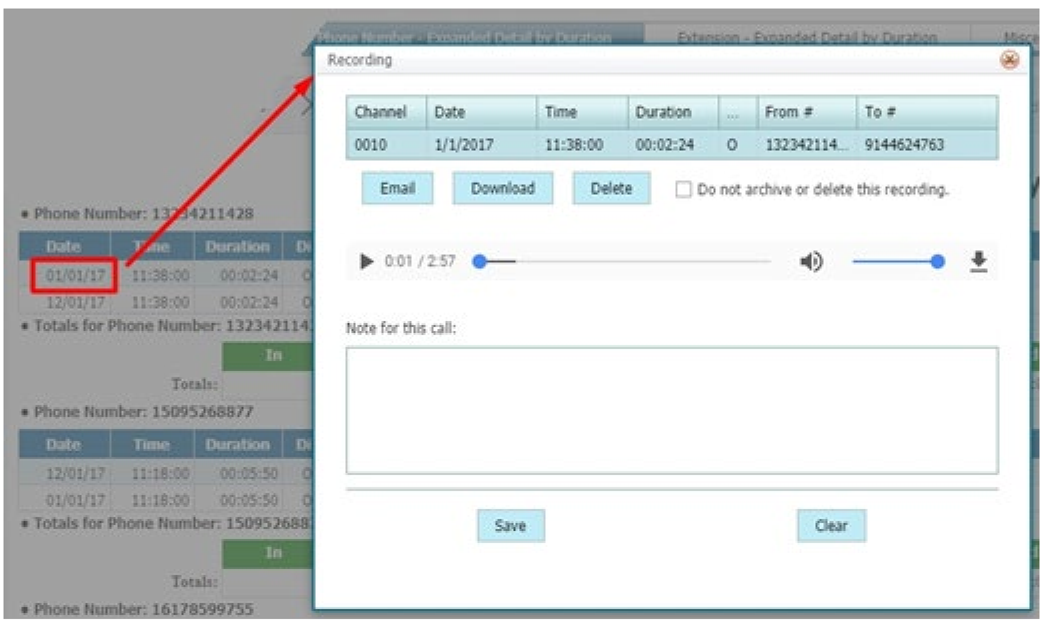
To export the report

Exported reports may be saved as PDF/Excel/Word documents.



Recording pop-up

User can click the value in the first column of the call record of the detail report and Recording pop-up will appear. On the pop-up user can listen a record, download, email, delete it or add note for this call. Any record can be marked as forbidden for archiving or deletion.



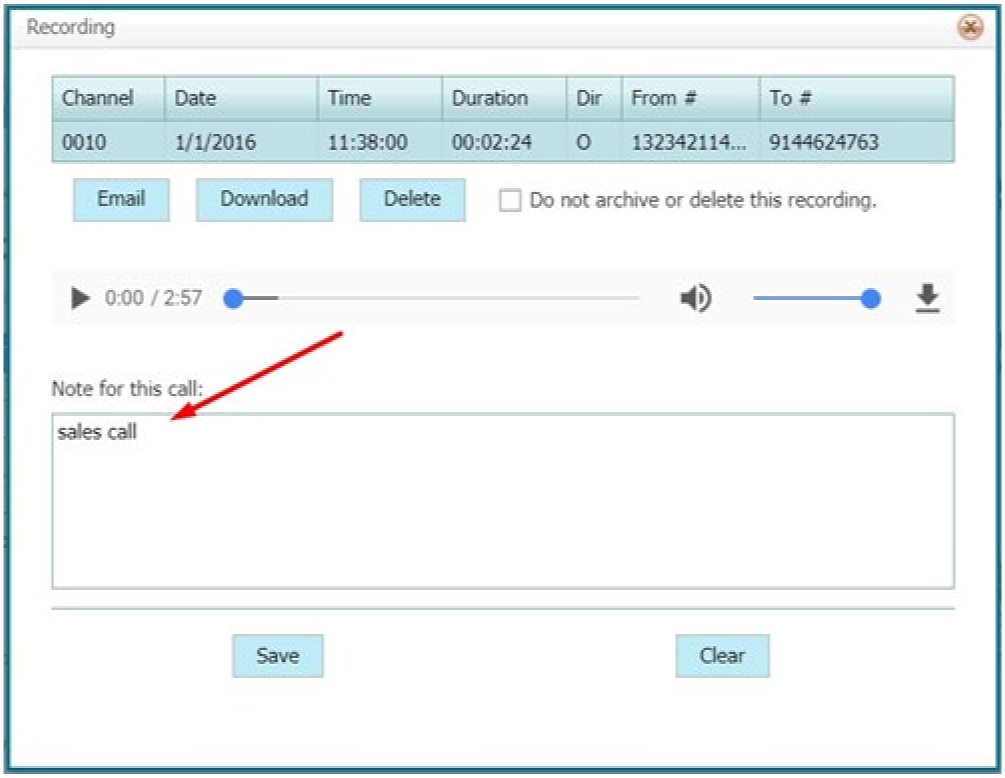
To add note for the call record

You can associate a note with any call record via any detail report.

1. Open **Record screen**.
2. Click on the value in the first column of the call record of the detail report.
3. Recording pop-up was got up, type a description.
4. Click the "Save" button.

This call record can be found now by setting Call Note search criteria on a filter screen. Simply enter text from the note, i.e. "sales call", into the Call Note field and run the report. The report will bring back all call records with notes containing "sales note" phrase.

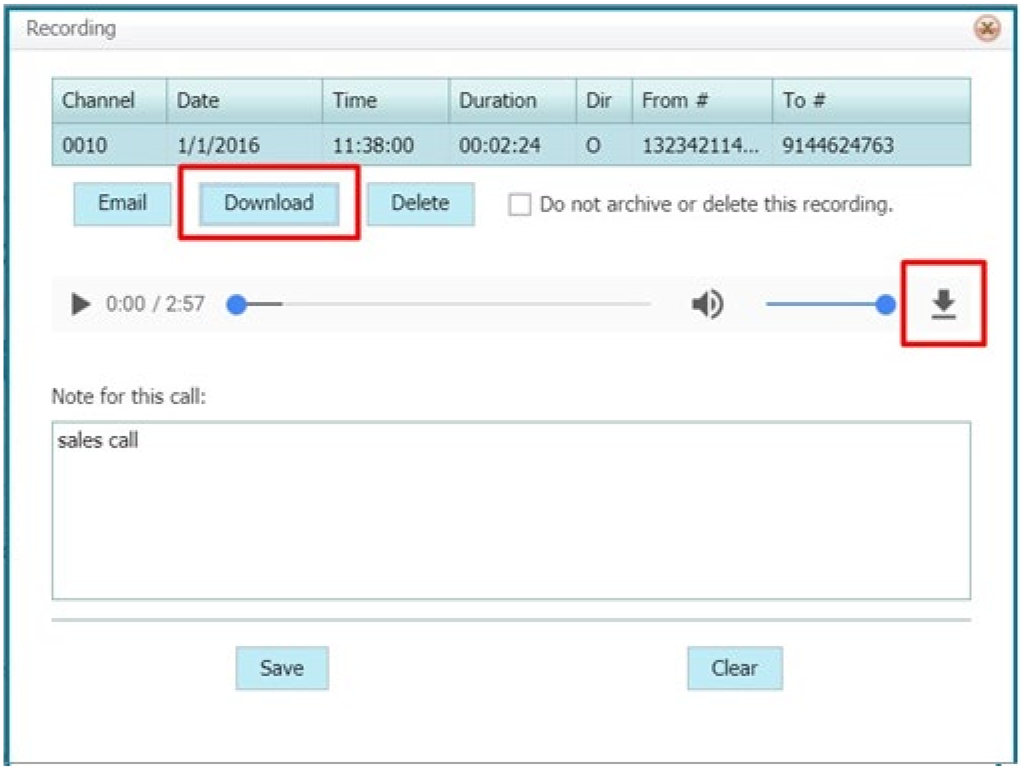
Use this to tag phone calls of the same type for quick retrieval in the future.



To download the call record

1. Open **Record screen**.
2. Click on the value in the first column of the call record of the detail report.
3. Recording pop-up was got up.
4. Click the "Download" button or icon.

The record has been downloaded.



To email the call record

1. Open **Record screen**.
2. Click on the value in the first column of the call record of the detail report.
3. Recording pop-up was got up.
4. Click the “Email” button.
5. Fill fields by data and click the “Email” button.

The record has been emailed on entered email.

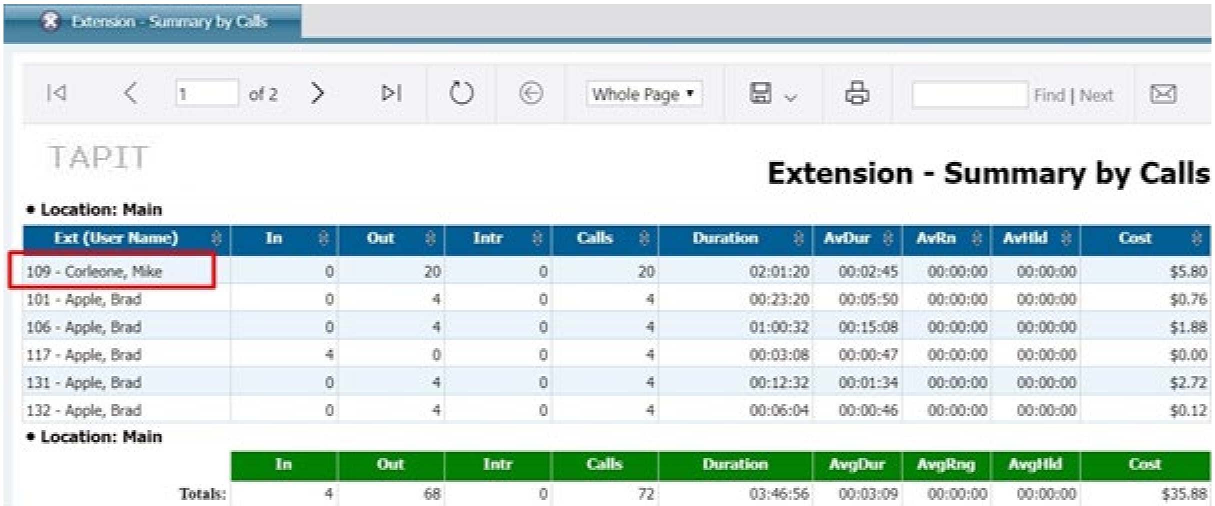
To delete the call record

1. Open **Record screen**.
2. Click on the value in the first column of the call record of the detail report.
3. Recording pop-up was got up.
4. Click the “Delete” button, confirm operation.
5. The record has been deleted from the grid.

To drill down to a detail report

Summary reports have a drill-down capability.

The entries in the first column on the summary report are the links to the corresponding detail reports**.** In our example the first column displays extension numbers. Clicking on the number 109 redirects the user to a detailed report for this extension.



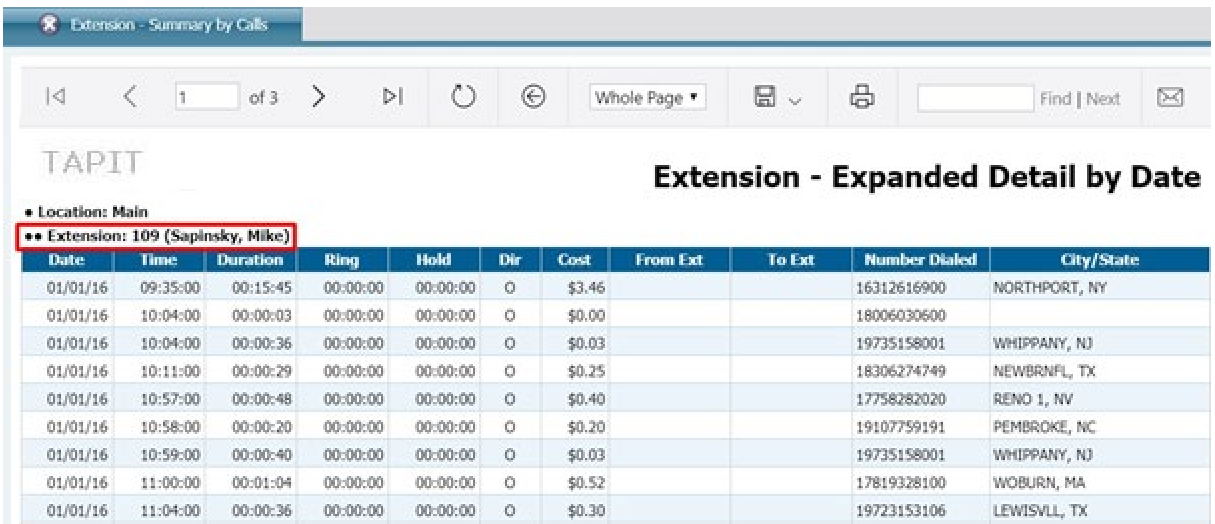
Extension - Summary by Calls

• Location: Main

Ext (User Name)	In	Out	Intr	Calls	Duration	AvDur	AvRn	AvHld	Cost
109 - Corleone, Mike	0	20	0	20	02:01:20	00:02:45	00:00:00	00:00:00	$5.80
101 - Apple, Brad	0	4	0	4	00:23:20	00:05:50	00:00:00	00:00:00	$0.76
106 - Apple, Brad	0	4	0	4	01:00:32	00:15:08	00:00:00	00:00:00	$1.88
117 - Apple, Brad	4	0	0	4	00:03:08	00:00:47	00:00:00	00:00:00	$0.00
131 - Apple, Brad	0	4	0	4	00:12:32	00:01:34	00:00:00	00:00:00	$2.72
132 - Apple, Brad	0	4	0	4	00:06:04	00:00:46	00:00:00	00:00:00	$0.12

• Location: Main

	In	Out	Intr	Calls	Duration	AvgDur	AvgRng	AvgHld	Cost
Totals:	4	68	0	72	03:46:56	00:03:09	00:00:00	00:00:00	$35.88



Extension - Expanded Detail by Date

• Location: Main

•• Extension: 109 (Sapinsky, Mike)

Date	Time	Duration	Ring	Hold	Dir	Cost	From Ext	To Ext	Number Dialed	City/State
01/01/16	09:35:00	00:15:45	00:00:00	00:00:00	O	$3.46			16312616900	NORTHPORT, NY
01/01/16	10:04:00	00:00:03	00:00:00	00:00:00	O	$0.00			18006030600	
01/01/16	10:04:00	00:00:36	00:00:00	00:00:00	O	$0.03			19735158001	WHIPPANY, NJ
01/01/16	10:11:00	00:00:29	00:00:00	00:00:00	O	$0.25			18306274749	NEWBRNFL, TX
01/01/16	10:57:00	00:00:48	00:00:00	00:00:00	O	$0.40			17758282020	RENO 1, NV
01/01/16	10:58:00	00:00:20	00:00:00	00:00:00	O	$0.20			19107759191	PEMBROKE, NC
01/01/16	10:59:00	00:00:40	00:00:00	00:00:00	O	$0.03			19735158001	WHIPPANY, NJ
01/01/16	11:00:00	00:01:04	00:00:00	00:00:00	O	$0.52			17819328100	WOBURN, MA
01/01/16	11:04:00	00:00:36	00:00:00	00:00:00	O	$0.30			19723153106	LEWISVLL, TX

Report Scheduler

System provides feature to schedule tasks. It can be run automatically daily, weekly, monthly, within desired time/date interval, or only once. Tasks screen shows already scheduled tasks, running services, etc.

Time for schedule reports:

Run Once – the report will run only once at a specified time.

Daily - the report will run every day at a specified time.
For example, if a report is scheduled to run at 23:00 (11:00 PM) the system waits until 11:00 PM every day and runs the scheduled report.

Daily (M - F) - the report will run every day from Monday till Friday at a specified time.

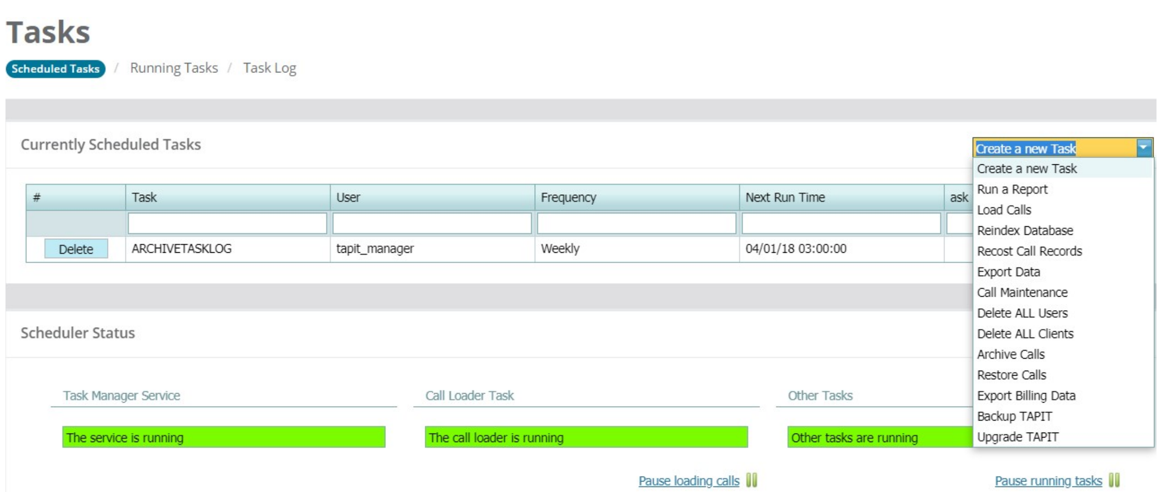
Weekly - checking this option, user should select day of the week for running the report.

Interval - when the Interval option is selected the screen displays a list of time intervals. The report can be scheduled to run repeatedly after a selected time interval.

Monthly - user should choose start date and start time. The report can be scheduled to run every month on a selected day of the month at a specified time.

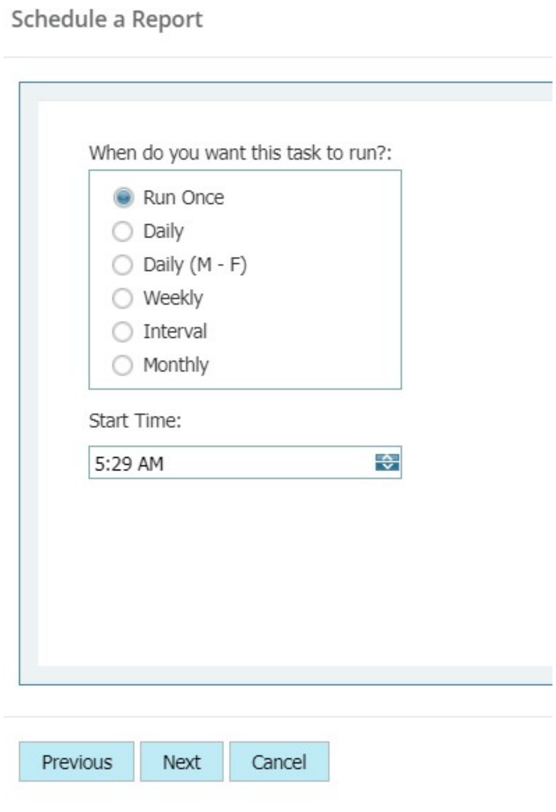
To schedule a new report

1. Login in to the application.
2. Click the **Reports** menu item, choose **Scheduler** menu item.
3. Choose any item from drop-down menu. User gets redirected on the next screen.



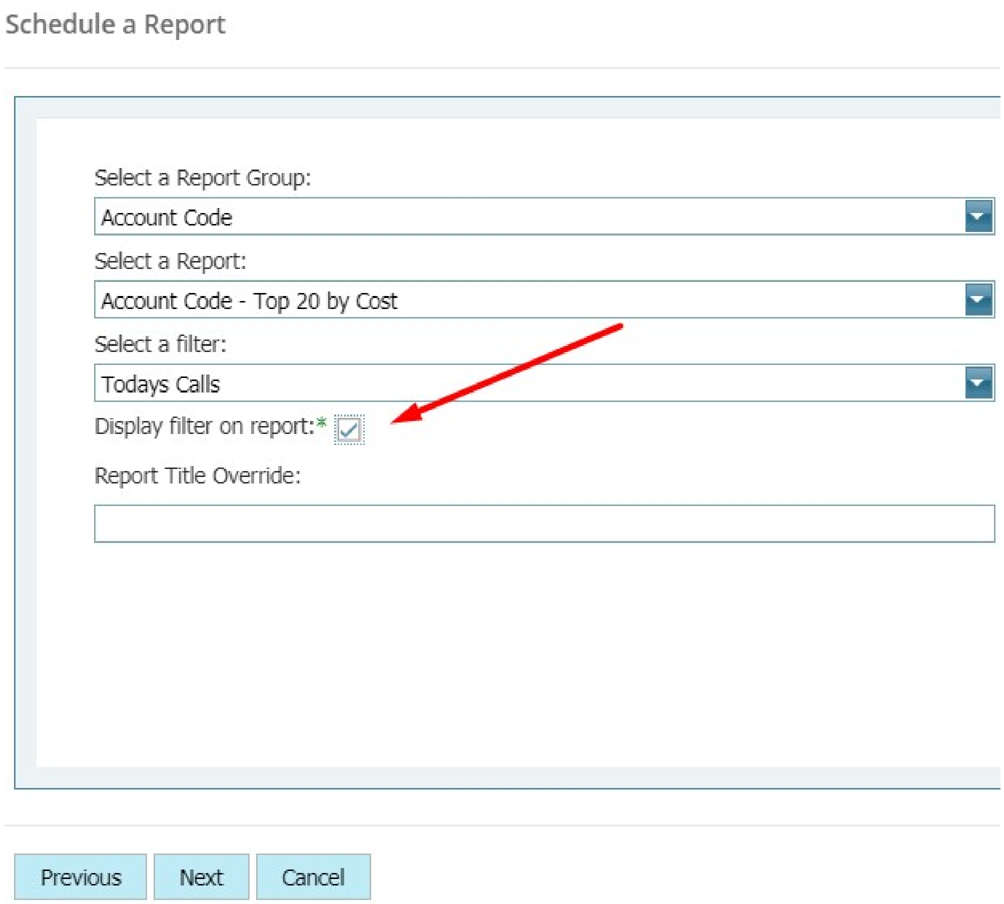
4. Select time interval, enter start time.

5. Click the "Next" button. User gets redirected on the next screen.



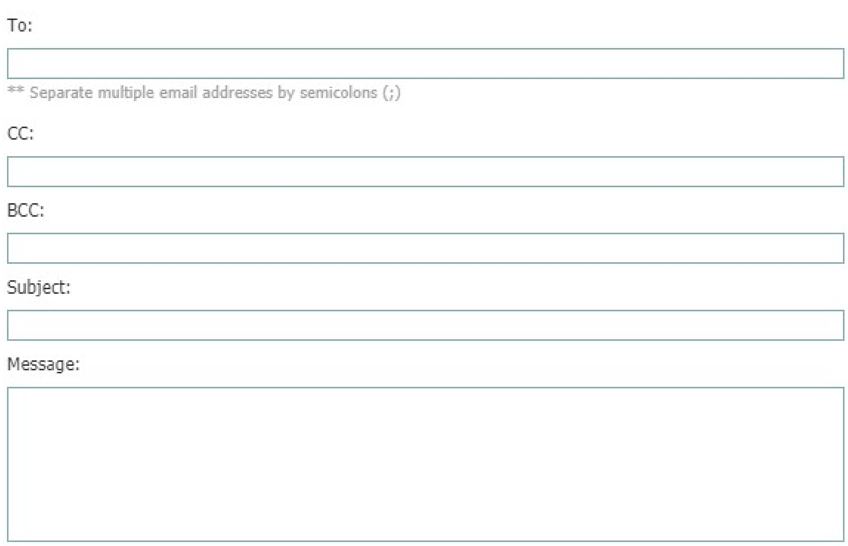
6. Click on the down-arrow of the Report Groups list and select a report group. Click on the down-arrow of the Reports list and select a report name. Click on the down-arrow of the Filter list and select a filter. Enter title. Click on the down-arrow of the Call Filters list and select a report filter name. If you would like the filter criteria to be displayed on the report, check the Display filter on report box. Enter the report title you would like to see on the report into Report Title Override. In other way the default report name will be used.

7. Click the "Next" button. User gets redirected on the next screen.



8. Enter the recipient's Email address, Subject, text message, choose format PDF/Excel/Word.

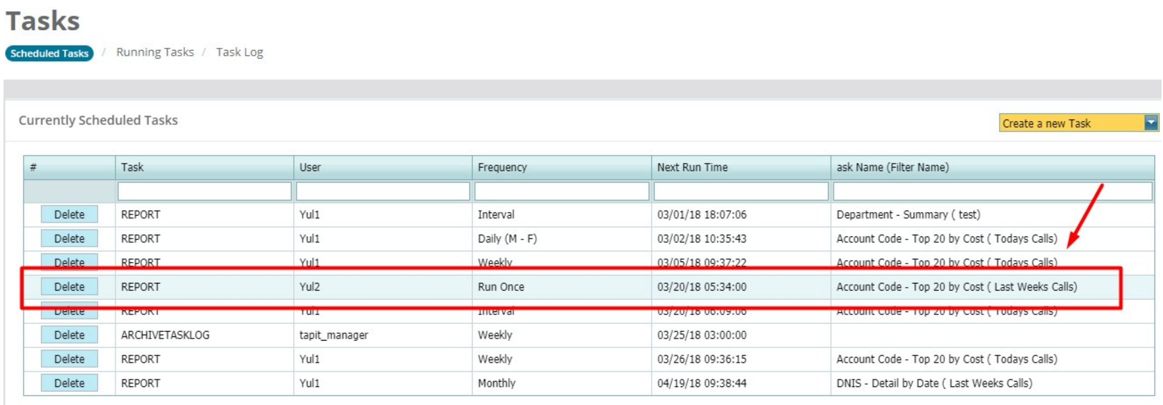
NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



9. Click the "Save" button.
10. Task has been added in the grid.

To edit an existing scheduled report

1. Login in to the application.
2. Click the **Reports** menu item, choose **Scheduler** menu item.
3. Select any report in the grid. User gets redirected on the next screen.



4. Change time interval, start date, etc.
5. Click the “Next” button. User gets redirected on the next screen.
6. Change report group, report, filter or title.
7. Click the “Next” button. User gets redirected on the next screen.
8. Change email Address, Subject, Message, Format.
9. Click “Save” button.

The record has been updated in the grid.

To delete an existing scheduled report

1. Login in to the application.
2. Click the **Reports** menu item, choose **Scheduler** menu item.
3. Select any report in the grid and click the “Delete” button, confirm operation.

The report has been removed from the Currently Scheduled Tasks list.

Admin

Users

Manage Users

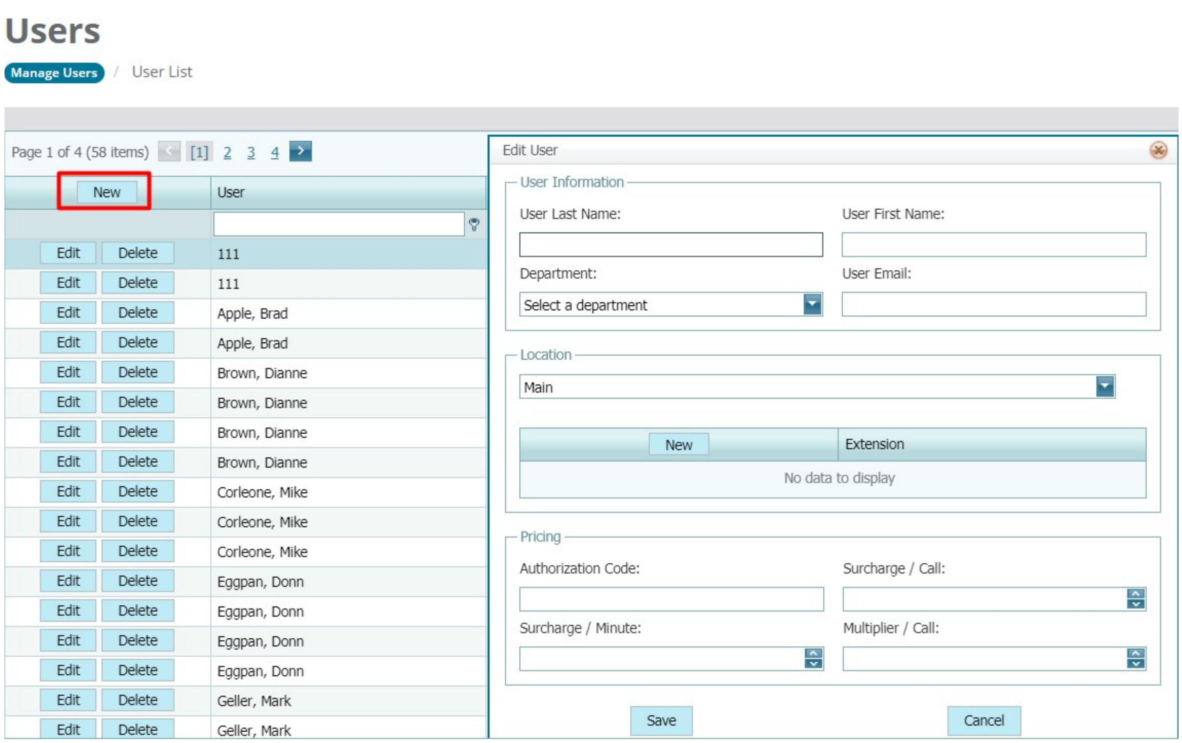
Users screen provides full information about users in the system.

To add new user

1. Login in to the application.
2. Click the **Admin** menu item, choose **Users** menu item.
3. Click the “New” button.
4. Enter Last Name, First Name, select Department, enter Email, chose Location. Enter Authorization Code, Surcharge / Call, Surcharge / Minute, Multiplier / Call.

If the user has an extension related to the selected location, click the "New" button, add the digits of the extension and click the "Save" button.

NOTE: If you haven’t purchased Remote Manager, you will have only one location.



5. Click the “Save” button.
6. New user gets added in the grid.

To edit an existing user

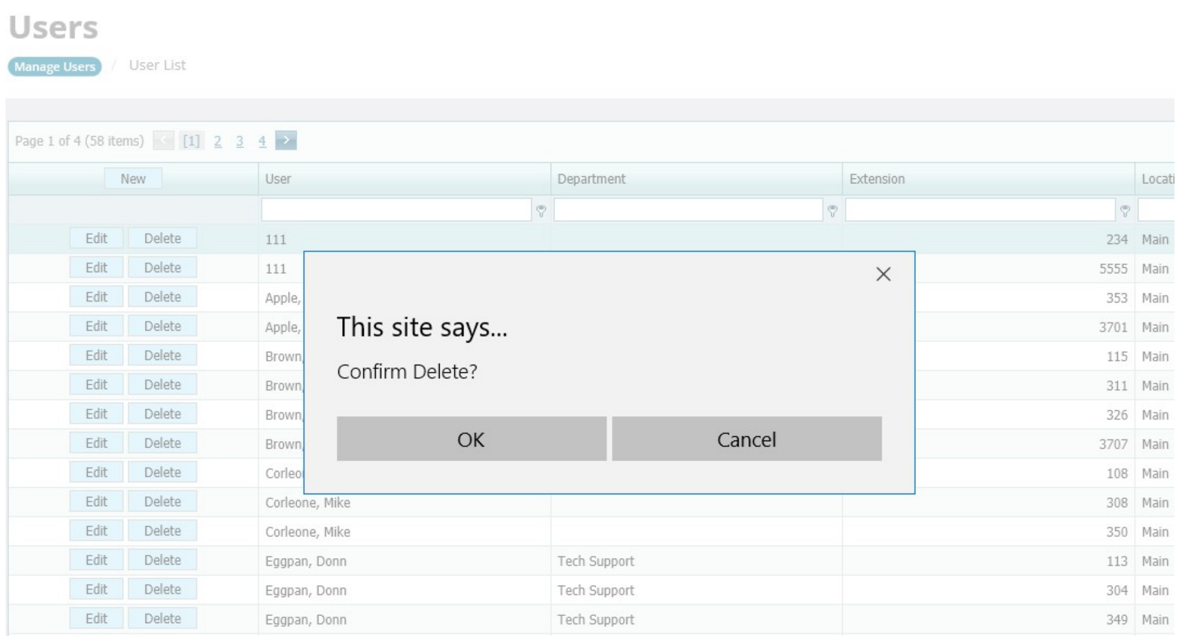
1. Login in to the application.
2. Click the **Admin** menu item, choose **Users** menu item.
3. Choose any user and click the “Edit” button.
4. Change any data and click the “Save” button.

The user gets updated by new data.

To delete an existing user

1. Login in to the application.
2. Click the **Admin** menu item, choose **Users** menu item.
3. Choose any user and click the “Delete” button, confirm operation.

The user gets deleted from grid.

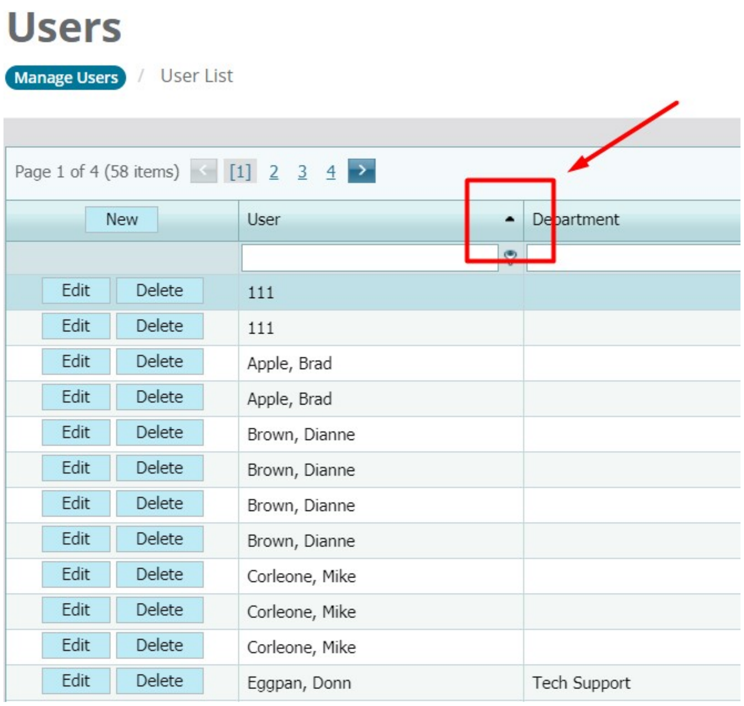


Manage Users/Users List tabs offers several ways to filter or search for the user using any column.

User List

To work with User List

The report user list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



To filter the grid

Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the users name and hit Enter on the keyboard to narrow search. Another option is to type a portion of the user name and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Please note each toggle search criteria are unique to the column it is in. For example, if you search John in the User column it will only filter users named John in the User column.

Begins with – search column and filter data with criteria beginning with …

Contains – search column and filter data with criteria containing …

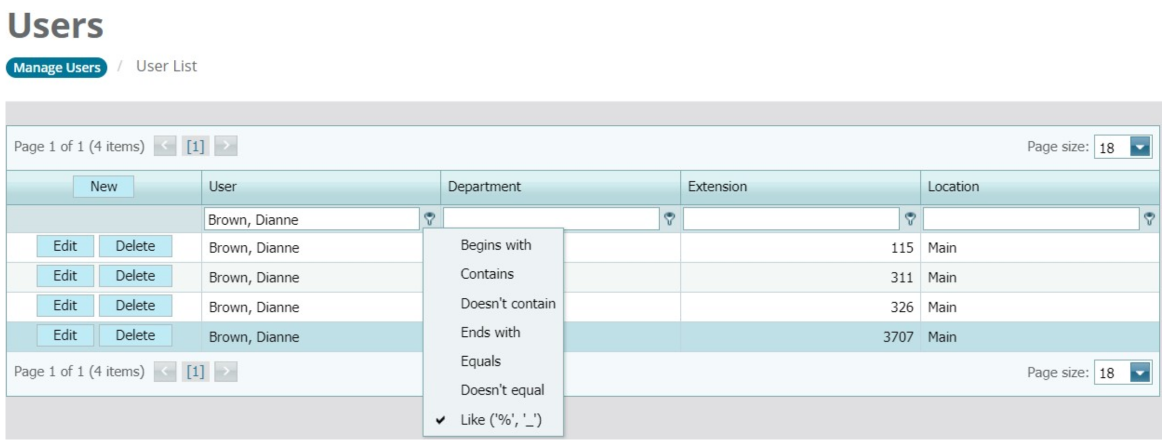
Doesn't contain – search column and filter data with criteria which does not contain or excludes …

Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

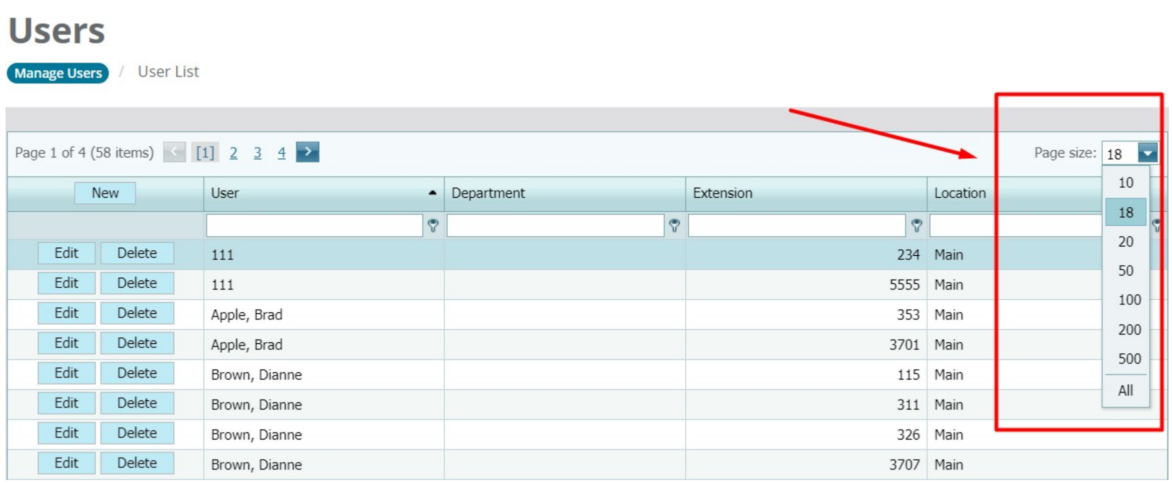
Doesn't equal – search column and filter data with criteria not equal to …

Like ('%', '_") – selects data by matching string values



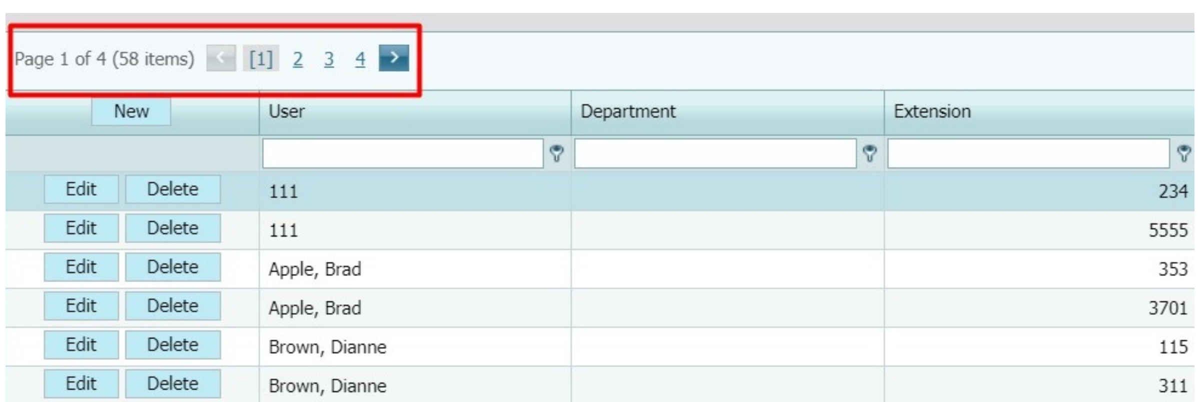
To navigate through report pages

To view more records per page, use record view controls on the right side of the table. Select the page size option and choose from the drop-down menu to select the number of records to be viewed per page.



Paging of the grid

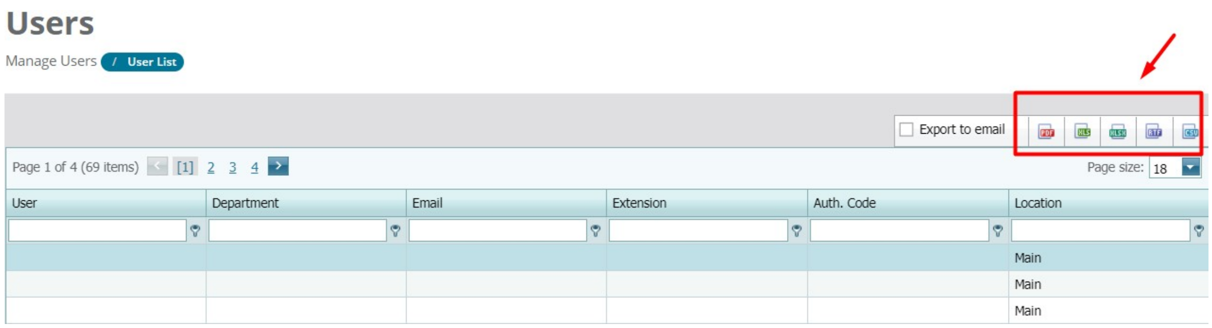
Use paging controls in the upper left corner of the **User screen** to navigate through report pages.



To export report

The list of users can be downloaded in PDF, XLS, XLSX, RTF or CSV format or shared via e-mail by clicking inside the check-box by "Export to email" to get copy of the report on e-mail box.

1. Click the **Admin** menu item, choose **User** menu item.
2. Select "User List" tab.
3. By clicking on any format, the selected report will export directly to your machine.



By clicking inside the check-box "Export to email" first and followed by selecting the format, a pop-up will appear.

The **Email Results screen** comes up.

1. Enter the recipient's email address into the To field. If required, enter email addresses into CC and BCC fields.
2. Enter the email subject into the Subject field.
3. Enter the email text into the Message field.
4. Click on the Email button.
5. The report has been emailed as an attachment in chosen (PDF/Excel/Word) format.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com

Departments

Departments screen is used to maintain department's information sorted alphabetically. It has two sections. The left section is a tree list of departments reflecting their hierarchy. The right pane of the screen to add new, edit or delete departments.

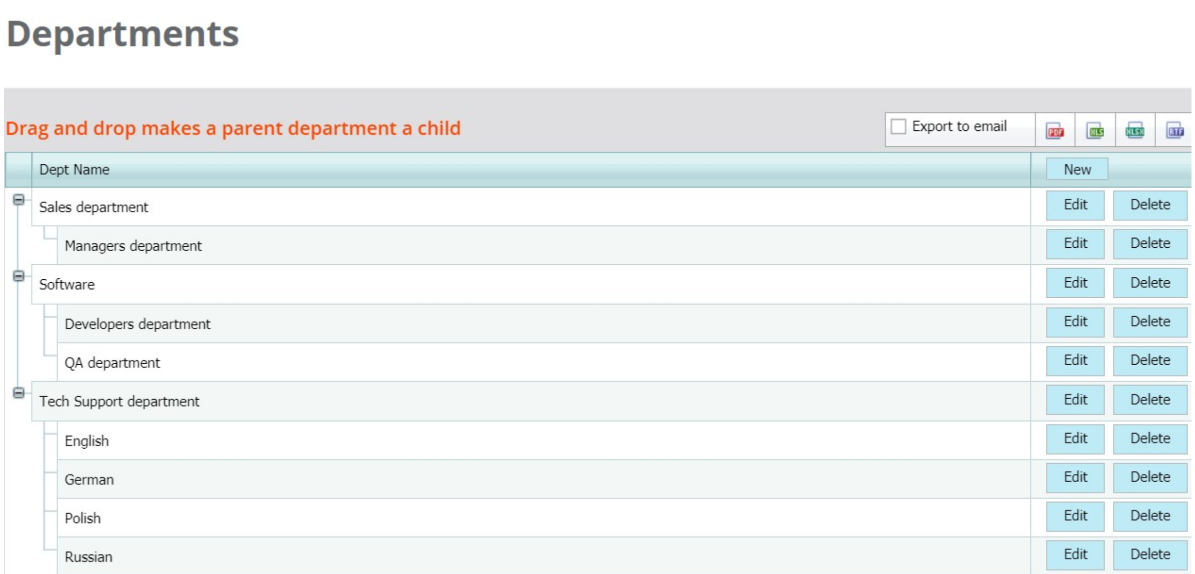
Use drag and drop to adjust the hierarchy relationship of the department.

Departments with sub-departments have node buttons with a minus sign when expanded, or a plus sign when closed. Clicking on a closed node (with a plus sign) expands the list of sub-departments.

To navigate the available departments tree list

1. Login in to the application.
2. Click the **Admin** menu item, choose **Departments** menu item.

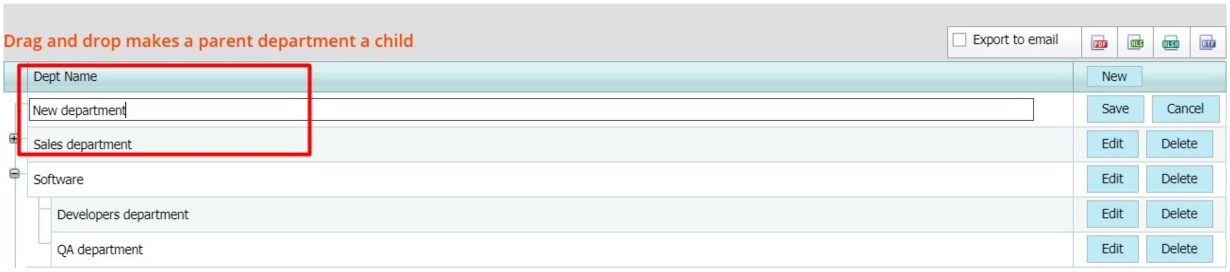
You can navigate the list by clicking on list items. Use +/- to minimize or maximize the tree.



To add new department

1. Login in to the application.
2. Click the **Admin** menu item, choose **Departments** menu item.
3. Click the "New" button.
4. Enter department name and click "Save" button.

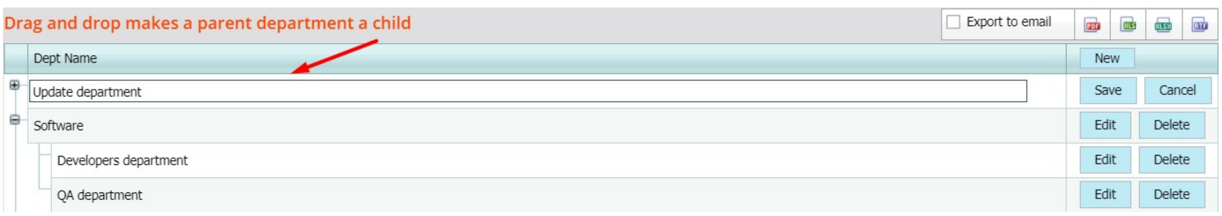
The department was added in the tree. The default value the newly added item is top level and sorted into the tree alphabetically.



To edit an existing department

1. Login in to the application.
2. Click the **Admin** menu item, choose **Departments** menu item.
3. Choose any item in the tree and click the "Edit" button.
4. Change department name and click "Save" button.

The department was updated by new name.

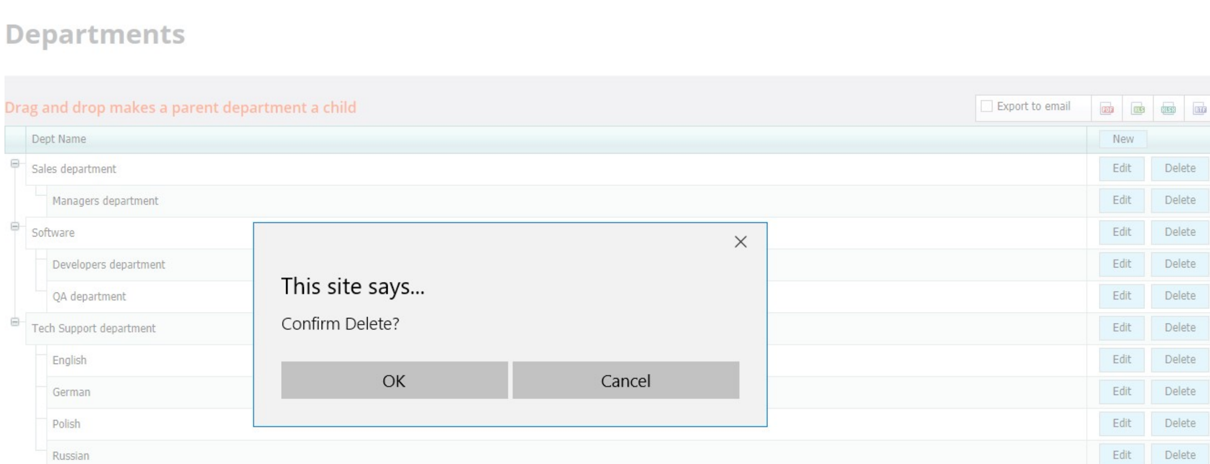


To delete an existing department

1. Login in to the application.
2. Click the **Admin** menu item, choose **Departments** menu item.
3. Choose any item in the tree.
4. Click the "Delete" button, confirm operation.

The department was deleted from the tree.

NOTE: Deleting a department will also delete its sub-departments.



To export report

1. Click the **Admin** menu item, choose **Departments** menu item.

The list of users can be downloaded in PDF, XLS, XLSX, RTF or CSV format. By clicking the check-box “Export to email” users can get a copy of the report e-mailed.

Clients

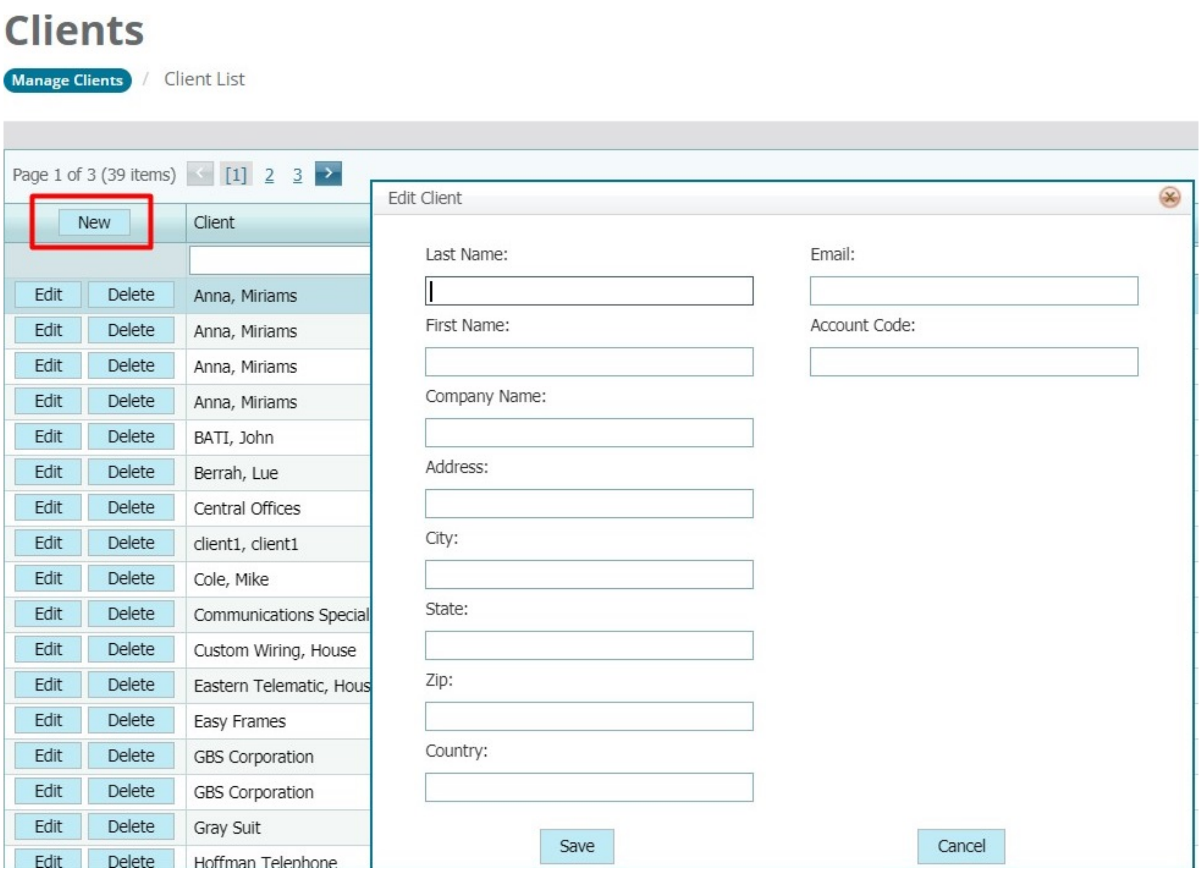
Manage Clients

Clients can be your organization’s business partner, vendors, resellers, customers, etc. Once they are entered into the system, Tapit 6 keeps track of all call traffic and costs associated with clients’ telephone numbers. The **Clients screen** is used to enter, view, and edit client information.

To add new client

1. Login in to the application.
2. Click the **Admin** menu item, choose **Clients** menu item.
3. Click the “New” button.
4. Enter Last Name, First Name, Company Name, Address, City, State, Zip, Country.
5. Click the “Save” button.

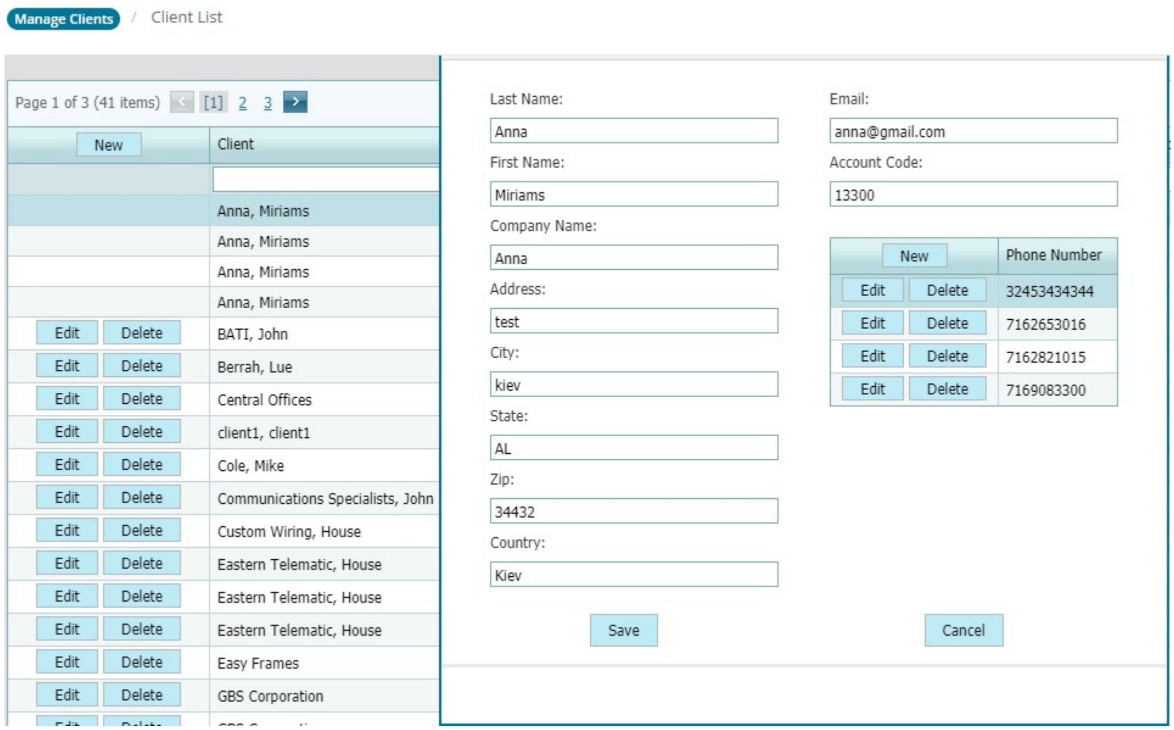
New client was added in the grid.



To edit an existing client

1. Login in to the application.
2. Click the **Admin** menu item, choose **Clients** menu item.
3. Choose any client and click the “Edit” button.
4. Change any data and click the “Save” button.

The client was updated by new data.



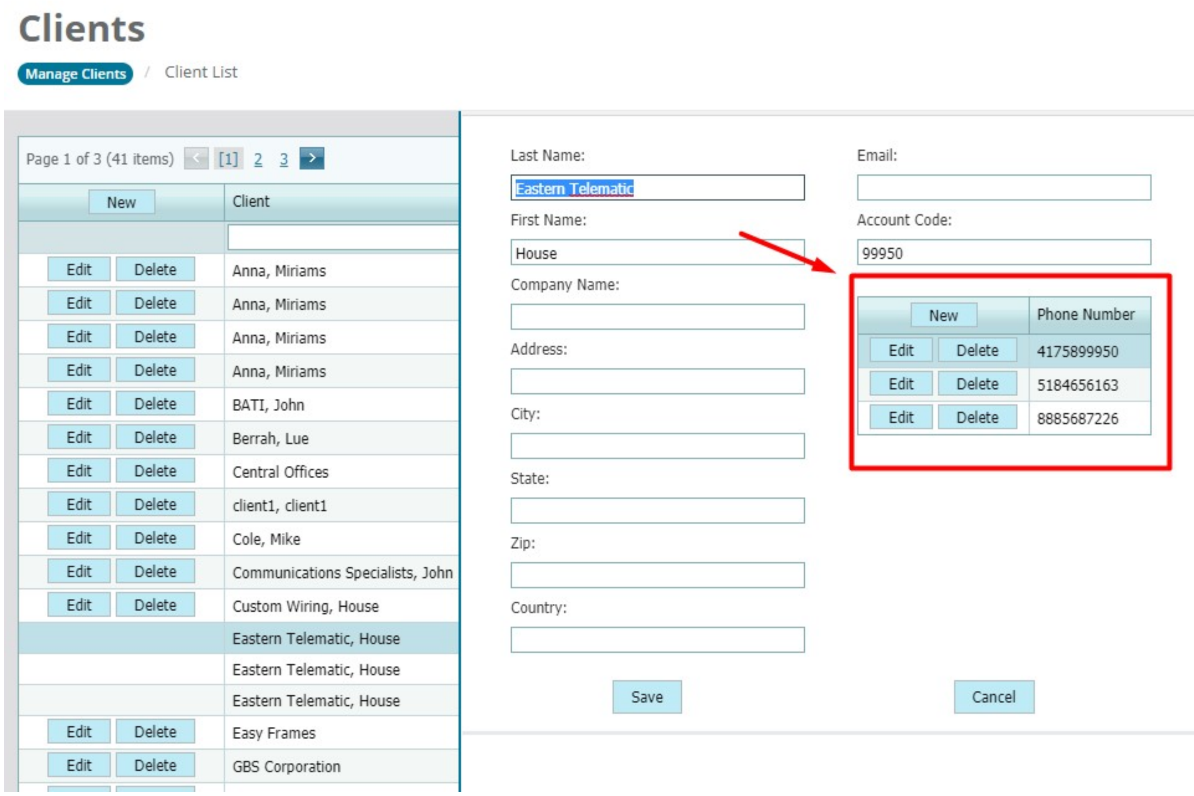
Phone number associated with the client

This feature is available just for existing clients. User can add, edit or delete phone number for any user. Any count of Phone Numbers can be added to any user.

To add a phone numbers associated with the client

1. Login in to the application.
2. Click the **Admin** menu item, choose **Clients** menu item.
3. Choose any client and click the "Edit" button. Phone list was shown.
4. Click the "New" button, enter Phone Number.
5. Click the "Save" button.

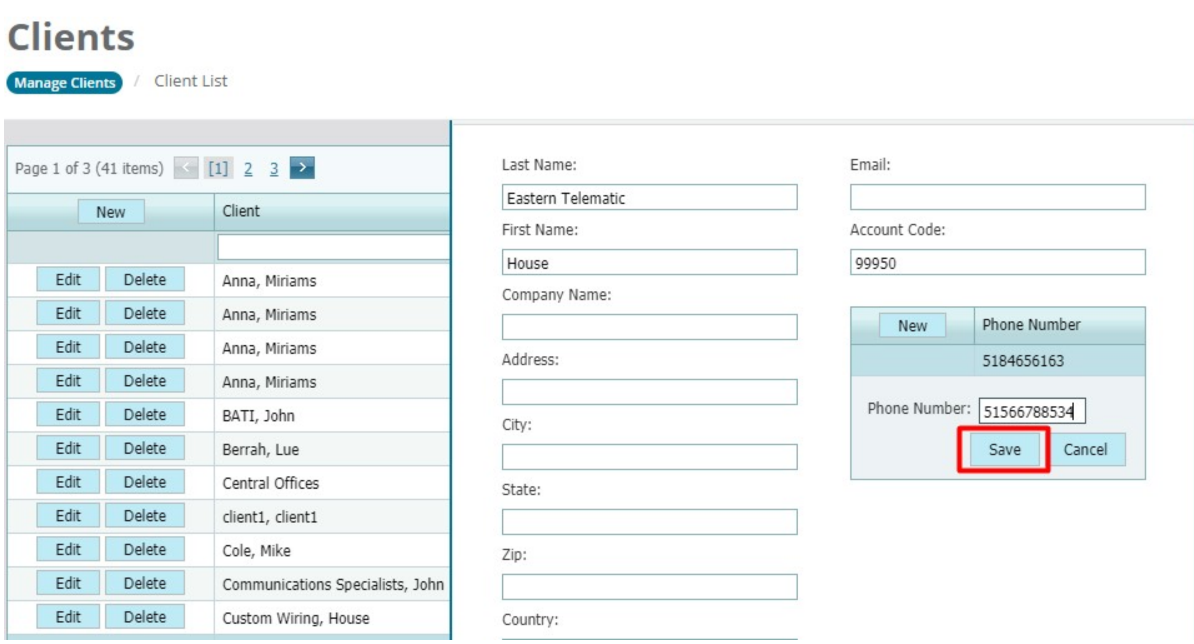
The Phone Number was added to the user.



To edit an existing phone number associated with the client

1. Login in to the application.
2. Click the **Admin** menu item, choose **Clients** menu item.
3. Choose any client and click the “Edit” button. Phone list was shown.
4. Choose any Phone Number and click the “Edit” button.
5. Change Phone Number and click the “Save” button.

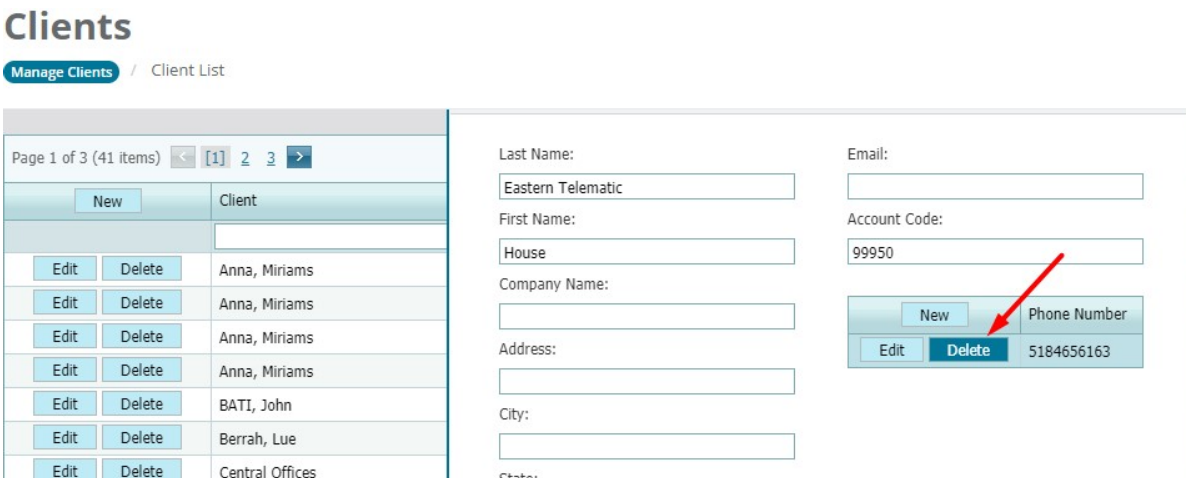
The Phone Number was updated by new data.



To delete an existing phone number associated with the client

1. Login in to the application.
2. Click the **Admin** menu item, choose **Clients** menu item.
3. Choose any client and click the “Edit” button. Phone list was shown.
4. Choose any Phone Number and click the “Delete” button, confirm operation.

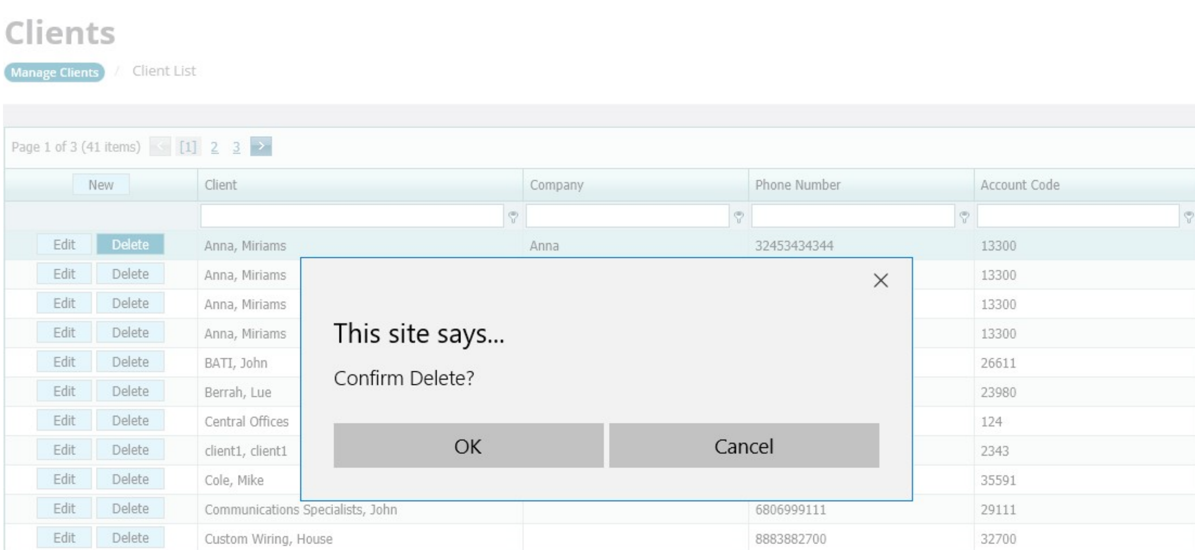
The Phone Number was deleted from Phone Number list.



To delete an existing client

4. Login in to the application.
5. Click the **Admin** menu item, choose **Clients** menu item.
6. Choose any client and click the “Delete” button, confirm operation.

The client was deleted from grid.

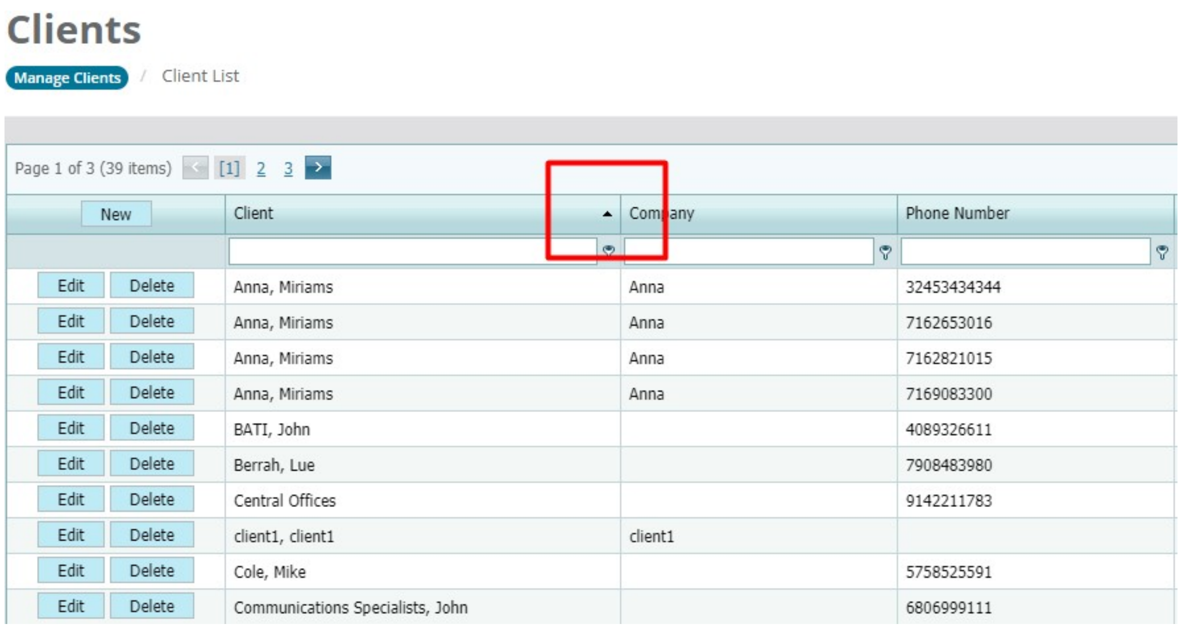


Client Lists

Manage Clients/Clients List tabs offers several ways to filter or search for the client using any column.

To sort the grid

The report clients list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



To filter the grid

Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the client name and hit Enter on the keyboard to narrow search. Another option is to type a portion of the client name and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Please note each toggle search criteria are unique to the column it is in. For example, if you search John in the Client column it will only filter clients named John in the User column.

Begins with – search column and filter data with criteria beginning with …

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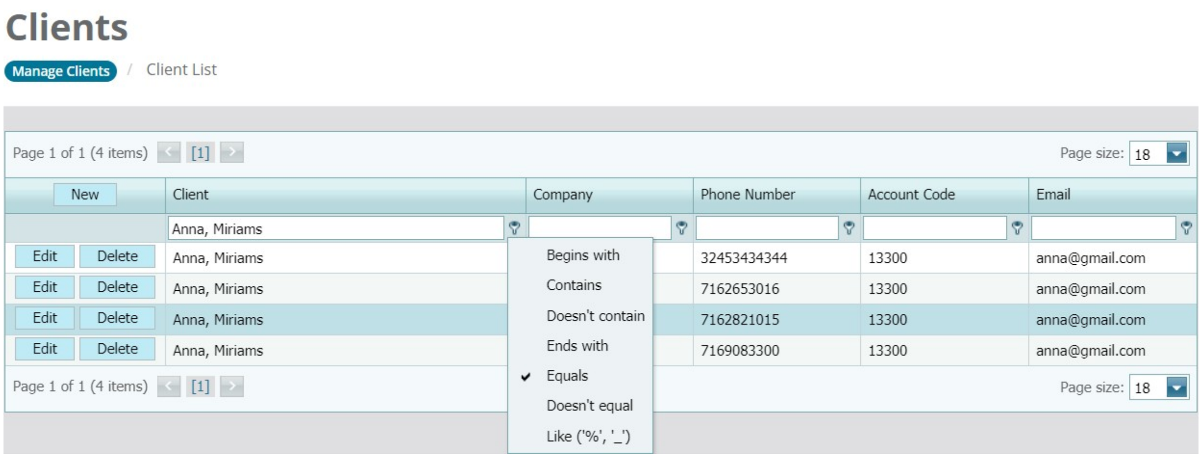
Equals – search column and filter data with criteria equal to …

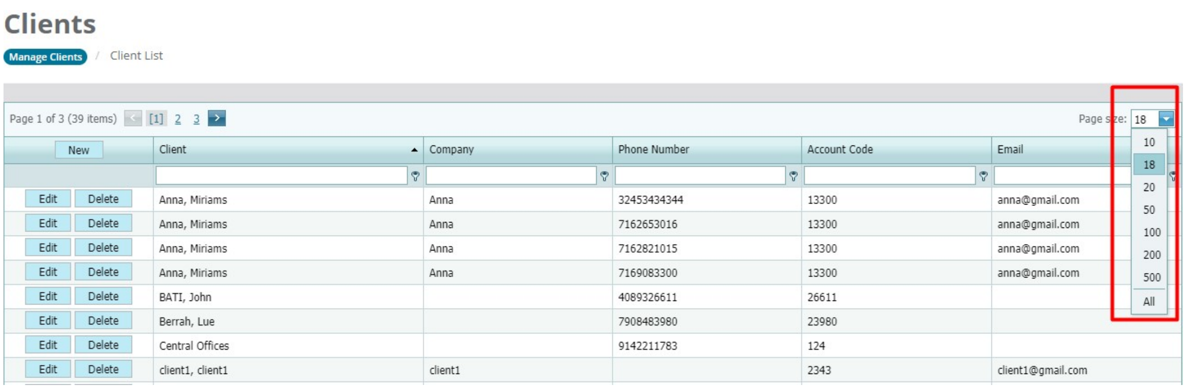
Doesn't equal – search column and filter data with criteria not equal to …

Like ('%' , '_") – selects data by matching string values



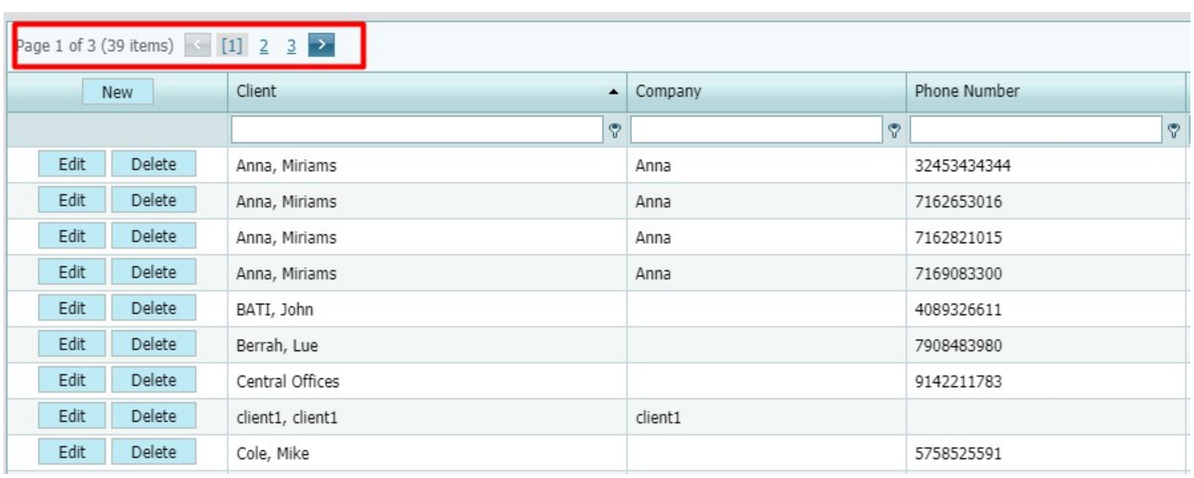
To navigate through report pages

To view more records per page, use record view controls on the right side of the table. Select the page size option and choose from the drop-down menu to select the number of records to be viewed per page.



Paging of the grid

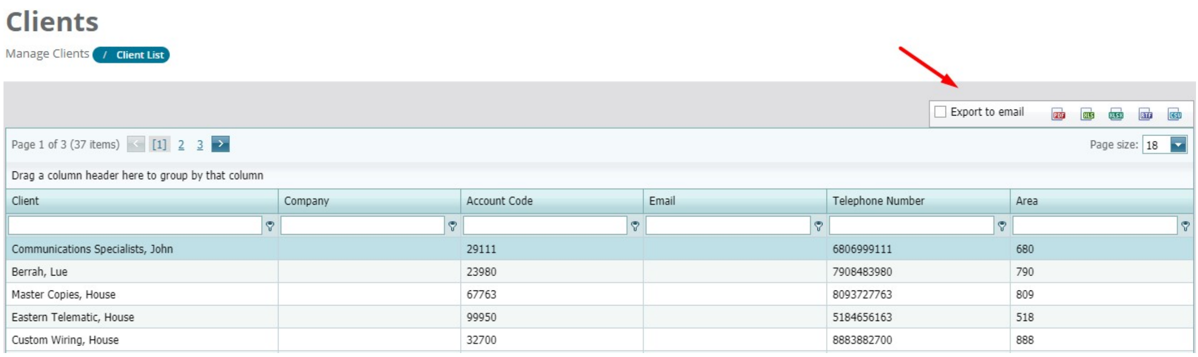
Use paging controls in the upper left corner of the **Clients screen** to navigate through report pages.



To export report

1. Click the **Admin** menu item, choose **Client** menu item.
2. Select “Client List” tab.

The list of clients can be downloaded in PDF, XLS, XLSX, RTF or CSV format. By clicking the check-box “Export to email” users can get a copy of the report e-mailed.



DNIS

DNIS Numbers

DNIS menu item provides full information about DNIS Numbers, Campaigns names with their descriptions, start dates, end dates and associated DNIS numbers.

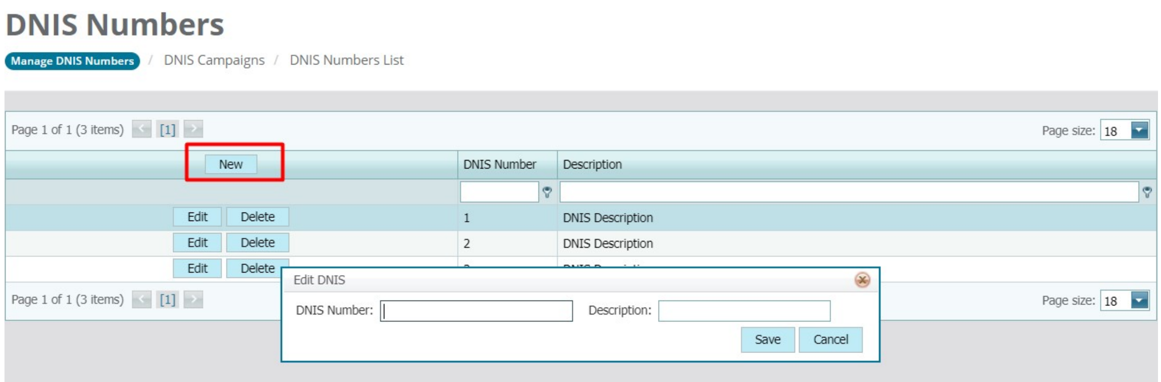
NOTE: DNIS reports will only work in Tapit 6 if your phone system provides that information in the SMDR we receive.

Manage DNIS Numbers tab

To add new DNIS number

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item.
3. Click the "New" button.
4. Enter DNIS Number, Description.
5. Click the "Save" button.

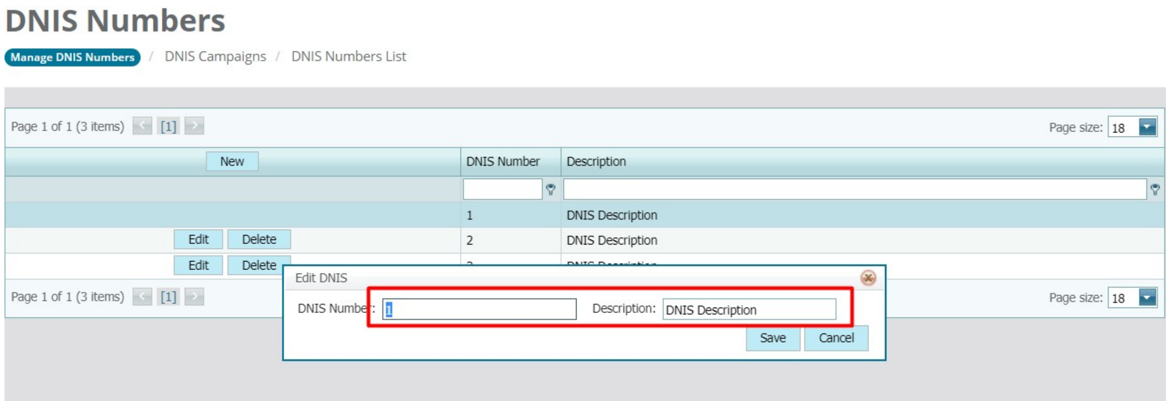
New DNIS number was added in the grid.



To edit an existing DNIS number

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item.
3. Choose any item in the grid and click the "Edit" button.
4. Change any values and click the "Save" button.

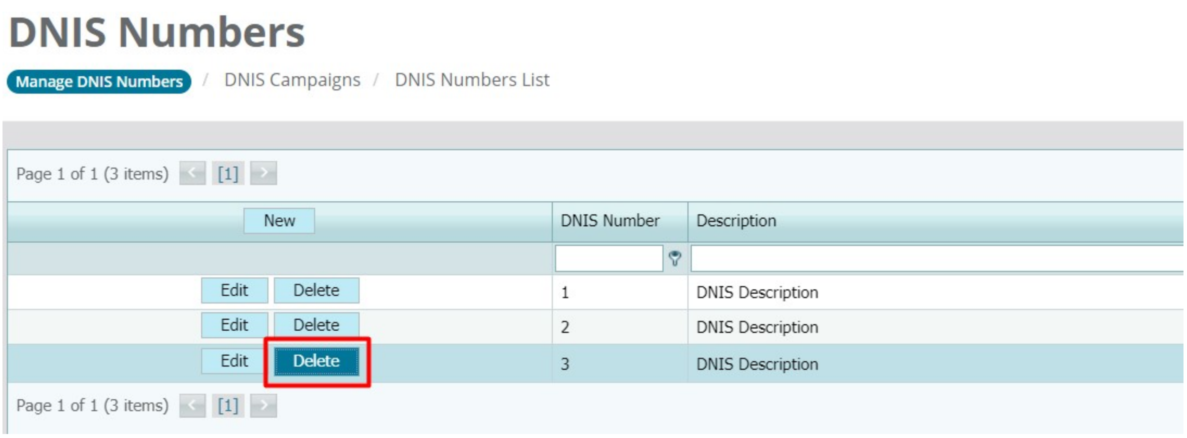
The DNIS number data was updated in the grid.



To delete an existing DNIS number

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item.
3. Choose any item in the grid and click the "Delete" button, confirm operation.

The DNIS number was deleted from the grid.

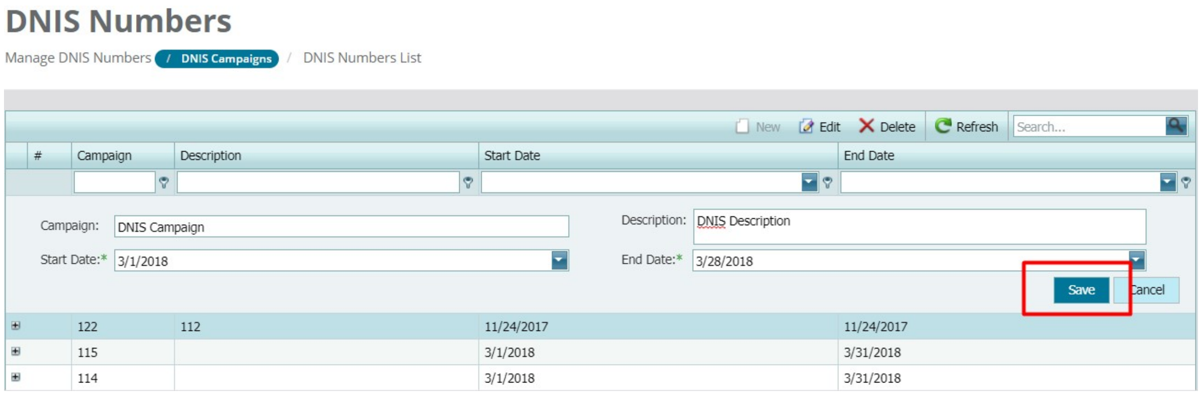


DNIS Campaigns

To create new DNIS Campaign

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Click the "New" button.
4. Enter Campaign, Description, set Start Date, End Date.
5. Click the "Save" button.

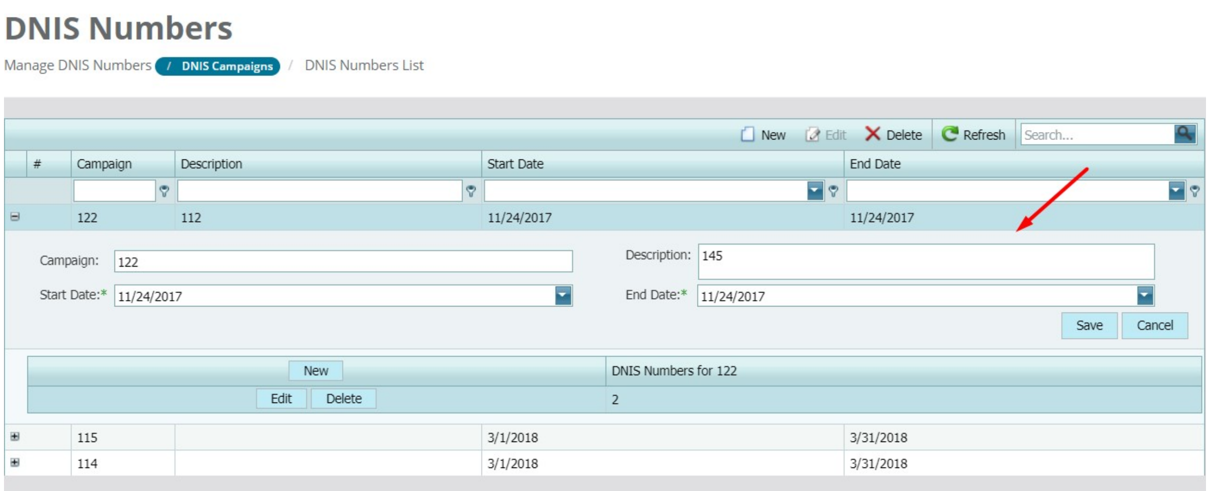
New DNIS campaign was added in the grid.



To edit an existing DNIS Campaign

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Choose any item in the grid and click the "Edit" button.
4. Change any values and click the "Save" button.

The DNIS campaign was updated in the grid.



To delete an existing DNIS Campaign

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Select any record in the grid and click the "Delete" button, confirm operation.

The DNIS campaign was deleted from the grid.

DNIS Numbers for definite campaign

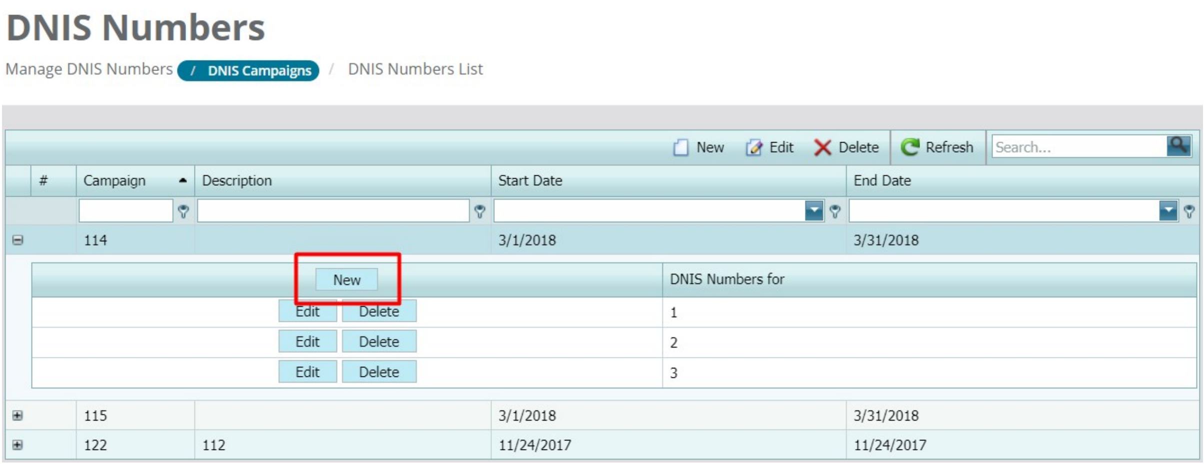
This feature is available just for existing campaigns. User can add, edit or delete DNIS number for any campaign. Any count of DNIS Numbers can be added to any campaign.

To add a DNIS number for definite campaign

1. Login in to the application.

4. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
2. Expand any record and click the “New” button.
3. Enter DNIS Number for the campaign.
4. Click the “Save” button.

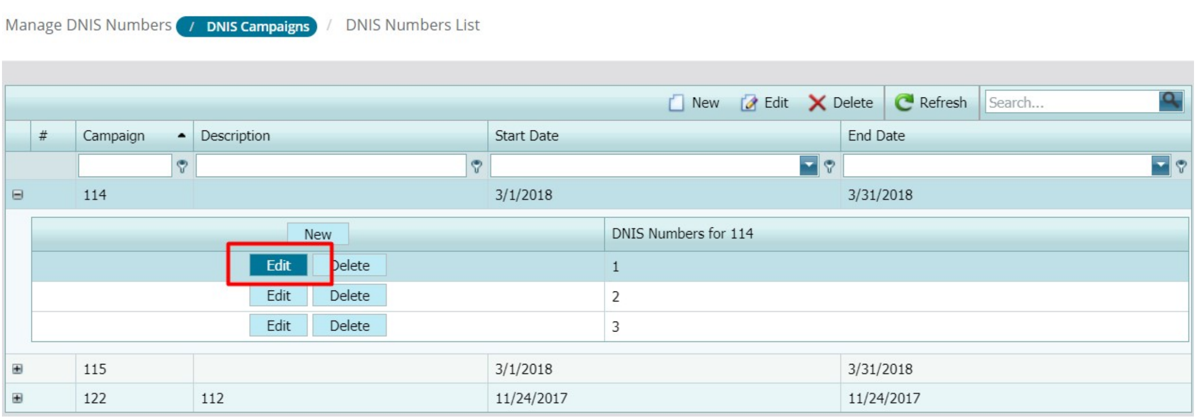
The DNIS Number was added to the campaign.



To edit an existing DNIS number of the campaign

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Expand any record and click the “Edit” button.
4. Change DNIS Number.
5. Click the “Save” button.

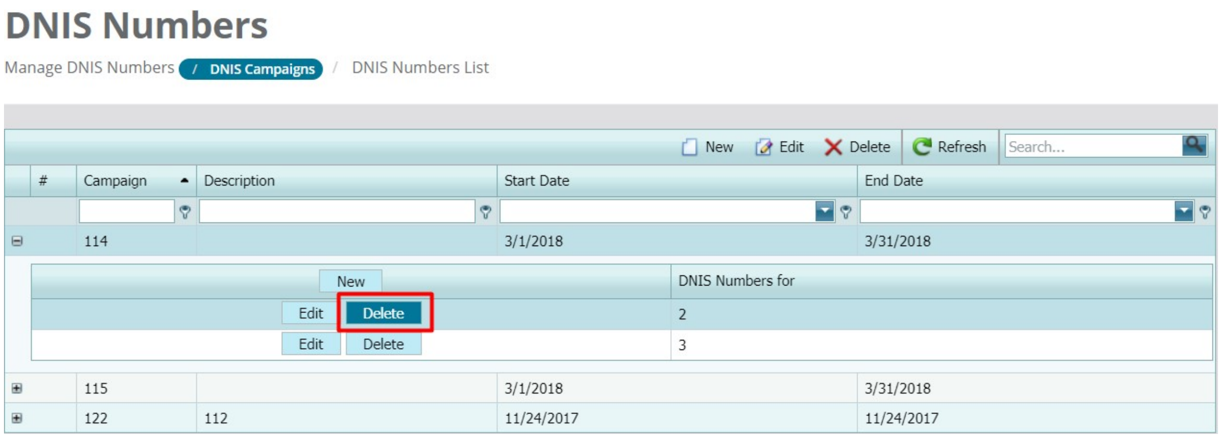
The DNIS Number was updated.



To delete an existing DNIS number from the campaign

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Expand any record and click the “Delete” button, confirm operation.

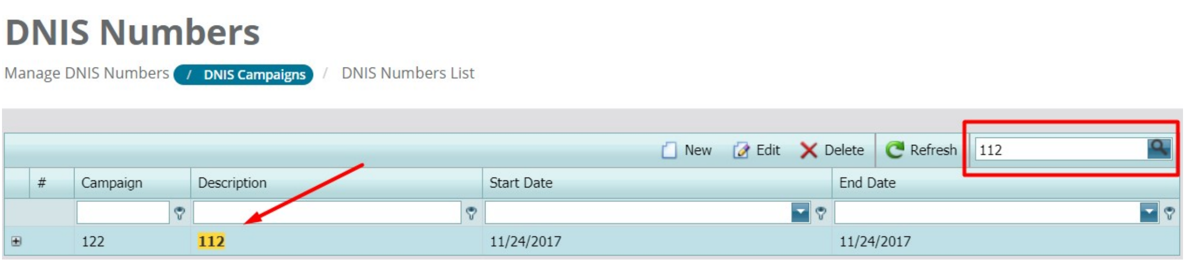
The DNIS Number was deleted.



Search feature

1. Login in to the application.
2. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
3. Enter text for search and click on search icon.

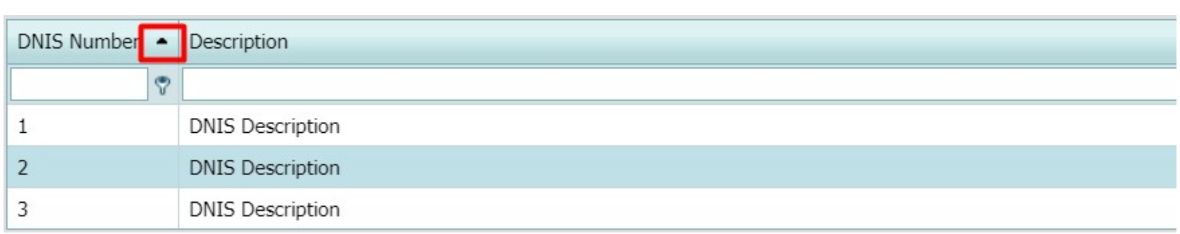
Search result will be highlighted.



DNIS Lists

To sort the grid

Sort feature is implemented on Manage DNIS Numbers tab, DNIS Campaigns tab, DNIS Numbers List tab. The reports list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



To filter the grid

Filter feature is implemented on Manage DNIS Numbers tab, DNIS Campaigns tab, DNIS Numbers List tab. Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the DNIS Number and hit Enter on the keyboard to narrow search. Another option is to type a portion of the DNIS Number and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Begins with – search column and filter data with criteria beginning with …

Contains – search column and filter data with criteria containing …

Doesn't contain – search column and filter data with criteria which does not contain or excludes …

Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

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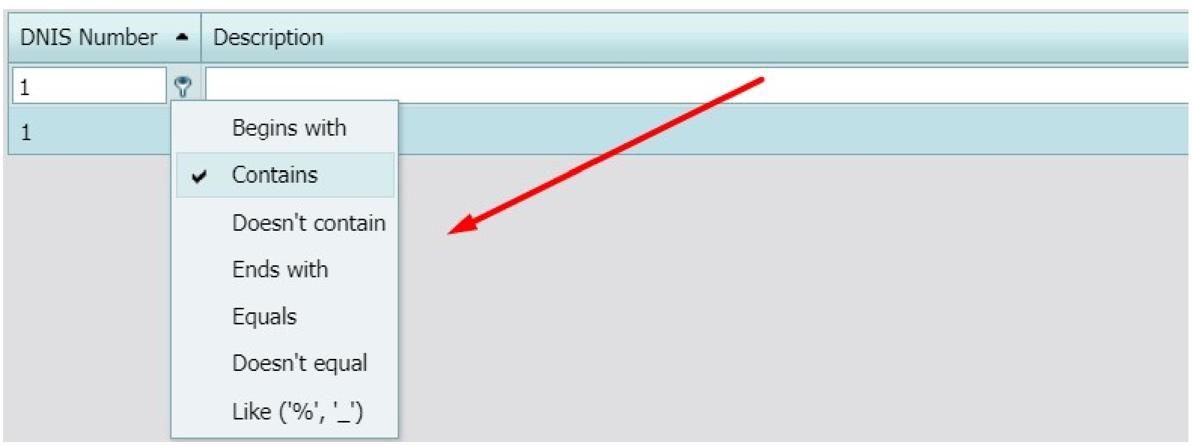
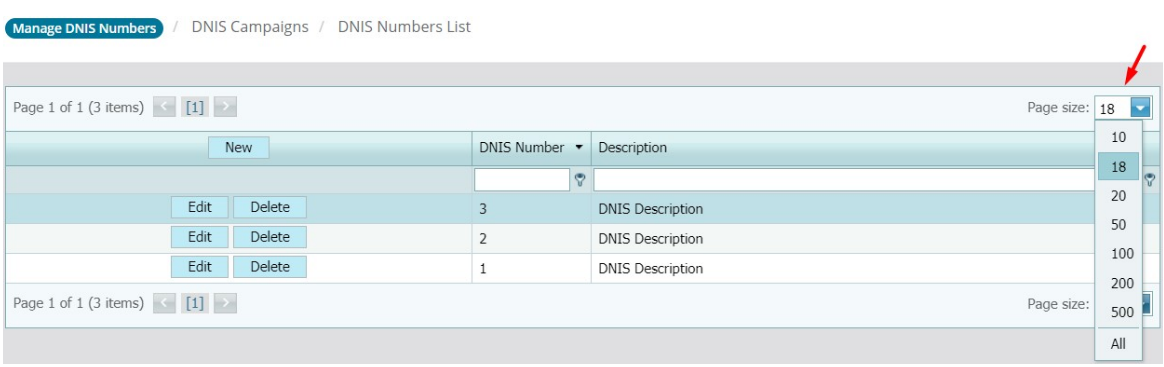
Like ('%' , '_") – selects data by matching string values



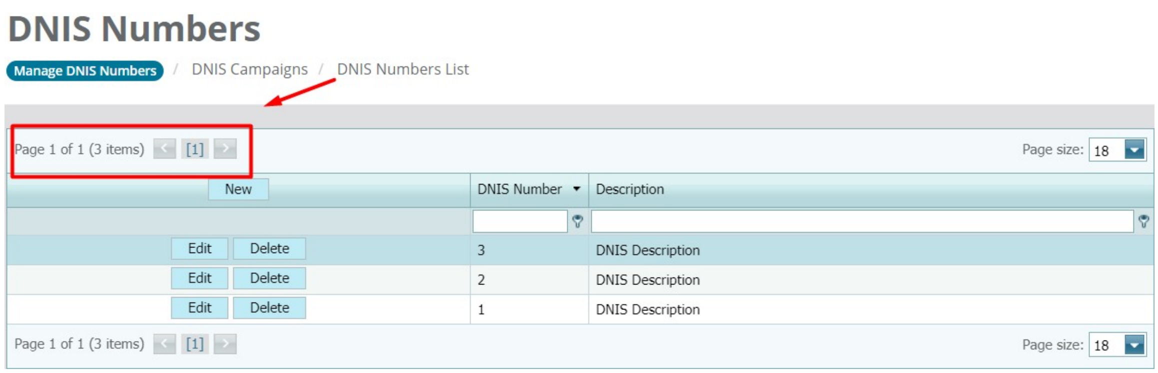
To navigate through report pages

This feature is implemented on Manage DNIS Numbers tab. To view more records per page, use record view controls on the right side of the table. Select the page size option and choose from the drop-down menu to select the number of records to be viewed per page.



Paging of the grid

Use paging controls in the upper left corner of the Manage DNIS Numbers tab to navigate through report pages.

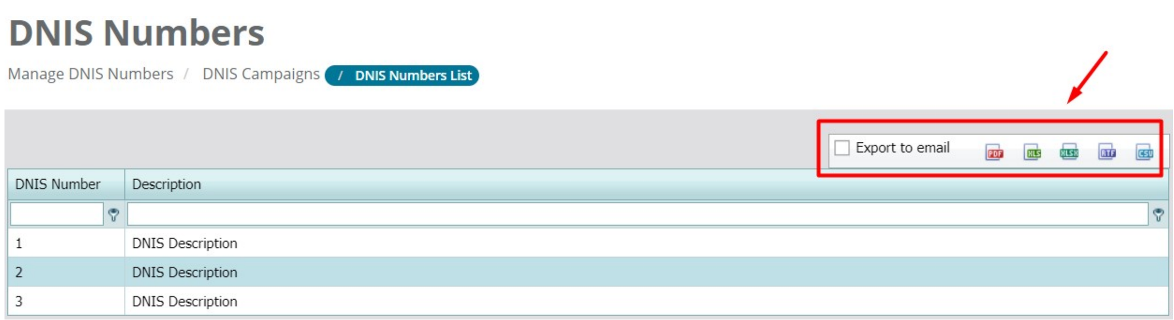


DNIS Numbers List tab

To export report

1. Click the **Admin** menu item, choose **DNIS** menu item, select **DNIS Campaign** tab.
2. Click the icon for download.

The list of DNIS Numbers can be downloaded in PDF, XLS, XLSX, RTF or CSV format. By clicking the check-box “Export to email” users can get a copy of the report e-mailed.



Matter Codes

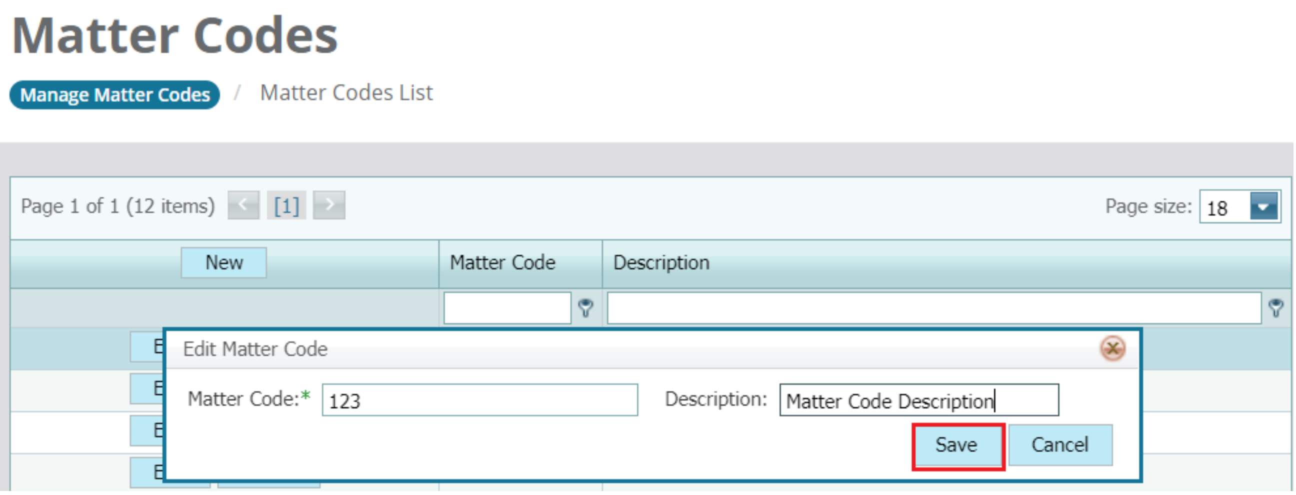
Matter Code is a part of account code used to identify the type of the call. For example, matter codes can be associated with different products offered by your organization. If a phone call pertains to product A an account code with the matter code for product A is keyed in. Consequently, a user enters an account code with the matter code for product B if the phone call is regarding product B. Later, a user can generate Tapit 6 reports based on matter codes to reflect statistics on calls in regards to product A and product B.
The **Matter Codes screen** is used to enter and edit matter code numbers.

To add new Matter Code

1. Login in to the application.

2. Click the **Admin** menu item, choose **Matter Code** menu item.
3. Click the “New” button.
4. Enter Matter Code, Description.
5. Click the “Save” button.

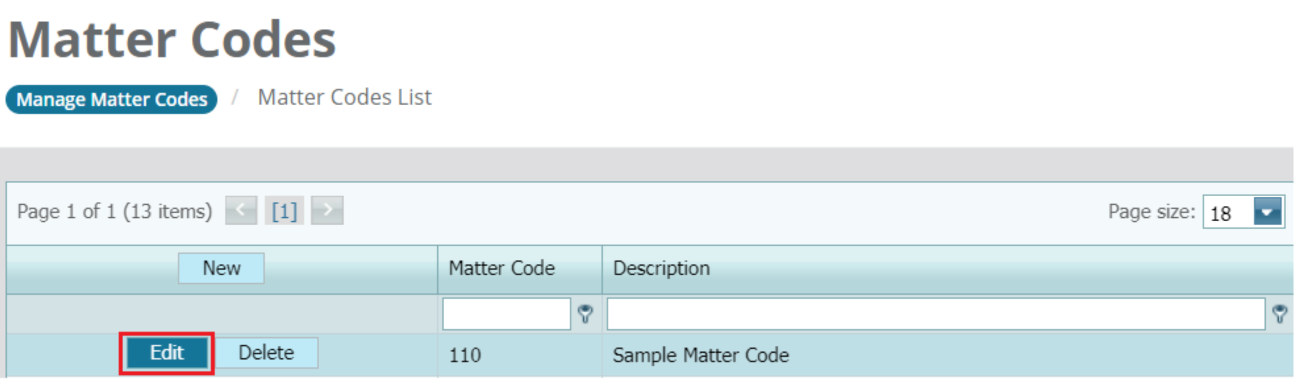
New Matter Code was added in the grid.



To edit an existing Matter Code

1. Login in to the application.
2. Click the **Admin** menu item, choose **Matter Code** menu item.
3. Choose any record and click the “Edit” button.
4. Change any value and click the “Save” button.

The Matter Code was updated in the grid.

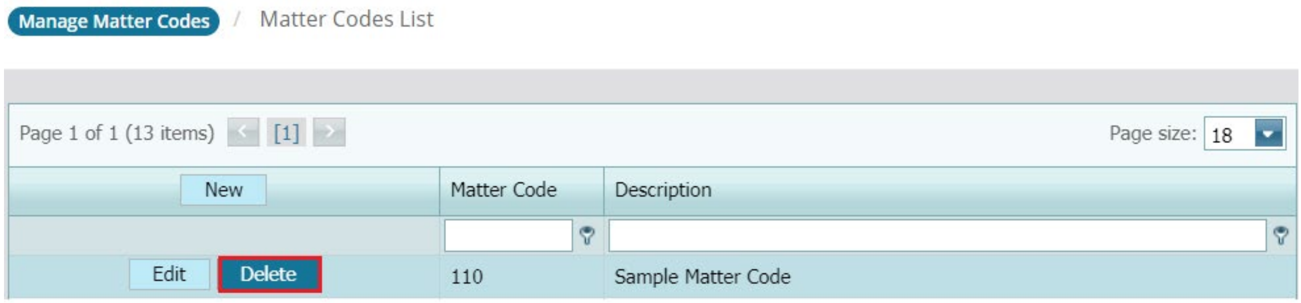


To delete an existing Matter Code

1. Login in to the application.
2. Click the **Admin** menu item, choose **Matter Code** menu item.
3. Choose any record and click the “Delete” button.

The Matter Code was deleted from the grid.

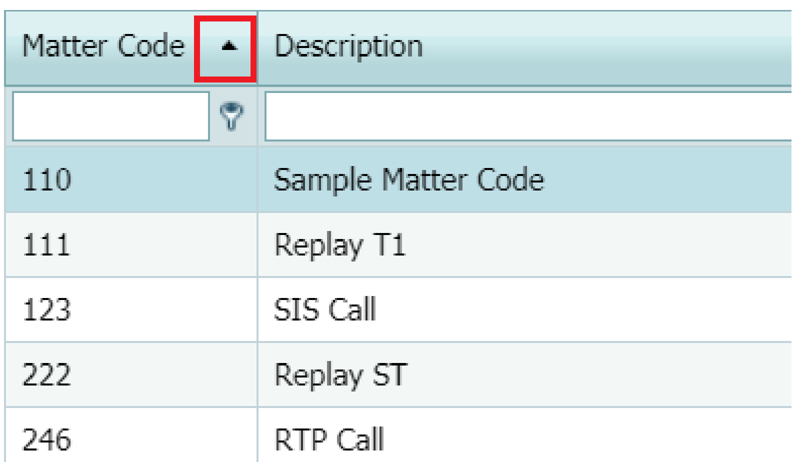
Matter Codes



Matter Codes List

To sort the grid

Sort feature is implemented on Manage Mater Codes, Mater Codes List. The reports list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



To filter the grid

Filter feature is implemented on Manage Mater Codes tab, Mater Codes List tab. Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the Manage Mater Code and hit Enter on the keyboard to narrow search. Another option is to type a portion of the Mater Code and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Begins with – search column and filter data with criteria beginning with …

Contains – search column and filter data with criteria containing …

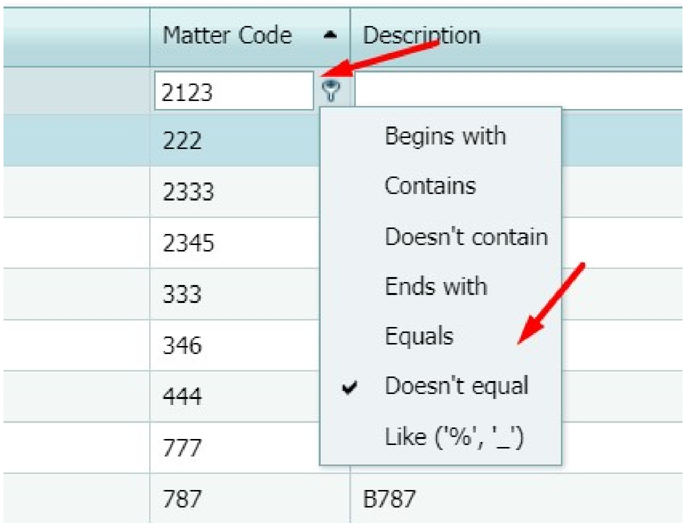
Doesn't contain – search column and filter data with criteria which does not contain or excludes …

Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

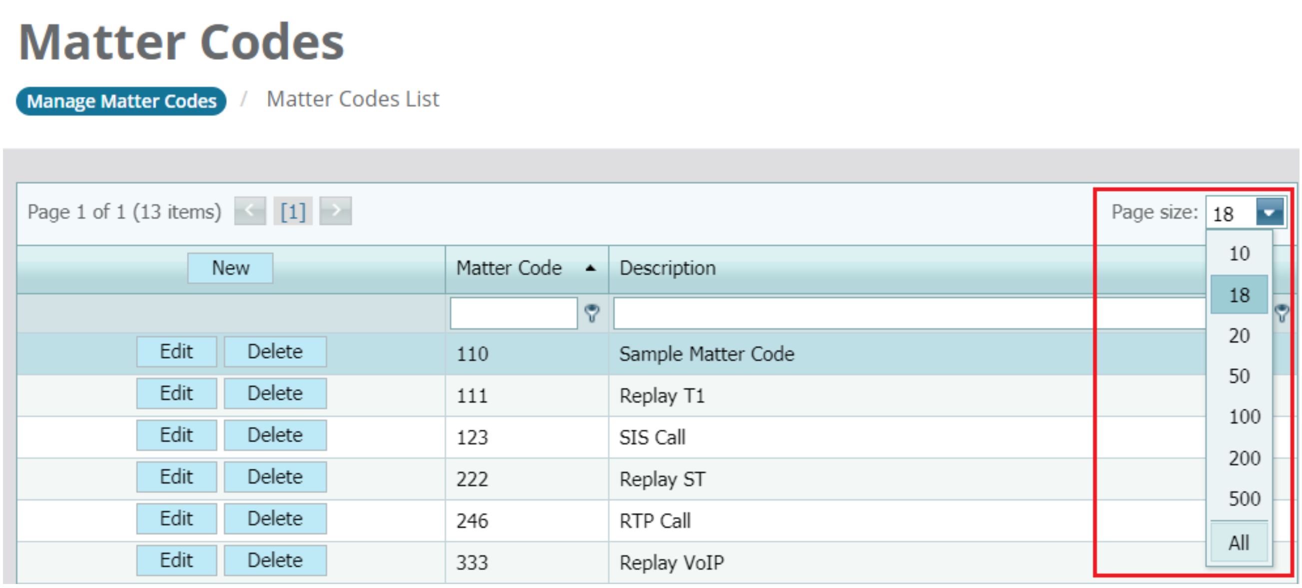
Doesn't equal – search column and filter data with criteria not equal to …

Like ('%' , '_") – selects data by matching string values



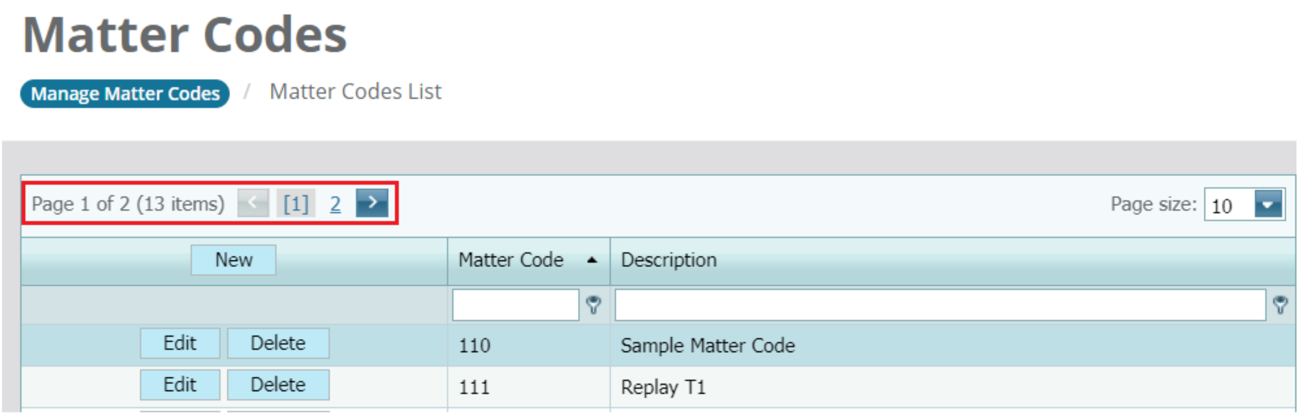
To navigate through report pages

This feature is implemented on Manage Mater Codes tab. To view more records per page, use record view controls on the right side of the table. Select the page size option and choose from the drop-down menu to select the number of records to be viewed per page.



Paging of the grid

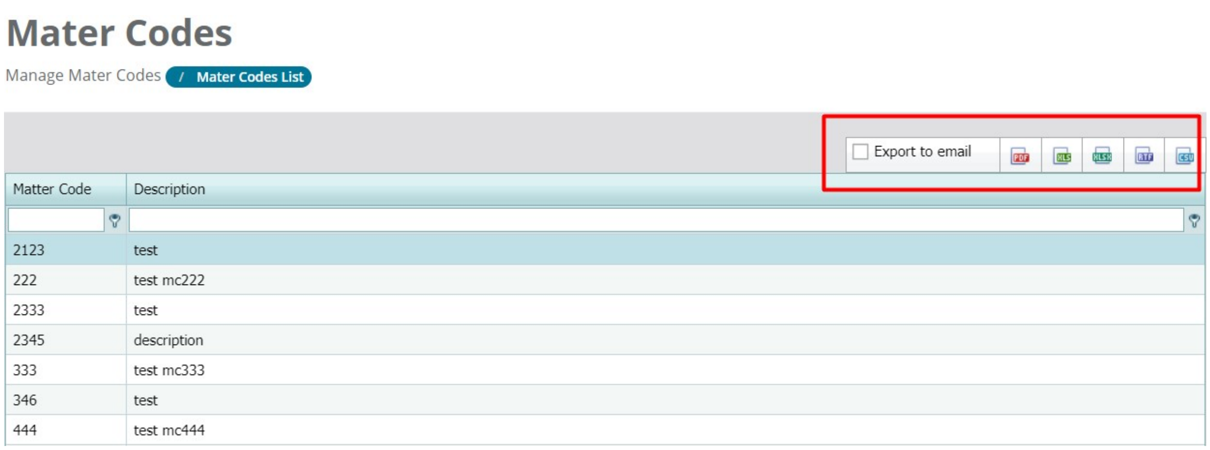
Use paging controls in the upper left corner of the Manage Mater Codes tab to navigate through report pages.



To export report

1. Login in to the application.
2. Click the **Admin** menu item, choose **Matter Code** menu item, select Mater Codes List.

The list of Mater Codes can be downloaded in PDF, XLS, XLSX, RTF or CSV format. By clicking the check-box "Export to email" users can get a copy of the report e-mailed.



Import

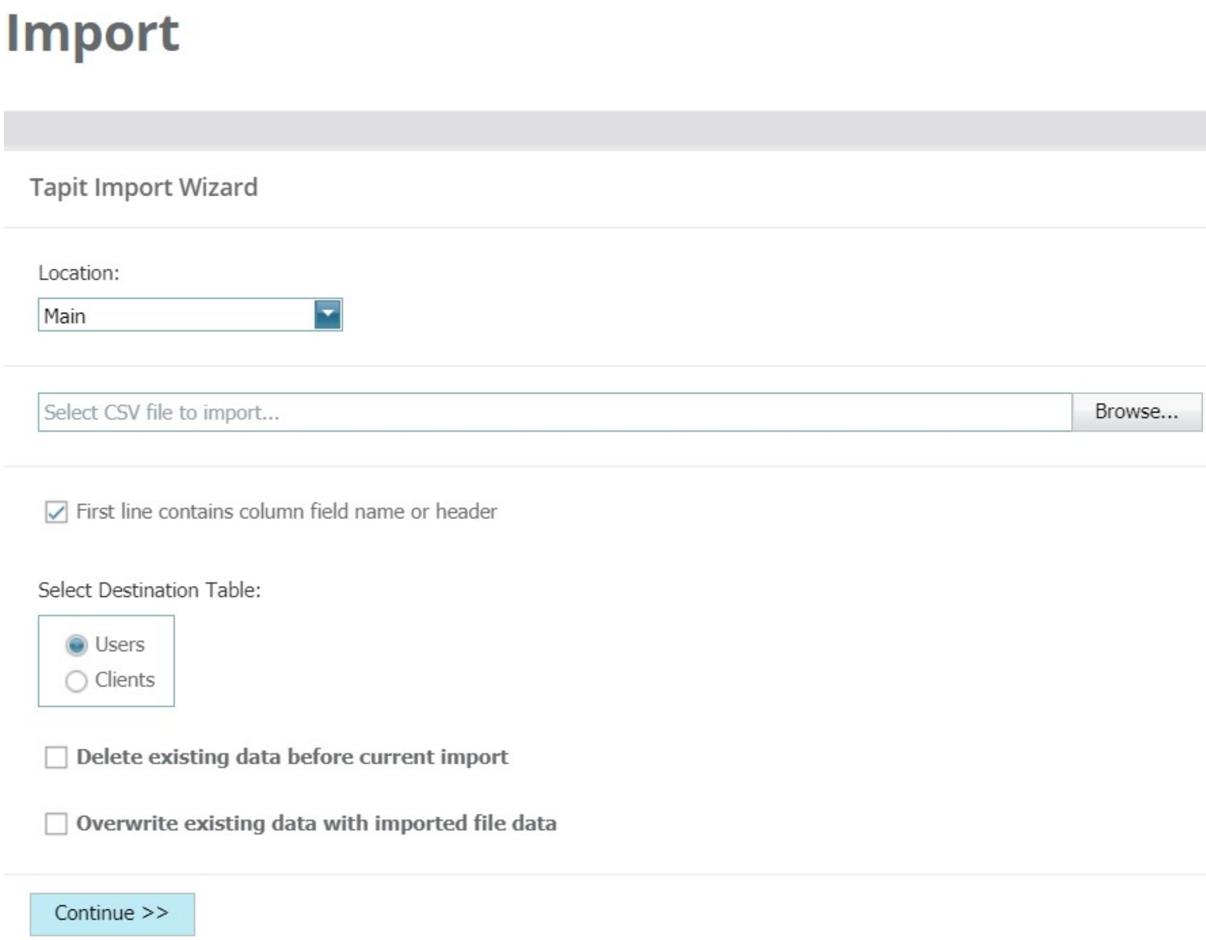
The **Import screen** helps user to update to update data from CSV file. From this screen user can import new data, delete existing data before current import, overwrite existing data with imported file data.

To import data from CSV file

1. Login in to the application.
2. Click the Admin menu item, choose Import menu item.

3. Choose Location.
4. Select file, select Destination Table (Users or Clients) for update.
5. Click the “Continue >>” button.

User should choose location, select



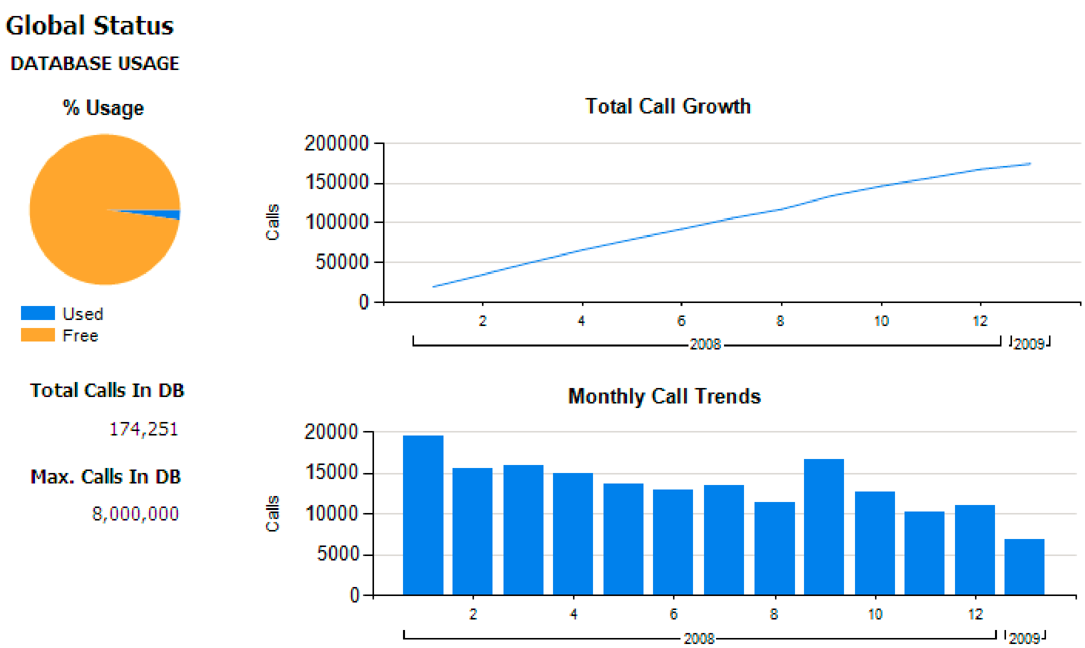
SYSTEM

System

System screen provides full information about the system: database usage, Total Calls In DB, disk space, work hours, Destination Codes.

Some TAPIT features communicate with users and administrators via email. These emails can be set up on the screen.

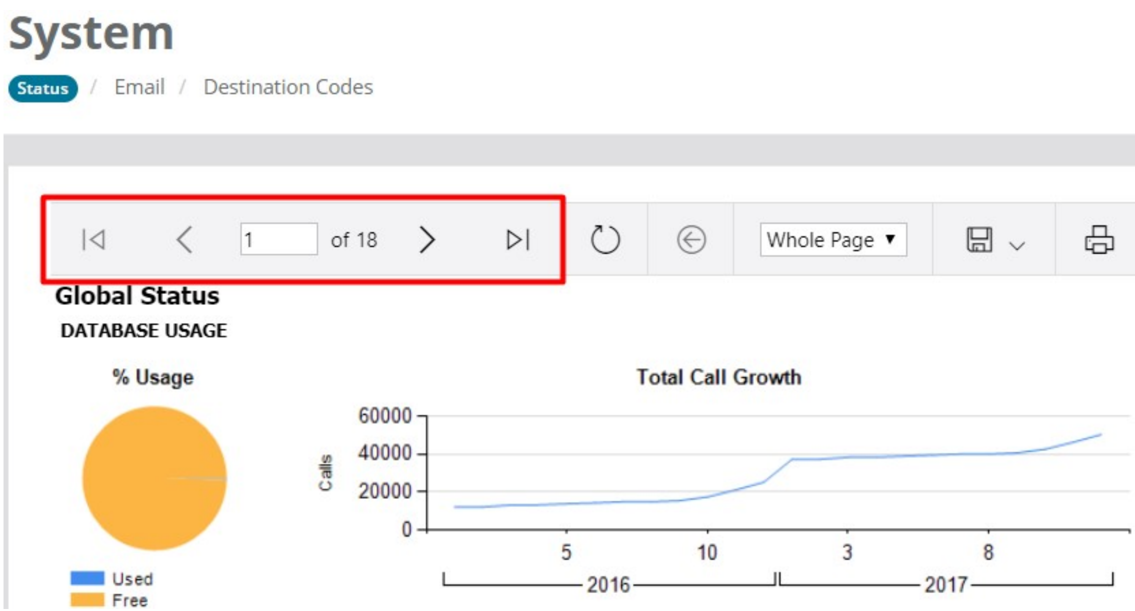
Database Usage reports on the **Used** and **Free** database space and the statistics of call volume over time.



Global Status Report

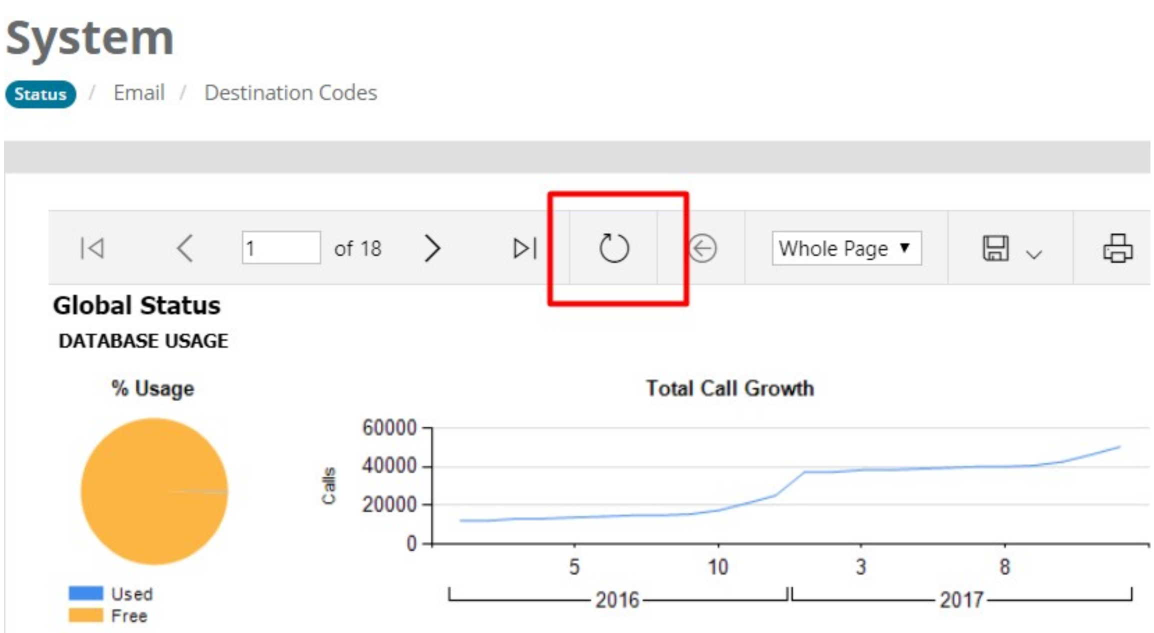
To navigate through Global Status Report pages

Arrows located in the upper left corner of the **Global Status Report screen** helps user to navigate through pages. If you would like to go to a specific page, enter the page number into the center text box and press the Enter key.



To refresh the Global Status Report

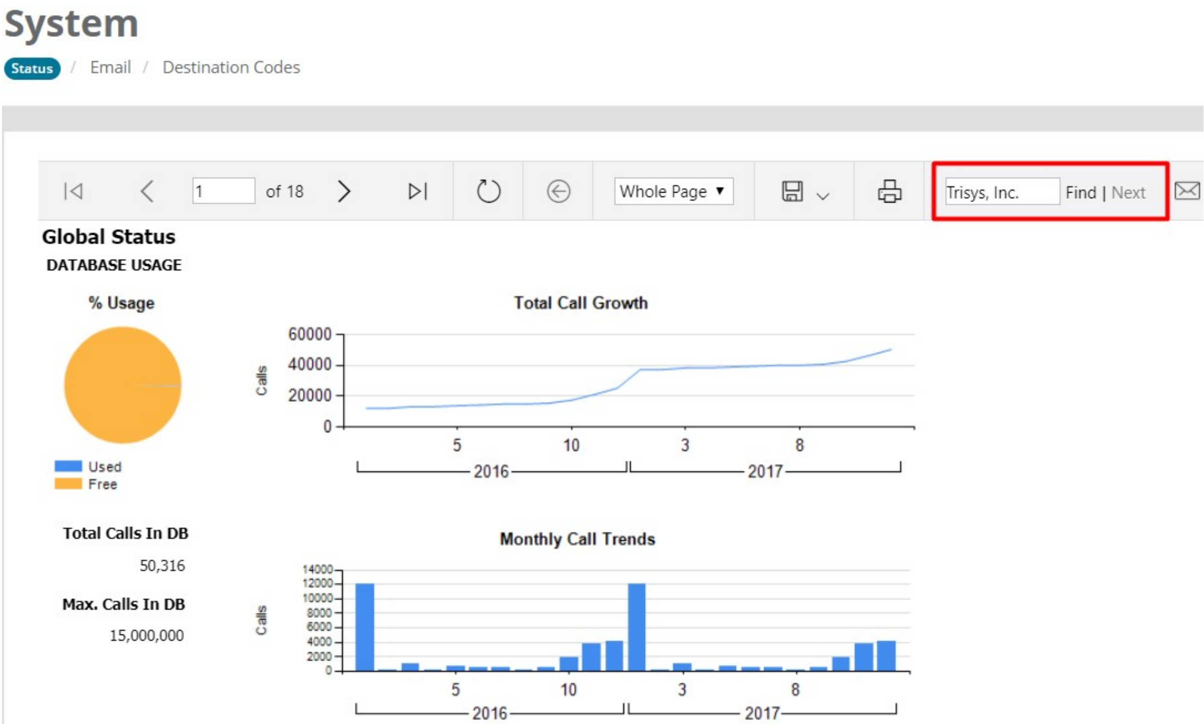
User can refresh data of the report with help of “Refresh” button.



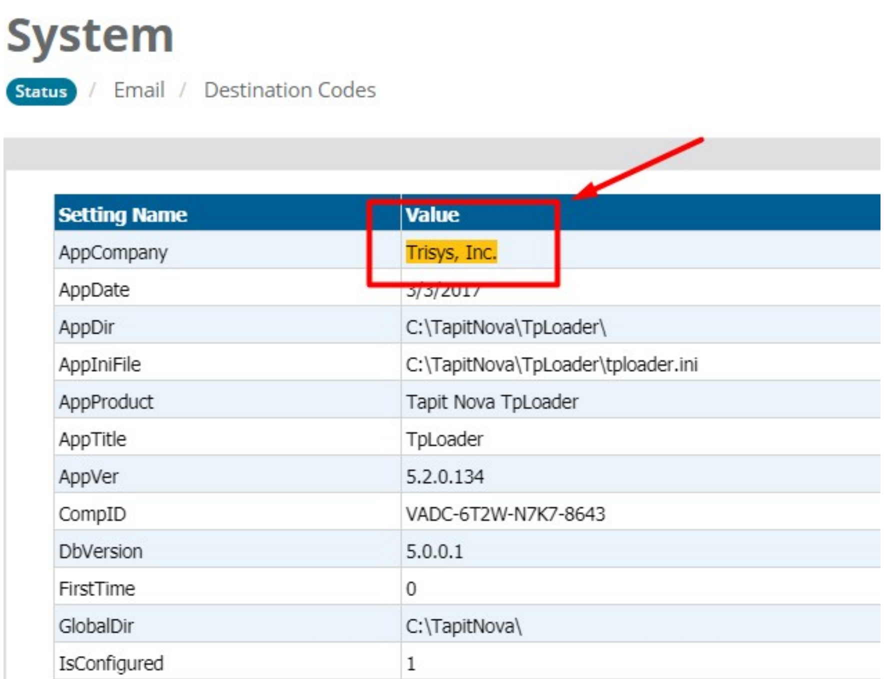
Search feature

A user can search for a specific value in the report using search control located on the tool bar above the report header.

For example, to find a company name “Trisys, Inc.” enter the name into the Find box and click on Find link.



"Trisys, Inc." has been found and it has been highlighted.

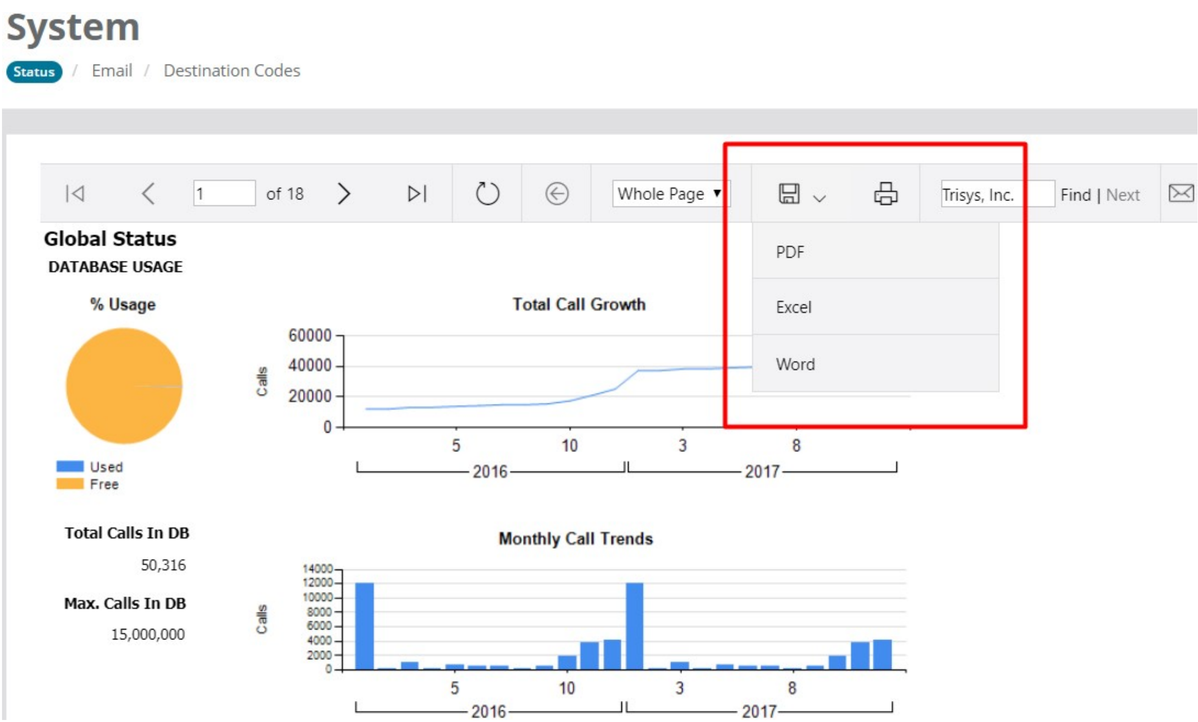

System

Status / Email / Destination Codes

Setting Name	Value
AppCompany	Trisys, Inc.
AppDate	3/3/2017
AppDir	C:\TapitNova\TpLoader\
AppIniFile	C:\TapitNova\TpLoader\tploader.ini
AppProduct	Tapit Nova TpLoader
AppTitle	TpLoader
AppVer	5.2.0.134
CompID	VADC-6T2W-N7K7-8643
DbVersion	5.0.0.1
FirstTime	0
GlobalDir	C:\TapitNova\
IsConfigured	1

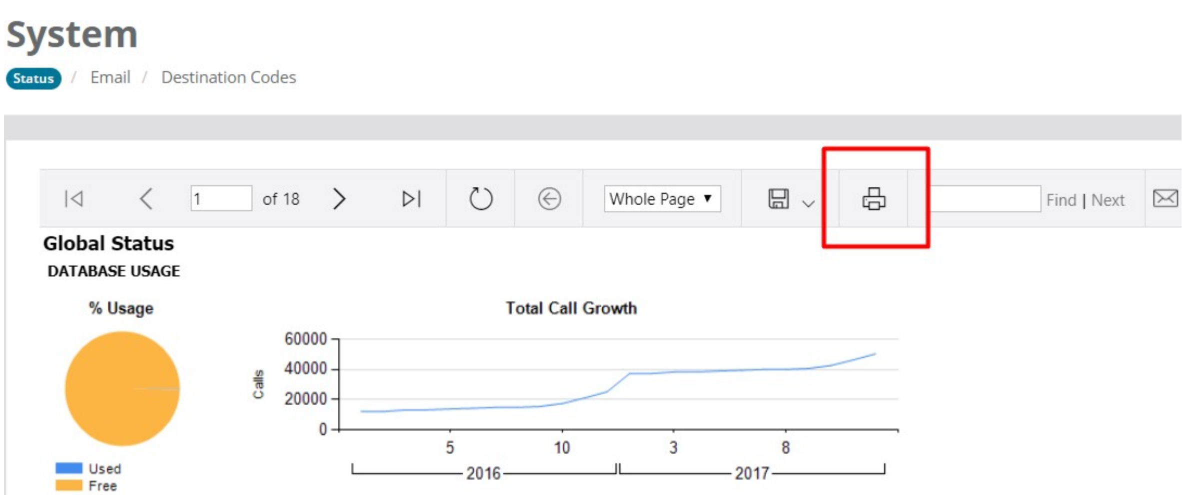
To download the Global Status Report

Users can easily download the Global Status Report in PDF/Excel/Word formats.



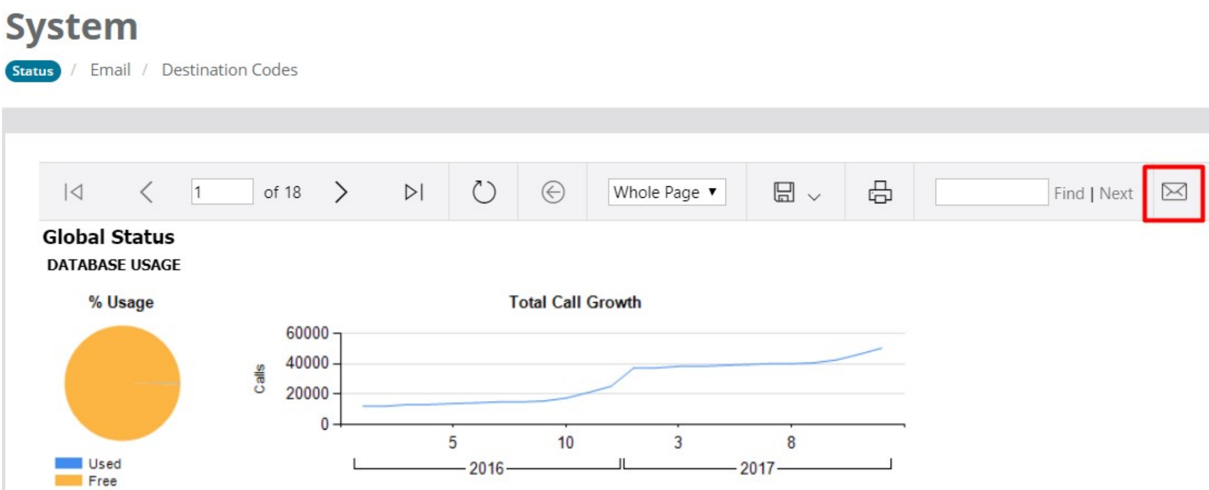
To print the Global Status Report

Click on the printer icon to print the report.



To email the Global Status Report

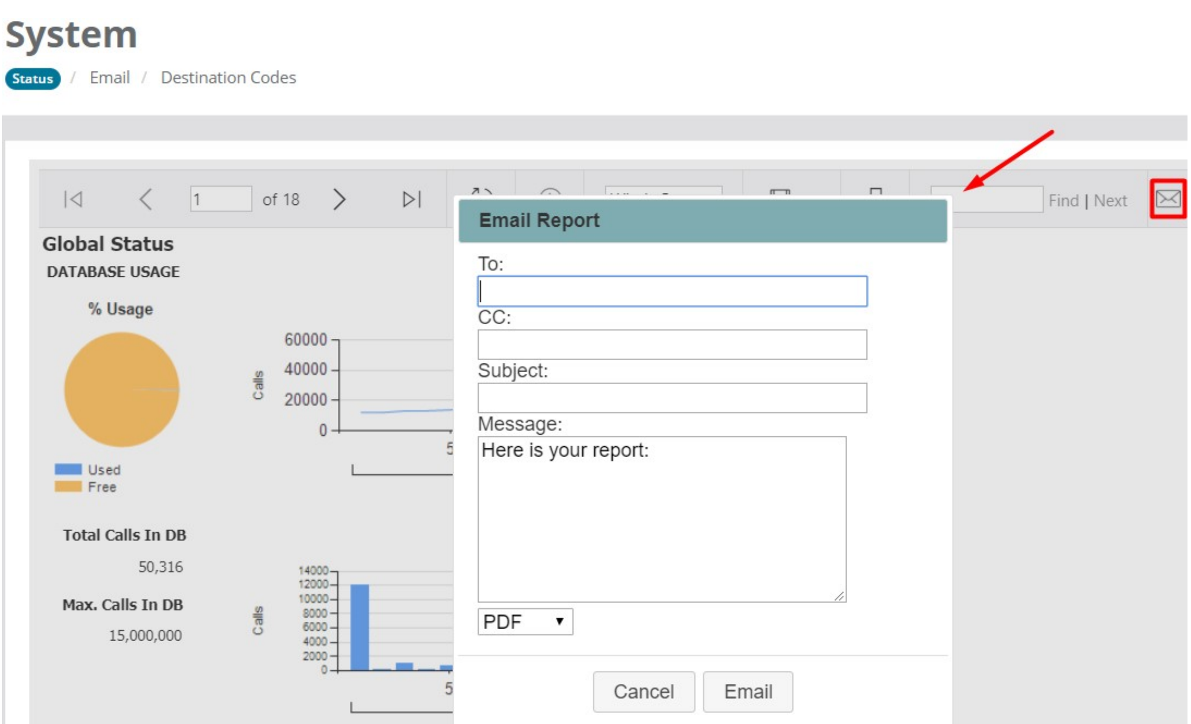
Click on the envelope icon to email the report.



The **Email Results screen** comes up.

6. Enter the recipient's email address into the To field. If required, enter email addresses into CC and BCC fields.
7. Enter the email subject into the Subject field.
8. Enter the email text into the Message field.
9. Click on the Email button.
10. The report has been emailed as an attachment in chosen (PDF/Excel/Word) format.

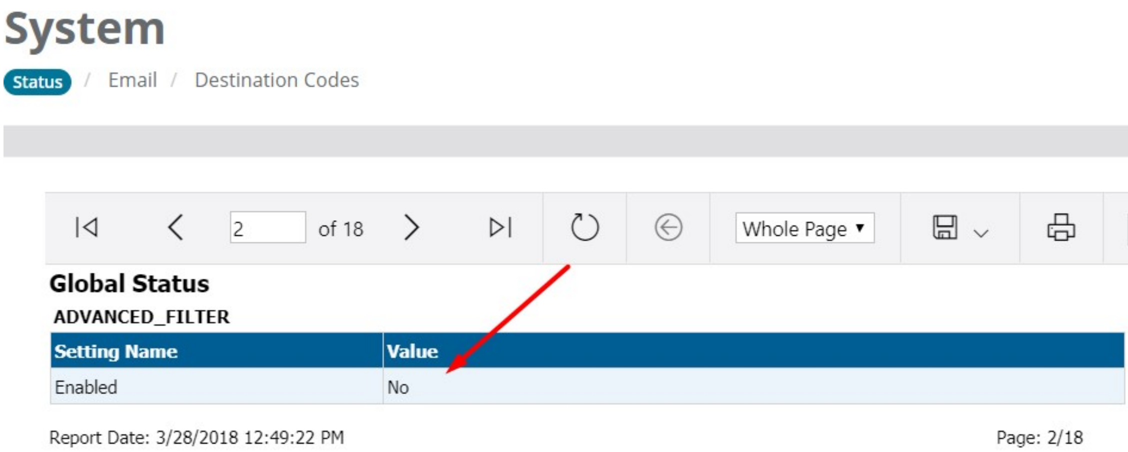
NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com



Advanced filter

Advanced Filter indicates if the Tapit 6 Report Advanced Filter feature is turned on or off.

Advanced Filter is disabled by default.



Global Status

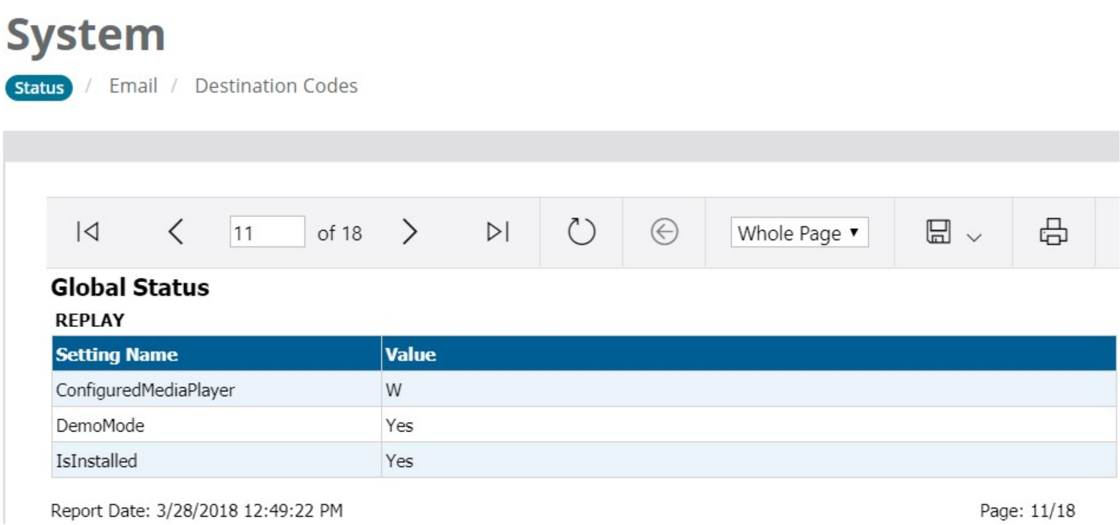
ADVANCED_FILTER

Setting Name	Value
Enabled	No

Report Date: 3/28/2018 12:49:22 PM Page: 2/18

Replay

The Replay page displays information pertaining to the Replay Voice Recording add-on.



Global Status

REPLAY

Setting Name	Value
ConfiguredMediaPlayer	W
DemoMode	Yes
IsInstalled	Yes

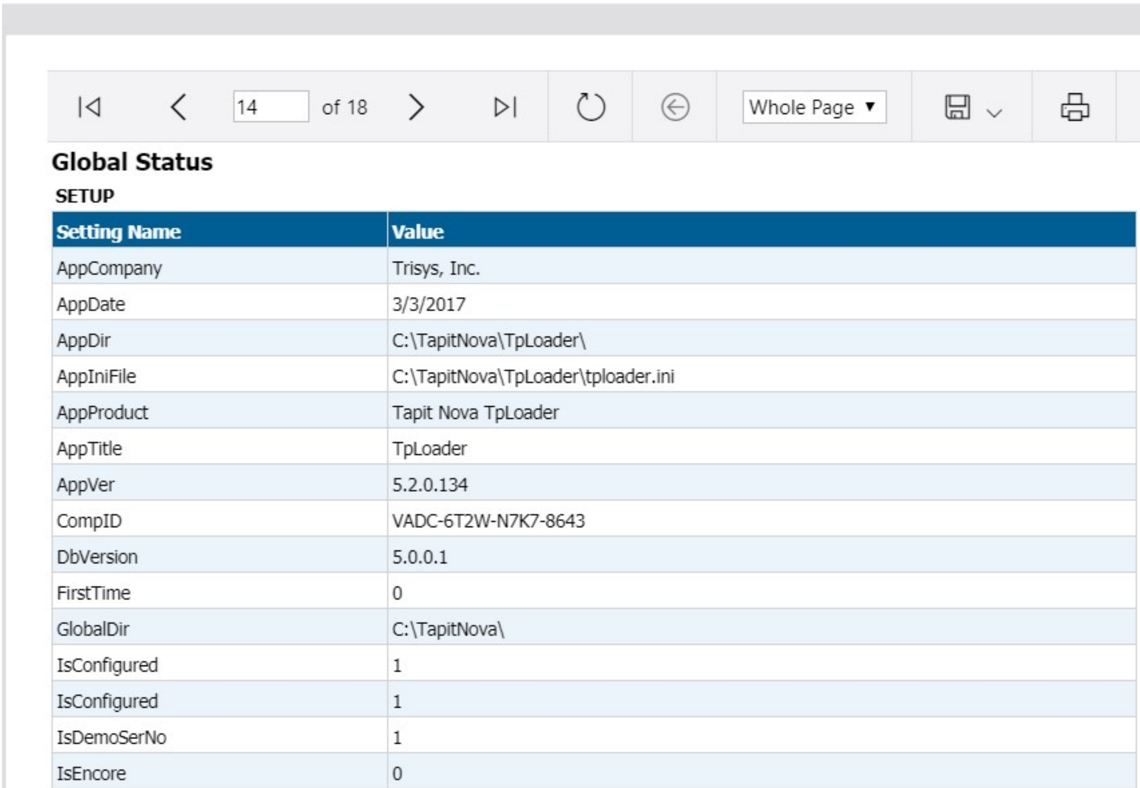
Report Date: 3/28/2018 12:49:22 PM Page: 11/18

Setup

The Setup page lists Tapit 6 system parameters.

System

Status / Email / Destination Codes



Global Status

SETUP

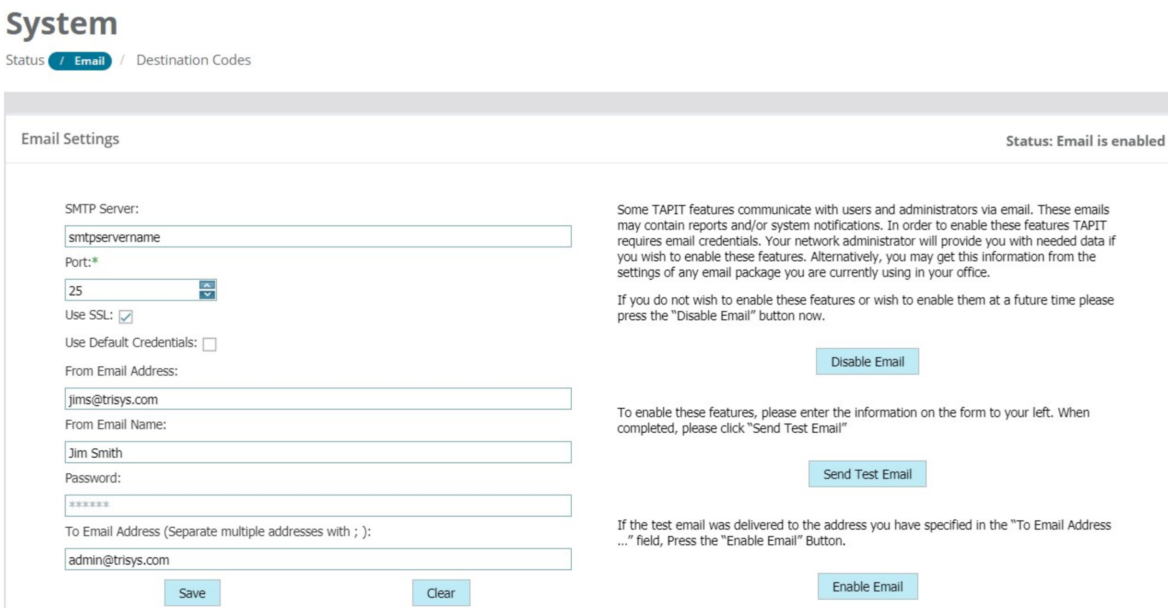
Setting Name	Value
AppCompany	Trisys, Inc.
AppDate	3/3/2017
AppDir	C:\TapitNova\TpLoader\
AppIniFile	C:\TapitNova\TpLoader\tploader.ini
AppProduct	Tapit Nova TpLoader
AppTitle	TpLoader
AppVer	5.2.0.134
CompID	VADC-6T2W-N7K7-8643
DbVersion	5.0.0.1
FirstTime	0
GlobalDir	C:\TapitNova\
IsConfigured	1
IsConfigured	1
IsDemoSerNo	1
IsEncore	0

Email

The **Email Settings screen** is used to enter email information for system notifications.

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 you would like to use 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 – enter sender's valid email address.
From Email Name – enter the name to represent sender.
Password – enter password for SMTP Server authentication (optional, only if needed).
Send Tapit Error Reports to – enter recipient's valid email address.

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



Destination Codes

A user can view, edit, add and delete records in the city and state destination table via the **Destination Code screen**.

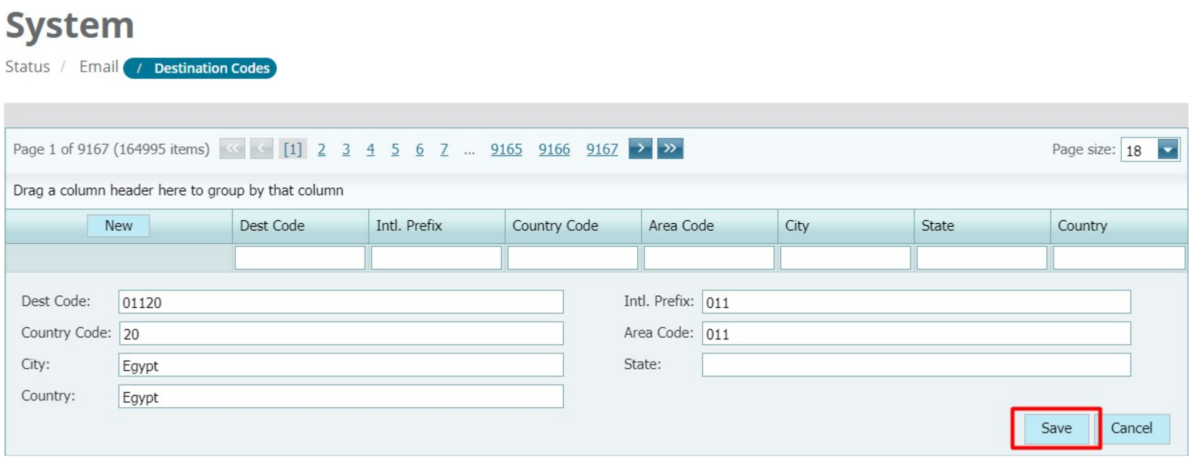
To add new INTERNATIONAL destination code

1. Login in to the application.
2. Click the System menu item, choose System menu item.
3. Click the "New" button.
4. Enter Dest Code, Country Code, City, Country, Intl. Prefix, Area Code, State.

Code – this field is a combination of international code ("011") and country code. For example: country code for Egypt is "20" thus the destination code for that country would be "01120".
Intl. Prefix – enter the international code ("011").
Country Code – enter the country code (For example: "20" for Egypt).
Trunk – enter the international code ("011").
City – enter the description for the international destination code. This description will identify the destination code on Tapit 6 reports (for example "Egypt").
State – leave this field empty.
Country – copy the value you've entered into the City field (in our example - "Egypt").

5. Click the "Save" button.

New international destination code was added in the grid.



To add new DOMESTIC destination code

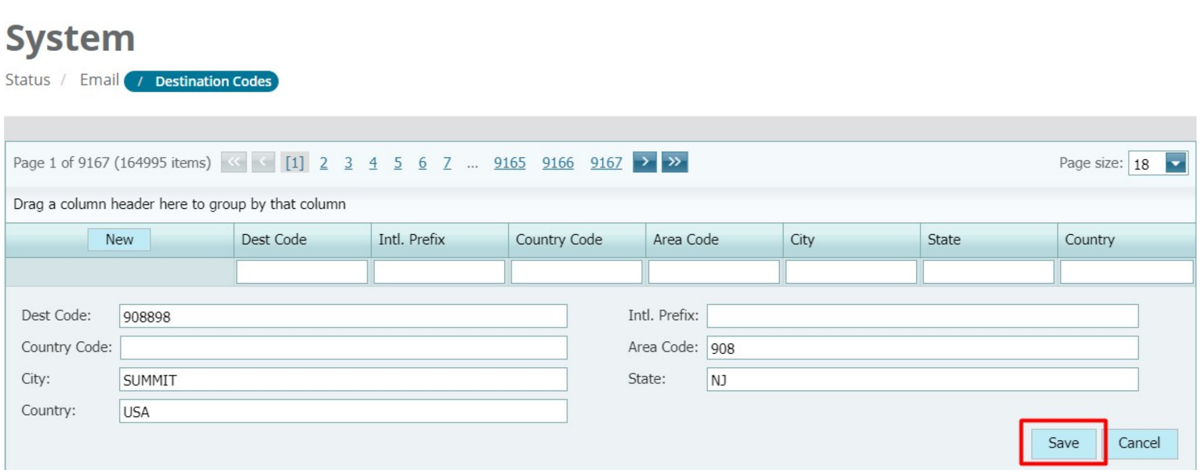
1. Login in to the application.
2. Click the System menu item, choose System menu item.
3. Click the "New" button.
4. Enter Dest Code, Country Code, City, Country, Intl. Prefix, Area Code, State.

Code – this field is a combination of Trunk and exchange. For example: Trunk for Summit, NJ is "908" and the exchange is "898", thus the destination code would be "908898".
Intl. Prefix – leave this field empty.
Country Code –leave this field empty.
Trunk – enter the Trunk (in our example - "908").
City – enter city (in our example – "SUMMIT").
State – enter state (in our example – "NJ").
Country – enter "USA".

6. Click the "Save" button.

New domestic destination code was added in the grid.

NOTE: It is suggested to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.



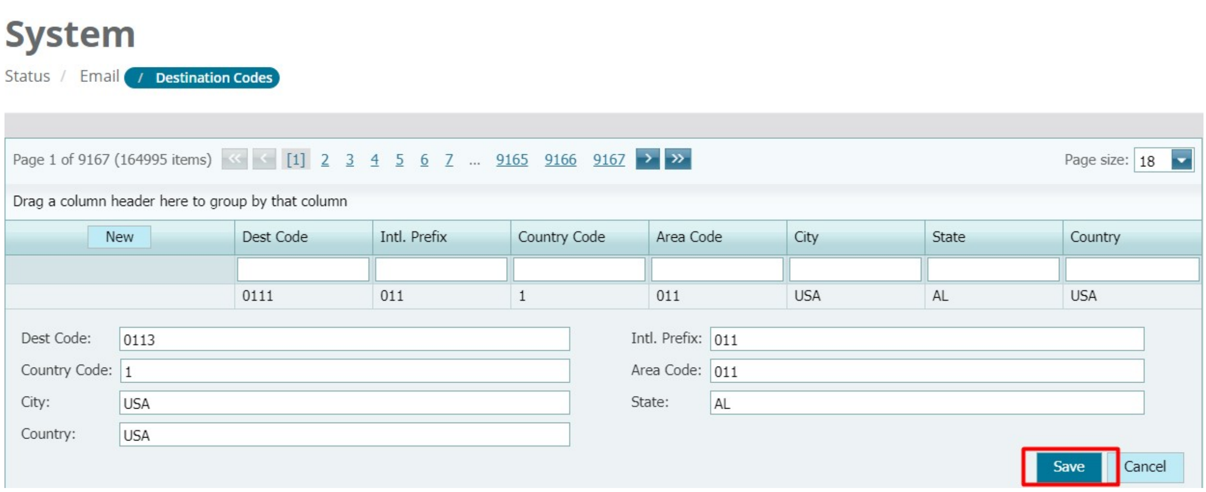
To edit an existing INTERNATIONAL destination code

1. Login in to the application.
2. Click the System menu item, choose System menu item.
3. Choose any record and click the “Edit” button.
4. Change any value.

Code – this field is a combination of international code (“011”) and country code. For example: country code for Egypt is “20” thus the destination code would be “01120”. Edit this entry if either an international code or a country code has changed.
Intl. Prefix – international code associated with the destination code (“011”). Edit this entry if an international code has changed.
Country Code – the country code associated with the destination code (For example: “20” for Egypt). Edit this entry if a country code has changed.
Trunk –the international code associated with the destination code (“011”). Edit this entry if an international code has changed.
City – enter an identifier for the international destination code. This identifier will be displayed on Tapit 6 reports (for example “Egypt”). Edit this entry if you would like to create a new identifier for the destination code.
State – leave this field empty.
Country – the same value you’ve entered into the City field (in our example - “Egypt”). Edit this entry if you have changed the value of the City field.

5. Click the “Save” button.

The international destination code was updated in the grid.



To edit an existing DOMESTIC destination code

1. Login in to the application.
2. Click the System menu item, choose System menu item.
3. Choose any record and click the “Edit” button.
4. Change any value.

Code – this field is a combination of international code (“011”) and country code. For example: country code for Egypt is “20” thus the destination code would be “01120”. Edit this entry if either an international code or a country code has changed.

Intl. Prefix – international code associated with the destination code (“011”). Edit this entry if an international code has changed.
Country Code – the country code associated with the destination code (For example: “20” for Egypt). Edit this entry if a country code has changed.
Trunk –the international code associated with the destination code (“011”). Edit this entry if an international code has changed.
City – enter an identifier for the international destination code. This identifier will be displayed on Tapit 6 reports (for example “Egypt”). Edit this entry if you would like to create a new identifier for the destination code.
State – leave this field empty.
Country – the same value you’ve entered into the City field (in our example - “Egypt”). Edit this entry if you have changed the value of the City field.

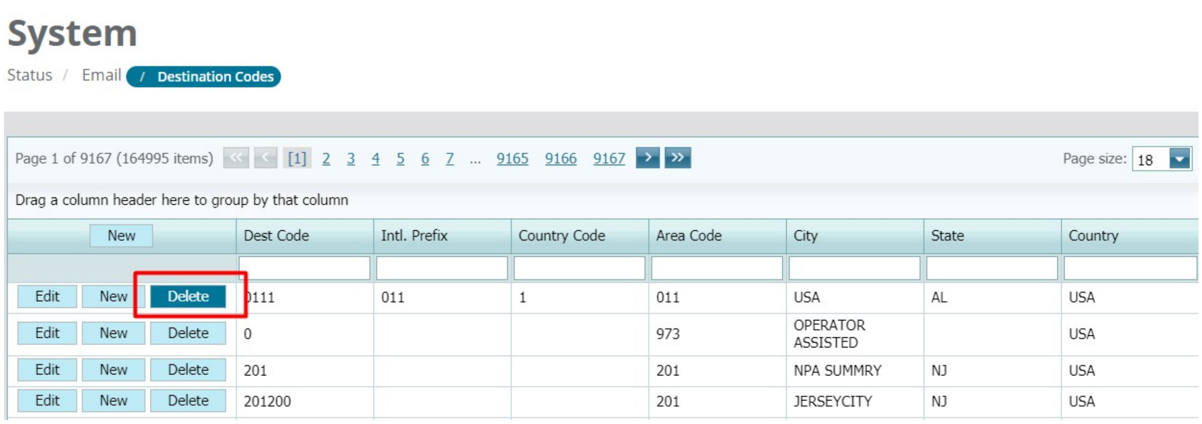
5. Click the “Save” button.

The domestic destination code was updated in the grid.

To delete an existing destination code

1. Login in to the application.
2. Click the System menu item, choose System menu item.
3. Choose any record and click the “Delete” button, confirm operation.

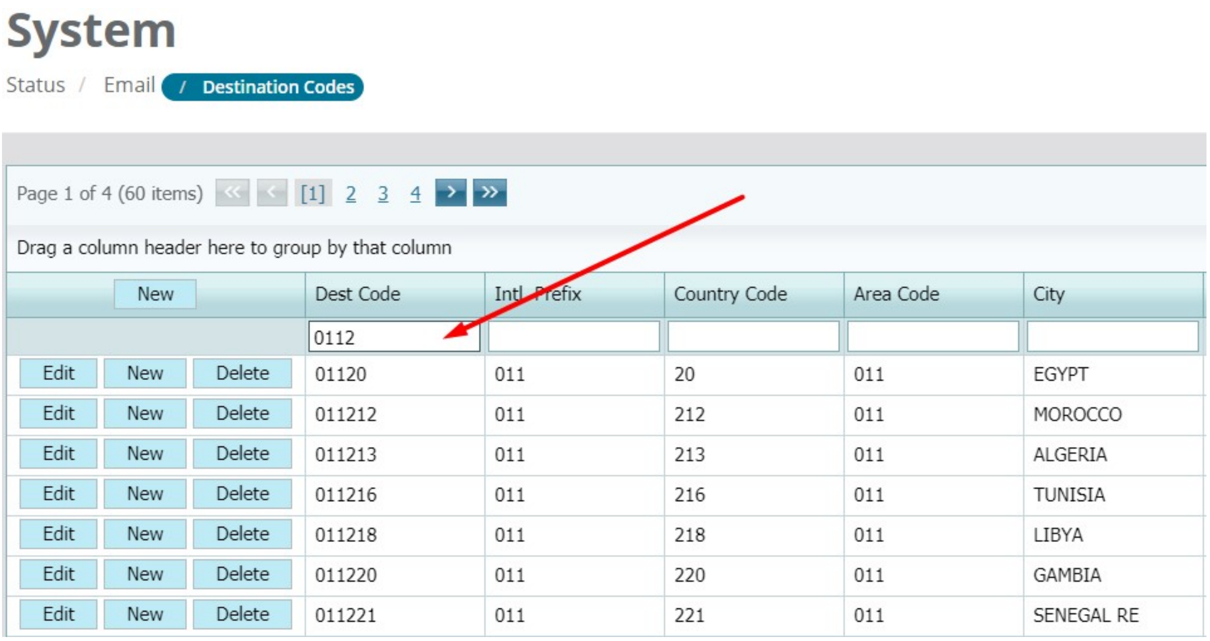
The Dest Code was deleted from the grid.



Search feature

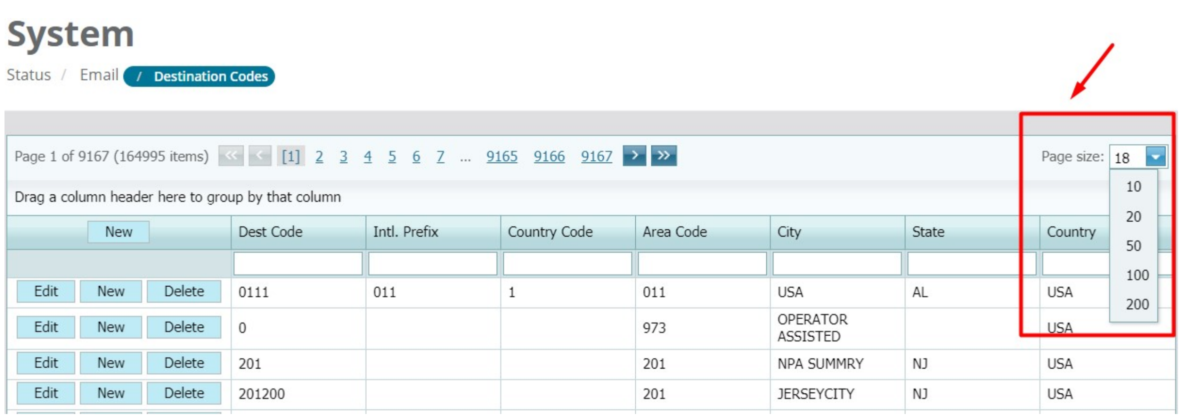
A user can search for a specific value in the grid using search control located on the tool bar above the grid header. User can use partial destination codes to display a list of codes beginning with the same set of digits.

For example, to view all destination codes starting with “0112”, user need to enter “0112” into the search field and click Enter key. The Destination Codes list will display only destination codes starting with “0112”.



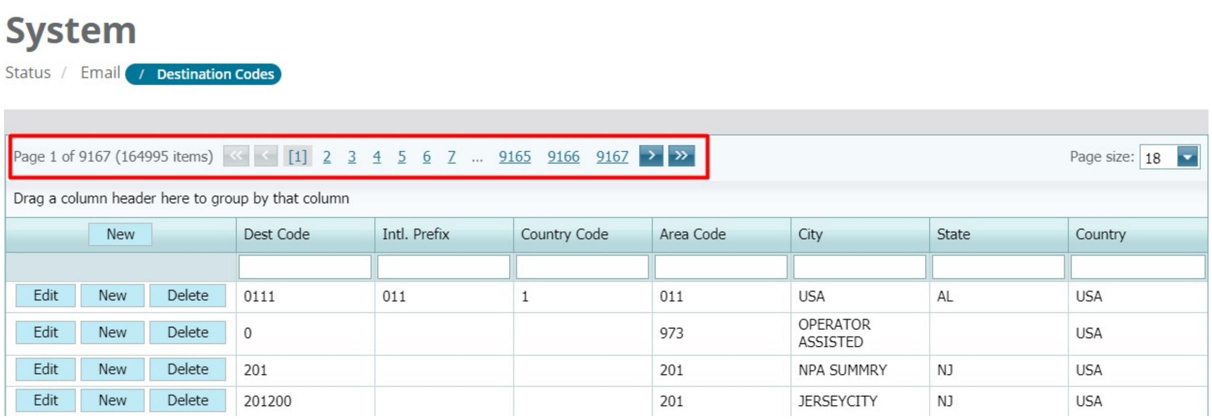
To navigate through report pages

This feature is implemented on Destination Codes tab. To view more records per page, use record view controls on the right side of the table. Select the page size option and choose from the drop-down menu to select the number of records to be viewed per page.



Paging of the grid

Use paging controls in the upper left corner of the Destination Codes tab to navigate through report pages.



Locations

Locations screen is used to manage pricing, dialing patterns, trunks and trunk groups as well as system parameters for each location. If you do not have Remote Manger this screen displays only Main location. However, if you have purchased Tapit 6 Remote Manager, and you have remote locations, this screen allows you to switch locations and manage their settings individually.

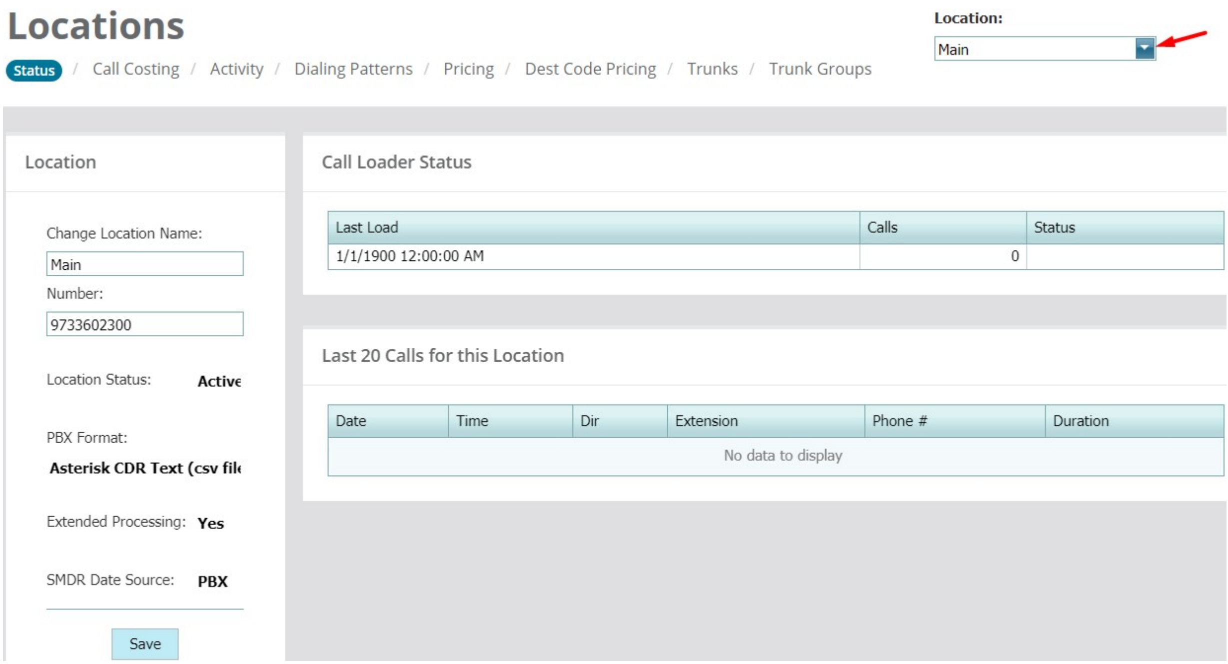
Status

Location Settings Report

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.

Status screen displays information regarding call loading for the selected location: Location

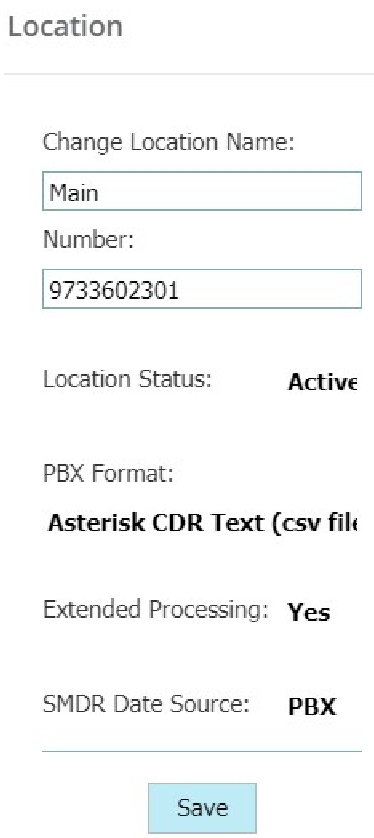
Name, Number, Location Status, PBX Format, SMDR Date Source, Call Loader Status, Last 20 Calls for this Location.



To change location name and phone number

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Change Location Name or Number and click the “Save” button.

Changes have been saved.



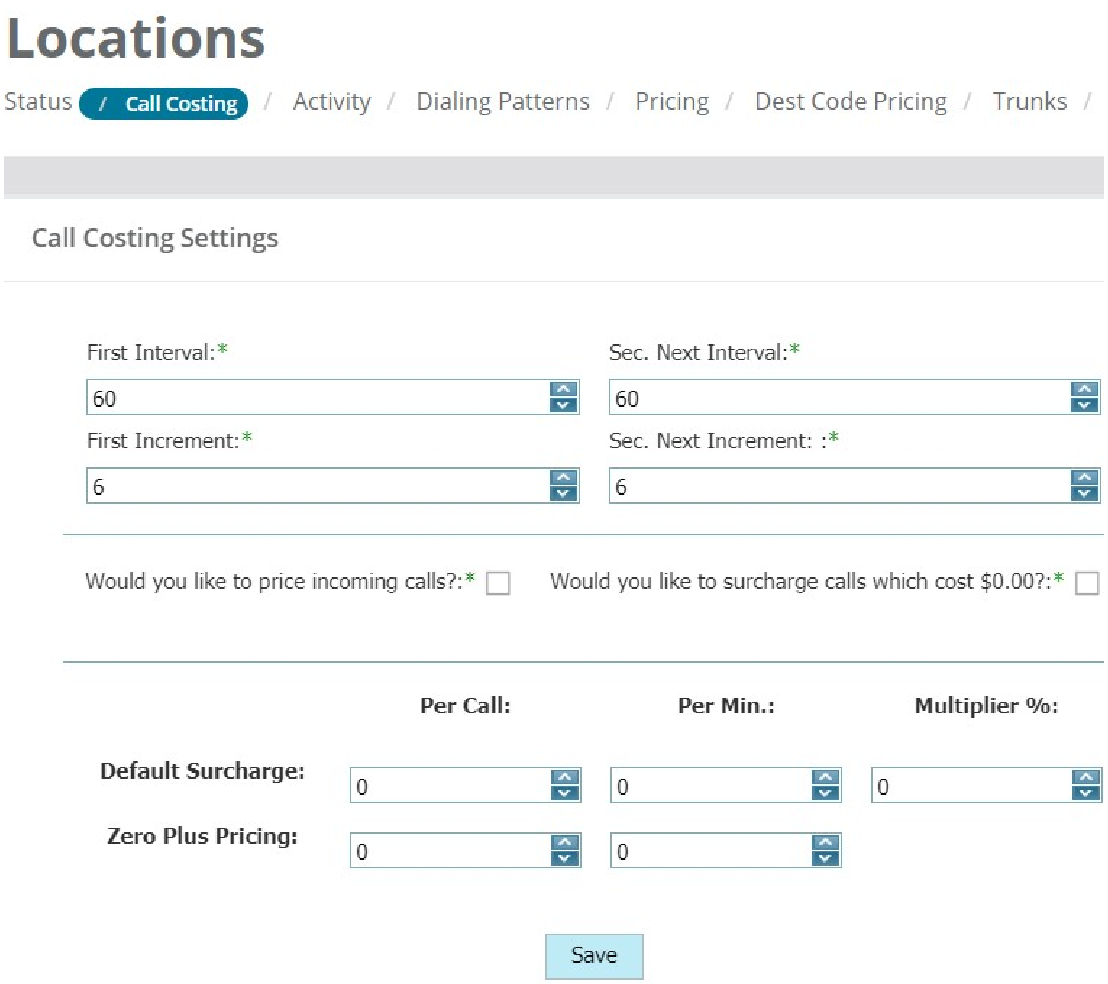
Call Costing

The **Call Costing Settings screen** is used to specify pricing intervals and increments for the selected location.

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Call Costing tab.
4. Select a location from the Select a location list.
5. Change any value and click the "Save" button.

First Interval specifies the length of the first pricing interval in seconds. This interval determines the first time the rates from Pricing table are applied to the phone call.
By default, this setting is 60 seconds – which means that if a rate for the call is $1:00 in the Pricing table, $1.00 will be applied to the call after the first 60 seconds.
Next Interval specifies the length of every pricing interval after the first one in seconds. This setting determines frequency the rates from Pricing table are applied to the phone call after the first interval is over.
By default, this setting is 60 seconds – which means that if a rate for the call is $1:00 in the Pricing table, $1.00 will be applied to the call every 60 seconds after the first interval is over.
NOTE: By default, both fields are set to 60 seconds and the calls are priced per minute
First Increment specifies time increments in seconds within the first interval.
For example, the first minute in Pricing table is set to 10 cents, First Interval equals 60 and First Increment equals 6.

If the call is shorter than 60 seconds, its cost is prorated according to the number of 6 seconds increments in the duration of the call. Thus, if the call record is 6 seconds long, it is priced at 1 cent.
However, if both First Interval and First Increment are equal to 60 seconds, a call record with the duration of 6 seconds costs 10 cents.
Next Increment specifies time increments in seconds within each interval after the first interval (within Next Interval).
For example, the next minute in Pricing table is set to 10 cents, Next Interval equals 60 and Next Increment equals 6. The cost of the call is prorated according to the number of 6 seconds increments in the duration of the call after the first interval.
Thus, if the call record is 1 minute and 6 seconds long and the first interval is 1 minute long and priced at 10 cents, the next 6 seconds are priced at 1 cent. Therefore, the total price for the call is 11 cents.
However, if both Next Interval and Next Increment equal 60 seconds, a call record with the duration of 1 minute and 6 seconds costs 20 cents.
Would you like to price incoming calls? – Check this box if you would like to price incoming calls according to the entries in the Pricing table.
Incoming calls will not be priced if this box is left un-checked.
Would you like to surcharge calls which cost $0.00?
Check this option if you would like to surcharge calls that cost $0.00.
Default Surcharge has three sub-fields:
Per Call, Per Minute, Multiplier - If there are surcharges specified on user level, via Admin\Users screen, the Call Costing surcharges are ignored for any phone calls belonging to users with surcharges.
Otherwise, Call Costing surcharges are applied on top of the call record pricing.
Per Call - enter dollar amount to apply per call surcharge. Numeric values from 0.00 to 100.00 are permitted.
Per Minute - enter dollar amount to apply per minute surcharge. Numeric values from 0.00 to 100.00 are permitted.
Multiplier – enter percentage value to apply as a surcharge i.e. 10 equals 10%.
Zero Plus Pricing @ – this field holds prices and surcharges for operator assisted calls.
Account/Trunk Processing Options:
Most Phone Systems provide only one kind of numeric code that can be used as account code or Trunk. The following settings determine if you would like to use account code or Trunk in your organization.
Click on **Client Account Code** to associate provided code numbers with client names (if your system supplies only account codes).
Click on **User Trunk** to associate provided code numbers with user names (if your system supplies only Trunks).
When **Client Account Code** is selected the **Matter Code Length** field becomes available (Matter Code is a part of the account code.).
Click on the **Matter Code Length** field to enter the number of digits used by the matter codes (This number must be shorter than a length of the account code).
However, in some cases both Trunk and account code are provided.
In that case click on the **Separate Account & Trunks** to associate account code with the client and Trunk with the user (if your system supplies both account and Trunks).



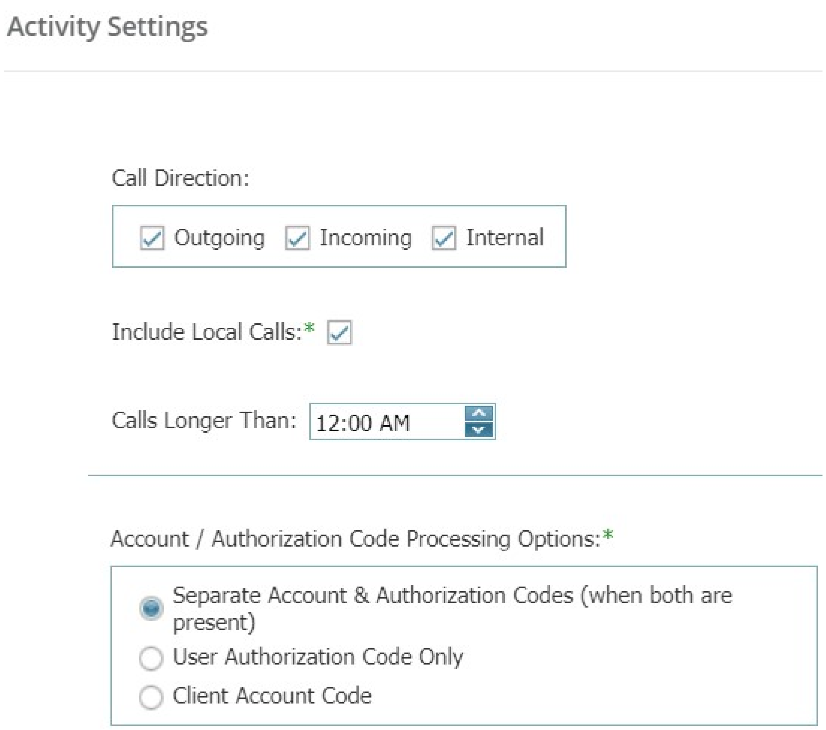
Activity

The Activity Settings screen is used to specify what type of the phone activity to store in the Tapit 6.

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Activity tab.

Store call records with Call Direction:
Outgoing – check this option to store outgoing calls. Leave it empty if you would like to exclude outgoing call activity from storage.
Incoming – check this option to store incoming calls. Leave it empty if you would like to exclude incoming call activity from storage.
Internal - – check this option to store internal calls. Leave it empty if you would like to exclude internal call activity from storage.
Include Local Calls – check this option if you want to store local calls. This option is checked by default.
Calls Longer Than – specify the minimum call length for calls you want to store in the Tapit database. Calls with a shorter duration time will not be stored in Tapit database. The default value is 00:00:00.

Account / Trunk Processing Options – select one of the options to determine whether how to process account / Trunks generated by the phone system.
Separate Account & Trunks – check this option if your phone system generates separately account codes and Trunks.
User Trunk Only Codes – check this option if your phone system generates only one code and you would like to process it as a Trunk associated with the user.
Client Account Code Only – check this option if your phone system generates only one code and you would like to process it as an account code associated with the client.



Exclude Activity For:
To add activity for a particular extension

1. Enter extension into the Extensions field.
2. Click the “Add” button.
3. Click on “Save” button to save changes.

The extension is added to the list. Any calls for this extension are not going to be stored in the Tapit 6 database.

To delete an existing extension

1. Select any extension
2. Click the “Delete” button.
3. Click on “Save” button to save changes.

The extension is removed from the list, calls associated with that extension are going to be stored in Tapit 6 database.

To add activity for a particular trunk

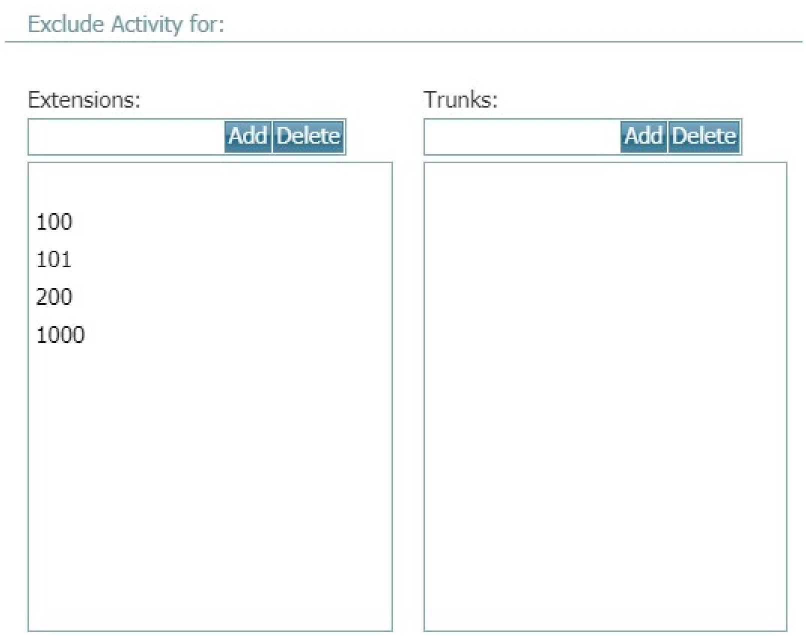
1. Enter trunk into the Trunks field.
2. Click the “Add” button.
3. Click on “Save” button to save changes.

The trunk number is added to the list. Any calls for this trunk are not going to be stored in the Tapit database.

To delete an existing trunk

1. Select any trunk
2. Click the “Delete” button.
3. Click on “Save” button to save changes.

The trunk is removed from the list, calls associated with that trunk are going to be stored in Tapit database.



Dialing Patterns

The Dialing Patterns screen is used to separate the actual telephone number from complex dialing digit sequences, so Tapit 6 can report on the telephone numbers stripped from the extra digits.

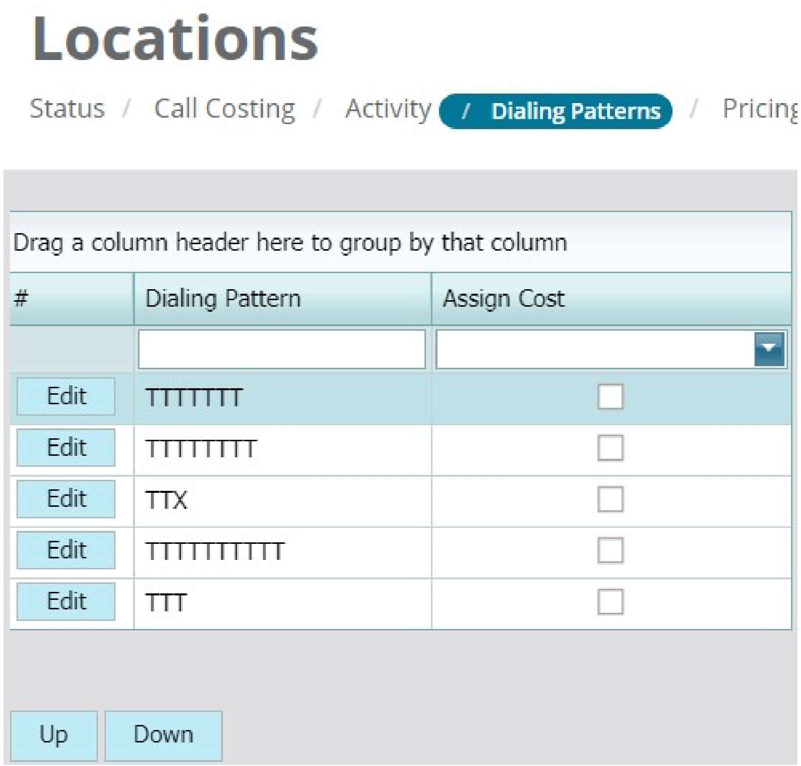
To add a dialing pattern

You may use the following characters:

- **T** - represents one digit of the telephone number (0-9)
- **0-9, #, *** - indicates a one to one correspondence between the appropriate character and the dialing string
- **N** - represents any one character of the dialing string that is not a part of the dialed number
- **X** - ignores all characters from this point on, can be used only once and after the longest dialing pattern
- **C** - indicates an area or account code that directly proceeds or follows the telephone number dialed on the SMDR string.
  When defining dialing patterns, remember that the dialing digit sequence generated by your telephone system does not always match what you have dialed, i.e. dialing 1-202-

593-8200 may generate 494-1-202-593-8200 in the phone system.

Therefore, the correct pattern to handle the above dialing sequence would be NNNTTTTTTTTTTT where NNN, is 494 that has been added to the number by the telephone system. NNN tells Tapit 6 that the first 3 digits of the dialing sequence are not a part of the actual phone number.



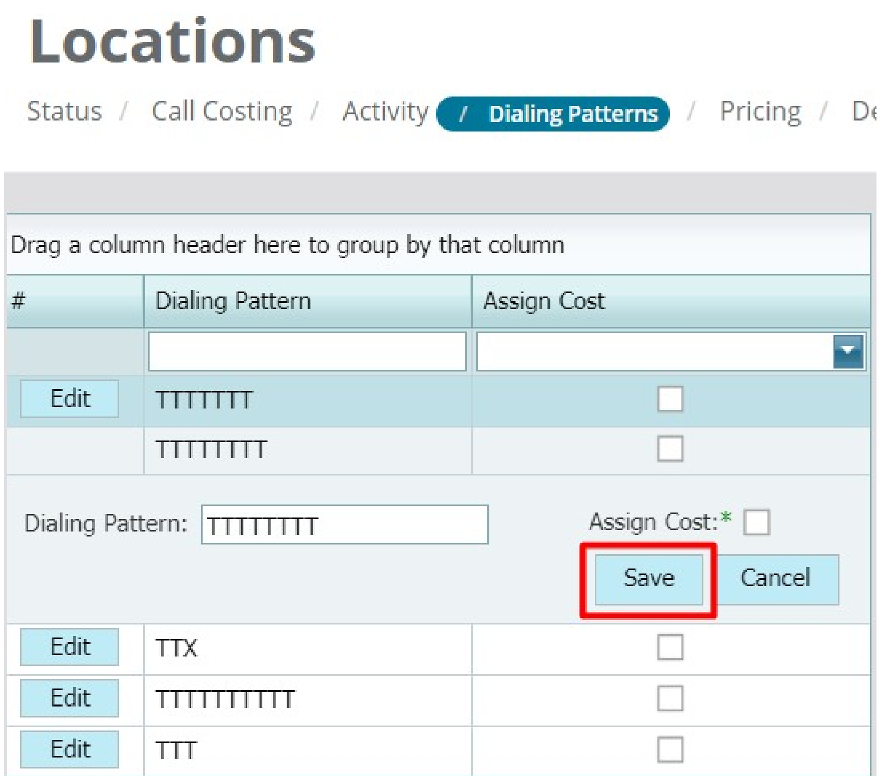
The following examples may already contain patterns that you can use.
If not, they should at least help you to create correct patterns for your environment:

DIALED COMBINATION	PATTERN
1-201-593-8200	TTTTTTTTTTT
593-8200	TTTTTTT
9-593-8200-123	9TTTTTTTNNN
1-593-8200	1TTTTTTT
10288-1-201-593-8200	10NNNTTTTTTTTTTT
1800-593-82004333#1123	TTTTTTTTTTTX
4994-1201-593-8200	4994TTTTTTTTTTT
1234-1201-593-8200	CCCCTTTTTTTTTTT
1202-593-82001234	TTTTTTTTTTCCCC

*In last two examples 1234 is an account code. This pattern can be used only if account or Trunk is generated with EVERY telephone number.

To edit an existing dialing pattern

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Dialing Patterns tab.
4. Select a location from the Select a location list.
5. Choose any item and click the "Edit" button.
6. Change Dialing Pattern. Check or uncheck the Assign Cost check box depending if you would like to price calls associated with this dialing pattern or not.
7. Click the "Save" button.



NOTE: It is strongly recommended that you exit out of the Tapit program as well as the SMDR Monitor and reboot the computer for the dialing pattern changes to take effect. The changes will affect only the calls processed after PC has been rebooted.

Pricing

The **Pricing screen** is used to enter pricing information that is going to be applied to the call records.

Common Tapit 6 Pricing Wildcards for Number Dialed Field:
L – Local. Calls made to Area codes and exchanges marked as Local under System->Locations->Dest Code Pricing.
LD – Domestic Long Distance. This covers all 10 and 11 digit dialed numbers not marked as

Local. Formerly QQQ which will work also.
TF – Toll Free Area codes. Costing for toll free numbers people dial. Currently covers 800, 888, 877, 866 and 855.
INTL – International Calls. The default charge for any International (011) call. Formerly 011 which will work also.
Px – Pricing for calls with a specific number of digits **x**. For example, P4 will cost all 4 digit dialed numbers; P6, all 6 digit dialed numbers etc.
Cx – Custom Rate. A custom rate for Area codes and exchanges you identify under System->Locations->Dest Code Pricing. You can have up to 15 custom rates (C1 through C15).
Area Code – This will cost all calls to a specific Area Code. For example, 973 will cost all calls to the 973 area code (with or without the 1).
Area Code + Exchange – This will cost all calls to that Area code and Exchange. For example, 973360 will cost all calls that begin with 973-360 (with or without the 1).
011 + a Country Code – This will cost all calls to a specific country. For example, 01181 will cost all calls to Japan.
IN – Costing Inbound calls. Please note the option to cost inbound calls under System->Locations->Call Costing must be checked for this to work.
IN + a Number – Pricing Inbound calls with a specific Caller ID number. This can be done by area code (e.g. IN973), Area Code+Exchange (e.g. IN973360) or full phone number (e.g. IN9733602300). Please note the option to cost inbound calls under System->Locations->Call Costing must be checked for this to work.
NNN – All calls not otherwise identified in the Pricing Table.
DA411 – This will cost 411 Directory Assistance calls.

NOTE: The more specific price setting the higher priority it receives.
For example, consider the following settings in the Pricing table:
919366 - is set to be priced at 5 cents per minute – all outgoing calls with Area Code 919 and exchange 366 are going to be priced at 5 cents per minute.

Drag a column header here to group by that column

New		Number Dialed	Start Time Rate / Minute			Start Time Rate / Minute			Start Time Rate / Minute		
			(HH:SS)	First	Next	(HH:SS)	First	Next	(HH:SS)	First	Next
Edit	Delete	973411	12:00			12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	DNIS2315	12:00	1.0000	1.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	IPI192.168.15.*	12:00	0.0100	0.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	IPO192.168.15.*	12:00	0.5000	0.5000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	L	12:00	0.0000	0.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	NNN	12:00	0.1000	0.1000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	QQQ	12:00	0.0500	0.0300	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	TLD0012	12:00	0.5000	0.2000	12:00	0.0000	0.0000	12:00	0.0000	0.0000

Pricing Table Example

The following examples show Number Dialed and Time/Rate the way they are entered into the Pricing table. You may find them helpful when setting up your own pricing.

Number Dialed: LD

Domestic long-distance calls are priced 11 cents per first minute interval and 8 cents per each additional minute interval.

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
00:00:00	0.11	0.08	00:00:00	0.00	0.00	00:00:00	0.00	0.00

Number Dialed: 01141 (011xxxxxx)
International calls with the 41 country code is priced 70 cents per first minute and 65 cents per each additional minute starting 9:00 AM. The rates change at 5:00 PM (17:00:00) to 60 cents per first minute and 55 cents per each additional minute. The last time interval starts at 11:00 PM (23:00:00). Then the rates are 50 cents per first minute and 45 cents per each additional minute

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
09:00:00	0.70	0.65	17:00:00	0.60	0.55	23:00:00	0.50	0.45

Number Dialed: 011
All other international calls are priced at 85 cents per each minute/interval

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
00:00	0.85	0.00	00:00	0.00	0.00	00:00	0.00	0.00

Number Dialed: L
All local calls are priced 10 cents per first minute/interval and 5 cents per each additional minute/interval.

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
00:00	0.10	0.05	00:00	0.00	0.00	00:00	0.00	0.00

NOTE: a user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

Number Dialed: 201593 (aaaxxx)
Calls made to the Area Code "201" and the exchange "593" are priced at 25 cents for the first minute/interval and 20 cents for each additional minute/interval between 8:00 AM and 11:00 AM. Between 11:00 AM and 23:00 calls are priced at 20 cents for the first minute/interval and 15 cents for each additional minute/interval. After 23:00 until 8:00 AM the rate is 11 cents for the first minute/interval and 8 cents for each additional minute/interval.

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
08:00	0.25	0.20	11:00	0.20	0.15	23:00	0.11	0.08

Number Dialed: 201 (aaa) all other calls made to the Area Code "201" are priced at 30 cents for the first minute/interval and 25 cents for each additional minute/interval between 8:00 AM and 11:00 AM. Between 11:00 AM and 23:00 calls are priced at 25 cents for the first minute/interval and 23 cents for each additional minute/interval.
After 23:00 until 8:00 AM the rate is 15 cents for the first minute/interval and 10 cents for each additional minute/interval.

Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next	Start Time (HH:MM)	Rate / Minute First	Next
08:00	0.30	0.25	11:00	0.25	0.23	23:00	0.15	0.10

To activate incoming calls pricing

The pricing of incoming calls needs to be activated via the Call Costing screen.

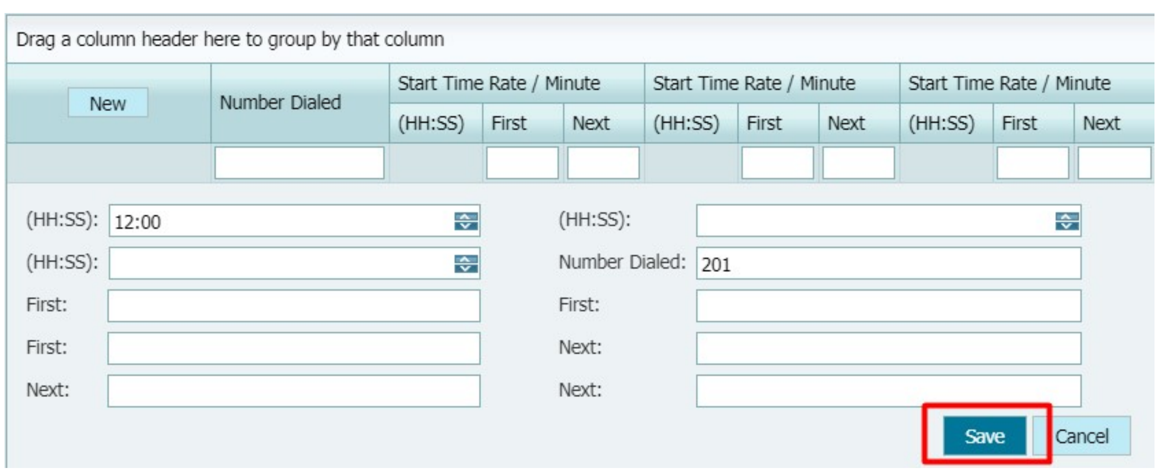
To activate incoming calls pricing

The pricing of incoming calls needs to be activated via the **Call Costing** screen. Follow the instructions below to activate incoming calls pricing.

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Call Costing tab.
4. Check the Would you like to price incoming calls? box to price incoming calls. Incoming calls will not be priced if this box is left un-checked.
5. Click on "Save" button.

To add a new price setting with different call rates for different times of the day

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Click the “New” tab.
5. Enter the new Number Dialed code. Enter Start Time, enter the rate for the first minute and the next minute, start time of the second daily time interval, Number Dialed.
Enter the start time of the first daily interval in military time format into the first **Start Time** field.
Enter the rate for the first minute and the next minute into the **First** and the **Next** fields for this daily time interval.
Enter the start time of the second daily time interval into the second **Start Time** field.
Enter rate for the first minute and the next minute into the **First** and the **Next** fields for this daily time interval.
Depending on how many times call rate changes throughout a day, you can leave the third time interval blank, or you can enter start time and rates into the third daily time interval fields in the same fashion you have entered them into the previous intervals.
6. Click the “Save” button.



NOTE: when populating Pricing table, please refer to the sections above, Guidelines for Number Dialed Field and Pricing Table Example, on help with price settings

Example of a call rate changing three times throughout a day:

- First time interval starting at 9:00:00 (9:00 AM) - calls are priced 70 cents per first minute and 65 cents per each additional minute
- Second time interval starting at 17:00:00 (5:00 PM) - the rates change to 60 cents per first minute and 55 cents per each additional minute
- Third time interval starting at 23:00:00 (11:00 PM) - the rates change to 50 cents per first minute and 45 cents per each additional minute

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
09:00:00	0.70	0.65	17:00:00	0.60	0.55	23:00:00	0.50	0.45

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. "973411".

To add a new price setting with the same call rate throughout the day

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Click the "New" tab.
5. Enter Number Dialed.

Enter call rates into the **First** and the **Next** fields for the first-time interval.
Leave all other fields empty. If a rate for the first minute is the same as a rate for each additional minute, enter the same rate into the **First** and the **Next** fields. Both fields have to be populated.

6. Click the "Save" button.

Example of pricing with one 24 hours long interval:
Calls are priced 11 cents per first minute interval and 8 cents per each additional minute interval

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
00:00:00	0.11	0.08	00:00:00	0.00	0.00	00:00:00	0.00	0.00

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. "973411".

To add a new price setting with the flat rate per call

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Click the "New" tab.
5. Enter Number Dialed. Enter the flat rate value into the **First** field under the first **Rate / Minute** section. Leave all other fields empty.

Call records for the specified number dialed are going to be priced at the flat rate of the first minute interval regardless of the call duration or the **System/Locations/Call Costing** price increment settings.

6. Click the "Save" button.

Example of the flat rate price setting – flat rate is 33 cents per call.
NOTE: the only populated field is the **First** field of the first **Rate/Minute** interval.

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
00:00:00	0.33	0.00	00:00:00	0.00	0.00	00:00:00	0.00	0.00

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. "973411".

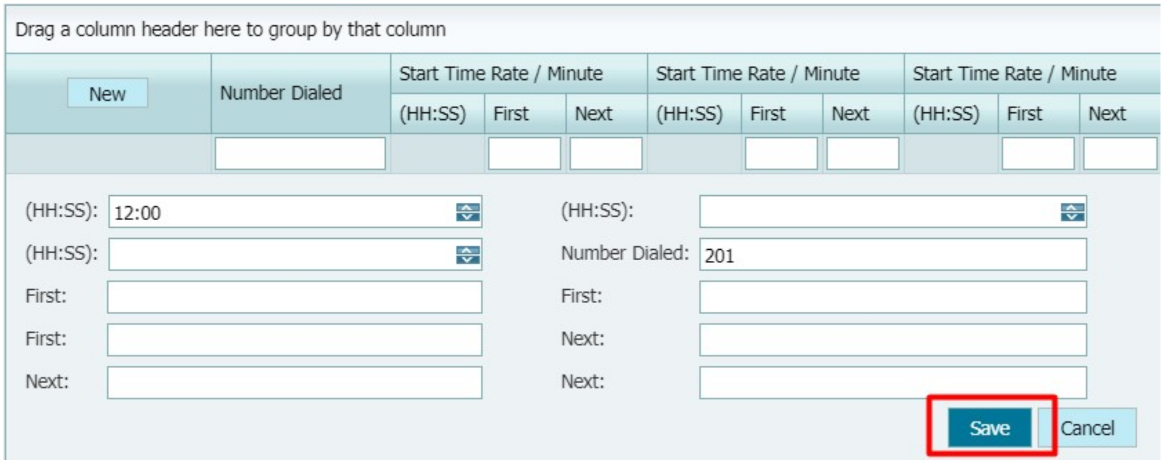
To edit an existing price setting with different call rates for different times of the day

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Choose any record and click the "Edit" button.
5. If needed, change the Number Dialed code.

Enter the start time of the first daily interval in military time format into the first Start Time field.
Enter the rate for the first minute and the next minute into the First and the Next fields for this daily time interval.
Enter the start time of the second daily time interval into the second Start Time field.
Enter rate for the first minute and the next minute into the First and the Next fields for this daily time interval.

Depending on how many times call rate changes throughout a day, you can leave the third-time interval blank, or you can enter start time and rates into the third daily time interval fields in the same fashion you have entered them into the previous intervals.

6. Click the "Save" button.



Example of a call rate changing three times throughout a day:
First time interval: starting at 09:00:00 (9:00 AM) - calls are priced 70 cents per first minute and 65 cents per each additional minute
Second time interval: starting at 17:00:00 (5:00 PM) - the rates change to 60 cents per first minute and 55 cents per each additional minute
Third time interval: starting at 23:00:00 (11:00 PM) - the rates change to 50 cents per first minute and 45 cents per each additional minute

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
09:00:00	0.70	0.65	17:00:00	0.60	0.55	23:00:00	0.50	0.45

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. “973411”.

To edit an existing price setting with the same call rate throughout the day

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Choose any record and click the “Edit” button.
5. If needed, change the Number Dialed code.

Enter call rates into the First and the Next fields for the first-time interval. Leave all other fields empty. If a rate for the first minute is the same as a rate for each additional minute, enter the same rate into the First and the Next fields. Both fields have to be populated.

5. Click the “Save” button.

Example of pricing with one 24 hours long interval:

Calls are priced 11 cents per first minute interval and 8 cents per each additional minute interval

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
00:00:00	0.11	0.08	00:00:00	0.00	0.00	00:00:00	0.00	0.00

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. "973411".

To edit an existing price setting with the flat rate per call

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Choose any record and click the "Edit" button.
5. If needed, change the Number Dialed code.

Enter the flat rate value into the First field under the first Rate / Minute section. Leave all other fields empty.
Call records for the specified number dialed are going to be priced at the flat rate of the first minute interval regardless of the call duration or the System/Locations/Call Costing price increment settings.

5. Click the "Save" button.

Enter the flat rate value into the **First** field under the first **Rate / Minute** section. Leave all other fields empty.
Call records for the specified number dialed are going to be priced at the flat rate of the first minute interval regardless of the call duration or the **System/Locations/Call Costing** price increment settings.

Example of the flat rate price setting – flat rate is 33 cents per call.
NOTE: the only populated field is the **First** field of the first **Rate/Minute** interval.

Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
(HH:MM)	First	Next	(HH:MM)	First	Next	(HH:MM)	First	Next
00:00:00	0.33	0.00	00:00:00	0.00	0.00	00:00:00	0.00	0.00

NOTE:
When pricing local calls: A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The System/Locations/Dest Code Pricing screen is used to mark a selection of destination codes as Local (see page 120 for DEST CODE PRICING section).

An exchange must be prefixed by the local Area Code. I.e. 411 calls must be entered with the local Area Code – i.e. “973411”.

To delete an existing price setting

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Pricing tab.
4. Choose any record and click the “Delete” button, confirm operation.

The price was removed from the grid.

Locations

Status / Call Costing / Activity / Dialing Patterns / Pricing / Dest Code Pricing / Trunks / Trunk Groups

Drag a column header here to group by that column

New		Number Dialed	Start Time	Rate / Minute		Start Time	Rate / Minute		Start Time	Rate / Minute	
			(HH:SS)	First	Next	(HH:SS)	First	Next	(HH:SS)	First	Next
Edit	Delete	973411		0.1000	0.0800		0.1100			0.1000	
Edit	Delete	DNIS2315	12:00	1.0000	1.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	IPI192.168.15.*	12:00	0.0100	0.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	IPO192.168.15.*	12:00	0.5000	0.5000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	L	12:00	0.0000	0.0000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	LD			0.0800		0.1100				
Edit	Delete	NNN	12:00	0.1000	0.1000	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	QQQ	12:00	0.0500	0.0300	12:00	0.0000	0.0000	12:00	0.0000	0.0000
Edit	Delete	TLD0012	12:00	0.5000	0.2000	12:00	0.0000	0.0000	12:00	0.0000	0.0000

TRISYS INC.

Dest Code Pricing tab

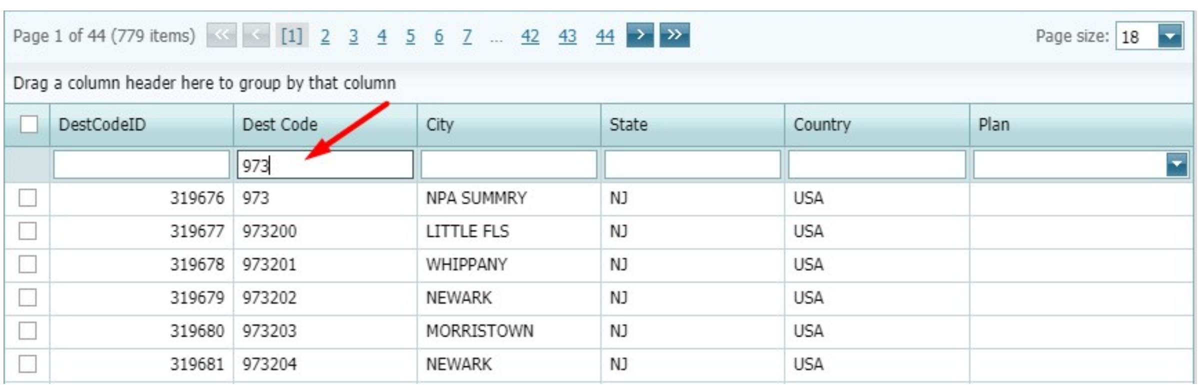
A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The Dest **Code Pricing screen** is used to mark a selection of destination codes as Local.

To mark destination codes as Local

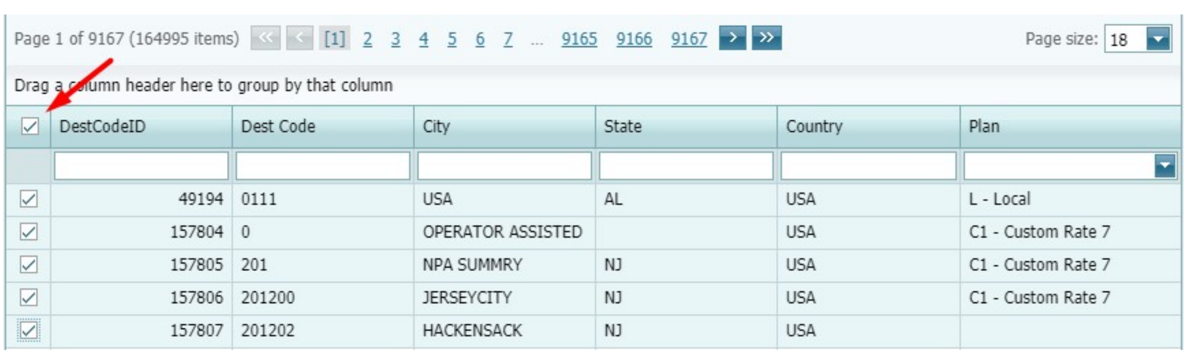
1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Dest Code Pricing tab.
4. Select location from Location list.
5. Check destination codes with you like to mark as Local.

NOTE: User can use partial destination codes to display a list of codes beginning with the same set of digits. To accomplish that, user should enter at least first three digits of the destination code into the Destination Codes beginning with: search field and click the "Go" button.

For example, to view all destination codes starting with "973", user should enter "973" into the search field and click the "Go" button. The Destination Codes list displays only destination codes starting with "973".



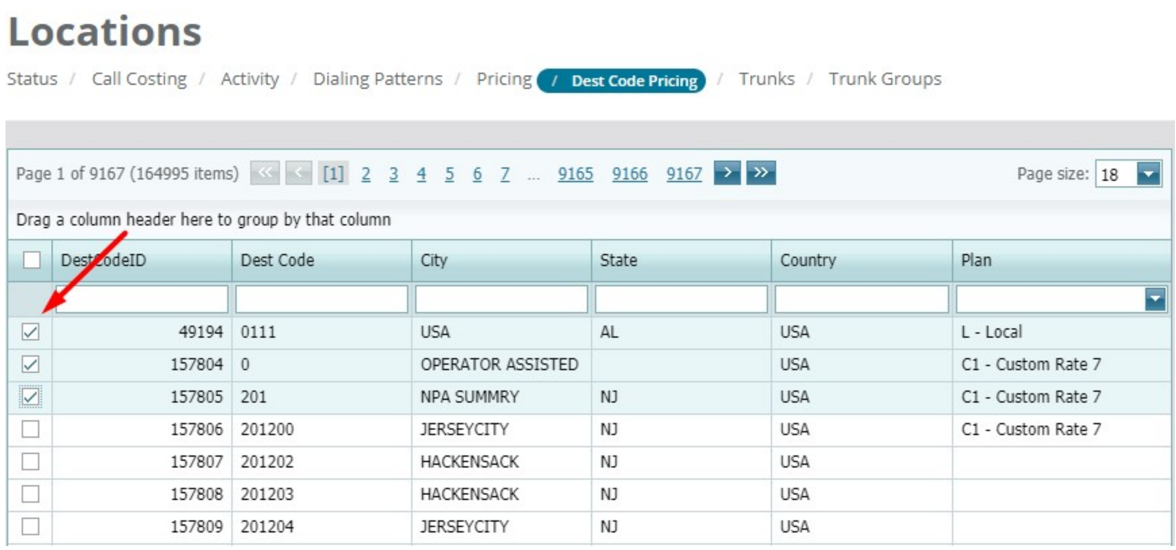
To select all displayed destination codes, click on the check box on Dest Code list header.



6.Select L-Local from the Select a Pricing Plan list on the right-hand side.
7.Click the "Apply" button.

The destination code list reflects changes. There is a pricing plan indicator L next to each of the selected destination code. These destination codes are going to be priced according to the local price settings defined in the Pricing table (System/Location/Pricing). Local price settings must exist in the Pricing table in order to price Local calls.

NOTE: It is suggested to run Reindex Database (Main Menu/Maintenance/Reindex Database) after changing pricing plan information for destination codes.



To clear destination codes pricing plan

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Dest Code Pricing tab.
4. Select location from Location list.
5. Check destination codes you would like reset. Resetting will erase already chosen pricing plan assignment.

NOTE: User can use partial destination codes to display a list of codes beginning with the same set of digits. To accomplish that, user should enter at least first three digits of the destination code into the Destination Codes beginning with: search field and click the "Go" button.

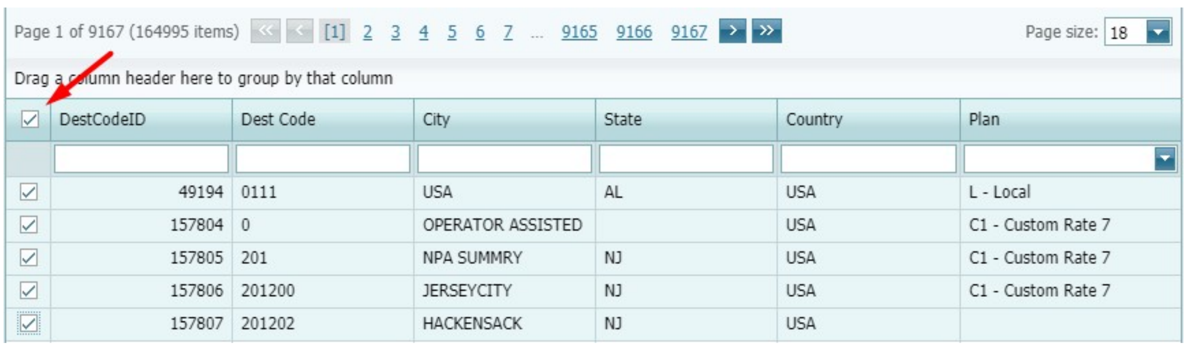
For example, to view all destination codes starting with "973", user should enter "973" into the search field and click the "Go" button. The Destination Codes list displays only destination codes starting with "973".

Page 1 of 44 (779 items) [1] 2 3 4 5 6 7 ... 42 43 44 Page size: 18

Drag a column header here to group by that column

	DestCodeID	Dest Code	City	State	Country	Plan
		973				
	319676	973	NPA SUMMRY	NJ	USA	
	319677	973200	LITTLE FLS	NJ	USA	
	319678	973201	WHIPPANY	NJ	USA	
	319679	973202	NEWARK	NJ	USA	
	319680	973203	MORRISTOWN	NJ	USA	
	319681	973204	NEWARK	NJ	USA	

To select all displayed destination codes, click on the check box on Dest Code list header.



Page 1 of 9167 (164995 items) [1] 2 3 4 5 6 7 ... 9165 9166 9167 Page size: 18

Drag a column header here to group by that column

☑	DestCodeID	Dest Code	City	State	Country	Plan
☑	49194	0111	USA	AL	USA	L - Local
☑	157804	0	OPERATOR ASSISTED		USA	C1 - Custom Rate 7
☑	157805	201	NPA SUMMRY	NJ	USA	C1 - Custom Rate 7
☑	157806	201200	JERSEYCITY	NJ	USA	C1 - Custom Rate 7
☑	157807	201202	HACKENSACK	NJ	USA	

8. Click the "Reset Codes" button.

The destination code list reflects changes. There is a pricing plan indicator L next to each of the selected destination code. These destination codes are going to be priced according to the local price settings defined in the Pricing table (System/Location/Pricing). Local price settings must exist in the Pricing table in order to price Local calls.

NOTE: It is suggested to run Reindex Database (Main Menu/Maintenance/Reindex Database) after changing pricing plan information for destination codes.

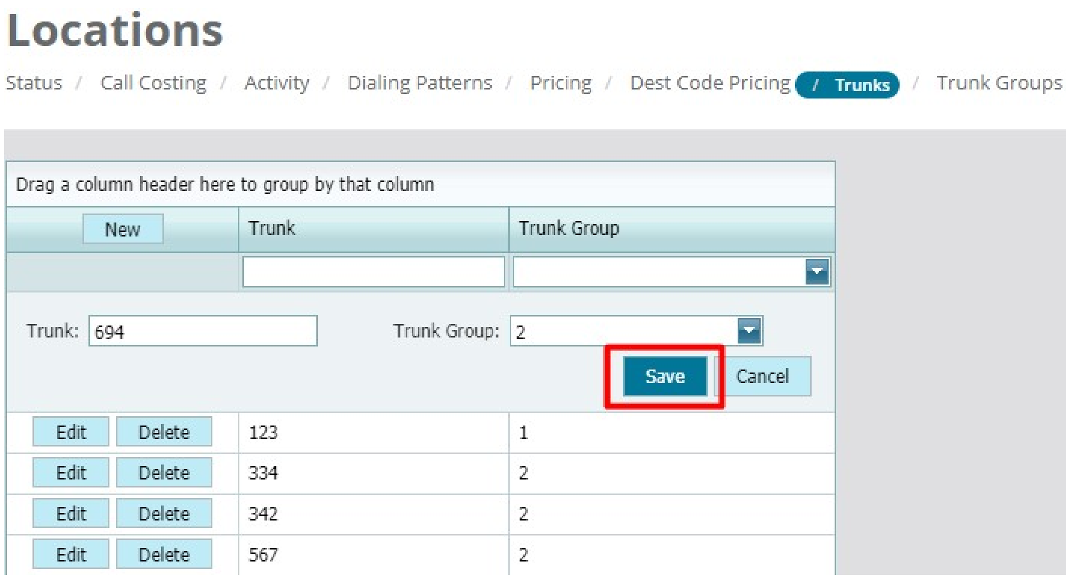
Trunks

A user has to identify Local destination codes so that price settings associated with Local Calls are applied to the correct call records. The **Dest Code Pricing screen** is used to mark a selection of destination codes as Local.

To add a new trunk

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunks tab.
4. Select location from Location list.
5. Click the "New" button.
6. Enter Trunk, choose Trunk Group from drop-down list.
7. Click the "Save" button.

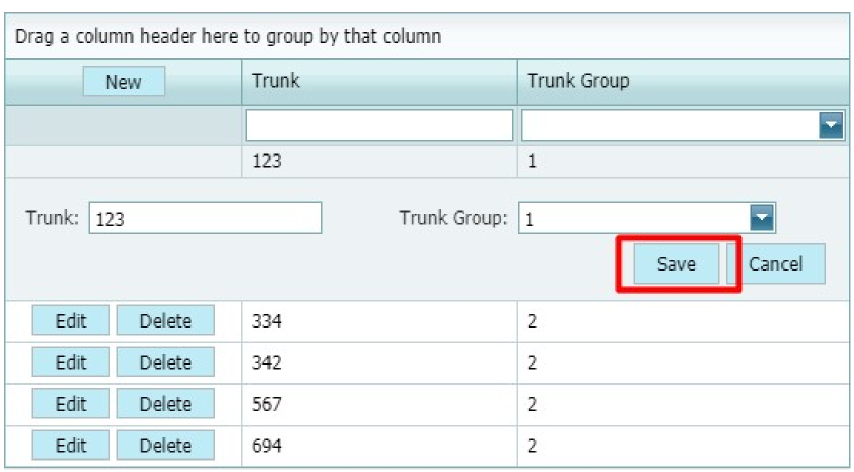
The trunk is removed from the list.



To edit an existing trunk

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunks tab.
4. Select location from Location list.
5. Choose any record and click the “Edit” button.
6. Change any values and click the “Save” button.

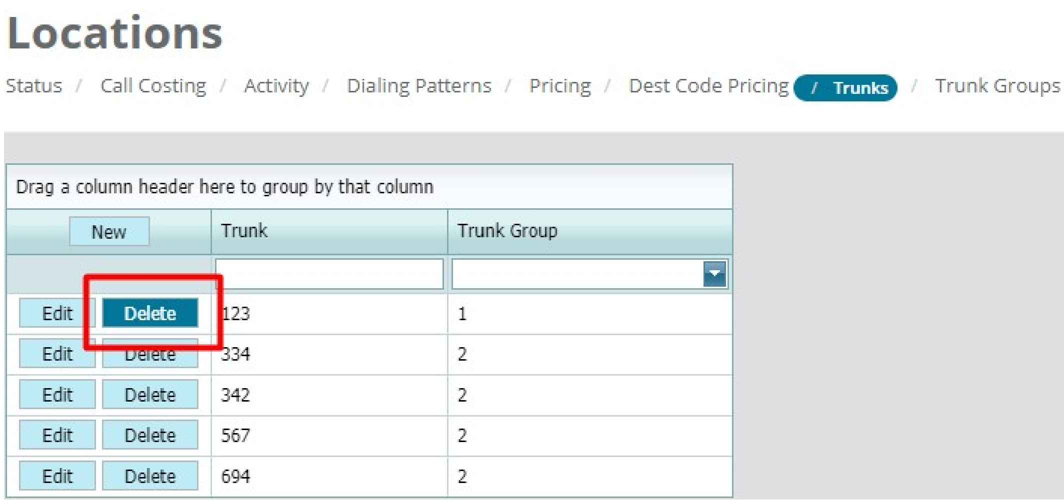
The Trunks list reflects revised trunk.



To delete an existing trunk

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunks tab.
4. Select location from Location list.
5. Choose any record and click the “Delete” button, confirm operation.

The Trunk was removed from the Trunks list.



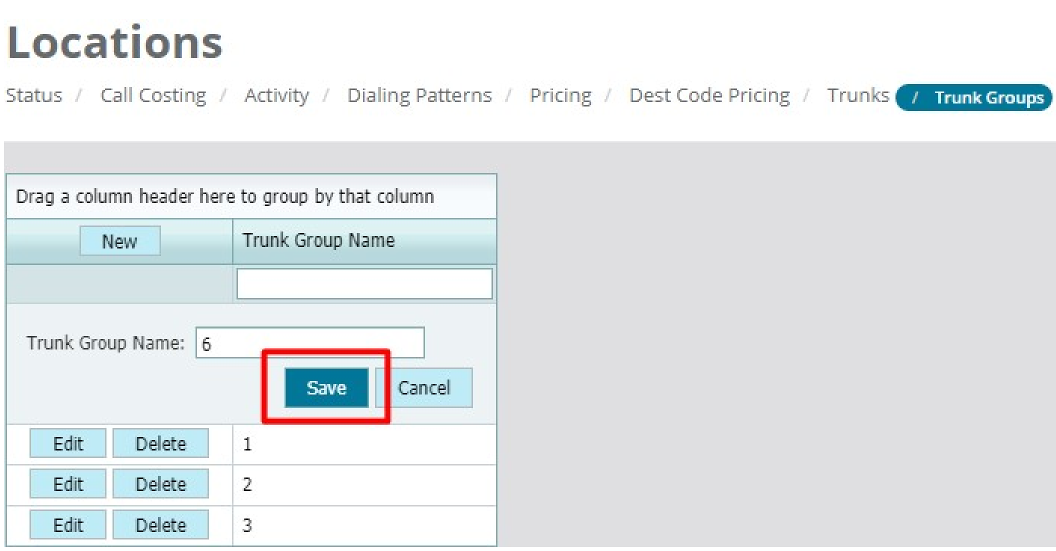
Trunk Groups

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

To add a new Trunk Group

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunk Groups tab.
4. Select location from Location list.
5. Click the "New" button.
6. Enter Trunk Group Name.
7. Click the "Save" button.

New Trunk Group was added into the list.

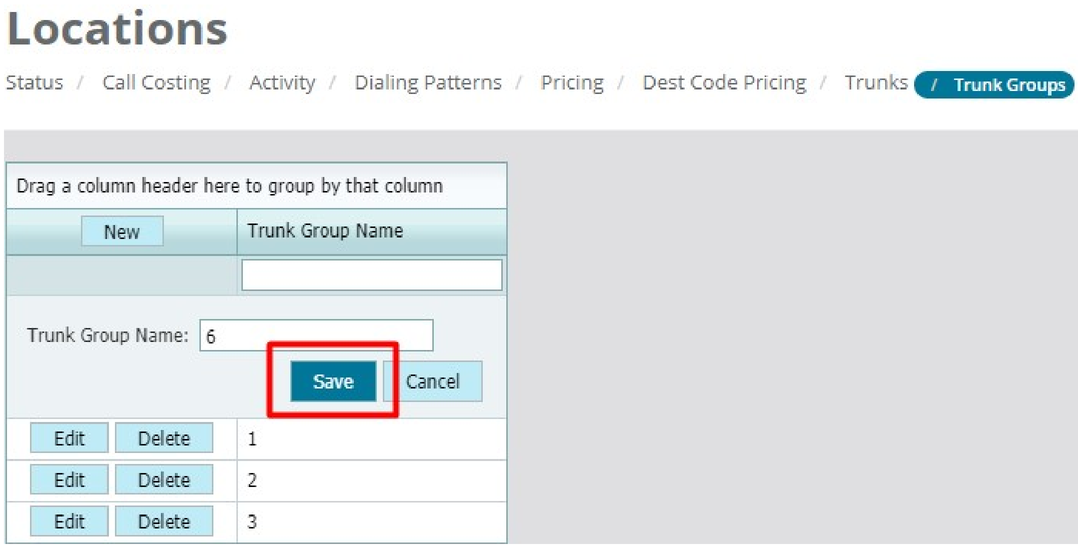


To edit an existing Trunk Groups

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunk Groups tab.

4. Select location from Location list.
5. Choose any record from grid and click the “Edit” button.
6. Change Trunk Group Name and click the “Save” button.

The Trunk Group was updated in the list.



To delete an existing Trunk Group

1. Login in to the application.
2. Click the System menu item, choose Locations menu item.
3. Select Trunk Groups tab.
4. Select location from Location list.
5. Choose any record from grid and click the “Delete” button, confirm operation.

The trunk group has been deleted and all assigned to it trunks have been released.

Tasks

Tasks screen is used to schedule tasks, run reports, load calls, reindex database, recost call records, export data, call maintenance, delete all users, delete all clients, archive calls, restore calls, export billing data, backup Tapit, upgrade Tapit. Any task can be run automatically daily, weekly, monthly, within desired time/date interval, or only once.

This screen shows user running tasks and log of completed tasks.

Time for schedule reports:

Run Once – the report will run only once at a specified time.

Daily - the report will run every day at a specified time.
For example, if a report is scheduled to run at 23:00 (11:00 PM) the system waits until 11:00 PM every day and runs the scheduled report.

Daily (M - F) - the report will run every day from Monday till Friday at a specified time.

Weekly - checking this option, user should select day of the week for running the report.

Interval - when the Interval option is selected the screen displays a list of time intervals. The report can be scheduled to run repeatedly after a selected time interval.

Monthly - user should choose start date and start time. The report can be scheduled to run every month on a selected day of the month at a specified time.

NOTE: Database backups and archiving calls are highly recommended before using this task option. Call records exported and deleted using the Call Maintenance task cannot be restored.

See page 164 on how to Archive Calls and see page 170 on how to Backup Tapit database.

If archive is available from Archive Calls task, see page 167 on how to Restore Call Records.

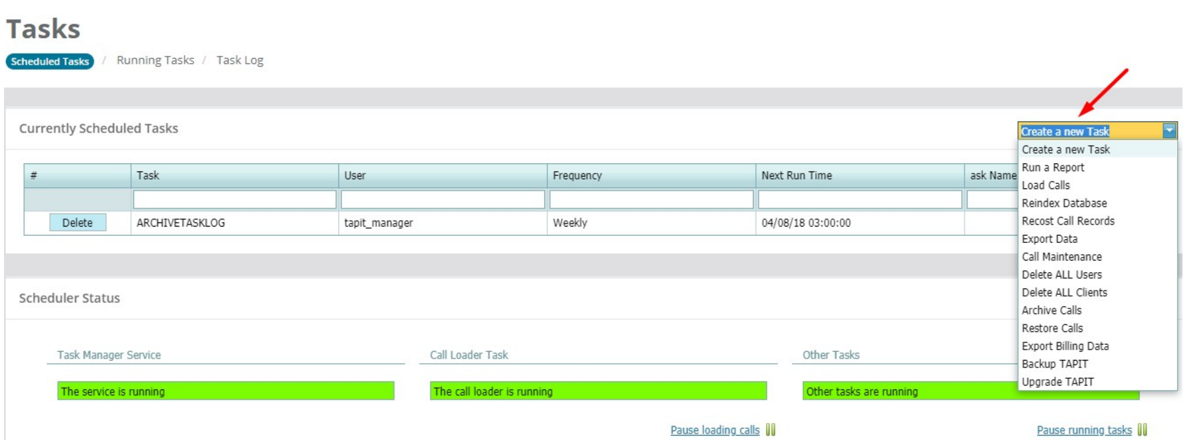
Report Scheduling

Report task generates selected reports automatically and emails them to the desired recipients.

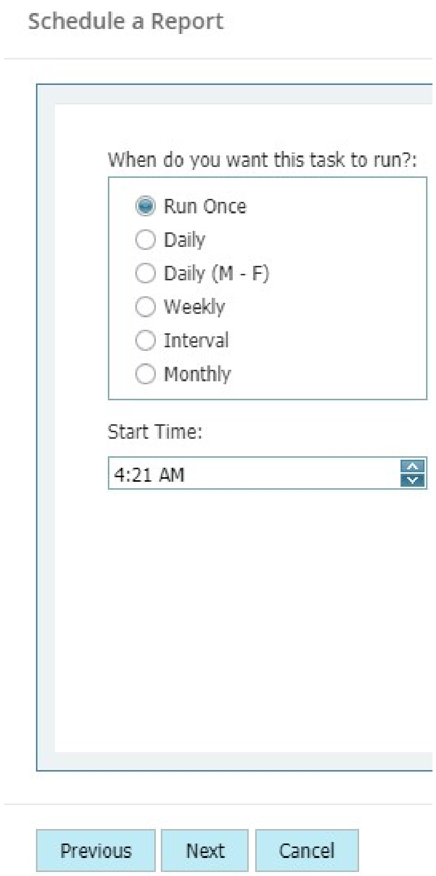
Report running

To create a new Report task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand “Create a new Task” list and select the Run a Report task. User gets redirected to the next screen.

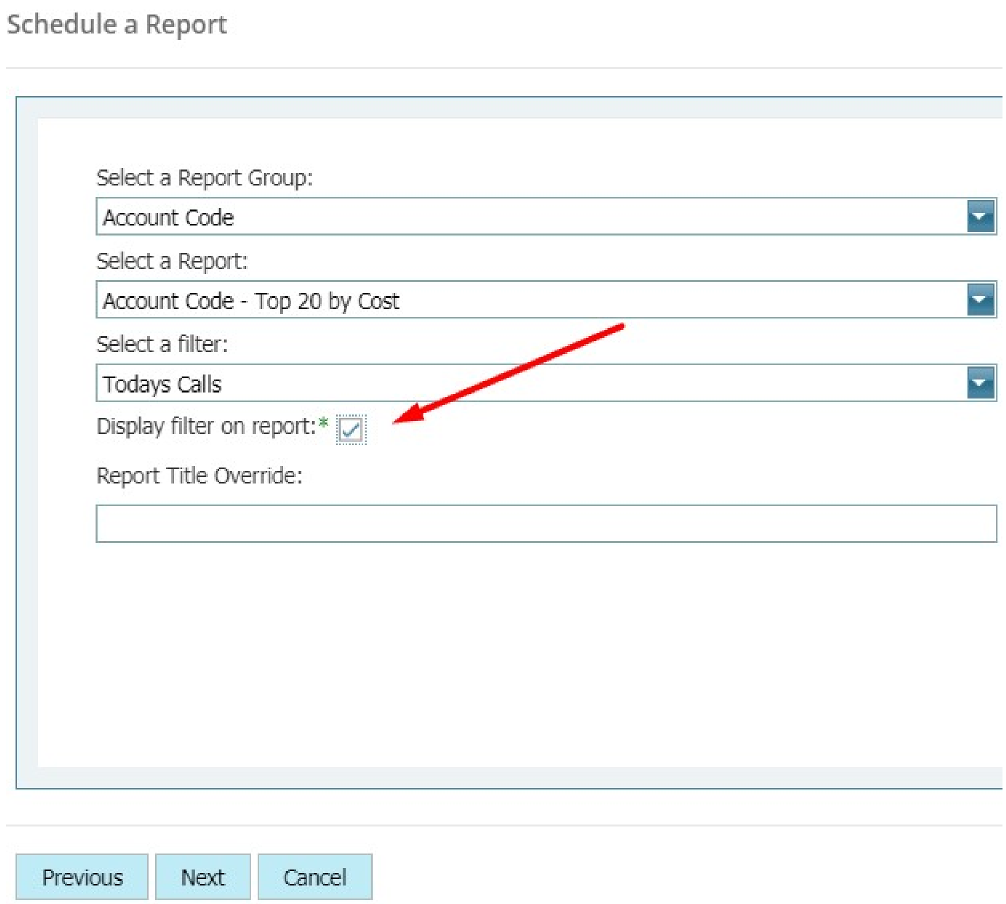


4.Select time interval, enter start time.
5.Click the “Next” button. User gets redirected on the next screen.



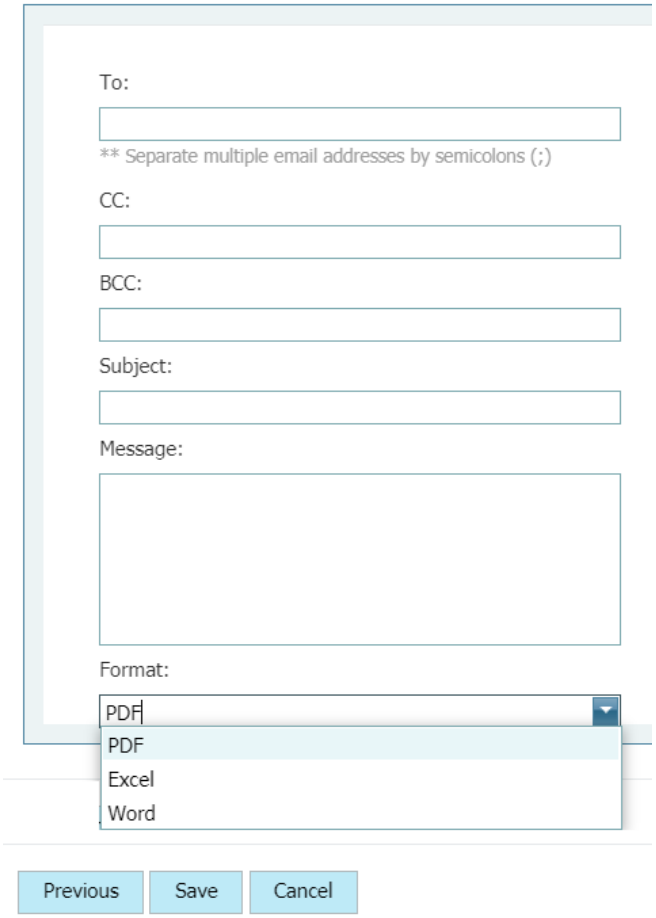
6.Click on the down-arrow of the Report Groups list and select a report group. Click on the down-arrow of the Reports list and select a report name. Click on the down-arrow of the Filter list and select a filter. Enter title. Click on the down-arrow of the Call Filters list and select a report filter name. If you would like the filter criteria to be displayed on the report, check the Display filter on report box. Enter the report title you would like to see on the report into Report Title Override. In other way the default report name will be used.

7.Click the “Next” button. User gets redirected on the next screen.

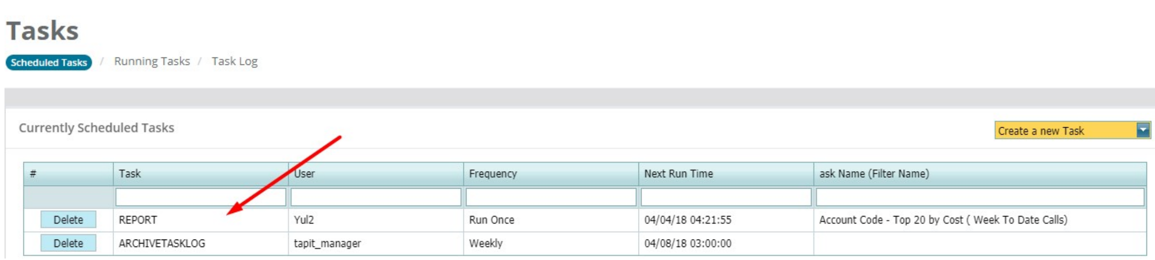


8.Enter the recipient's Email address, Subject, text message, choose format PDF/Excel/Word.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.

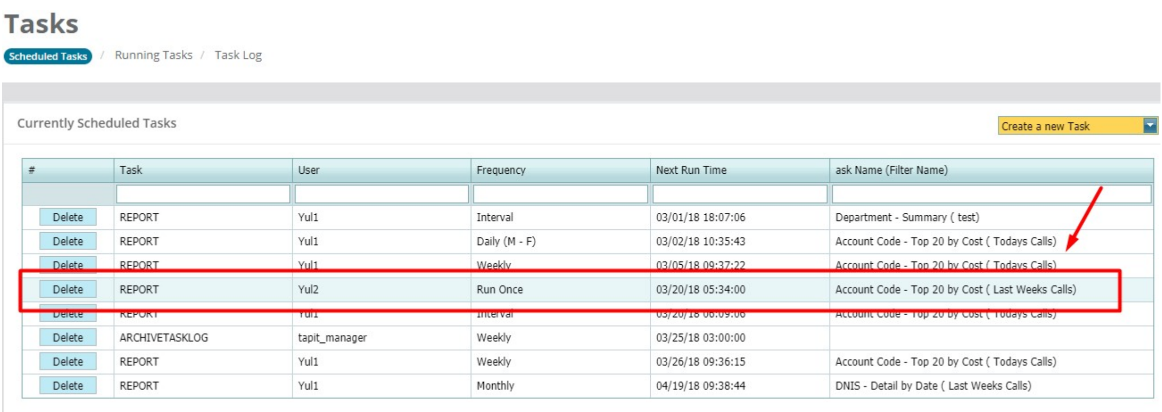


9.Click the “Save” button.
The newly created Report task was listed on the **Scheduled Tasks screen**.



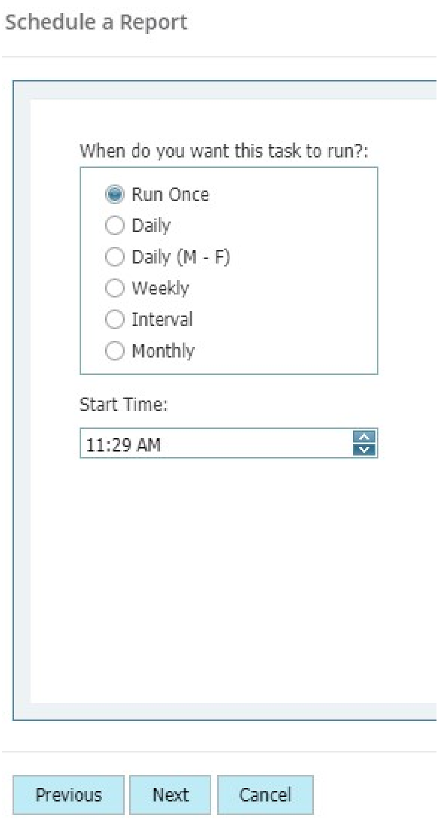
To edit an existing Report task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any report in the grid. User gets redirected on the next screen.

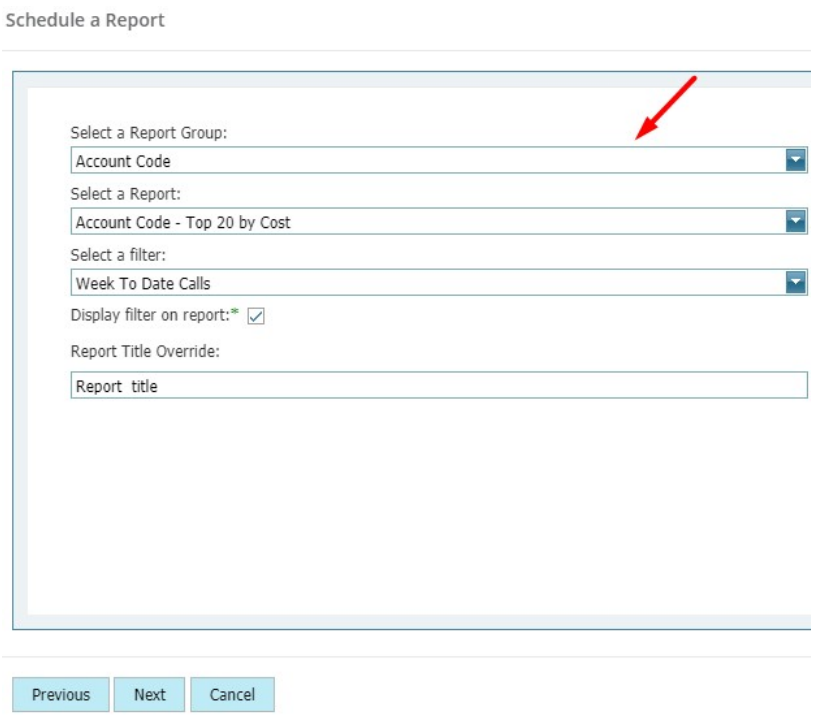


#	Task	User	Frequency	Next Run Time	ask Name (Filter Name)
Delete	REPORT	Yul1	Interval	03/01/18 18:07:06	Department - Summary (test)
Delete	REPORT	Yul1	Daily (M - F)	03/02/18 10:35:43	Account Code - Top 20 by Cost (Todays Calls)
Delete	REPORT	Yul1	Weekly	03/05/18 09:37:22	Account Code - Top 20 by Cost (Todays Calls)
Delete	REPORT	Yul2	Run Once	03/20/18 05:34:00	Account Code - Top 20 by Cost (Last Weeks Calls)
Delete	REPORT	Yul1	Interval	03/20/18 06:09:06	Account Code - Top 20 by Cost (Todays Calls)
Delete	ARCHIVETASKLOG	tapit_manager	Weekly	03/25/18 03:00:00	
Delete	REPORT	Yul1	Weekly	03/26/18 09:36:15	Account Code - Top 20 by Cost (Todays Calls)
Delete	REPORT	Yul1	Monthly	04/19/18 09:38:44	DNIS - Detail by Date (Last Weeks Calls)

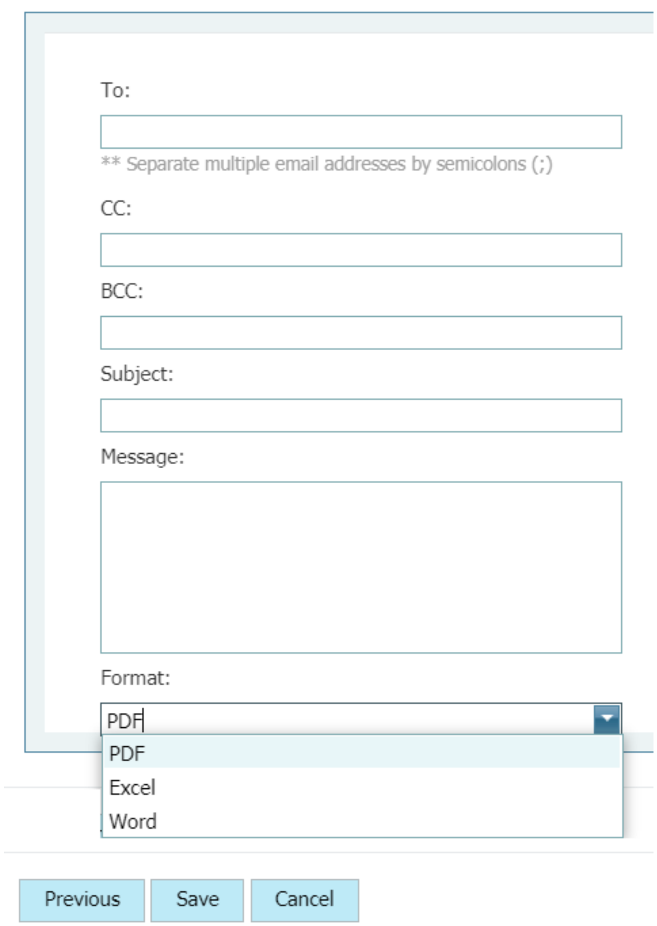
4.Change time interval, start date, etc.



5.Click the “Next” button. User gets redirected on the next screen.
6.Change report group, report, filter or title.
7.Click the “Next” button. User gets redirected on the next screen.



8. Change email Address, Subject, Message, Format.



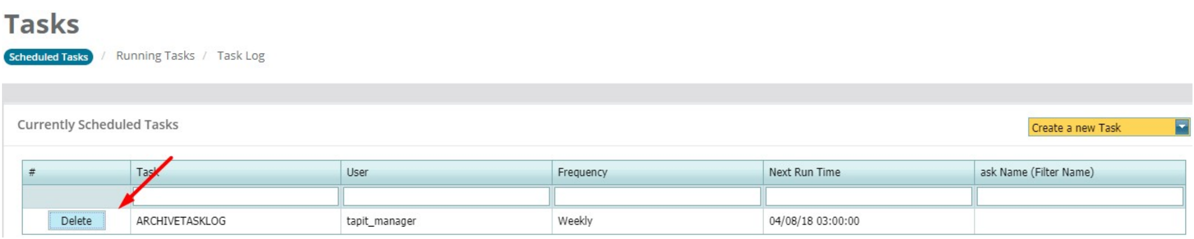
9. Click "Save" button.

The report was updated in the Currently Scheduled Tasks list.

To delete an existing Report task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any report in the grid and click the "Delete" button, confirm operation.

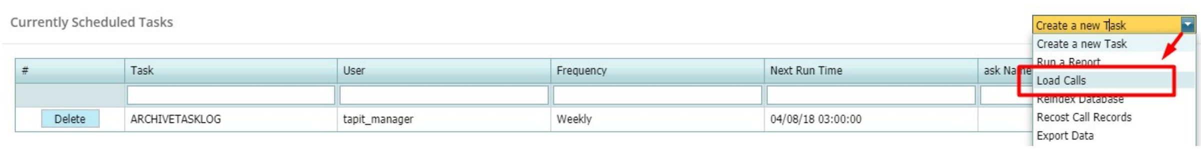
The report was deleted from the Currently Scheduled Tasks list.



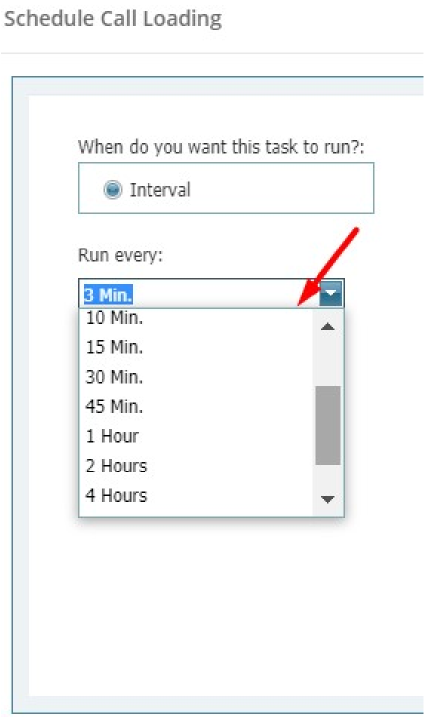
Call Loading

To create a new Call Load task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Load Calls task.

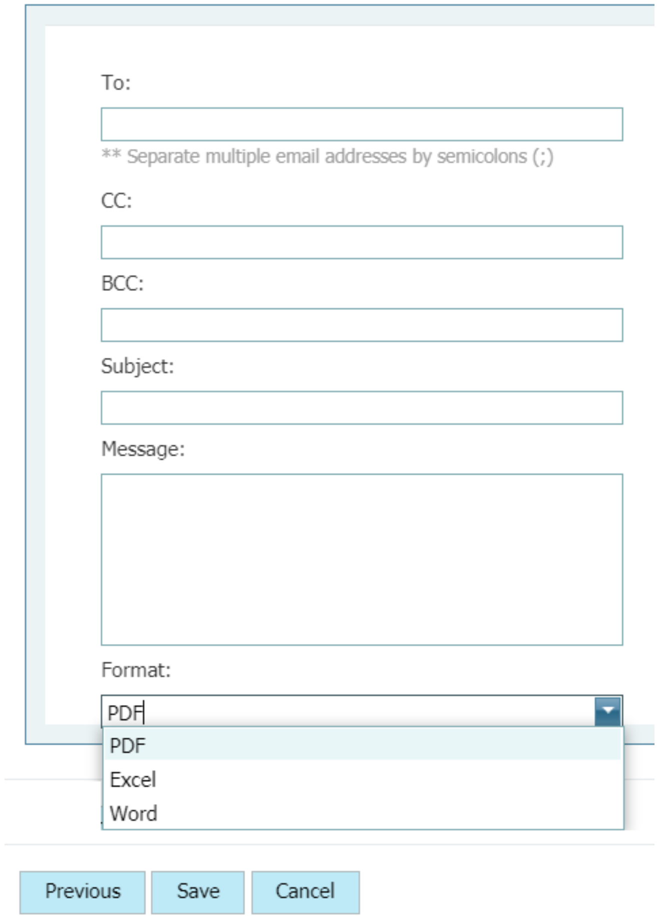


4. The report will run at a specified time interval. Choose any value from drop-down list and click the "Save" button.



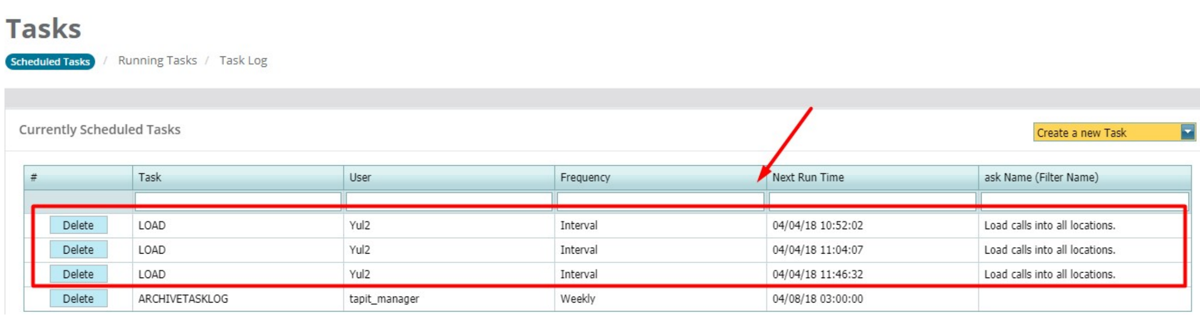
5. Enter the recipient's Email address, Subject, text message, choose format PDF/Excel/Word.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



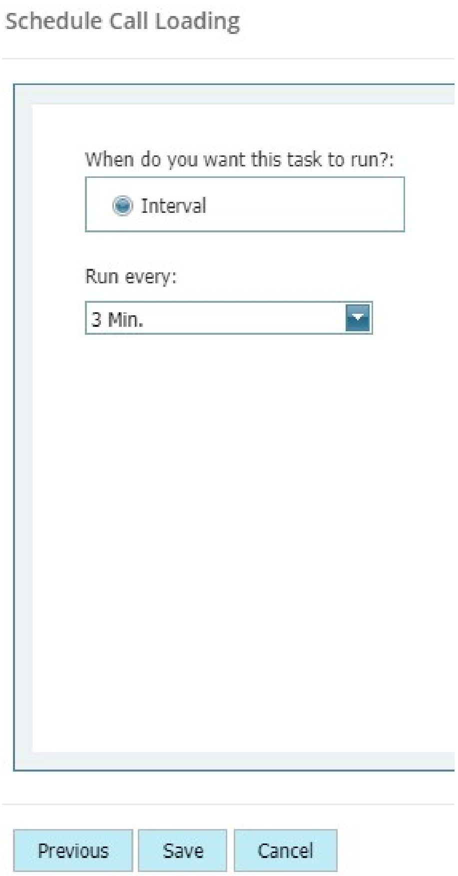
4. Click the “Save” button.

The newly created Call Load task was listed on the Currently Scheduled Tasks screen.



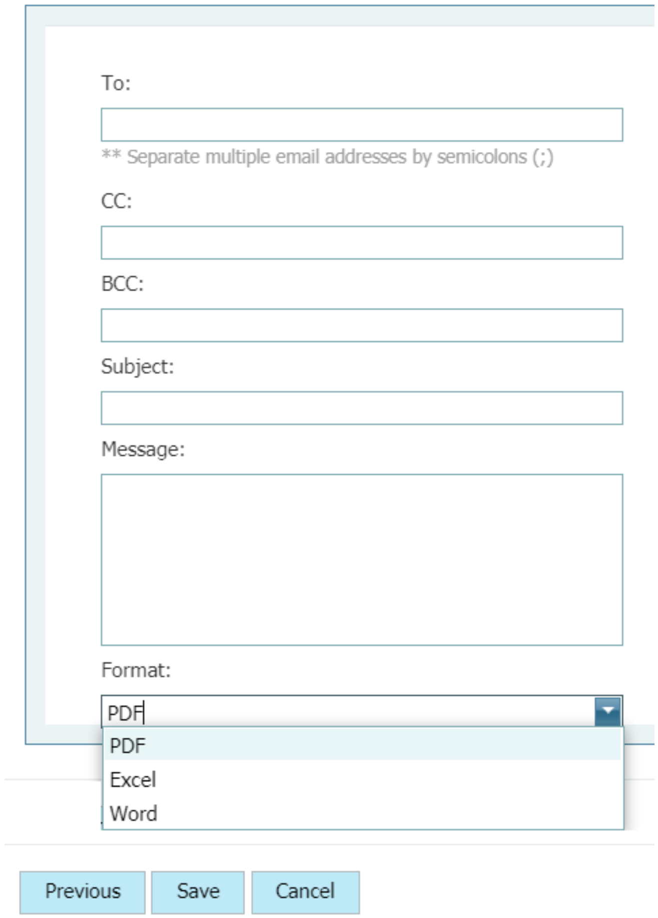
To edit an existing Call Load task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any call load task in the grid. User gets redirected on the next screen.
4. Change time interval. Choose any value from drop-down list and click the “Save” button.



5. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



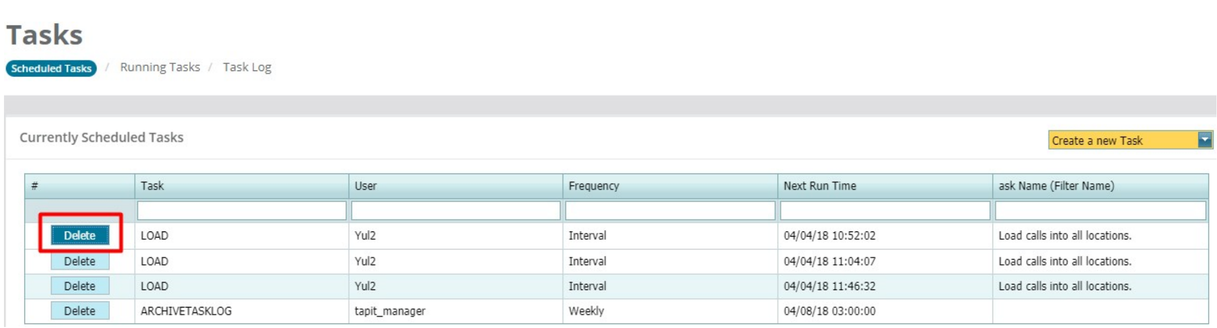
5. Click the "Save" button.

The Call Load task was updated on Currently Scheduled Tasks screen.

To delete an existing Call Load task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any call load task in the grid and click the "Delete" button, confirm operation.

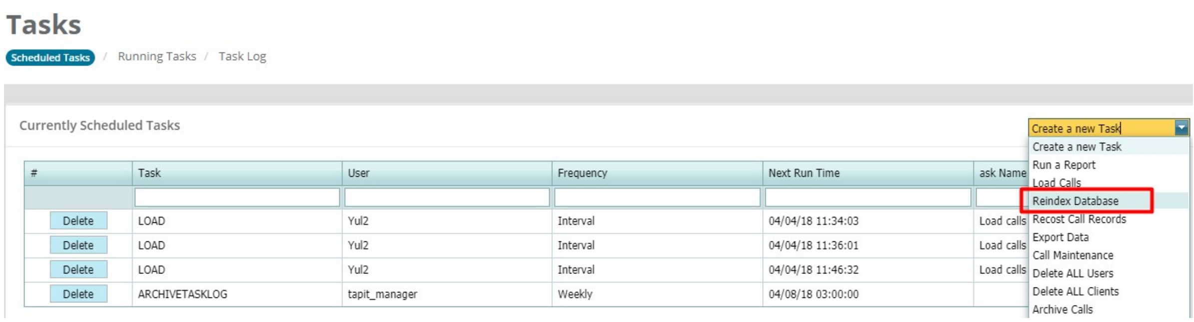
The call was deleted from the Currently Scheduled Tasks list.



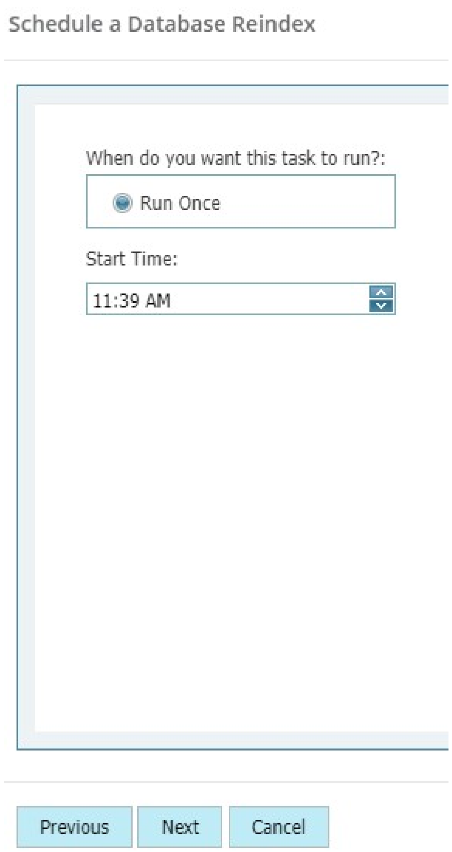
Reindex Database

To create a new reindex Database task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Reindex Database task.

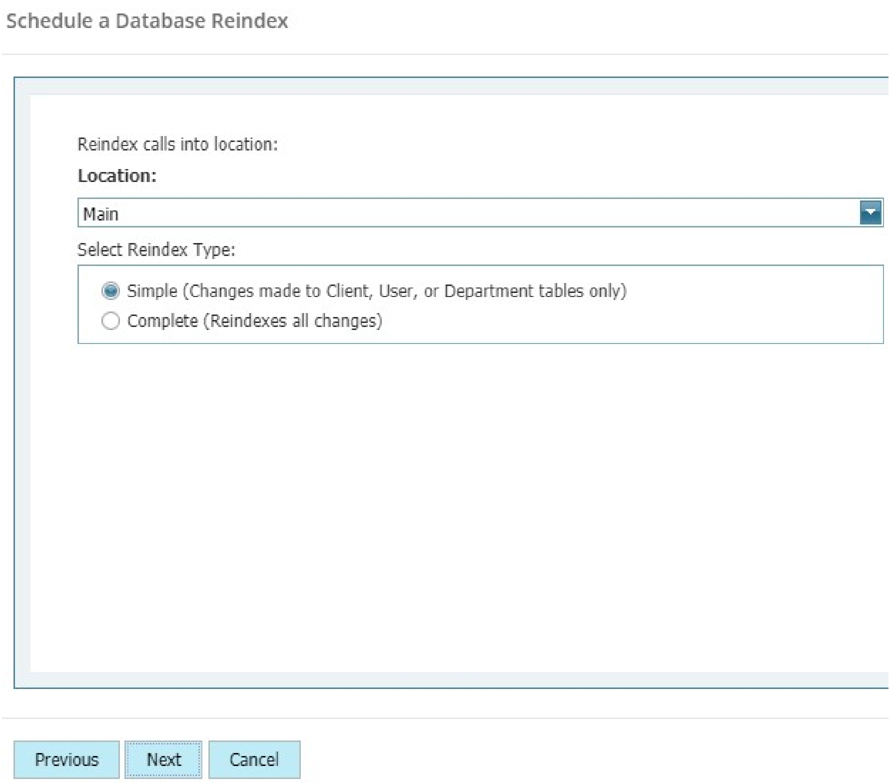


4.The report will run at a specified time interval. Choose any value from drop-down list and click the "Next" button. User gets redirected on the next screen.



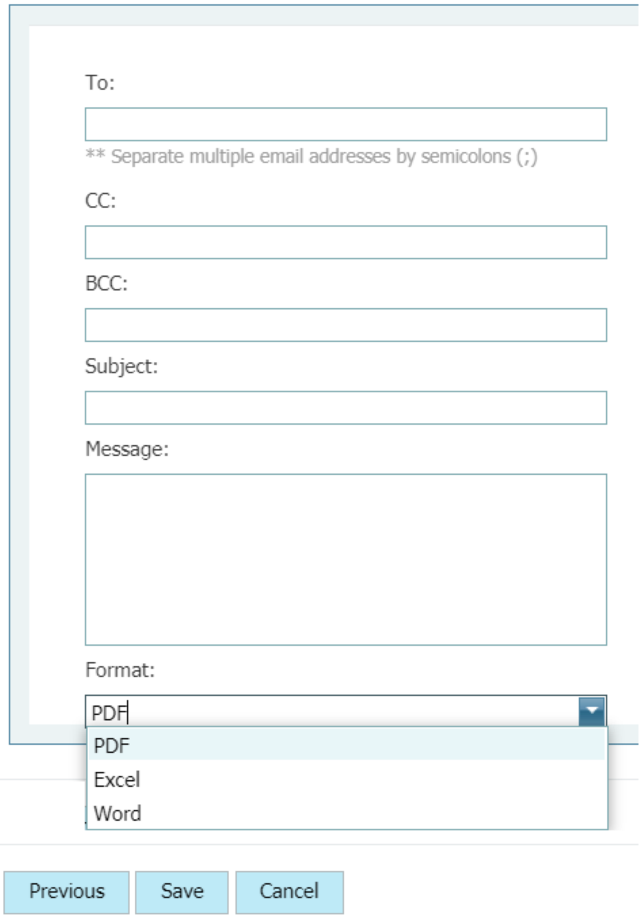
5.Chose Location, select one of the options under the Select Reindex Type. Click the "Next" button

Simple – reindexes changes made to Client, User, or Department tables only.
Complete – reindexes all changes made to the Tapit database.



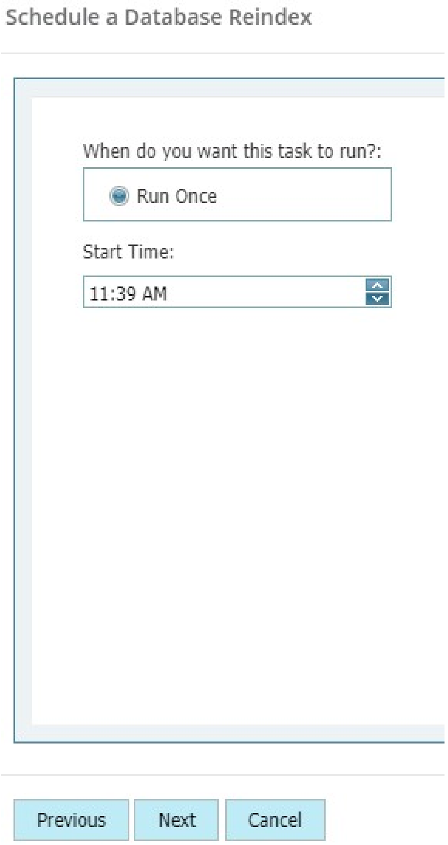
6.Click the “Next” button. User gets redirected on the next screen.
7.Change the recipient’s Email address, Subject, text message, choose format PDF/Excel/Word and click the “Save” button.
The Reindex task was added in the Currently Scheduled Tasks list.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



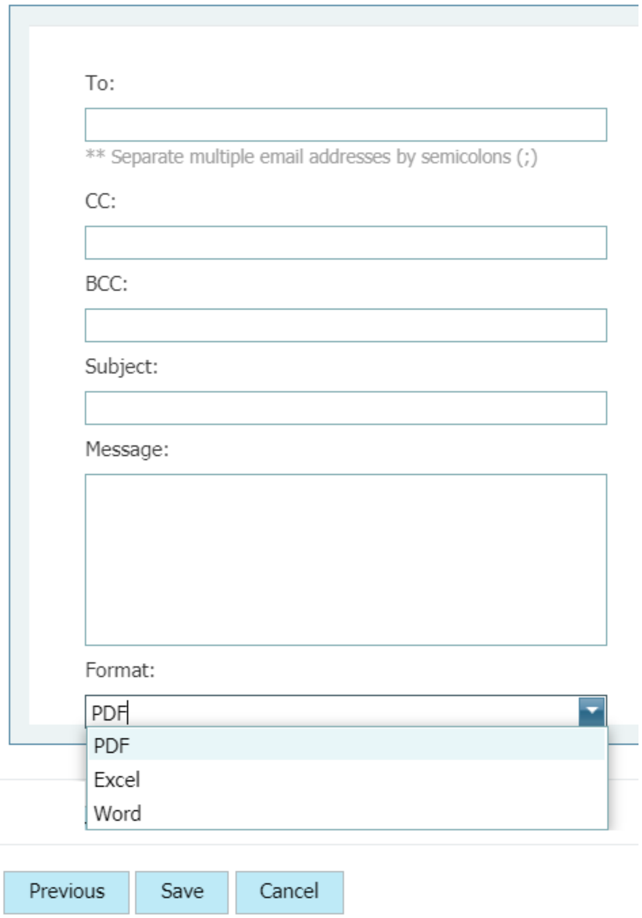
To edit an existing reindex Database task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
4. Select any reindex Database task in the grid. User gets redirected on the next screen.
5. Change time interval and click the “Next” button. User gets redirected on the next screen.



6. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.
The Reindex task was edited in the Currently Scheduled Tasks list.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To delete an existing reindex Database task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any reindex Database task in the grid and click the "Delete" button, confirm operation.

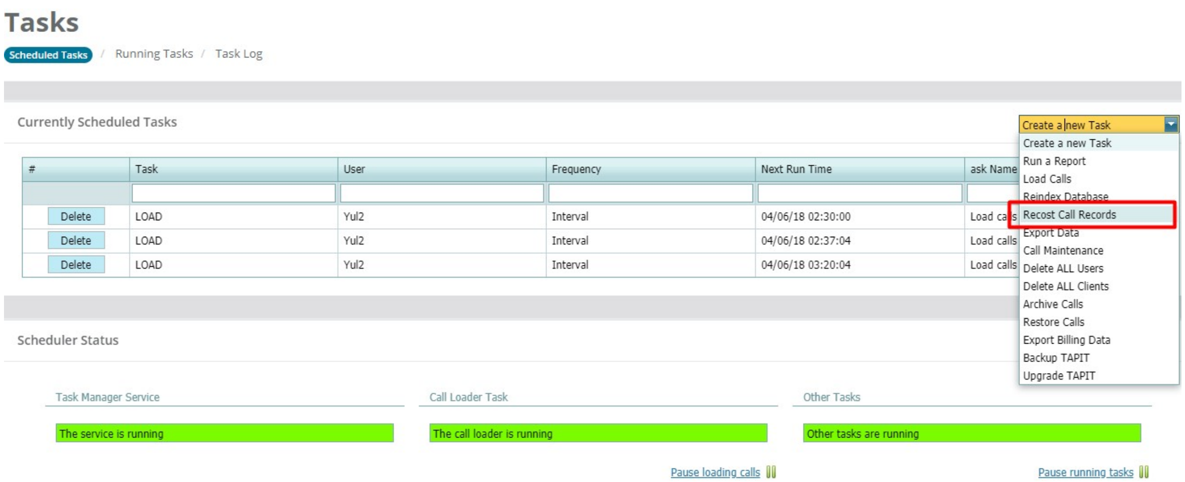
Recost Call Records

There are two types of recosting: **Tapit Carrier** and **Custom**.
Tapit Carrier -Tapit calls are priced according to the Tapit Pricing and city and destination settings. Calls should be recosted with **Tapit Carrier** whenever there are any changes to the Tapit Pricing table, city and destination table, phone numbers in Call Editor or call records are imported.
Custom - a user can define price adjustments to apply to Tapit calls. Calls should be recosted with **Custom** option whenever there is a flat dollar rate or percentage to be added or subtracted to cost of Tapit calls.

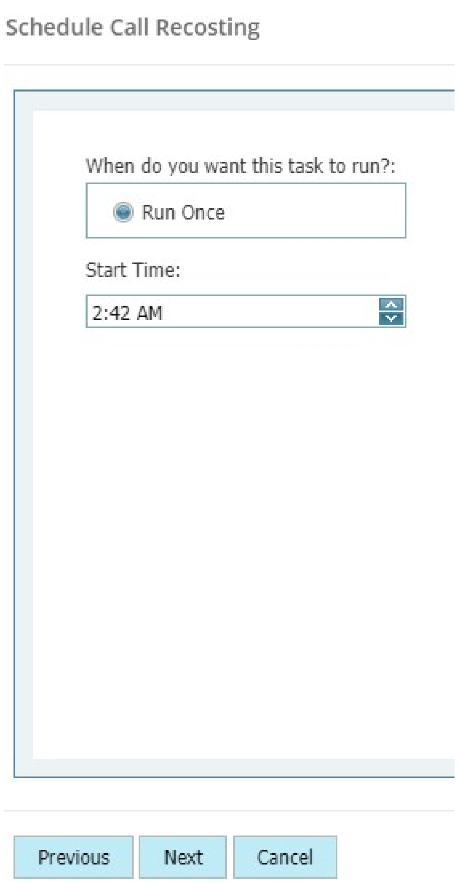
To create a new Call Recosting task – Recosting with Tapit Carrier

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.

3. Expand “Create a new Task” list and select the Recost Call Records task. User gets redirected on the next screen.



4. Change time interval and click the “Next” button. User gets redirected on the next screen.



5.Select location, select Type of Recosting the Tapit Carrier. Choose any option of Recost Scope. Click the “Next” button. User gets redirected on the next screen.

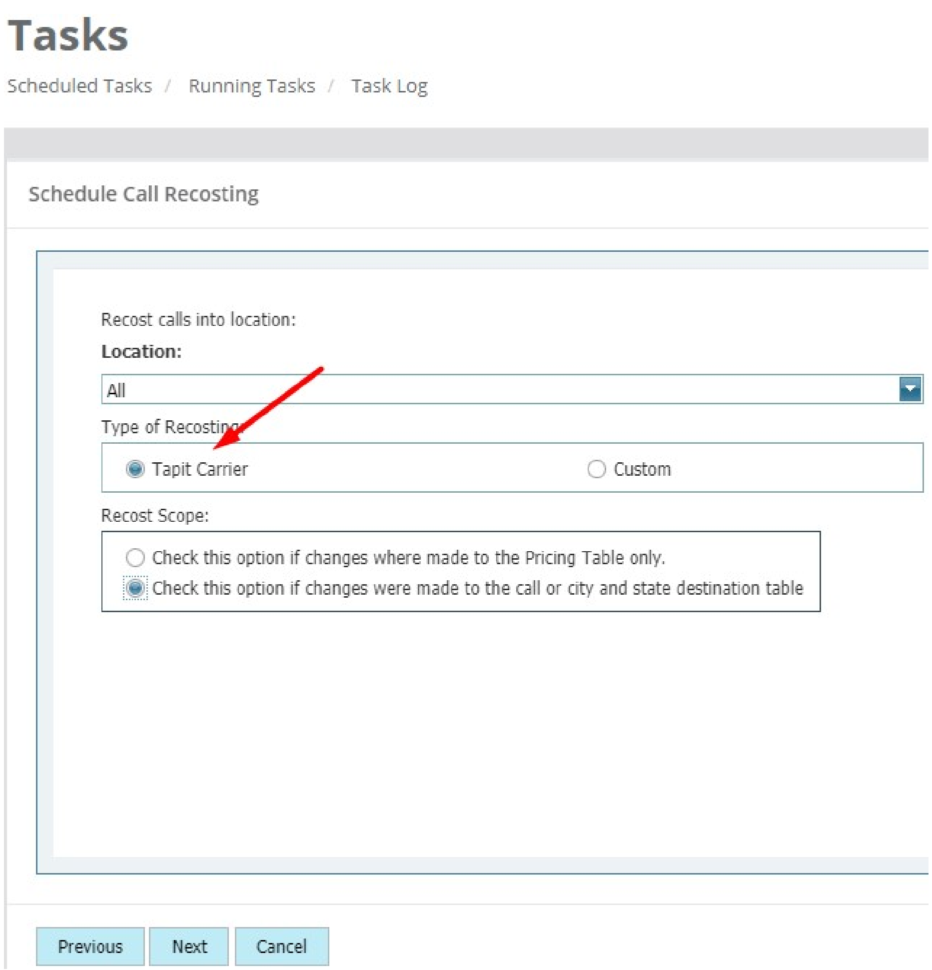
Tapit Carrier – calls are priced according to the Tapit Pricing and city and destination settings.

Custom – a user can define price adjustments to apply to Tapit calls. See the section below on how to Custom Recost Tapit calls.

Recost Scope

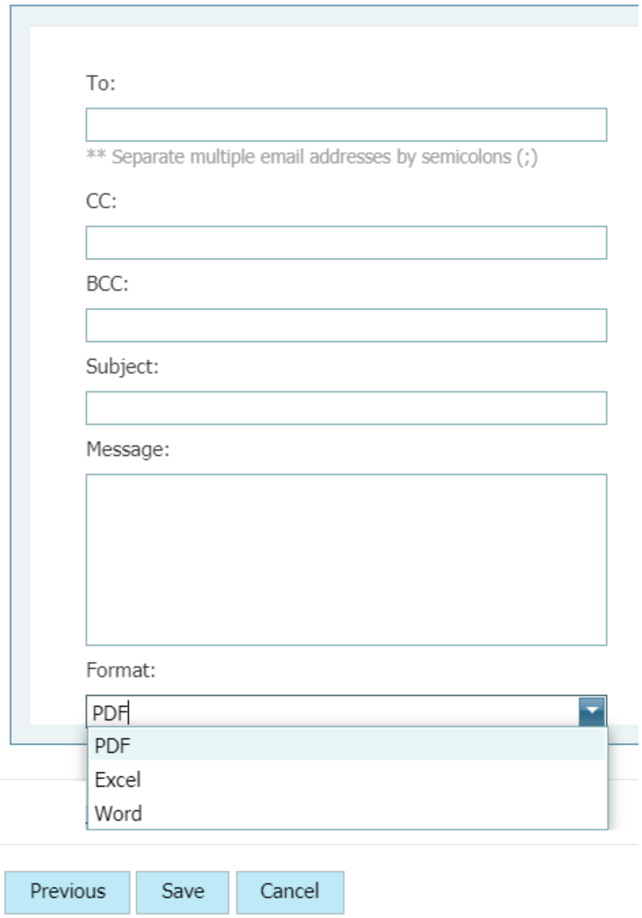
Check the first option if you are recosting because changes were made to the Pricing Table only.

Check the second option if you are recosting because changes were made to the Pricing Table and to the City and Destination table or/and phone number field in Call Editor, and/or calls were imported.



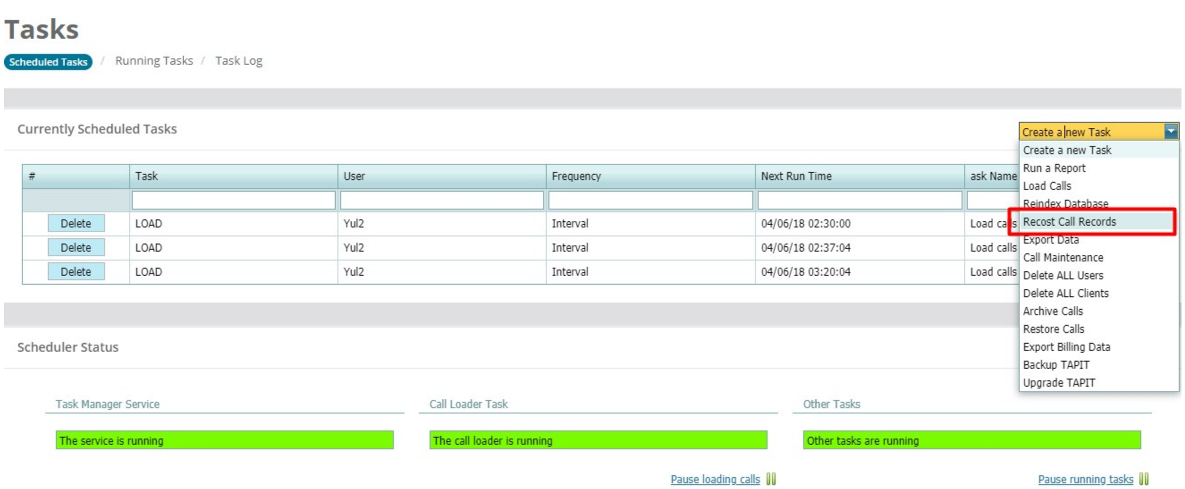
6.Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.
The newly created Recost task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.

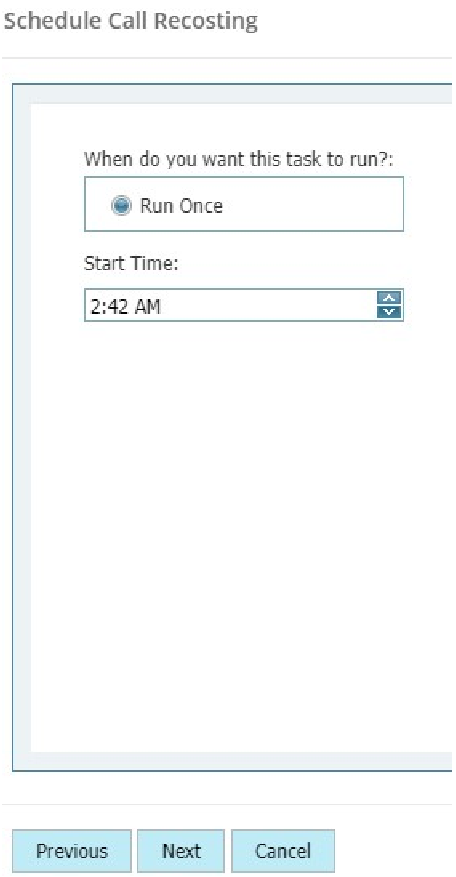


To create a new Call Recosting task – Custom Recosting

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Recost Call Records task. User gets redirected on the next screen.



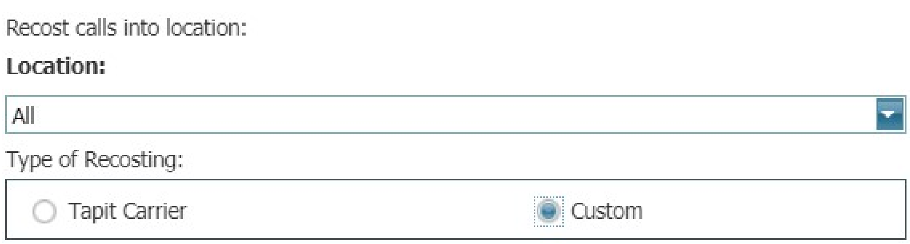
4. Change time interval and click the "Next" button. User gets redirected on the next screen.



5. Select location, select Type of Recosting the Tapit Carrier. The screen expands and price adjustment options are displayed. Choose any option of Recost Scope. Click the “Next” button. User gets redirected on the next screen.

Tapit Carrier – calls are priced according to the Custom option and city and destination settings.

Custom – a user can define price adjustments to apply to Tapit calls. See the section below on how to Custom Recost Tapit calls.



Increment – the price adjustment value is going to be added to the cost of a call record.

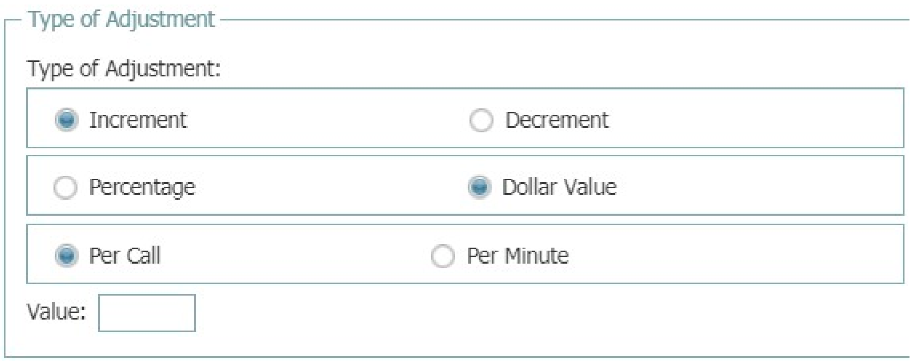
Decrement – the price adjustment value is going to be subtracted from the cost of a call record.

Percentage - the price adjustment value represents percentage of the cost of a call record.

Dollar Value - the price adjustment value represents dollar amount.

Per Call - the price adjustment value is going to be applied per call.

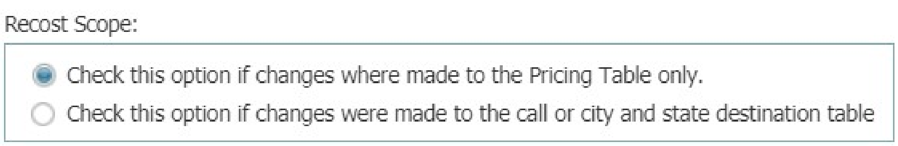
Per Minute - the price adjustment value is going to be applied per minute.



Recost Scope

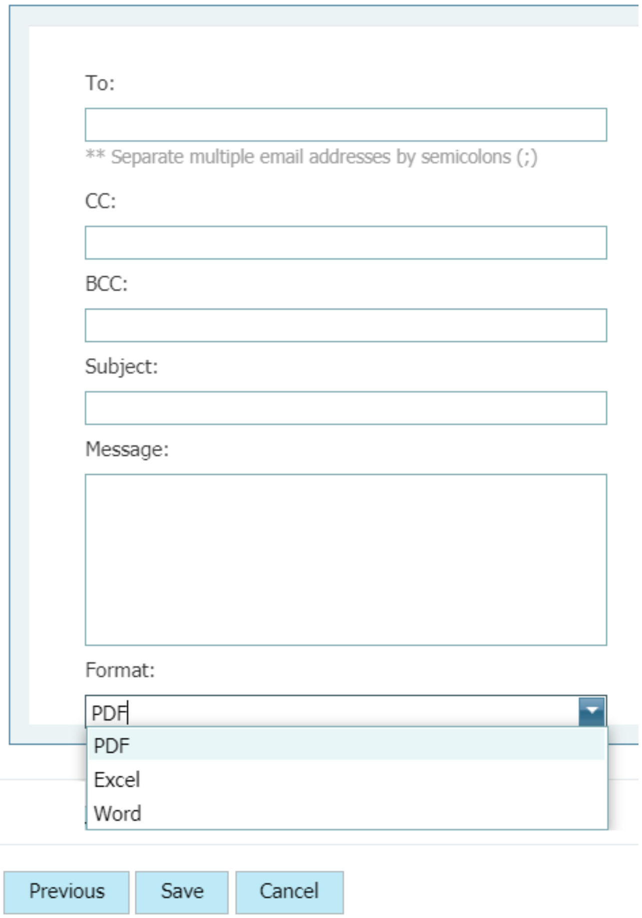
Check the first option if you are recosting because changes were made to the Pricing Table only.

Check the second option if you are recosting because changes were made to the Pricing Table and to the City and Destination table or/and phone number field in Call Editor, and/or calls were imported.



6.Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.
The newly created Recost task was listed on the Currently Scheduled Tasks screen.

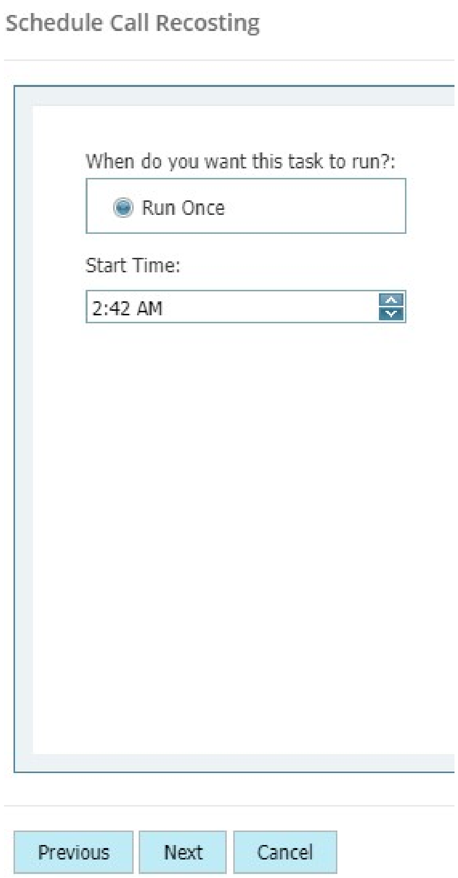
NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Call Recosting task – Custom Recosting

There are two types of recosting: **Tapit Carrier** and **Custom**.
Tapit Carrier -Tapit calls are priced according to the Tapit Pricing and city and destination settings. Calls should be recosted with **Tapit Carrier** whenever there are any changes to the Tapit Pricing table, city and destination table, phone numbers in Call Editor or call records are imported.
Custom - a user can define price adjustments to apply to Tapit calls. Calls should be recosted with **Custom** option whenever there is a flat dollar rate or percentage to be added or subtracted to cost of Tapit calls.

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Recost Call Records task in the grid. User gets redirected on the next screen.
4. Change time interval and click the “Next” button. User gets redirected on the next screen.



5. Change location to recost, Type of Recosting option, Recost Scope.

Tapit Carrier – calls are priced according to the Tapit Pricing and city and destination settings.

Custom – a user can define price adjustments to apply to Tapit calls. See the section below on how to **Custom** Recost Tapit calls.

If user select Custom – the screen expands and price adjustment options are displayed.

Increment – the price adjustment value is going to be added to the cost of a call record.

Decrement – the price adjustment value is going to be subtracted from the cost of a call record.

Percentage - the price adjustment value represents percentage of the cost of a call record.

Dollar Value - the price adjustment value represents dollar amount.

Per Call - the price adjustment value is going to be applied per call.

Per Minute - the price adjustment value is going to be applied per minute.

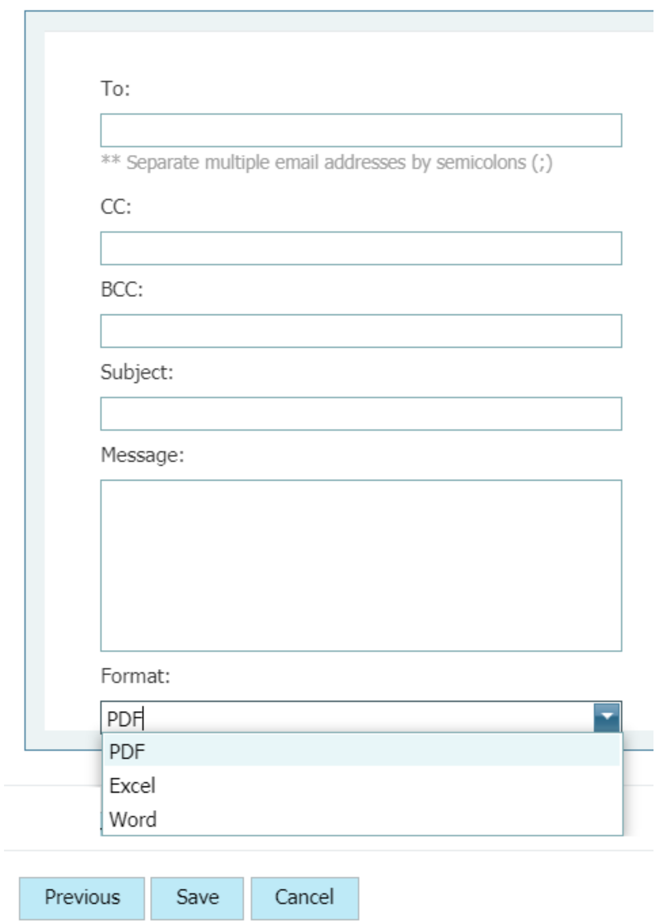
Recost Scope

Check the first option if you are recosting because changes were made to the Pricing Table only.

Check the second option if you are recosting because changes were made to the Pricing Table and to the City and Destination table or/and phone number field in Call Editor, and/or calls were imported.

6. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.
The Recost task was updated on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To delete an existing Call Recost task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Recost Call Records task in the grid.
4. Click the "Delete" button, confirm operation.

The selected Call Recost task was deleted from the list.

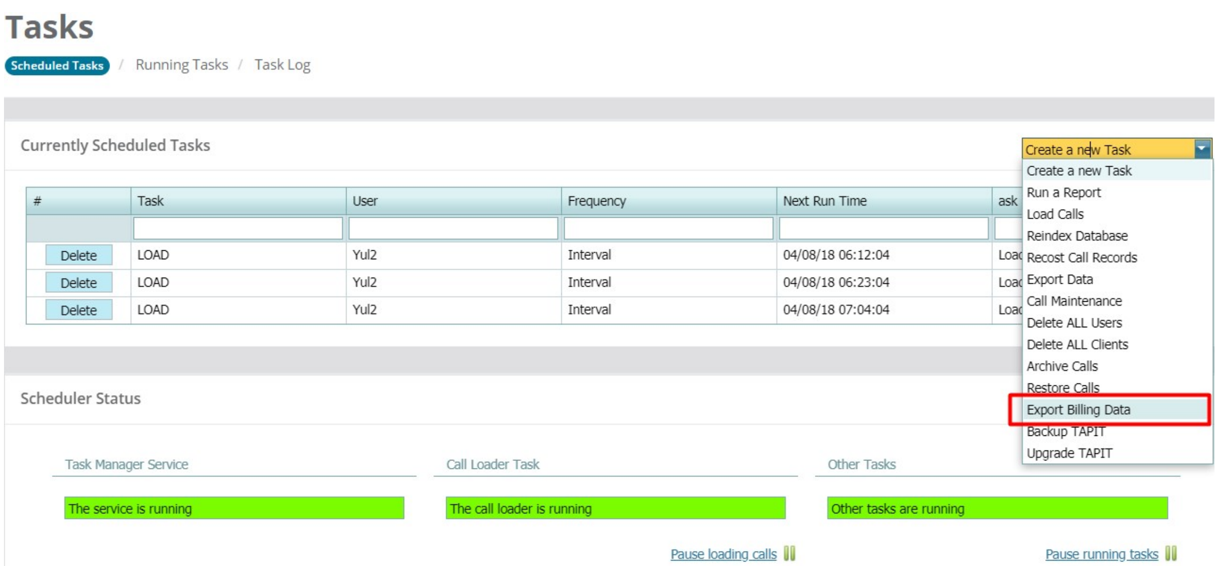
Export Billing Data

The Export Billing Data task exports Tapit call data in various formats supported by major Database, Spreadsheet and Time & Billing software applications.

To create a new Export Billing Data task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Export Billing Data task.

User gets redirected on the next screen.



4. Select time interval and set start time. Click the "Next" button. User gets redirected on the next screen.

Run Once
A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

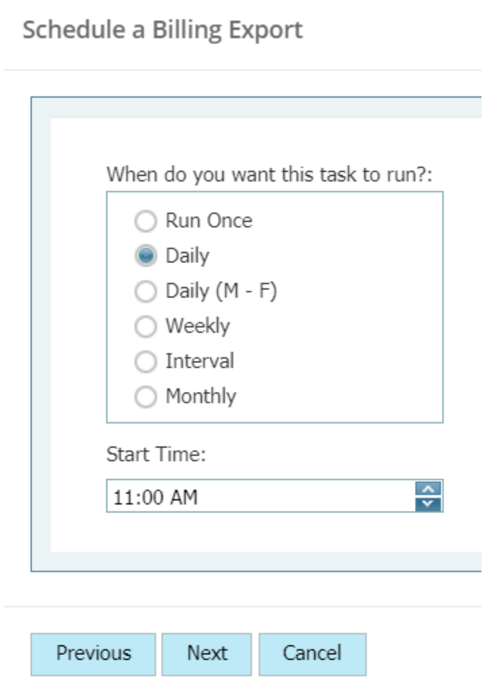
Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

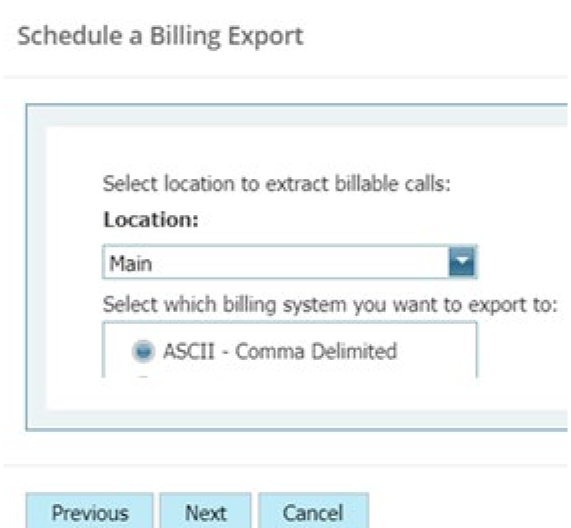
Interval

The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



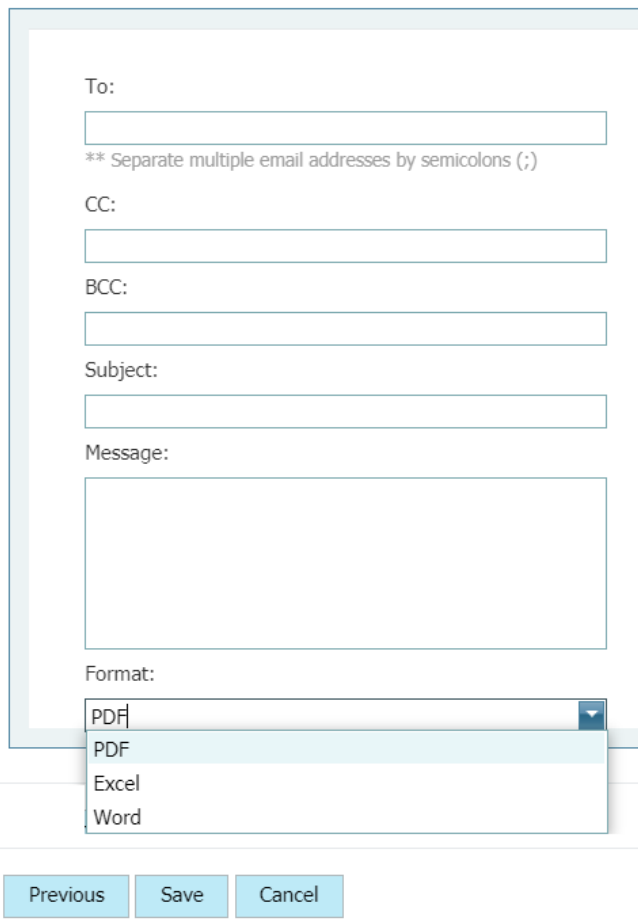
5. Select the location for export data and choose billing system format.



6. Click the "Next" button. The filter screen shows up. Set up filter criteria to select call data to export billing data. See page 43, section, for instructions on using filter screen.
7. Click the "Next" button. User gets redirected on the next screen.
8. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The newly created Export Billing Data task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Export Billing Data task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Export Billing Data task. User gets redirected on the next screen.
4. Change time interval and start time. Click the "Next" button. User gets redirected on the next screen.

Run Once

A report will run only once at a specified time.

For example, the screen below shows a report set up to run once at 5:00 PM.

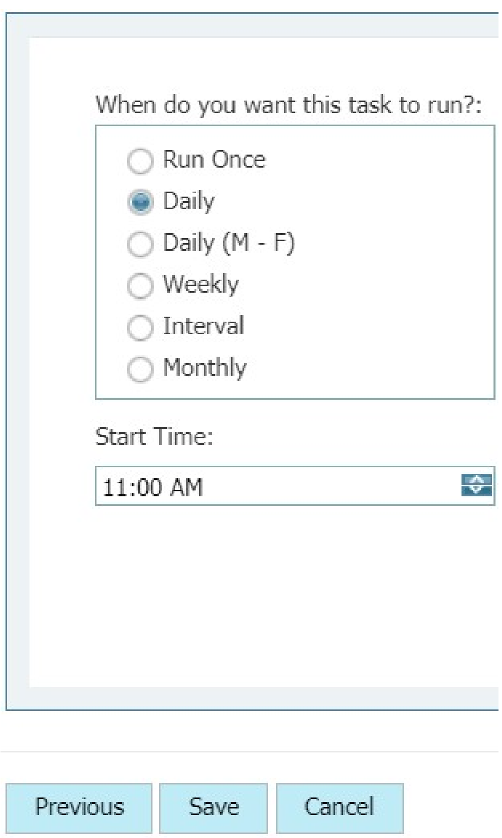
Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

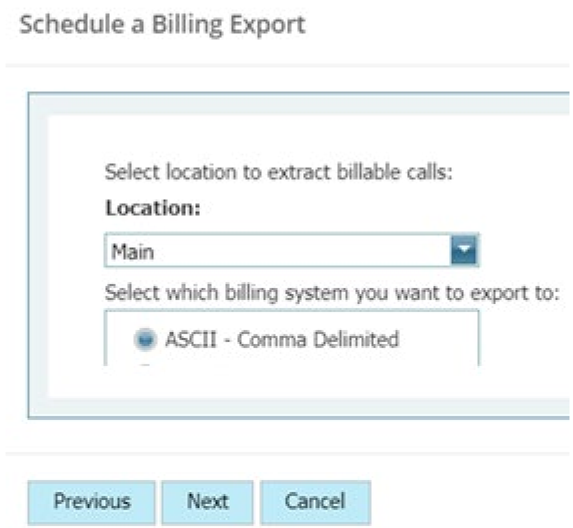
Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval
The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



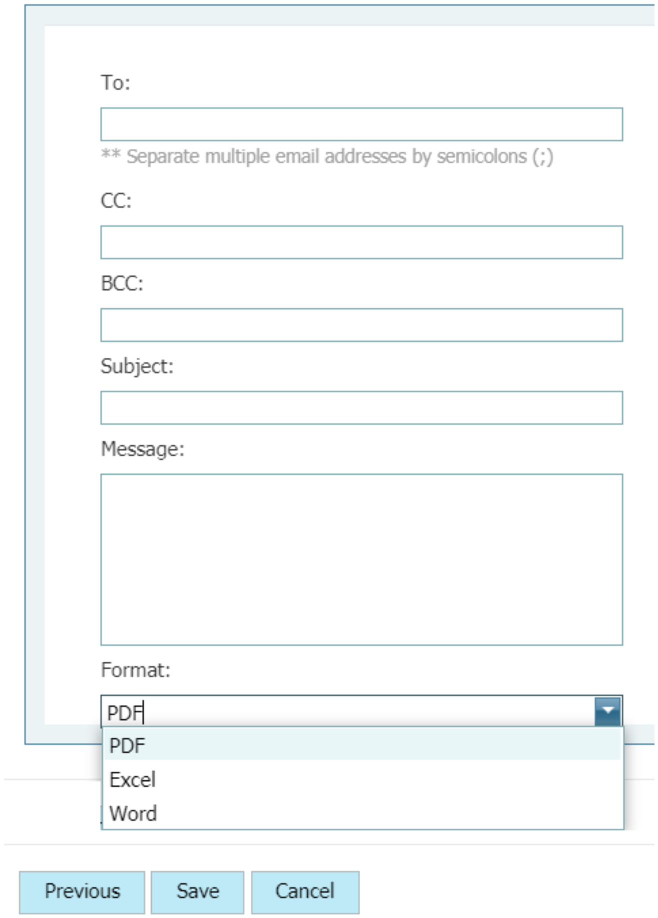
6. Select the location for export data and choose billing system format.



7. Click the “Next” button. The filter screen shows up. Set up filter criteria to select call data to export billing data. See page 43, section, for instructions on using filter screen.
8. Click the “Next” button. User gets redirected on the next screen.
9. Change the recipient’s Email address, Subject, text message, choose format PDF/Excel/Word and click the “Save” button.

The Export Billing Data task was updated on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To delete an existing Export Billing Data task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Export Billing Data task and click the "Delete" button, confirm operation.

The selected Export Billing Data task was deleted from the list.

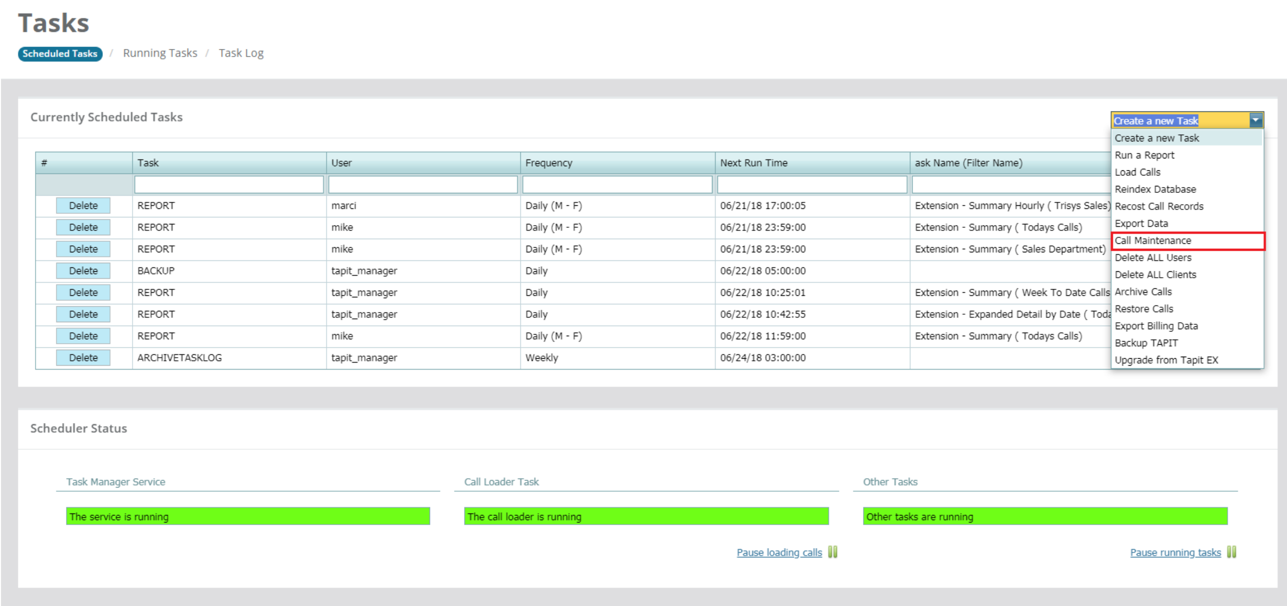
Call Maintenance

The Call Maintenance task allows users to conduct maintenance on call records database. Choose from export and keep all call records, exports and delete all call records or delete all call records.

NOTE: Database backups and archiving calls are highly recommended before using this task option. Call records exported and deleted using the Call Maintenance task cannot be restored. See page 164 on how to Archive Calls and see page 170 on how to Backup Tapit database.

To create a new Call Maintenance task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Call Maintenance task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the “Next” button. User gets redirected on the next screen.

Run Once
A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

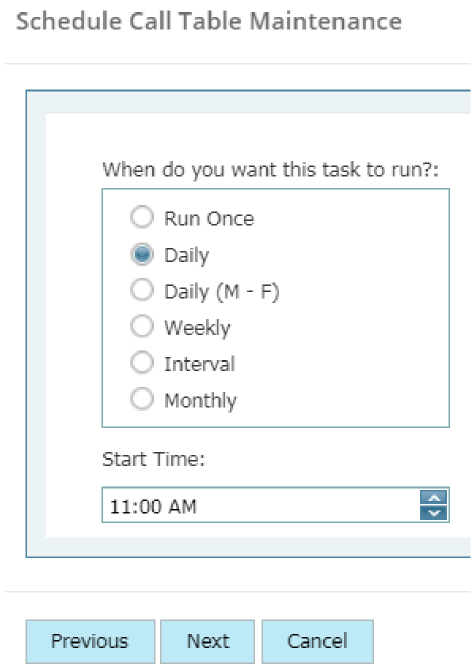
Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval
The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



5. Select which operation to perform on call table.

Export and Keep Call Records
The Export and Keep Call Records option, allows user to export call records while keeping call records in the database.

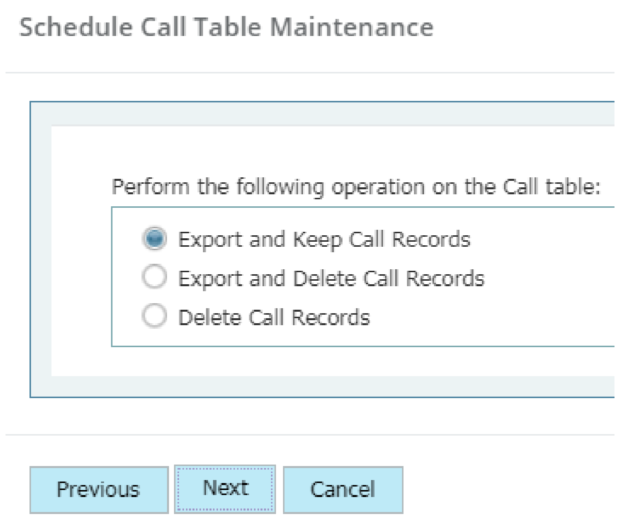
Export and Delete Call Records
The Export and Delete Call Records option, allows user to export call records and deletes all call records in the database.

Delete Call Records
The Delete Call Records option, allows user to delete all call records from the database.

NOTE: Database backups and archiving calls are highly recommended before using this task option. Call records exported and deleted using the Call Maintenance task cannot be restored.

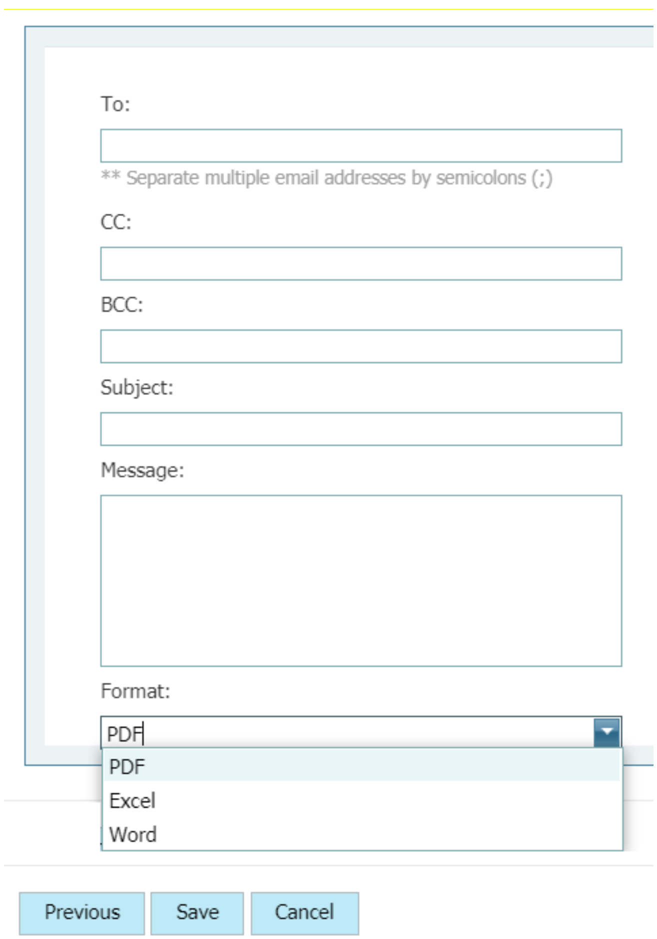
See page 164 on how to Archive Calls and see page 170 on how to Backup Tapit database.

If archive is available from Archive Calls task, see page 167 on how to Restore Call Records.



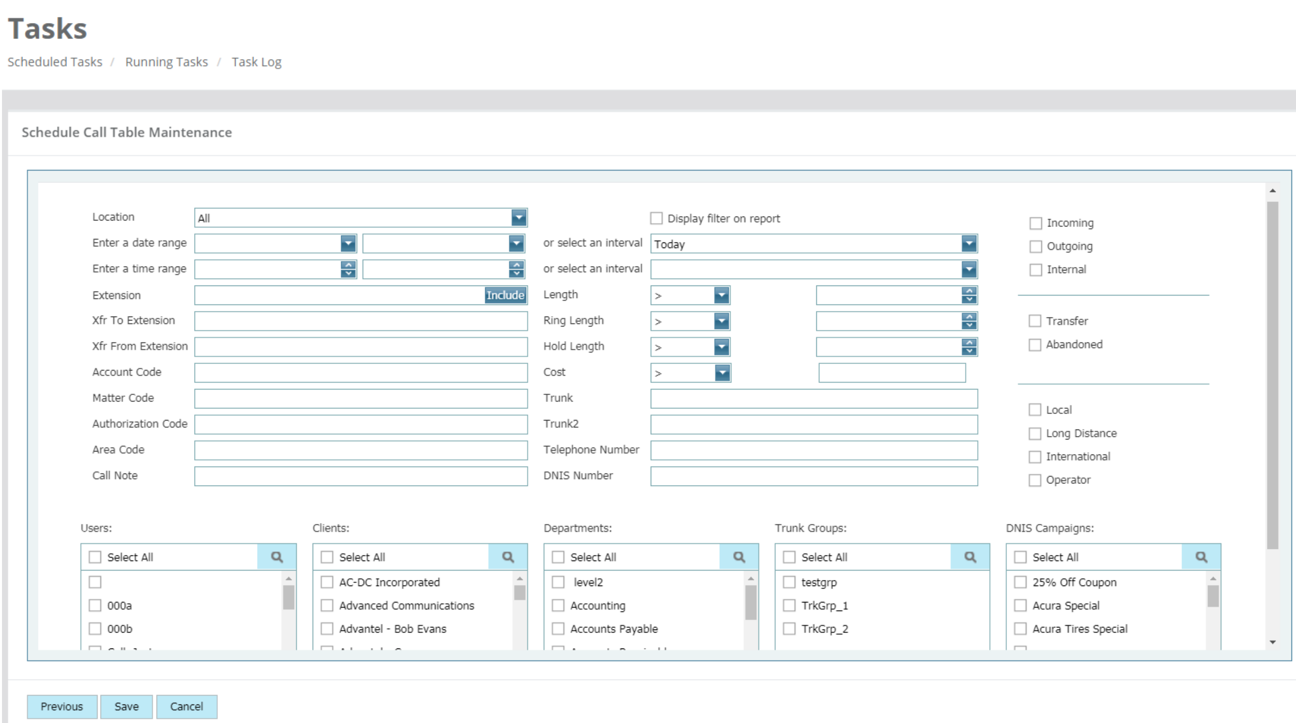
6. Click the “Next” button. User gets redirected on the next screen.
7. Change the recipient’s Email address, Subject, text message, choose format PDF/Excel/Word and click the “Next” button. User gets redirected on the next screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



8. The Schedule Call Table Maintenance filter screen allows users to narrow down which call records to delete, using any combination of filters. Click the “Save” button.

The Call Maintenance task was updated on the Currently Scheduled Tasks screen.



To edit an existing Call Maintenance task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Call Maintenance task. User gets redirected on the next screen.
4. Change time interval and start time. Click the “Save” button. User gets redirected back to the Scheduled Tasks screen. Revised task will reflect changes.

The selected Call Maintenance task was updated on the Currently Scheduled Tasks screen.

To delete an existing Call Maintenance task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Call Maintenance task and click the “Delete” button, confirm operation.

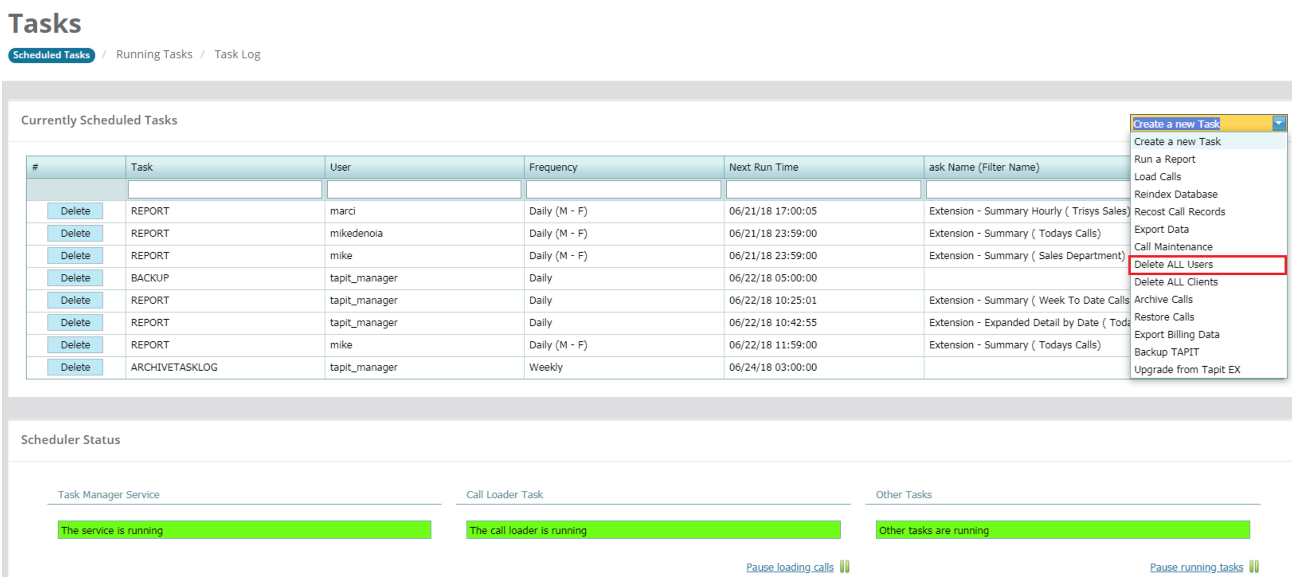
The selected Call Maintenance task was deleted from the list.

Delete ALL Users

The Delete ALL Users task deletes all users in the database.

To create a new Delete ALL Users task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand “Create a new Task” list and select the Delete ALL Users task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the “Next” button. User gets redirected on the next screen.

Run Once
A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

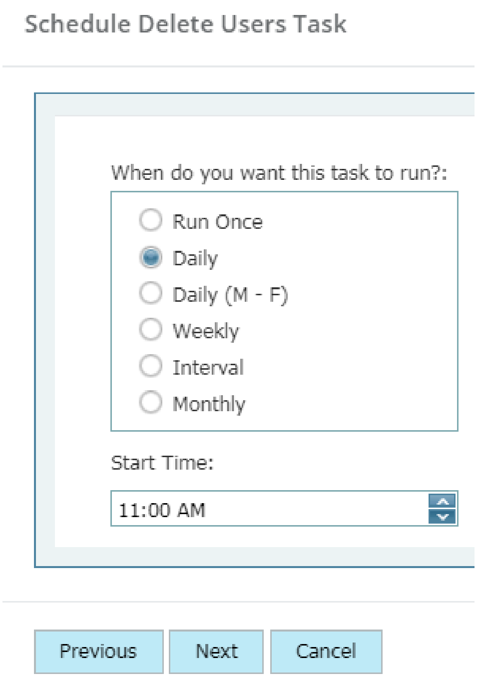
Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval
The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly

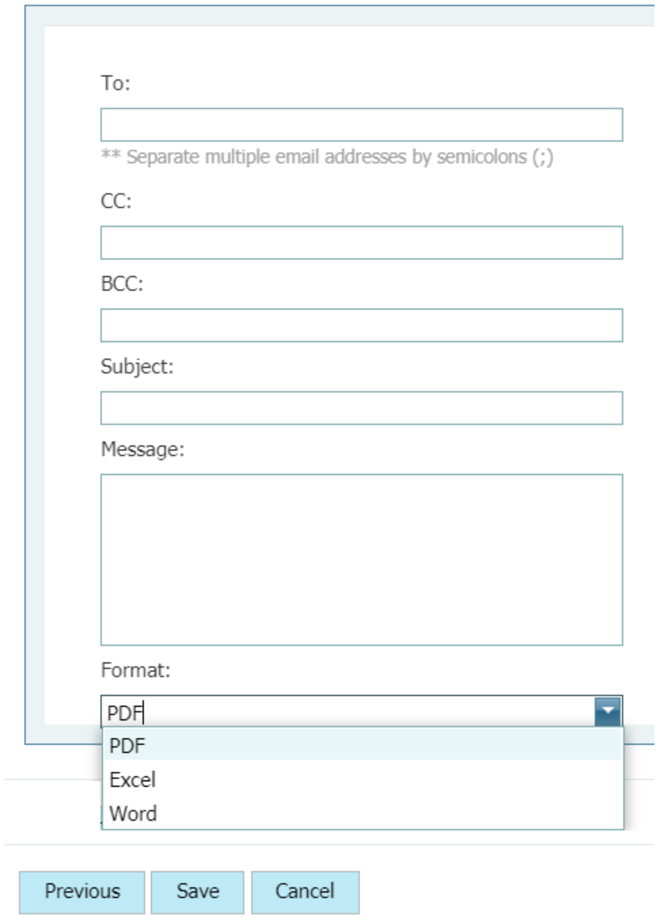
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



6. Click the "Next" button. User gets redirected on the next screen.
7. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The newly created Delete ALL Users task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Delete ALL Users task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Call Maintenance task. User gets redirected on the next screen.
4. Change time interval and start time. Click the "Save" button. User gets redirected back to the Scheduled Tasks screen. Revised task will reflect changes.

The selected Delete ALL Users task was updated on the Currently Scheduled Tasks screen.

To delete an existing Call Maintenance task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Delete ALL Users task and click the "Delete" button, confirm operation.

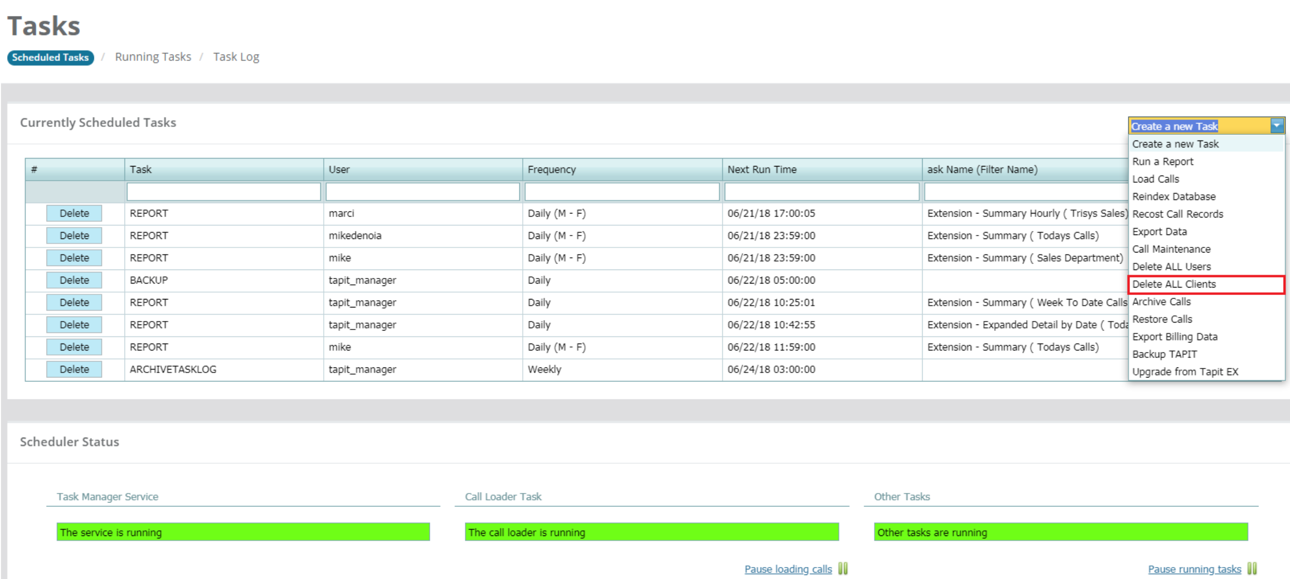
The selected Delete ALL Users task was deleted from the list.

Delete ALL Clients

The Delete ALL Clients task deletes all users in the database.

To create a new Delete ALL Clients task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand “Create a new Task” list and select the Delete ALL Clients task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the “Next” button. User gets redirected on the next screen.

Run Once
A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

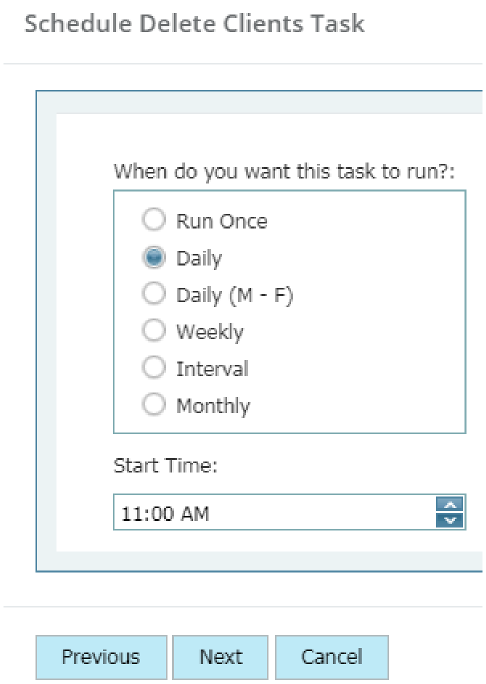
Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval
The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly

The report will run monthly, on a specified day of the month, at a specified time.

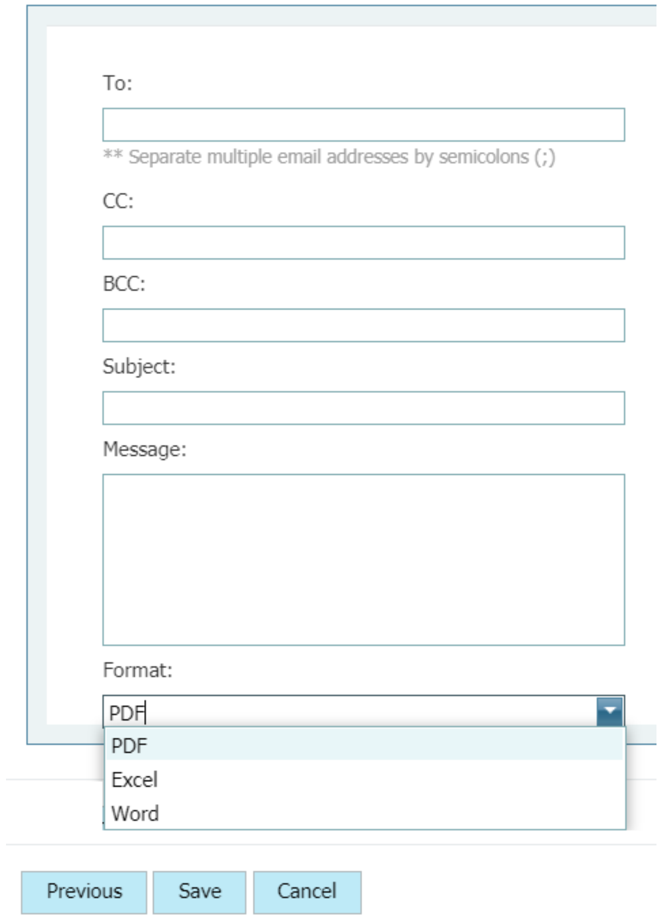
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



6. Click the "Next" button. User gets redirected on the next screen.
7. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The newly created Delete ALL Clients task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Delete ALL Clients task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Delete ALL Clients task. User gets redirected on the next screen.
4. Change time interval and start time. Click the "Save" button. User gets redirected back to the Scheduled Tasks screen. Revised task will reflect changes.

The selected Delete ALL Clients task was updated on the Currently Scheduled Tasks screen.

To delete an existing Delete ALL Clients task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Delete ALL Clients task and click the "Delete" button, confirm operation.

The selected Delete ALL Clients task was deleted from the list.

Archive Calls

The Archive Calls task exports call data older than a selected time frame.

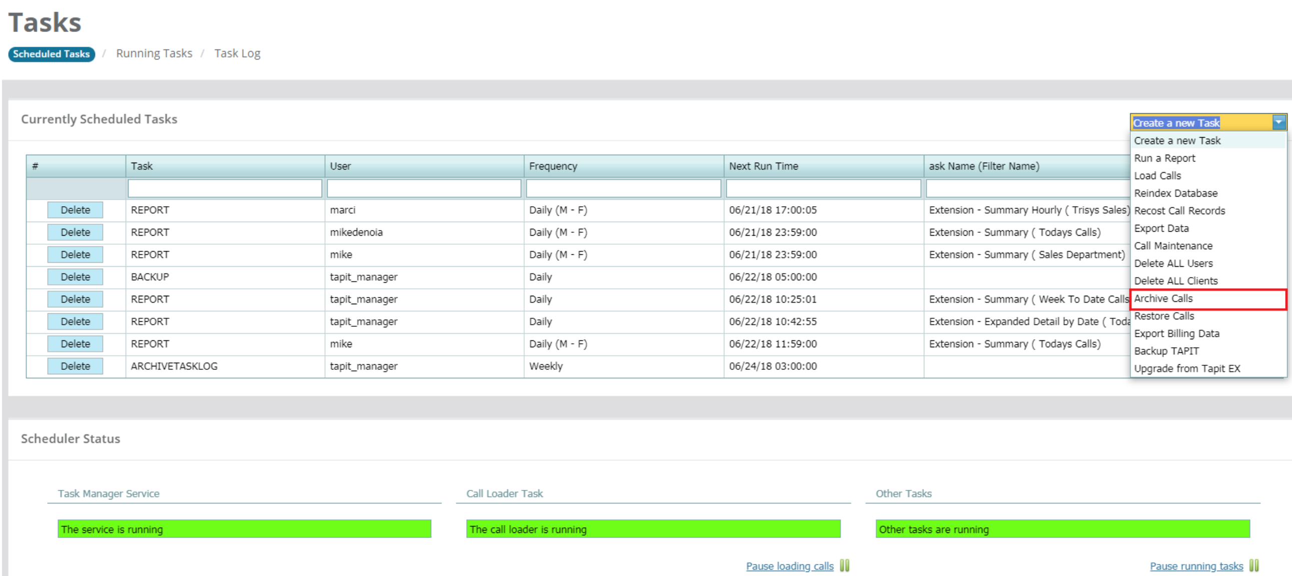
NOTE: Database backups and archiving calls are highly recommended before using this task option. Call records exported and deleted using the Call Maintenance task cannot be restored.

See page 164 on how to Archive Calls and see page 170 on how to Backup Tapit database.

If archive is available from Archive Calls task, see page 167 on how to Restore Call Records.

To create a new Archive Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand “Create a new Task” list and select the Archive Calls task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the “Next” button. User gets redirected on the next screen.

Run Once

A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily

A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)

A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly

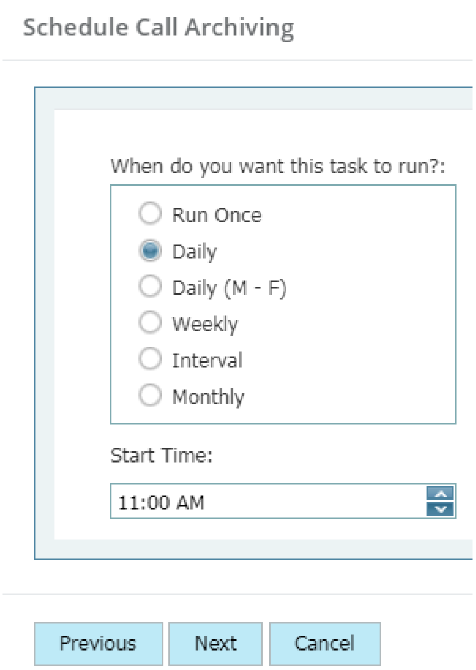
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval

The report will run at a specified time interval.

For example, the screen below shows a report set up to run every four hours.

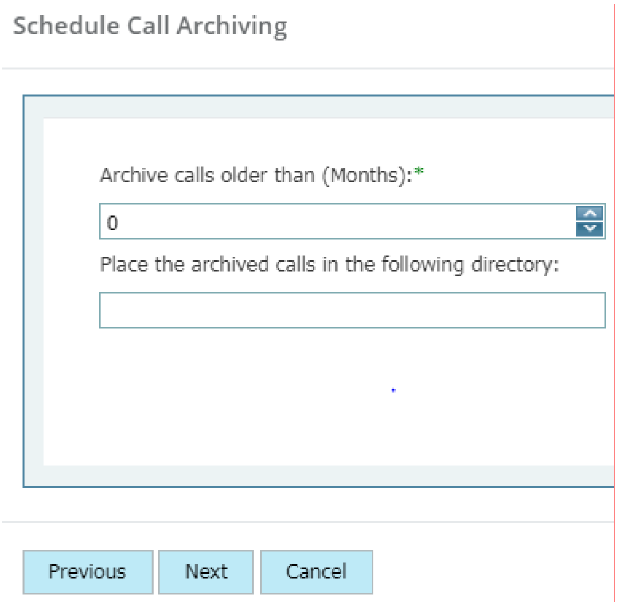
Monthly
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



6. Click the “Next” button. User gets redirected on the next screen.
7. Enter desired criteria in the boxes. Click the “Next” button. User gets redirected on the next screen.

Archive calls older than (Months)*
Using the up/down arrows at the end of the tab or by typing the value, select the time frame of calls to archive older than X months.

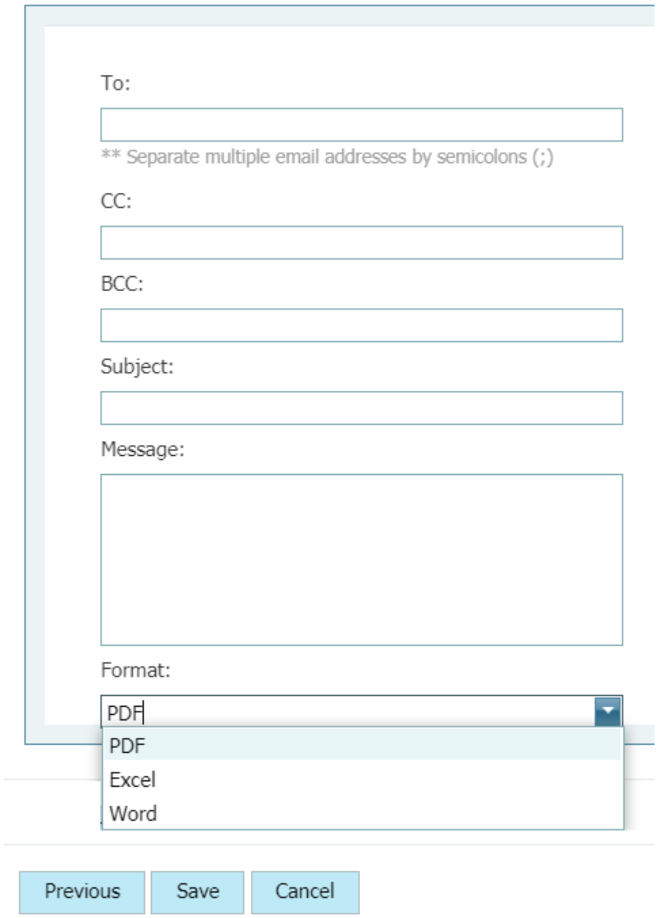
Place the archived calls in the following directory:
Type the folder name of the directory or destination to place archived call data.



8. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The newly created Archive Calls task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Archive Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Archive Calls task. User gets redirected on the next screen.
4. Change time interval and start time. Click the "Save" button. User gets redirected back to the Scheduled Tasks screen. Revised task will reflect changes.

The selected Archive Calls task was updated on the Currently Scheduled Tasks screen.

To delete an existing Archive Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Archive Calls task and click the "Delete" button, confirm operation.

The selected Archive Calls task was deleted from the list.

Restore Calls

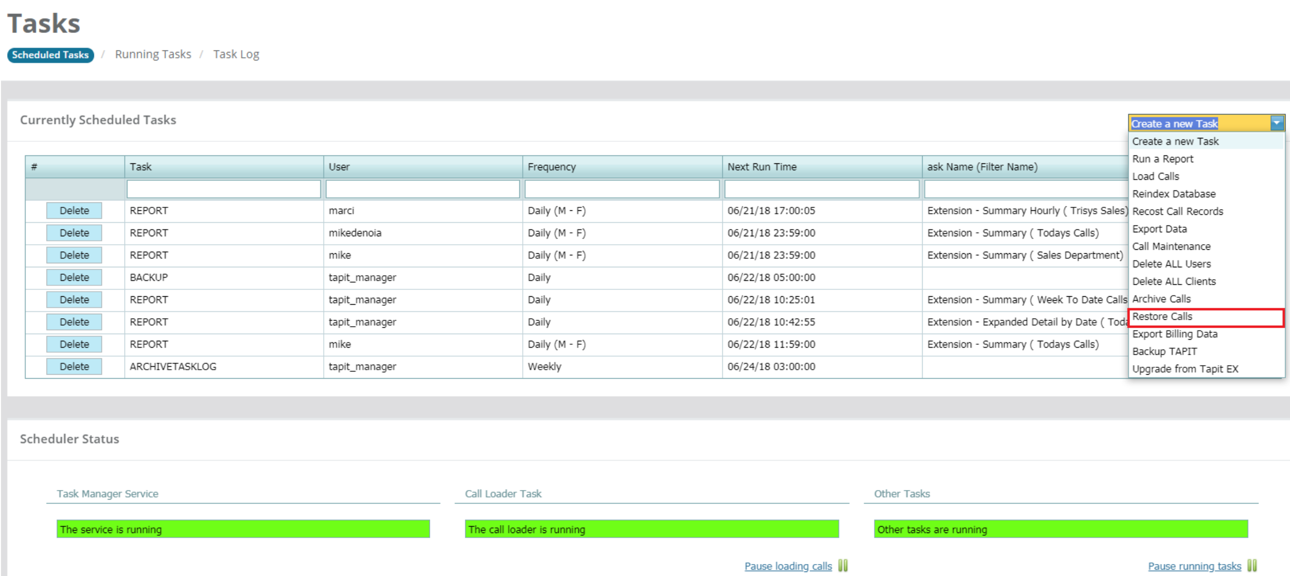
The Restore Calls task imports previously archived call data, only from the Archive Calls task.

NOTE: Database backups and archiving calls are highly recommended before using this task option. Call records exported and deleted using the Call Maintenance task cannot be restored.

See page 164 on how to Archive Calls and see page 170 on how to Backup Tapit database.

To create a new Restore Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Restore Calls task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the "Next" button. User gets redirected on the next screen.

Run Once

A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily

A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)

A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly

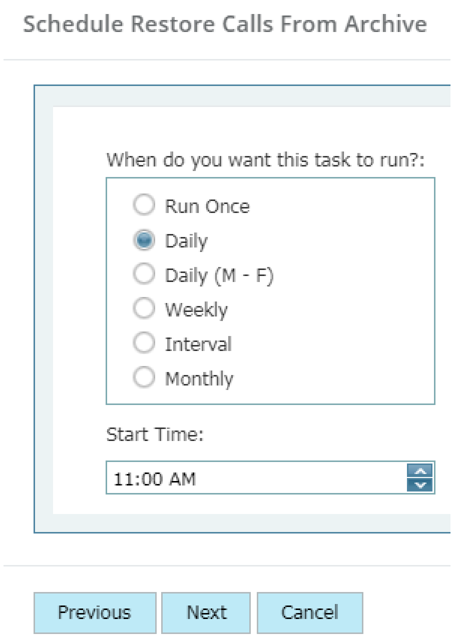
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval

The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly

The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



9. Click the "Next" button. User gets redirected on the next screen.
10. Enter desired criteria in the boxes. Click the "Next" button. User gets redirected on the next screen.

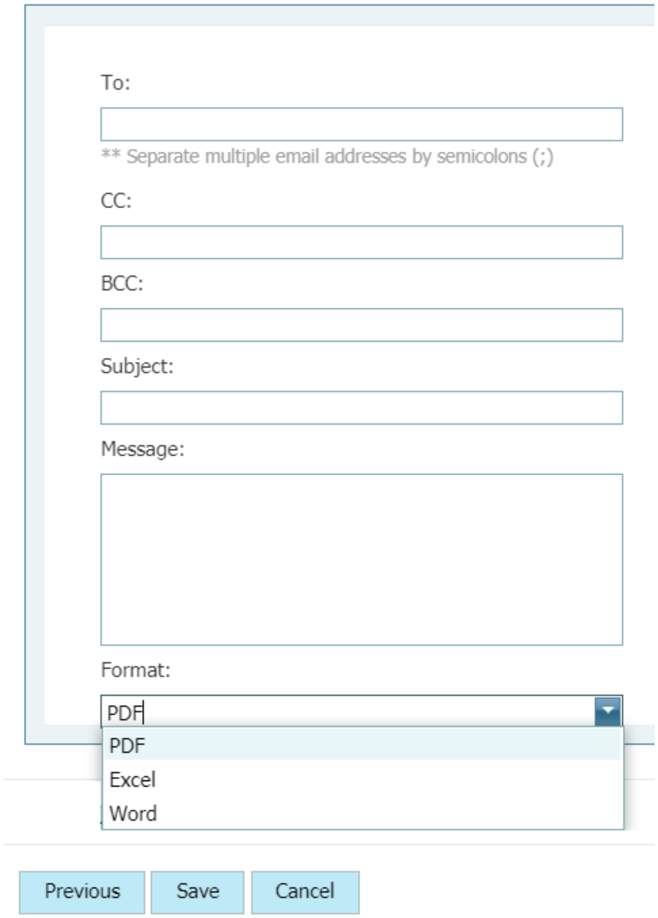
Select start and end date range from which to restore calls.

Archive Directory:
Type the name of the directory from which to restore archived call data in the selected time frame.

11. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The newly created Restore Calls task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Restore Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Restore Calls task. User gets redirected on the next screen.
4. Change time interval and start time. Click the “Save” button. User gets redirected back to the Scheduled Tasks screen. Revised task will reflect changes.

The selected Restore Calls task was updated on the Currently Scheduled Tasks screen.

To delete an existing Restore Calls task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Restore Calls task and click the “Delete” button, confirm operation.

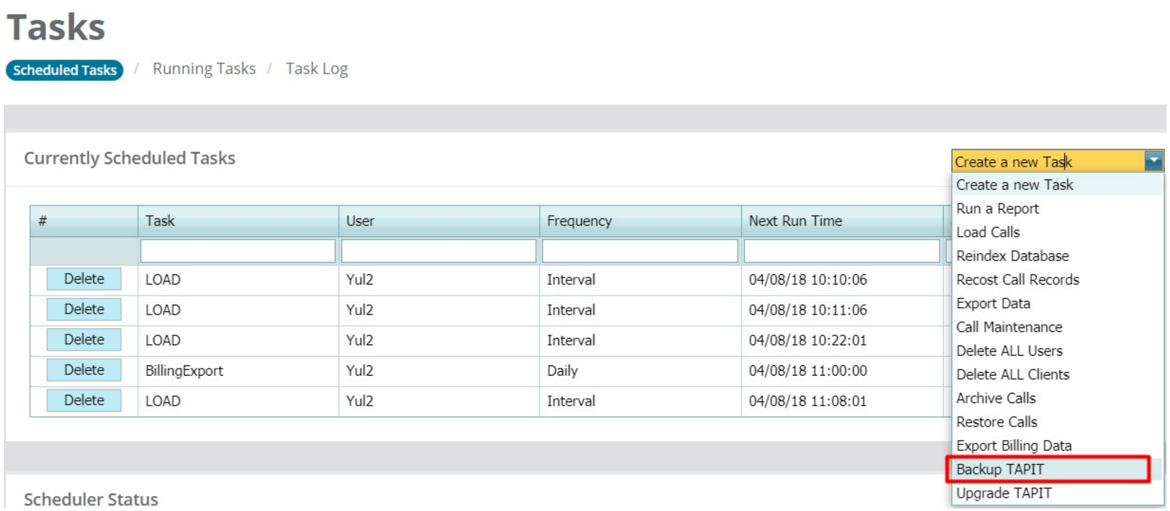
The selected Restore Calls task was deleted from the list.

Backup Tapit

User can schedule the Backup Tapit task to create backup copies of Tapit databases.

To create a new Backup Tapit task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Expand "Create a new Task" list and select the Backup TAPIT task. User gets redirected on the next screen.



4. Select time interval and set start time. Click the "Next" button. User gets redirected on the next screen.

Run Once
A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily
A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

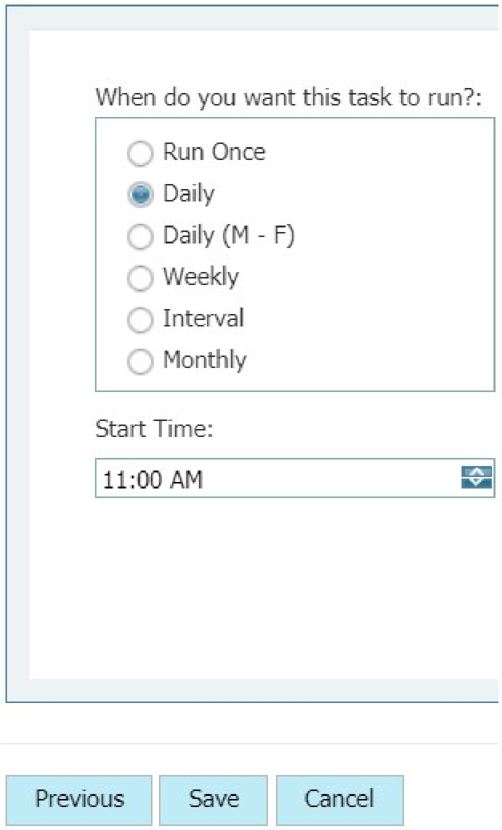
Daily (M - F)
A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly
A report will run every week, on a specified day of the week, at a specified time.
For example, the screen below shows a report set up to run every week, on Friday, at 8:30 AM.

Interval
The report will run at a specified time interval.
For example, the screen below shows a report set up to run every four hours.

Monthly
The report will run monthly, on a specified day of the month, at a specified time.
For example, the screen below shows a report set up to run monthly, on every 10th of

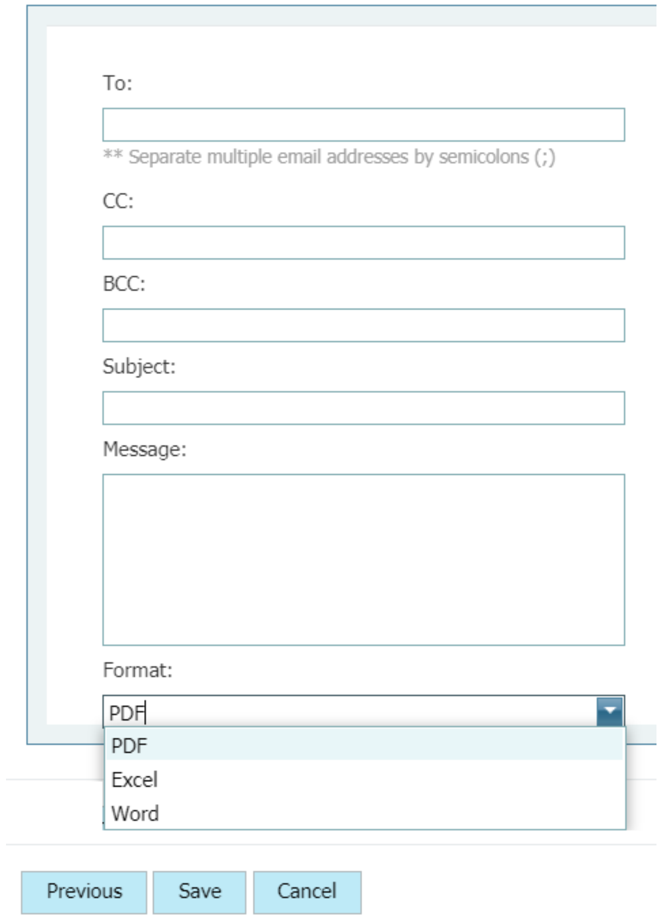
the month starting 12/10/2009, at 4:30 PM. If the report is scheduled to run on 31st day of the month, in case a month does not have 31 days, it will run on the last day of the month.



5. Click the “Next” button. User gets redirected on the next screen.
6. Change the recipient’s Email address, Subject, text message, choose format PDF/Excel/Word and click the “Save” button.

The newly created Backup Tapit task was listed on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To edit an existing Backup Tapit task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Export Billing Data task. User gets redirected on the next screen.
4. Change time interval and start time. Click the "Next" button. User gets redirected on the next screen.

Run Once

A report will run only once at a specified time.
For example, the screen below shows a report set up to run once at 5:00 PM.

Daily

A report will run every day at a specified time.
For example, the screen below shows a report set up to run every day at 8:30 AM.

Daily (M - F)

A report will run every day, Monday through Friday, at a specified time.
For example, the screen below shows a report set up to run every day, Monday through Friday, at 8:30 AM.

Weekly

A report will run every week, on a specified day of the week, at a specified time.
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Interval
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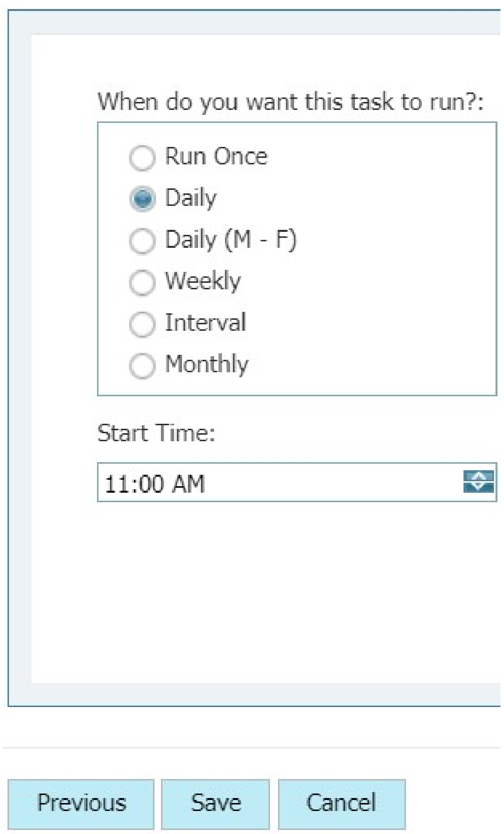
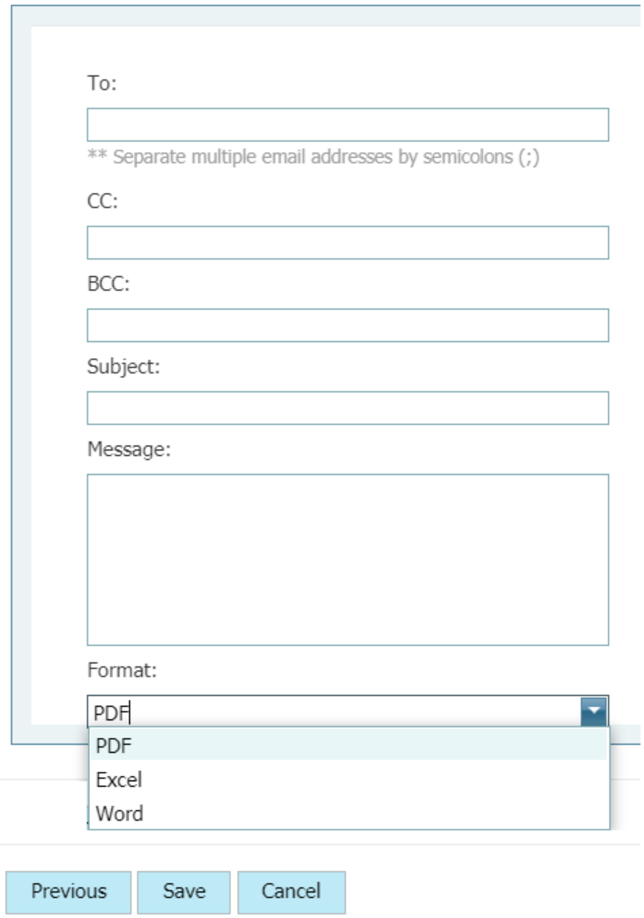


5. Click the "Next" button. User gets redirected on the next screen.
6. Change the recipient's Email address, Subject, text message, choose format PDF/Excel/Word and click the "Save" button.

The Backup Tapit task was updated on the Currently Scheduled Tasks screen.

NOTE: When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com; recipient2@trisys.com; recipient3@trisys.com.



To delete an existing Backup Tapit task

1. Login in to the application.
2. Click the System menu item, choose Tasks menu item.
3. Select any Export Billing Data task, click the “Delete” button, confirm operation.

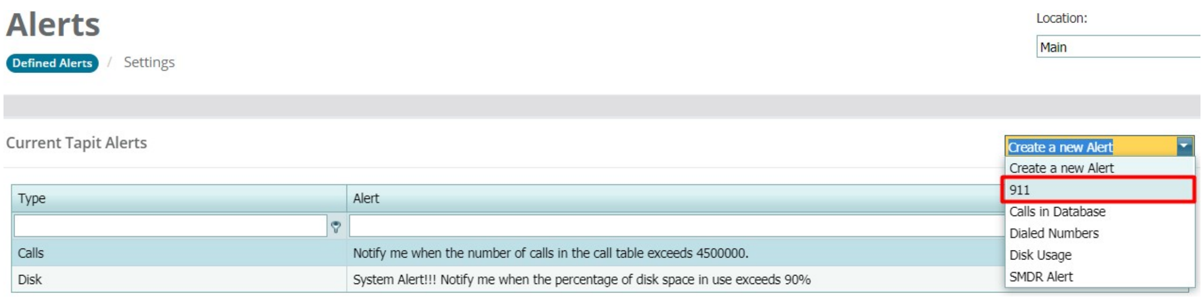
The selected Backup Tapit task was deleted from the list.

Alerts

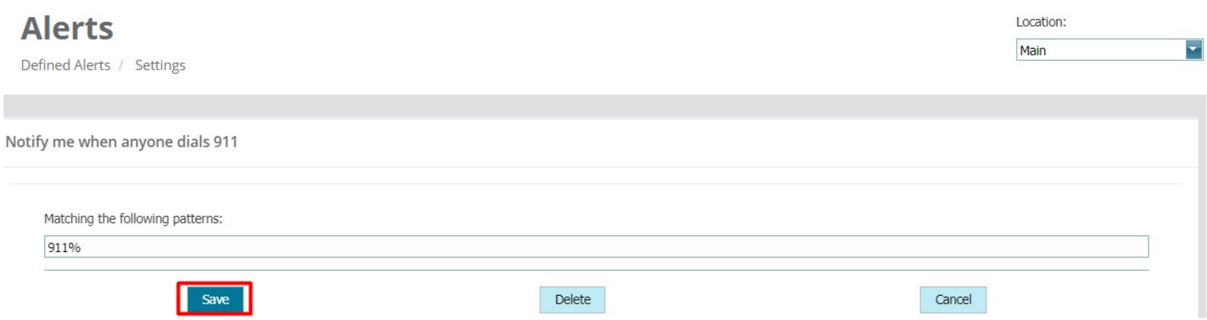
Alerts screen set up notifications for events in the system. For example: number of calls in the call table exceeds max value, the defined number was dialed, percentage of used disk space exceeds max value or anyone dials 911.

To create notification when anyone dials 911

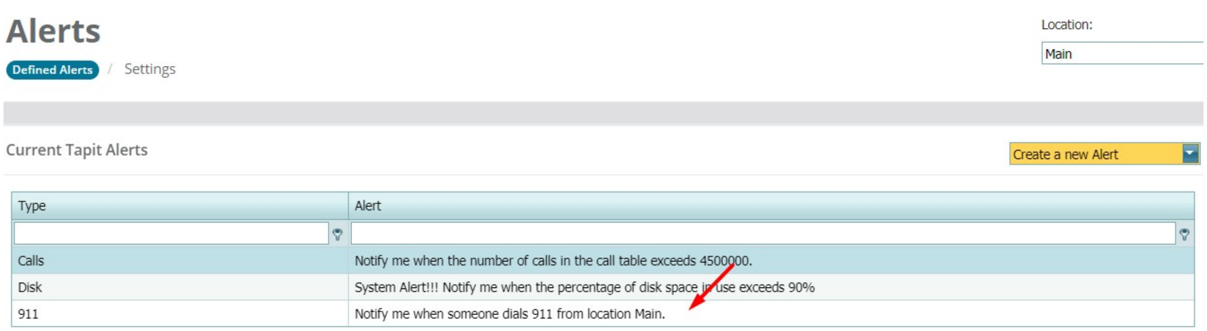
1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Expand “Create a new Alert” list and select the 911. User gets redirected on the next screen.
4. Select location.



5. User should use the percent sign (%) to match phone numbers beginning with, ending with, or containing the specified numbers. User should use the underscore (_) to match one individual character (e.g. _911 all four digits phone numbers ending in 911) and click the "Save" button, confirm operation.

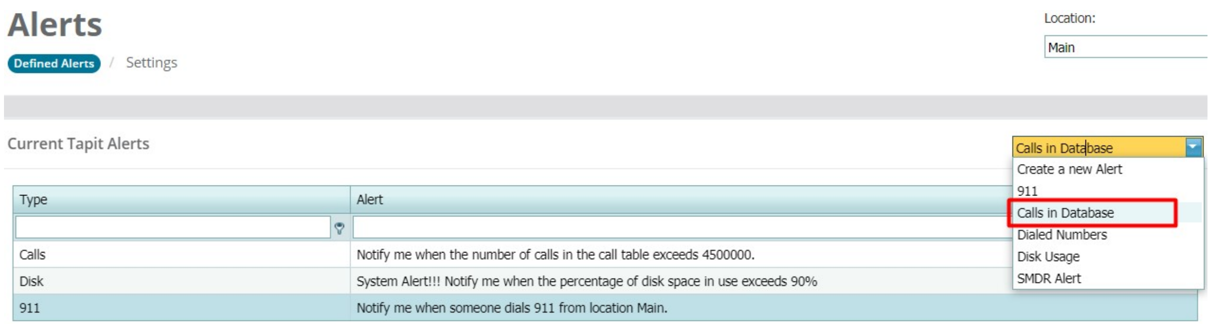


The Alert was added in the list.



To create notification Calls in Database

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Expand "Create a new Alert" list and select Calls in Database. User gets redirected on the next screen.

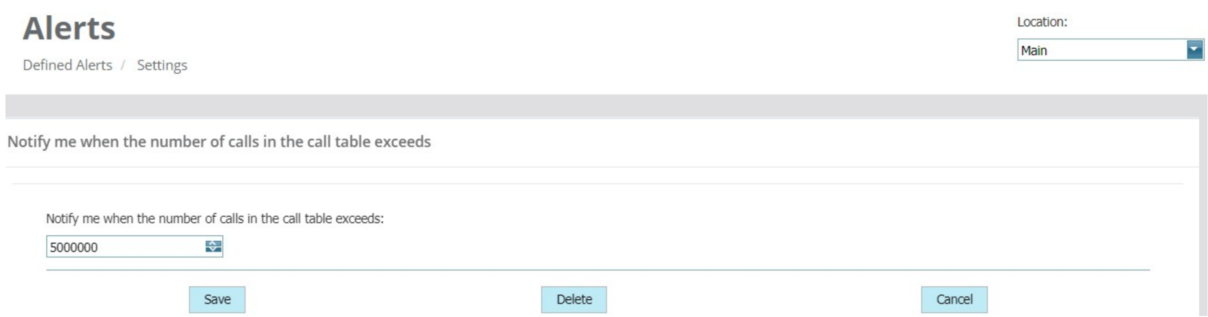


4. Select location.

5. Enter maximum number of calls in the call table. The Number of Calls alert is a tool to warn you when the calls database is getting full. Enter the maximum number of calls you would like to see in the database. There can be a maximum of 5,000,000 calls in the Tapit 6 call table.

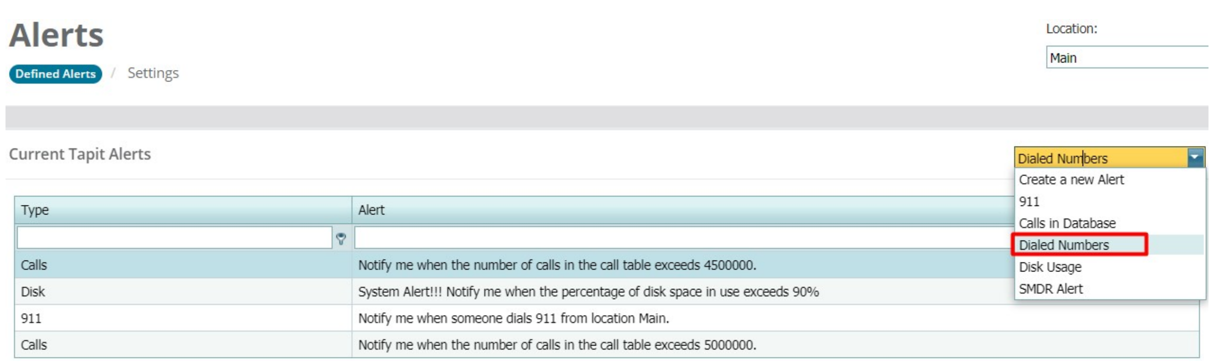
6. Click the "Save" button, confirm operation.

The alert was added in the list.



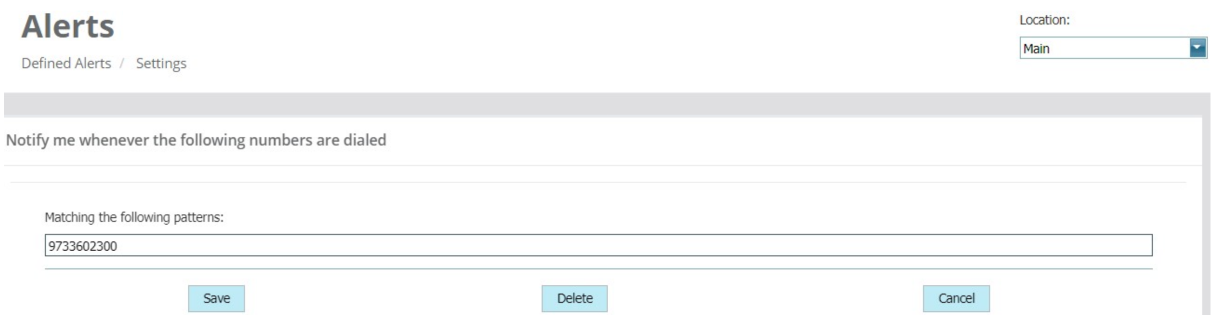
To create the Dialed Number alert

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Expand "Create a new Alert" list and select Dialed Numbers. User gets redirected on the next screen.
4. Select location.



5. Enter the entire phone number to be notified when a specific number is dialed. The Dialed Number alert will notify user if any numbers are dialed that match any of the patterns. Use the percent sign to match phone numbers beginning with, ending with, or containing the specified numbers. For example,

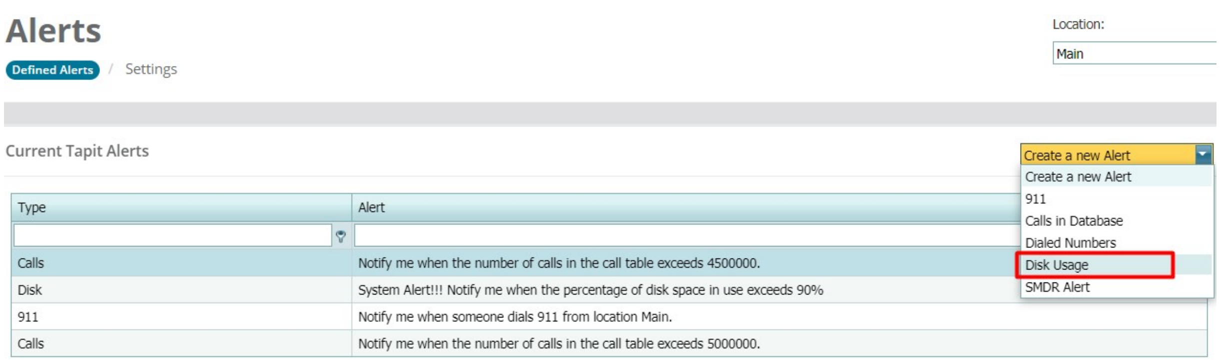
Begins with: 973%, Ends with %2300, contains: %360%.



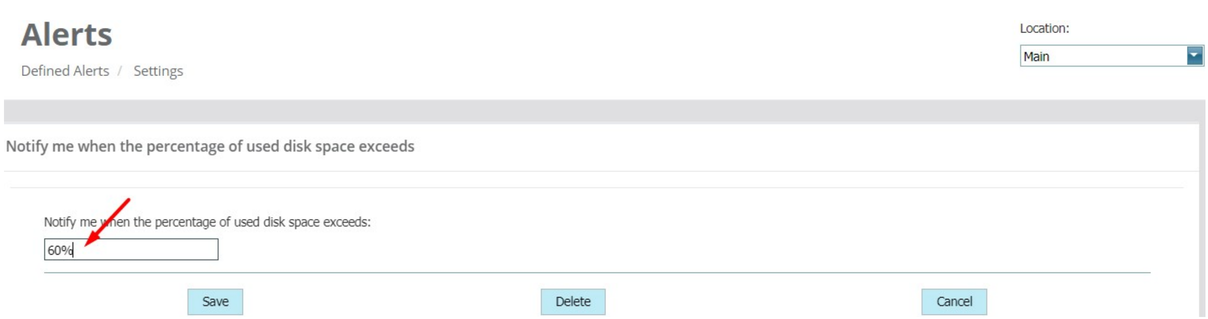
The alert was added in the list.

To create the Disk Usage alert

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Expand "Create a new Alert" list and select Disk Usage. User gets redirected on the next screen.



4. Select location.
5. Set percentage of disk space exceeds. Click the "Save" button.

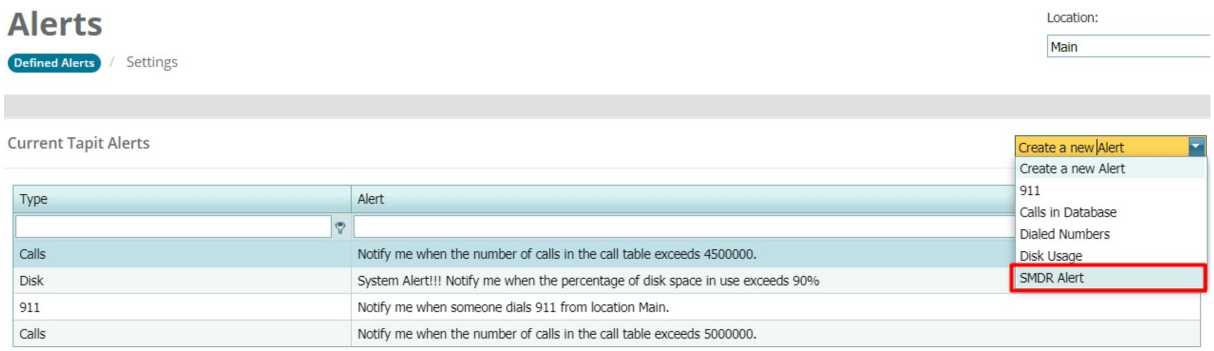


The alert was added in the list.

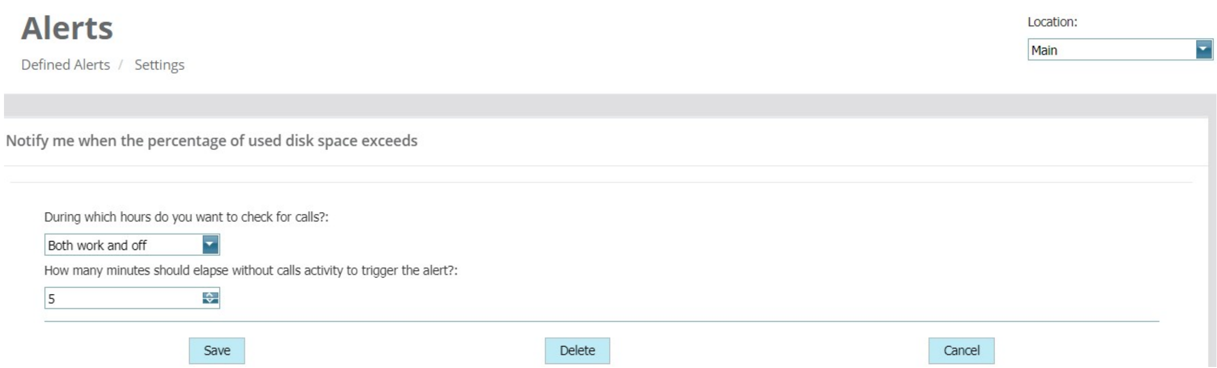
To create the SMDR Alert

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Expand "Create a new Alert" list and select SMDR Alert. User gets

redirected on the next screen.



4. Select location.
5. Expand “During which hours do you want to check for calls?” list and select any item. Set percentage of disk space exceeds. Click the “Save” button.

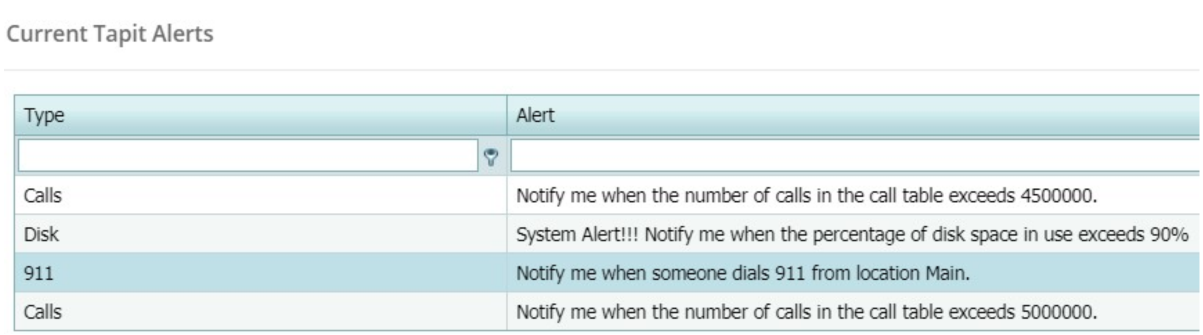


The alert was added in the list.

To edit an existing Alert

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Select any alert from the list.
4. Change any data and click the “Save” button.

The alert was updated in the list.



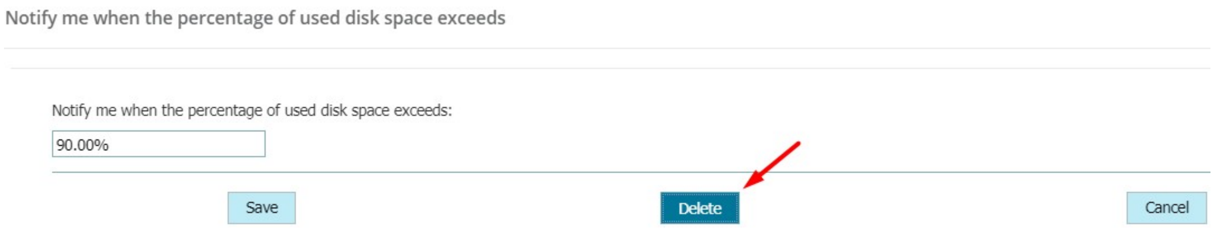
Current Tapit Alerts

Type	Alert
Calls	Notify me when the number of calls in the call table exceeds 4500000.
Disk	System Alert!!! Notify me when the percentage of disk space in use exceeds 90%
911	Notify me when someone dials 911 from location Main.
Calls	Notify me when the number of calls in the call table exceeds 5000000.

To delete an existing Alert

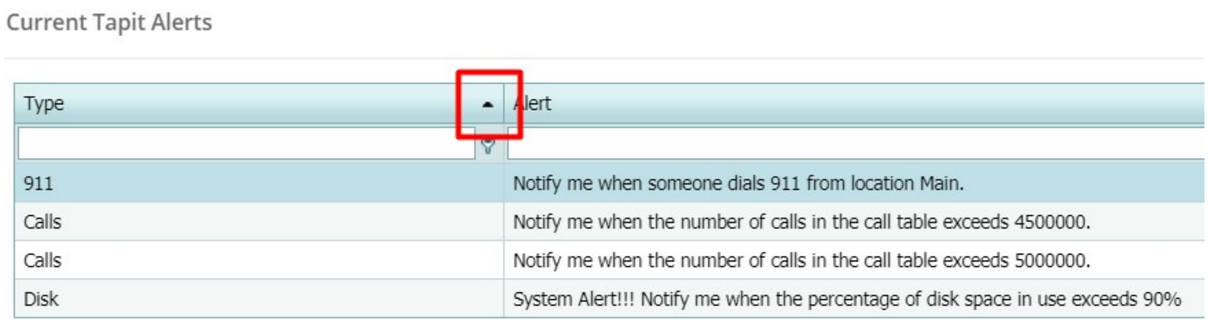
1. Login in to the application.
2. Click the System menu item, choose Alerts menu item.
3. Choose any alert from the list and click the “Delete” button, confirm operation.

The alert was deleted from the list.



To sort the grid

The report user list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



To filter the grid

Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the users name and hit Enter on the keyboard to narrow search. Another option is to type a portion of the user name and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Begins with – search column and filter data with criteria beginning with …

Contains – search column and filter data with criteria containing …

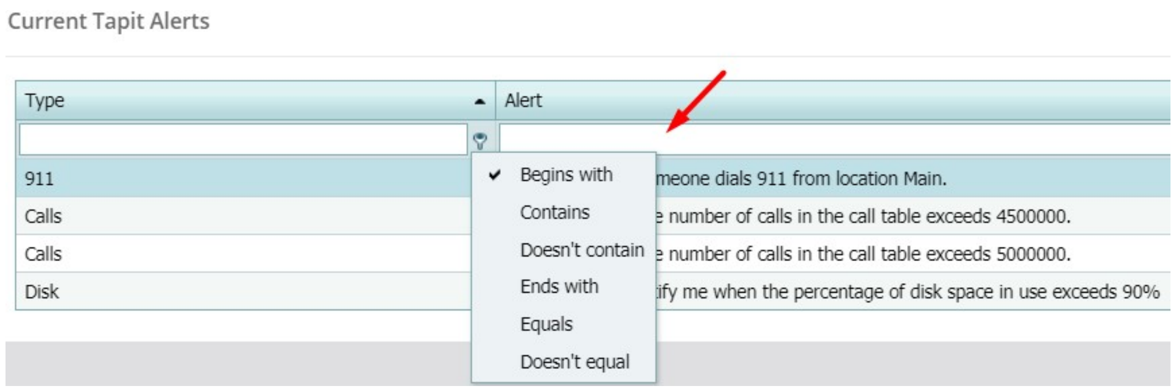
Doesn’t contain – search column and filter data with criteria which does not contain or excludes …

Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

Doesn’t equal – search column and filter data with criteria not equal to …

Like (‘%’ , ‘_”) – selects data by matching string values



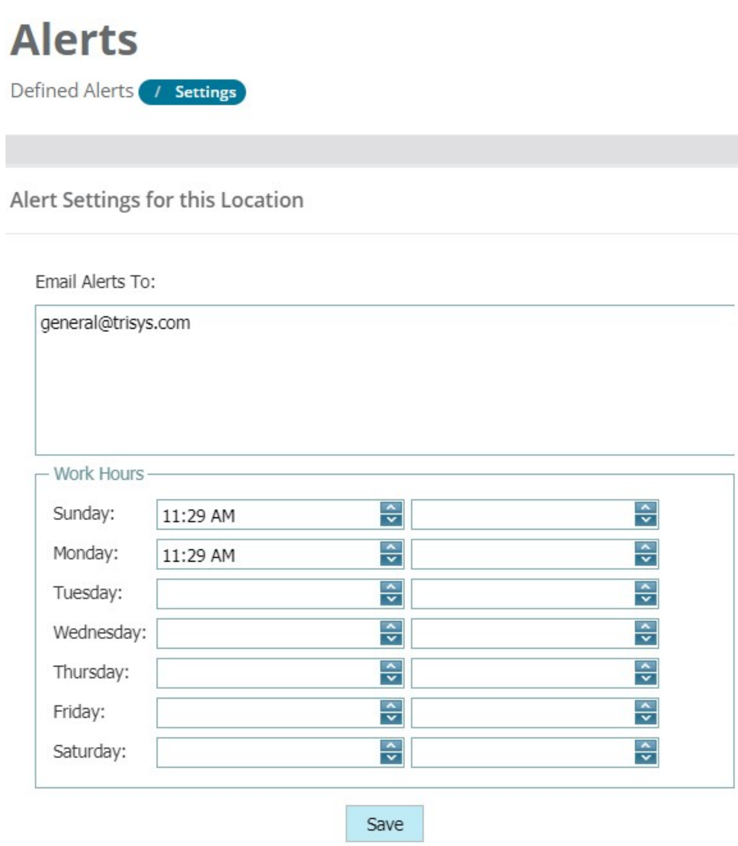
Settings tab

Settings screen set up time, work hours, days for notifications.

To configure alerts

1. Login in to the application.
2. Click the System menu item, choose Alerts menu item, select Settings tab.
3. Choose location.
4. Enter one or more email addresses (separated by semi-colons) you would like alerts sent to. There must be at least one valid email address in this field. For each day your office is open, enter the open and closing times of your business on that day. Hours are entered in military time format (hh:mm) where the hours range from 00 (12 am) to 23 (11 pm). If your business is not open on a particular day, leave the open and close times blank.
5. Click the “Save” button.

Setting were saved for chosen location.



Security

Access to Tapit 6 can be controlled by creating user accounts with different security clearance. There are three security levels: System Manager, Administrator, and User. Each security level can be restricted further by imposing different permissions.

System Manager – this is the highest level of security. This user will be able to access all features of the Tapit 6 application.

Administrator – a user account with this security level will have access only to Dashboard, Reports and Admin sections of Tapit 6. System will not be accessible to this user.

User – a user account with this security level will have access only to Dashboard and Reports. Admin and System sections of Tapit 6 will not be available for this user.

"tapit_manager" is a generic System Manager account. It works as both a user name and a password for logging in to Tapit 6. If you would like to use the Security feature of Tapit 6 to restrict access to the application, it is recommended to create another System Manager password and delete the generic account.

To create new user account

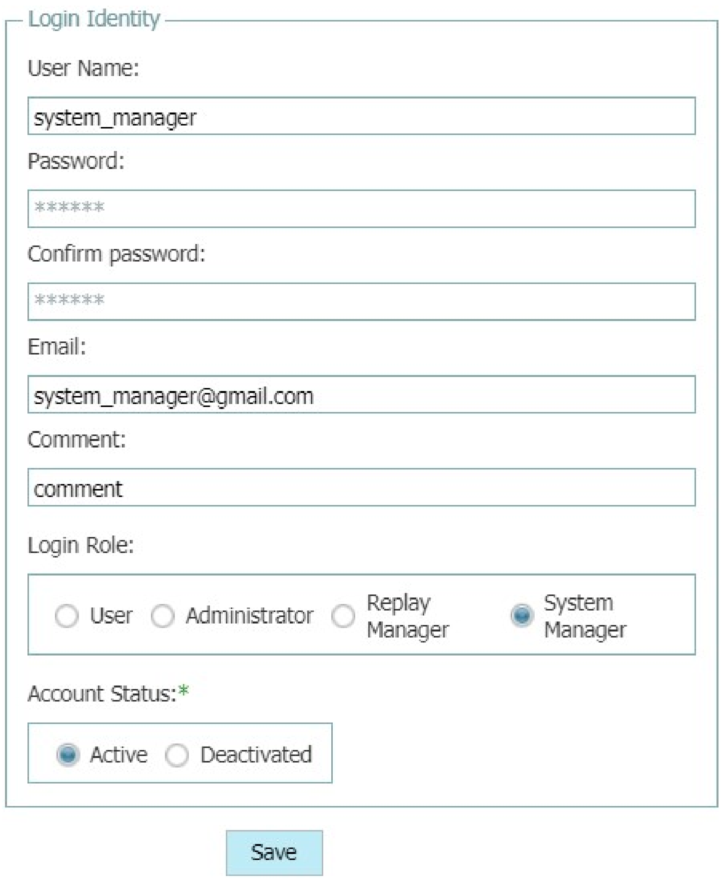
1. Login in to the application.
2. Click the System menu item, choose Security menu item.
3. Click the "Create a New Login" button. User gets redirected on the **Manage a Login screen.**
4. Enter a user name, password (password has to be a least 7 characters long), email address, account description.
5. Choose security level.

System Manager – this is the highest level of security. This user will be able to access all features of the Tapit 6 application.

Administrator – a user account with this security level will have access only to Dashboard, Reports and Admin sections of Tapit 6. System will not be accessible to this user.

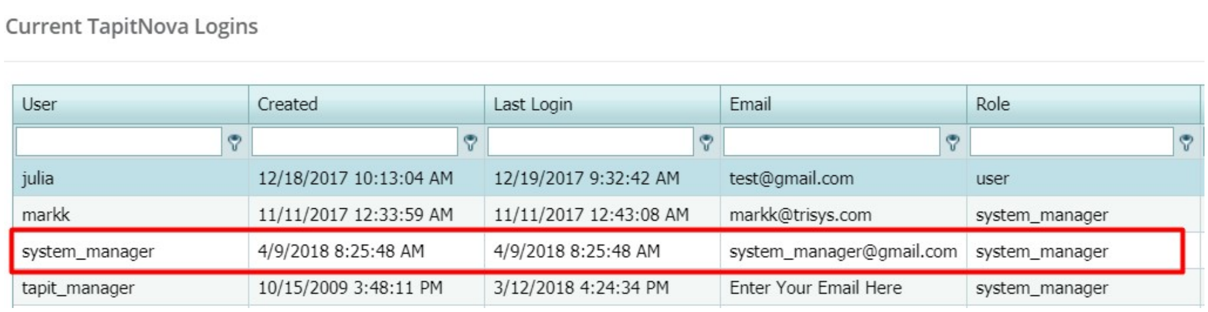
User – a user account with this security level will have access only to Dashboard and Reports. Admin and System sections of Tapit 6 will not be available for this user.

NOTE: each of the above security levels can be restricted by a variety of permissions.



6. Click the "Save" button.

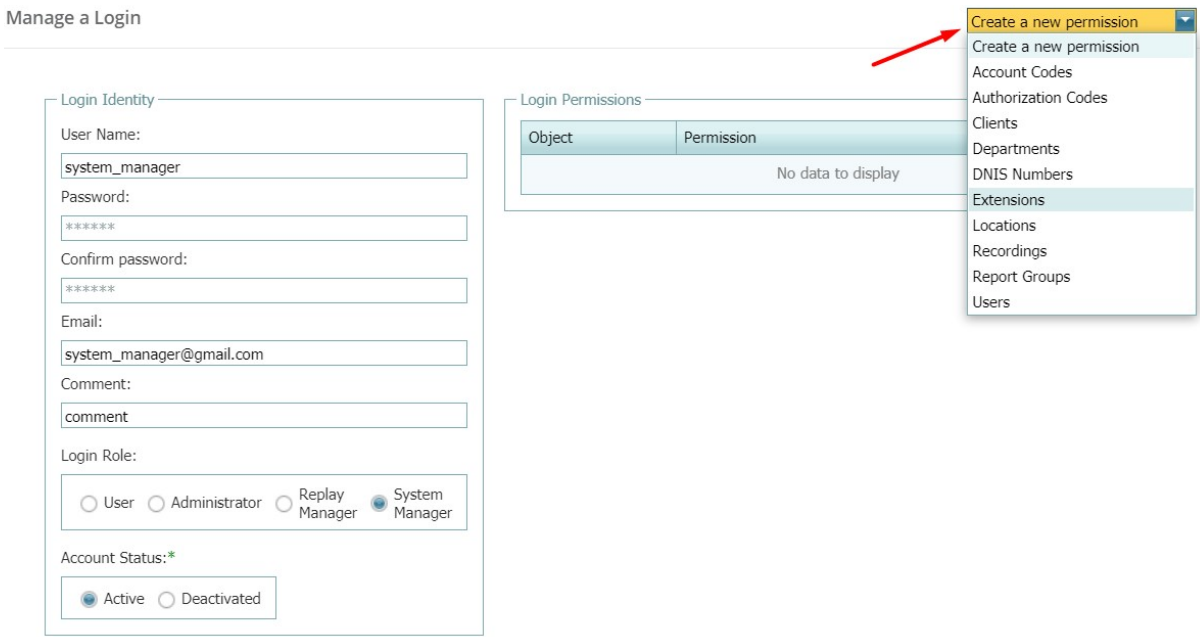
The user gets added in the system.


Current TapitNova Logins

User	Created	Last Login	Email	Role
julia	12/18/2017 10:13:04 AM	12/19/2017 9:32:42 AM	test@gmail.com	user
markk	11/11/2017 12:33:59 AM	11/11/2017 12:43:08 AM	markk@trisys.com	system_manager
system_manager	4/9/2018 8:25:48 AM	4/9/2018 8:25:48 AM	system_manager@gmail.com	system_manager
tapit_manager	10/15/2009 3:48:11 PM	3/12/2018 4:24:34 PM	Enter Your Email Here	system_manager

To grant or deny permissions

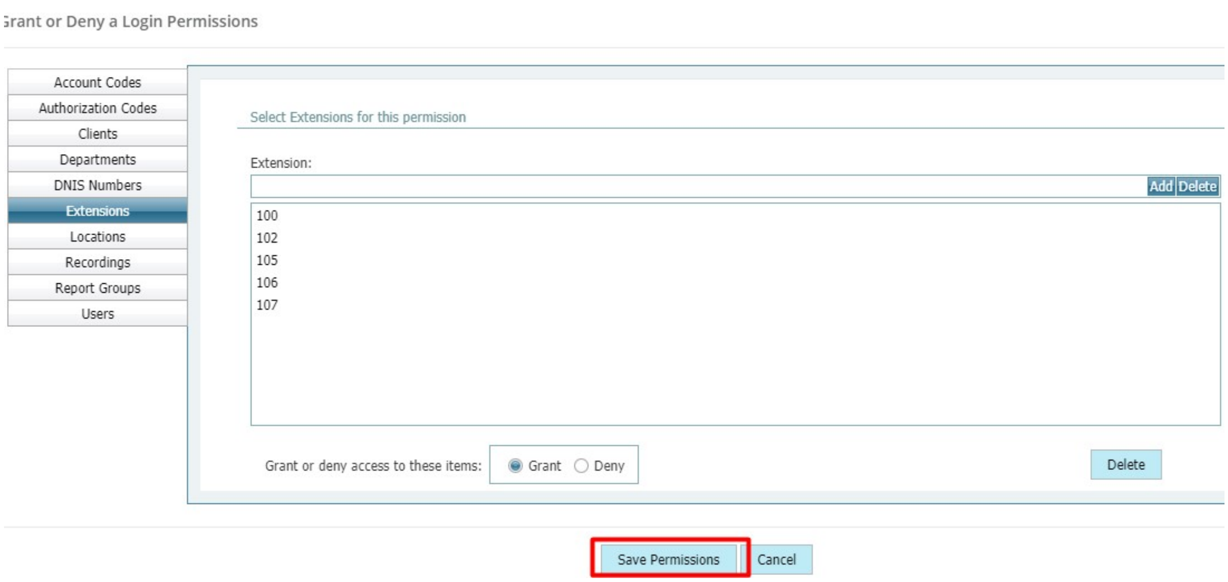
1. Login in to the application.
2. Click the System menu item, choose Security menu item.
3. Select user in the grid. User gets redirected on the **Manage a Login screen.**
4. Expand "Create a new permission" list and select any item. For example: "Extensions".



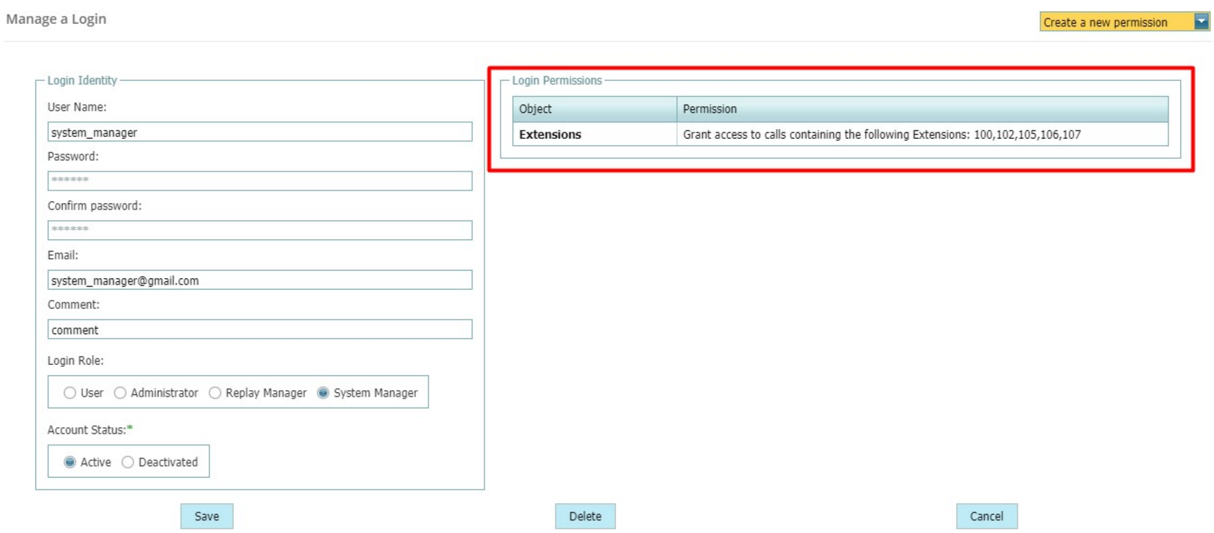
9. Add Extensions, select option Grand or Deny access for these items.
10. Click the "Save Permissions".

Grant – a user will have access only to the extensions from the Selected list.

Deny – a user will have access to all extensions except extensions from the Selected list.



The Login Permissions screen reflects newly added permission.



To edit an existing user account

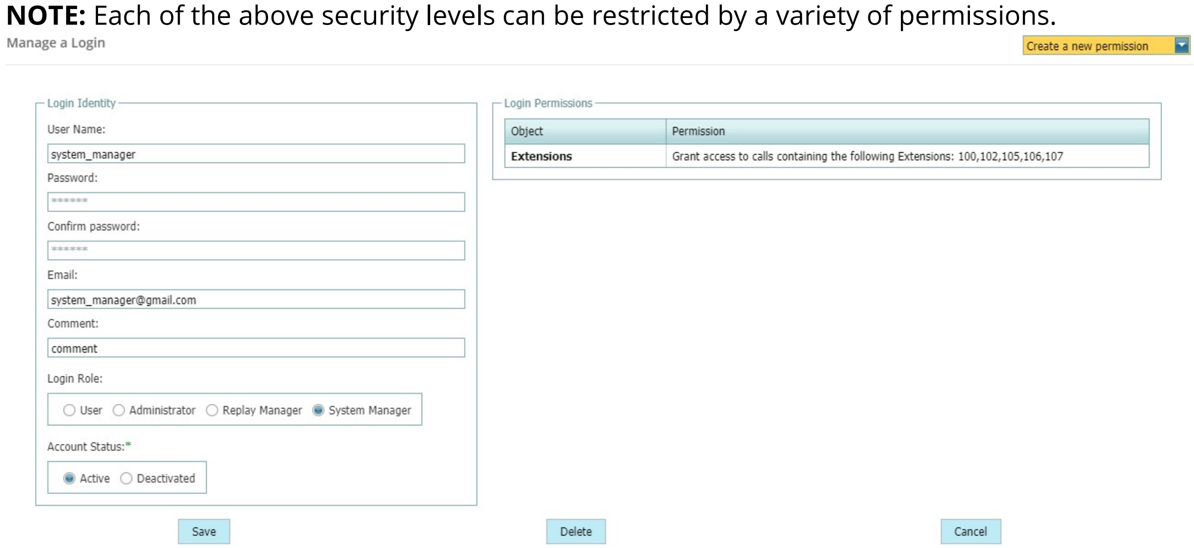
1. Login in to the application.
2. Click the System menu item, choose Security menu item.
3. Select any user in the grid. User gets redirected on the **Manage a Login screen.**
4. Change user name, password, email address, account description or security level.

System Manager – this is the highest level of security. This user will be able to access all features of the Tapit 6 application.

Administrator – a user account with this security level will have access only to Dashboard, Reports and Admin sections of Tapit 6. System will not be accessible to this user.

User – a user account with this security level will have access only to Dashboard and Reports. Admin and System sections of Tapit 6 will not be available for this user.

NOTE: Each of the above security levels can be restricted by a variety of permissions.



5. Change permissions.

If you would like this user to have no access to Tapit 6 click “Deactivated” option under the Account Status. You can activate it at any time later, by selecting Active option.

You can assign new permissions to this user account or edit existing ones.
To assign a new permission click the “Create a new permission” button.
To change existing permissions, click the desired permission on the Login Permissions list.

If you would like to delete this permission, click the “Delete” button.

6. Grant or deny access to these items.
7. Click the “Save Permissions”.

Grant – a user will have access only to the extensions from the Selected list.

Deny – a user will have access to all extensions except extensions from the Selected list.

11. Click the “Save” button.

The Login Permissions screen reflects created or edited permission. The user account was edited.

To delete an existing account

1. Login in to the application.
2. Click the System menu item, choose Security menu item.
3. Select any user in the grid. User gets redirected on the **Manage a Login screen.**
4. Click “Delete”, confirm operation.

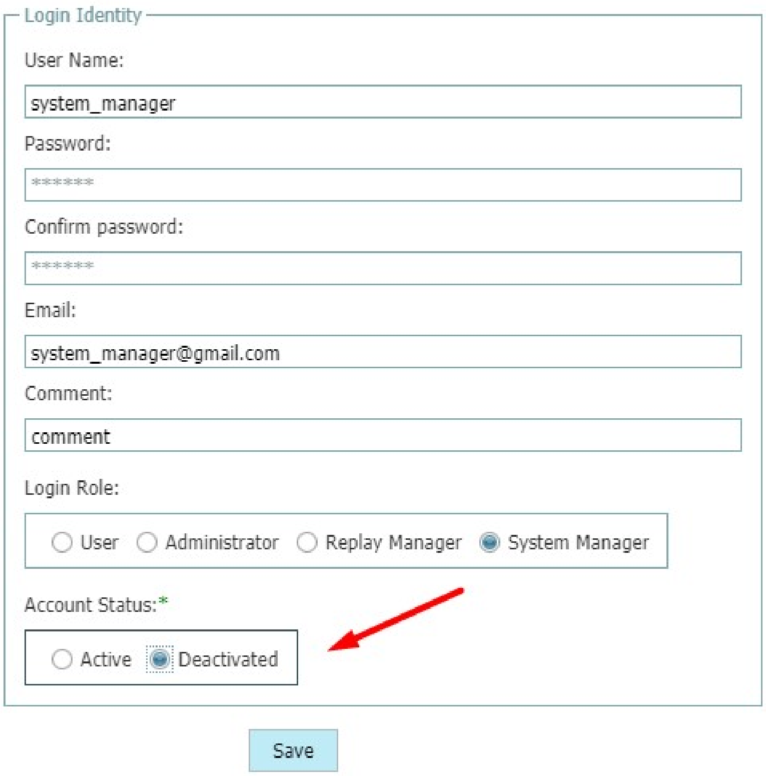
The user account was deleted from the list.

To activate/deactivate an existing Tapit 6 user account

1. Login in to the application.
2. Click the System menu item, choose Security menu item.
3. Select any user in the grid. User gets redirected on the **Manage a Login screen.**
4. Select Active/Deactivated option.
5. Click the “Save” button.

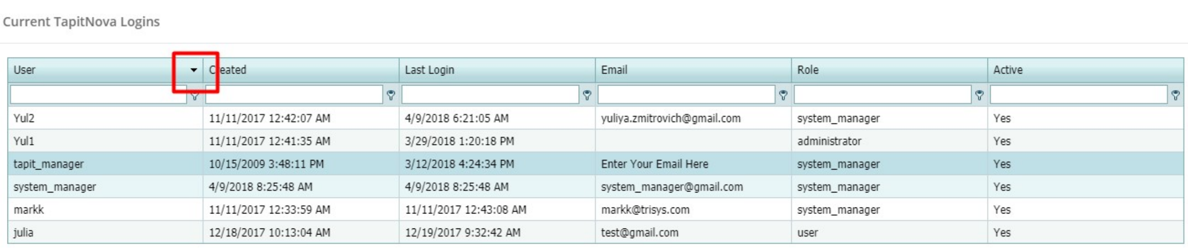
If you would like this user to have no access to Tapit 6 click Deactivated option under the Account Status. You can activate it at any time later, by selecting Active option.

Deactivated user will not be able to access Tapit 6 at all.



To sort the grid

The report user list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.



Current TapitNova Logins

User	Created	Last Login	Email	Role	Active
Yul2	11/11/2017 12:42:07 AM	4/9/2018 6:21:05 AM	yuliya.zmitrovich@gmail.com	system_manager	Yes
Yul1	11/11/2017 12:41:35 AM	3/29/2018 1:20:18 PM		administrator	Yes
tapit_manager	10/15/2009 3:48:11 PM	3/12/2018 4:24:34 PM	Enter Your Email Here	system_manager	Yes
system_manager	4/9/2018 8:25:48 AM	4/9/2018 8:25:48 AM	system_manager@gmail.com	system_manager	Yes
markk	11/11/2017 12:33:59 AM	11/11/2017 12:43:08 AM	markk@trisys.com	system_manager	Yes
julia	12/18/2017 10:13:04 AM	12/19/2017 9:32:42 AM	test@gmail.com	user	Yes

To filter the grid

Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the users name and hit Enter on the keyboard to narrow search. Another option is to type a portion of the user name and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

Begins with – search column and filter data with criteria beginning with …

Contains – search column and filter data with criteria containing …

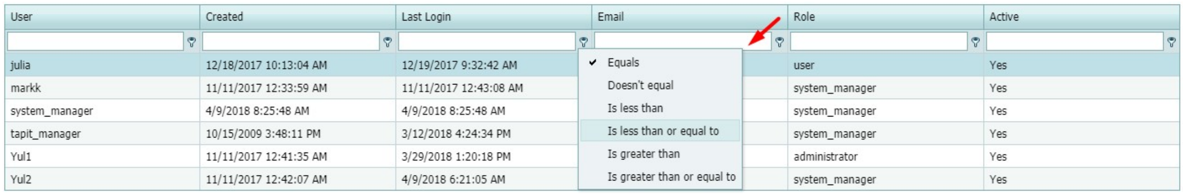
Doesn't contain – search column and filter data with criteria which does not contain or excludes …

Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

Doesn't equal – search column and filter data with criteria not equal to …

Like ('%' , '_") – selects data by matching string values



Audit Trail

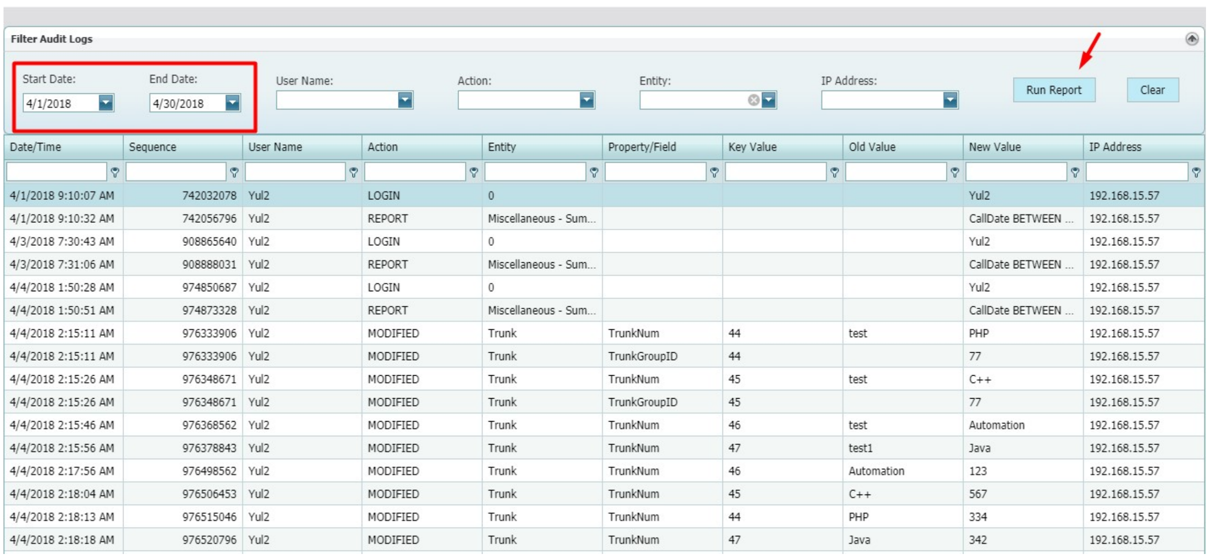
The Audit Trail screen shows full information about events in the system. User can filter logs by Start Date, End Date, User Name, Action, Entity or IP Address.

To filter logs

1. Login in to the application.
2. Click the System menu item, choose Audit Trail menu item.
3. Set Start Date, End date.
4. Click the “Run Report” button.

The report was filtered by month.

Audit Trail

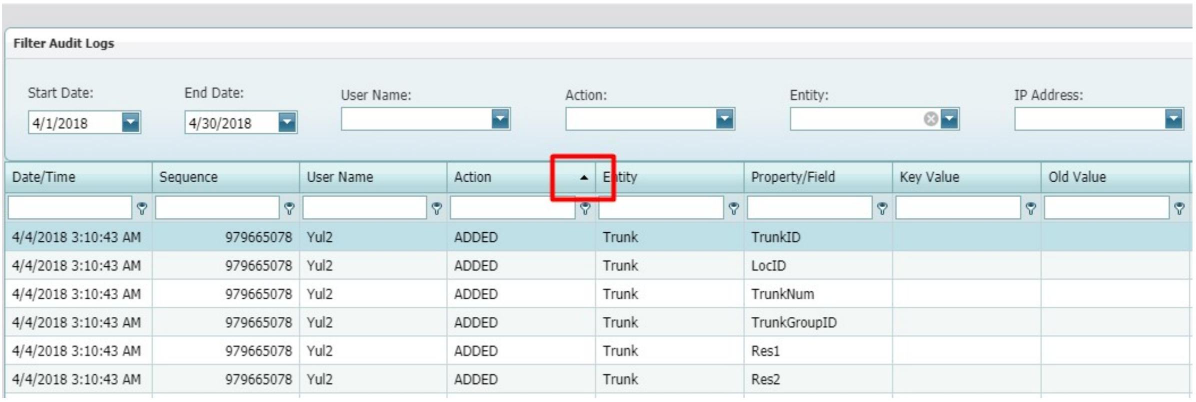


Date/Time	Sequence	User Name	Action	Entity	Property/Field	Key Value	Old Value	New Value	IP Address
4/1/2018 9:10:07 AM	742032078	Yul2	LOGIN	0				Yul2	192.168.15.57
4/1/2018 9:10:32 AM	742056796	Yul2	REPORT	Miscellaneous - Sum...				CallDate BETWEEN ...	192.168.15.57
4/3/2018 7:30:43 AM	908865640	Yul2	LOGIN	0				Yul2	192.168.15.57
4/3/2018 7:31:06 AM	908888031	Yul2	REPORT	Miscellaneous - Sum...				CallDate BETWEEN ...	192.168.15.57
4/4/2018 1:50:28 AM	974850687	Yul2	LOGIN	0				Yul2	192.168.15.57
4/4/2018 1:50:51 AM	974873328	Yul2	REPORT	Miscellaneous - Sum...				CallDate BETWEEN ...	192.168.15.57
4/4/2018 2:15:11 AM	976333906	Yul2	MODIFIED	Trunk	TrunkNum	44	test	PHP	192.168.15.57
4/4/2018 2:15:11 AM	976333906	Yul2	MODIFIED	Trunk	TrunkGroupID	44		77	192.168.15.57
4/4/2018 2:15:26 AM	976348671	Yul2	MODIFIED	Trunk	TrunkNum	45	test	C++	192.168.15.57
4/4/2018 2:15:26 AM	976348671	Yul2	MODIFIED	Trunk	TrunkGroupID	45		77	192.168.15.57
4/4/2018 2:15:46 AM	976368562	Yul2	MODIFIED	Trunk	TrunkNum	46	test	Automation	192.168.15.57
4/4/2018 2:15:56 AM	976378843	Yul2	MODIFIED	Trunk	TrunkNum	47	test1	Java	192.168.15.57
4/4/2018 2:17:56 AM	976498562	Yul2	MODIFIED	Trunk	TrunkNum	46	Automation	123	192.168.15.57
4/4/2018 2:18:04 AM	976506453	Yul2	MODIFIED	Trunk	TrunkNum	45	C++	567	192.168.15.57
4/4/2018 2:18:13 AM	976515046	Yul2	MODIFIED	Trunk	TrunkNum	44	PHP	334	192.168.15.57
4/4/2018 2:18:18 AM	976520796	Yul2	MODIFIED	Trunk	TrunkNum	47	Java	342	192.168.15.57

To sort the grid

The report user list can be sorted alphabetically by clicking the header of each column header. Click once to sort A-Z or click a second time to re-sort Z-A. Click the header again to change the sort direction.

Audit Trail



To filter the grid

Beneath the title of each column is an empty field bar with a toggle symbol to the right. You can type the users name and hit Enter on the keyboard to narrow search. Another option is to type a portion of the user name and click the toggle button to the right of the field which provides a drop-down menu to further filter the search.

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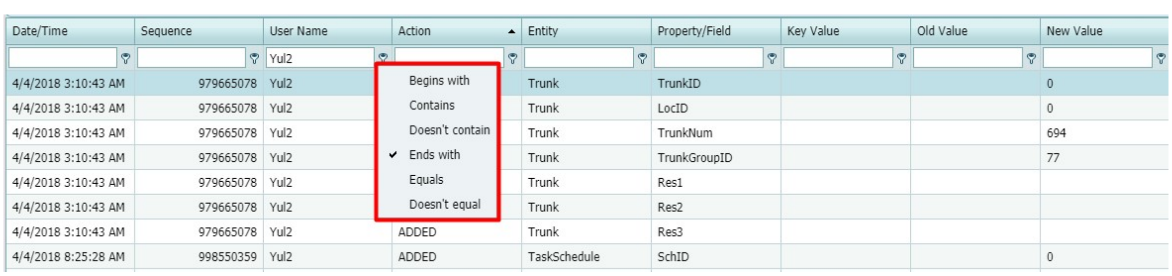
Ends with – search column and filter data with criteria ending with …

Equals – search column and filter data with criteria equal to …

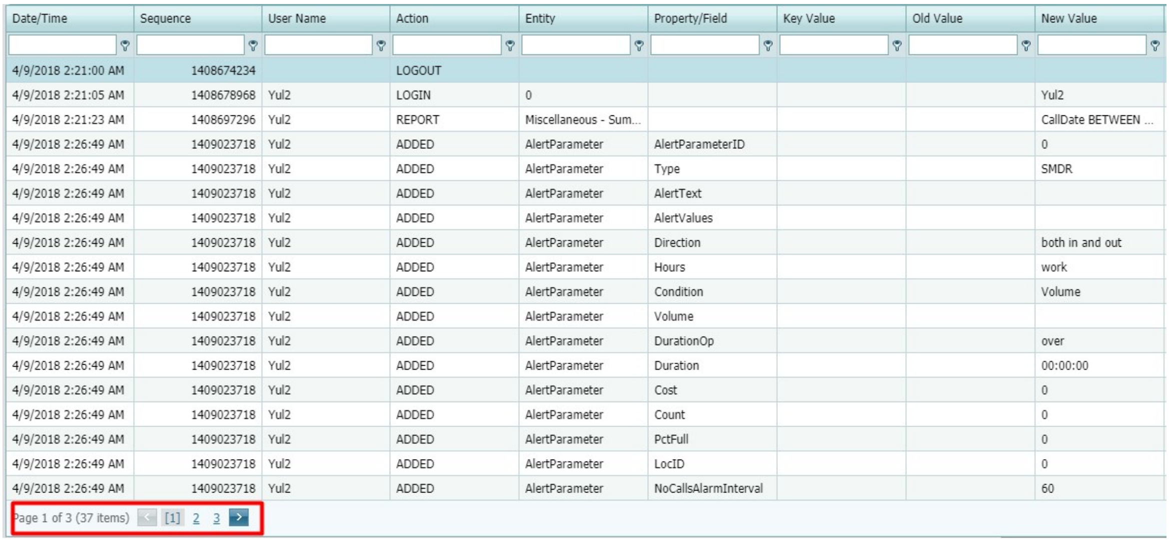
Doesn't equal – search column and filter data with criteria not equal to …

Like ('%' , '_") – selects data by matching string values



Paging of the grid

Use paging controls in the down right corner of the **Audit Trail screen** to navigate through report pages.



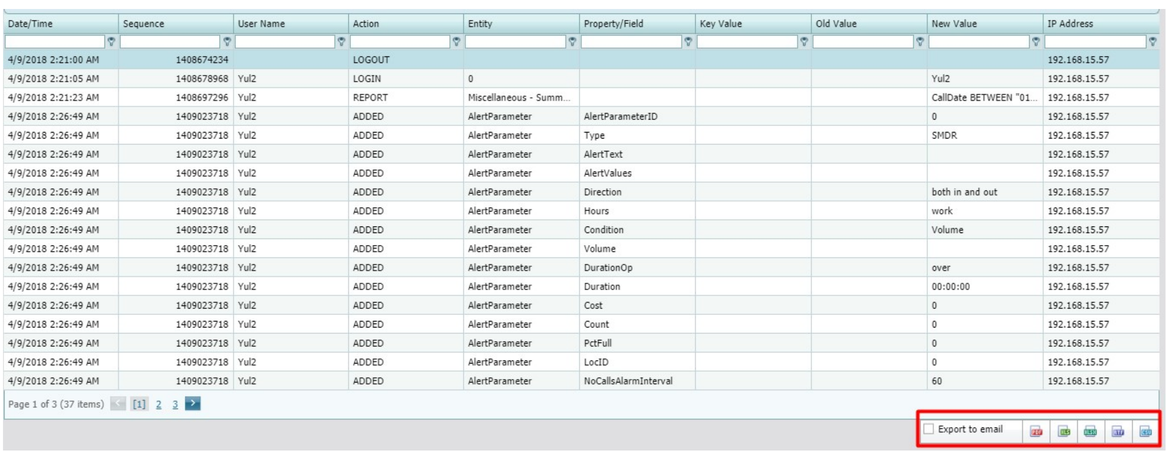
Date/Time	Sequence	User Name	Action	Entity	Property/Field	Key Value	Old Value	New Value
4/9/2018 2:21:00 AM	1408674234		LOGOUT					
4/9/2018 2:21:05 AM	1408678968	Yul2	LOGIN	0				Yul2
4/9/2018 2:21:23 AM	1408697296	Yul2	REPORT	Miscellaneous - Sum...				CallDate BETWEEN ...
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertParameterID			0
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Type			SMDR
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertText			
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertValues			
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Direction			both in and out
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Hours			work
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Condition			Volume
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Volume			
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	DurationOp			over
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Duration			00:00:00
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Cost			0
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Count			0
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	PctFull			0
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	LocID			0
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	NoCallsAlarmInterval			60

Page 1 of 3 (37 items) [1] 2 3

To export report

1. Login in to the application.
2. Click the System menu item, choose Audit Trail menu item.

The list of users can be downloaded in PDF, XLS, XLSX, RTF or CSV format. By clicking the check-box "Export to email" users can get a copy of the report e-mailed.



Date/Time	Sequence	User Name	Action	Entity	Property/Field	Key Value	Old Value	New Value	IP Address
4/9/2018 2:21:00 AM	1408674234		LOGOUT						192.168.15.57
4/9/2018 2:21:05 AM	1408678968	Yul2	LOGIN	0				Yul2	192.168.15.57
4/9/2018 2:21:23 AM	1408697296	Yul2	REPORT	Miscellaneous - Summ...				CallDate BETWEEN "01...	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertParameterID			0	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Type			SMDR	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertText				192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	AlertValues				192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Direction			both in and out	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Hours			work	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Condition			Volume	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Volume				192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	DurationOp			over	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Duration			00:00:00	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Cost			0	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	Count			0	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	PctFull			0	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	LocID			0	192.168.15.57
4/9/2018 2:26:49 AM	1409023718	Yul2	ADDED	AlertParameter	NoCallsAlarmInterval			60	192.168.15.57

Page 1 of 3 (37 items) [1] 2 3

Export to email

SMDR Service Manager

Overview

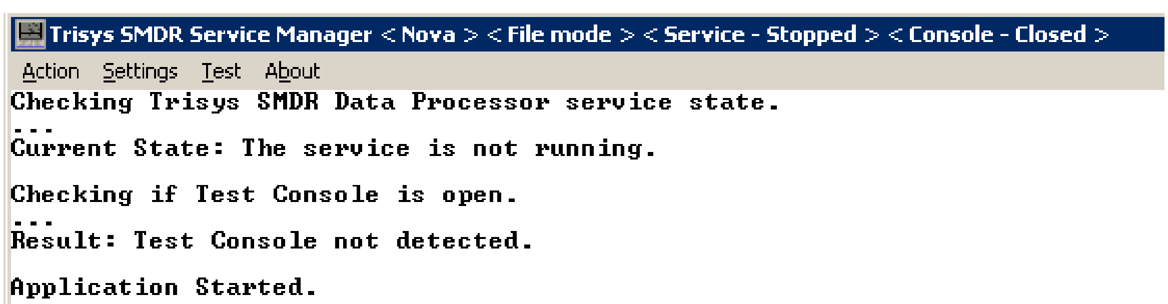
SMDR Service Manager is an application used to manage SMDR data collection. Data is collected and processed by **SMDR Data Processor Service**.
Using **SMDR Service Manger** you can start and stop SMDR **Data Processor Service**, enter and edit **PBX** and **Com Port** settings, and test data collection.

SMDR Data Processor Service must be running at all times to collect and process SMDR Data.

Testing with Test Console and SMDR Monitor are the only exceptions. SMDR Data Processor Service is stopped while testing. However, it must be resumed as soon as testing is finished.

The title bar of the **SMDR Service Manger** screen displays information regarding data collection mode, status of **SMDR Data Processor Service** and **Test Console**.

For example, the screen below shows:
<File mode> - SMDR data is collected and processed from text file.
<Service – Stopped> - **SMDR Data Processor Service** is currently stopped. Calls are not being processed.
<Console – Closed> - **Test Console** is closed



Action Menu (SMDR Service Manager)

Start Service – starts **SMDR Data Processor Service**. If **SMDR Data Processor Service** is not running and neither **Test Console** nor **Tapit Monitor** are open then calls are not processed.

Stop Service – stops **SMDR Data Processor Service**. Calls are not processed. If **SMDR Data Processor Service** is not running and neither **Test Console** nor **Tapit Monitor** are open then calls are not processed.

Open Test Console – opens **Test Console**. This screen is used to test **SMDR** data collection.

Close Test Console – closes **Test Console**.

Exit – exits **SMDR Service Manager**. This option does not stop **SMDR Data Processor Service**.

To start collecting calls

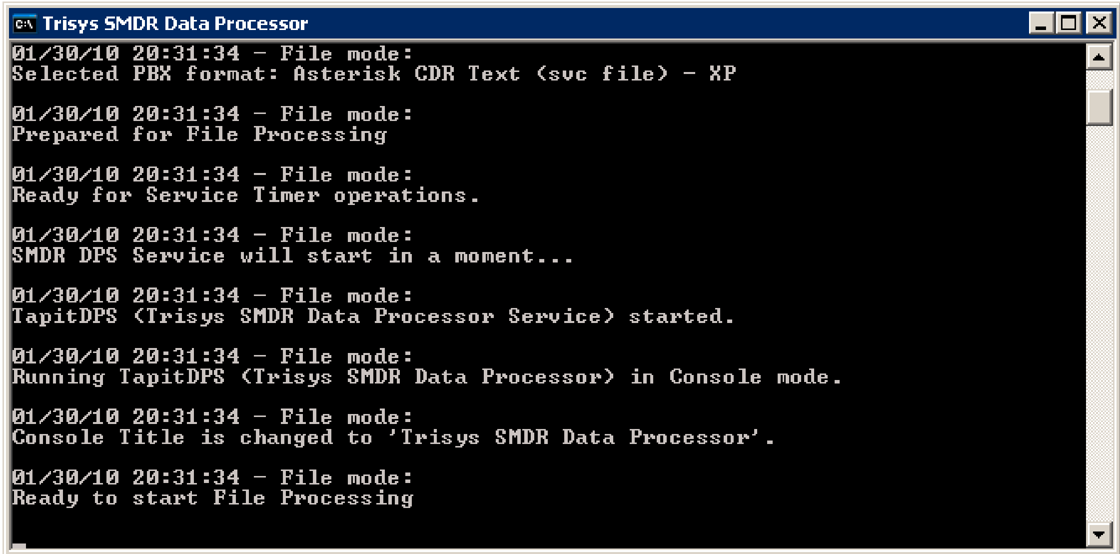
1. Open SMDR Service Manager (**Start**/**Tapit 6**/**SMDR Service Manger**).
2. Click on the **Action** menu.
3. Click on **Start Service**. **SMDR Data Processor Service** is started and calls are being processed.

To stop collecting calls

1. Open SMDR Service Manager (**Start**/**Tapit 6**/**SMDR Service Manger**).
2. Click on the **Action** menu.
3. Click on **Stop Service**. **SMDR Data Processor Service** is stopped and calls are NOT being processed.

To test SMDR data collection with Test Console

1. Open SMDR Service Manager (**Start**/**Tapit 6**/**SMDR Service Manger**).
2. Click on the **Action** menu.
3. Click on **Stop Service**.
4. Click on the **Open Test Console**. **Trisys SMDR Data Processor** window is displayed.



When done with testing, click on **Action** in **SMDR Service Manager** and click on **Close Test Console**. **Trisys SMDR Data Processor** window closes.

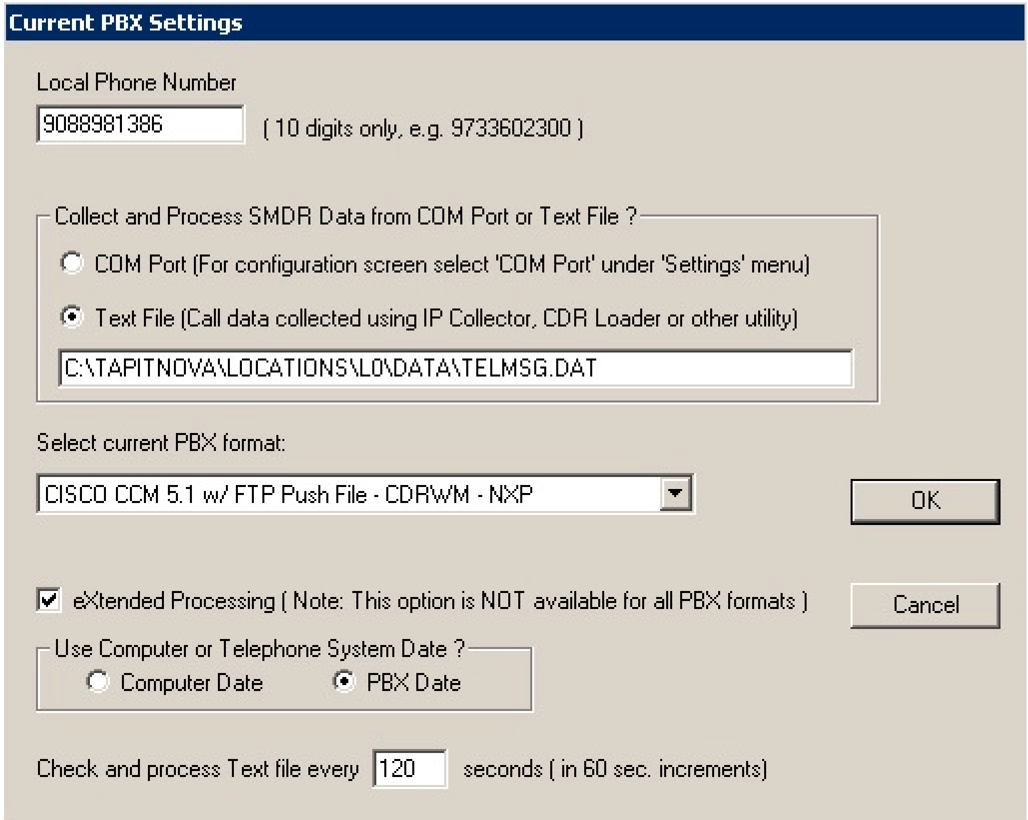
5. To start data collection, click on **Action** and then **Start Service**. **SMDR Data Processor Service** has started and is ready to process call data.

Settings Menu (SMDR Service Manger)

PBX Format – opens Current PBX Settings. This screen has to be set up for calls to be processed correctly. The **Local Phone Number** and **PBX format** settings are crucial to the SMDR data collection process.
COM Port – if SMDR data is collected via COM Port, a user needs to enter Com Port settings.

To setup SMDR Service Manger Settings

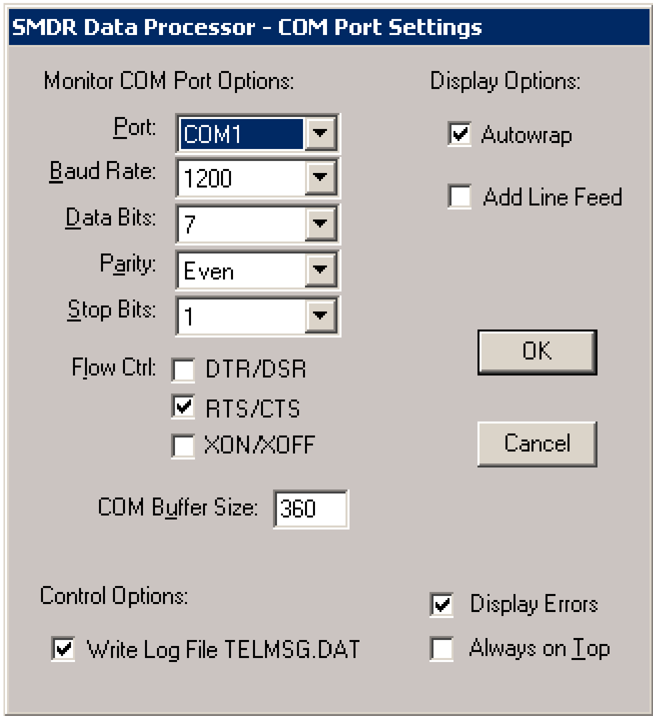
1. Open SMDR Service Manager (**Start/Tapit 6/SMDR Service Manger**).
2. Click on the **Action** menu.
3. Click on **Stop Service**.
4. Click on the **Settings** menu.
5. Click on **PBX Format**.
6. The **Current PBX Settings** screen comes up.



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

7. **Local Phone Number** - enter the local phone number for the Main location.
8. 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 is SMDR data is collected via COM Port.
   Text File – select this option if SMDR data is collected via IP Collector, CDR Loader or another utility.
1. **Select current PBX format** – select the PBX format you are using.
2. **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.
3. **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**.

4. **Check and process Text file every…seconds** – this option becomes available when the **Load Calls from Text File** box is checked. The value entered in this box determines how often Tapit loads data from the text file (as opposed to the Call Load task that converts raw information into Tapit database format file).
5. Click on **OK** to save settings.
6. If Tapit 6 is collecting SMDR data via COM Port, open **Settings/Com Port**. However, if Tapit 6 is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader or another utility) proceed with point 22.



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

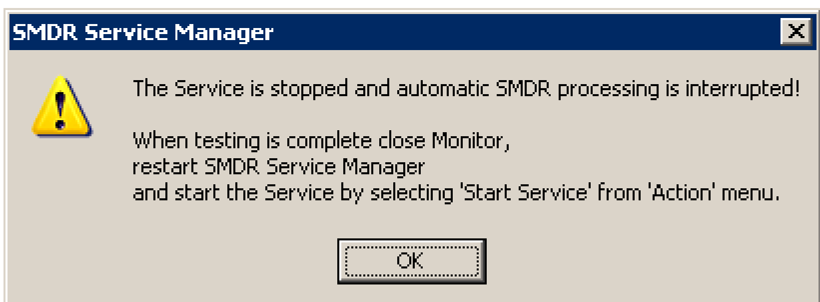
Test (SMDR Service Manger)

Load Telmsg.dat file- click on it if you would like to load data from Telmsg.dat file. Loading Telmsg.dat may result in duplicate records in your Tapit database.
Start Monitor – opens SMDR Monitor.

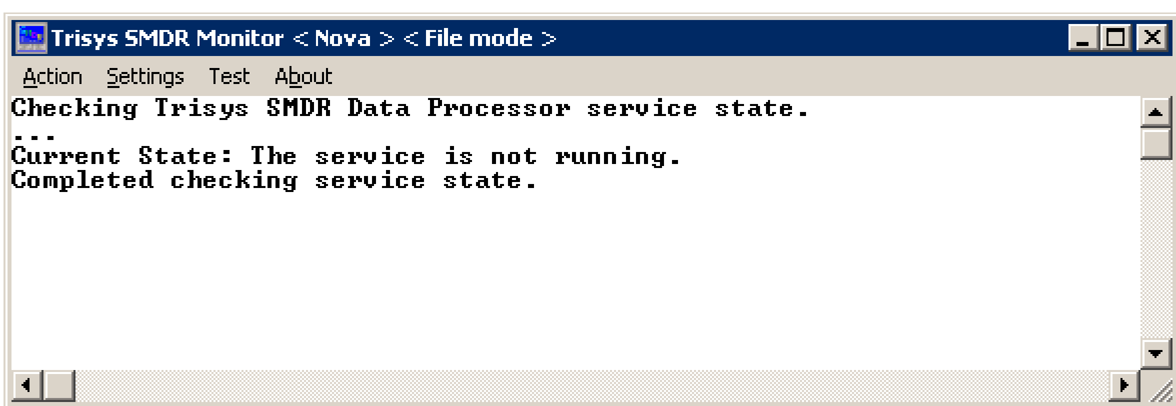
SMDR Monitor

SMDR Monitor is very useful for testing purposes. It processes calls and displays the raw SMDR data on the screen of your computer in real time.
However, while it is running the **SMDR Data Processor** service has to be stopped. **SMDR Monitor** does not work as a service. Therefore, a user must stay logged in when SMDR Monitor is running.

1. Open SMDR Service Manager (**Start/Tapit 6/SMDR Service Manger**).
2. Click on the **Test** menu.
3. Click on **Start Monitor**. The **SMDR Data Processor** service needs to be stopped before **SMDR Monitor** is opened. Click **OK** to the notification message.



4. **SMDR Data Processor Service** is stopped and the **SMDR Service Manager** screen is closed. **SMDR Monitor** opens up.



5. **SMDR Monitor Action** menu has following options:

   Connect – click on it start processing calls.
   Disconnect – click on it to stop processing calls.
   Flush – click on it to dump any SMDR data that may be currently in **SMDR Monitor** buffer.
   Print – click on it to print a content of current screen.
   Exit - exits **SMDR Monitor**. Call data is not being collected.

6. The **SMDR Monitor Settings** menu has following options:

   PBX Format – opens Current PBX Settings. This screen has to be set up for calls to be processed correctly.
   COM Port – if SMDR data is collected via COM Port, a user needs to enter Com Port settings.

7. The **SMDR Monitor Test/Load Telmsg.dat** option is used to load data from Telmsg.dat file. **NOTE:** Loading Telmsg.dat may result in duplicate records in your Tapit database.
8. When finished working with SMDR Monitor, click on **Action** and then **Start Service** to start **SMDR Data Processor Service**.

To setup SMDR Monitor Settings

This section pertains to the SMDR Monitor.
In order to see the SETTINGS MENU (SMDR SERVICE MANGER) section for SMDR Service Manager, see page 192.

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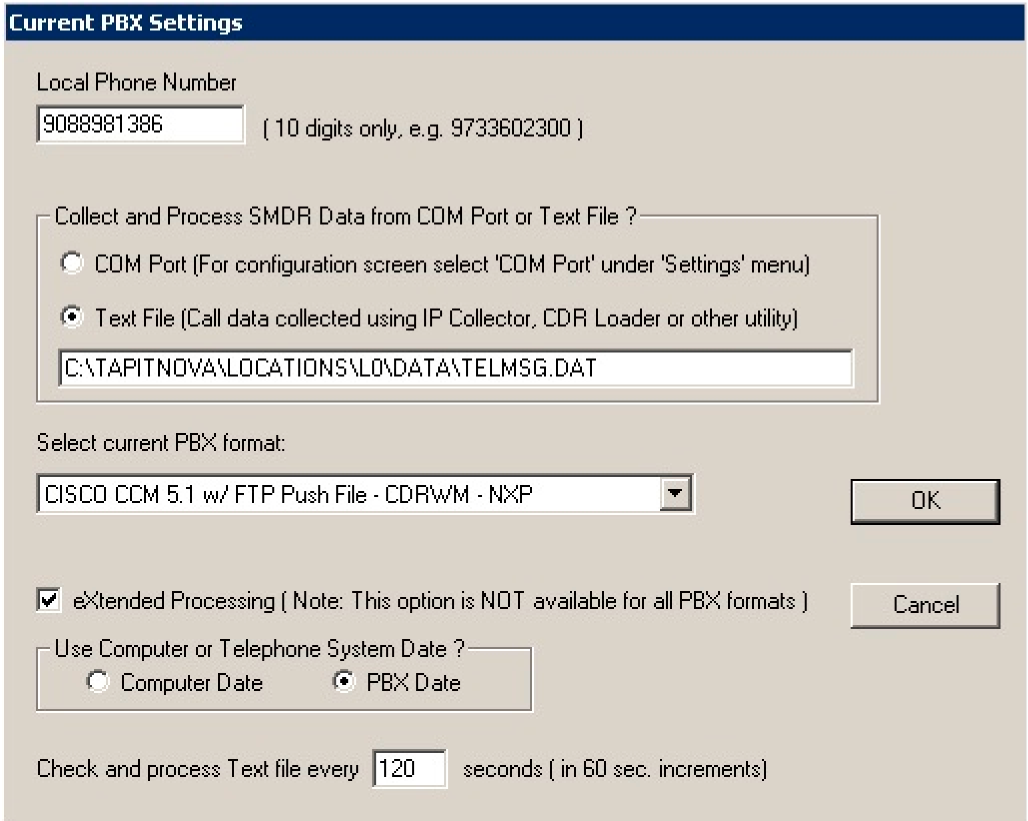
1. Open SMDR Service Manager (**Start/Tapit 6/SMDR Service Manger**).
2. Click on the **Action** menu.
3. Click on **Stop Service**.
4. Click on the **Settings** menu.
5. Click on **PBX Format**.
6. The **Current PBX Settings** screen comes up.



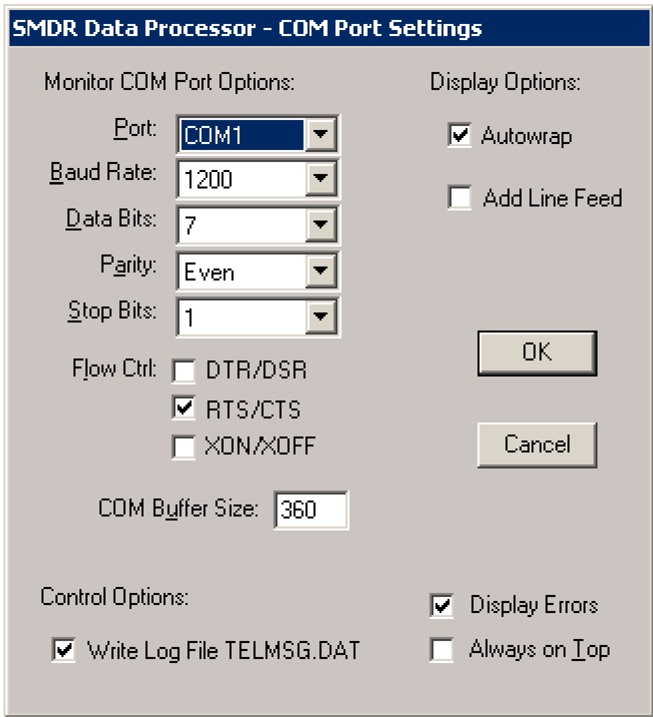
NOTE: in case you have more than one location (you've purchased Remote Manager) this screen pertains to the **Main** location.

7. **Local Phone Number** - enter the local phone number for the Main location.
8. 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 is SMDR data is collected via COM Port.
   Text File – select this option if SMDR data is collected via IP Collector, CDR Loader or another utility.

9. **Select current PBX format** – select the PBX format you are using.
10. **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.
11. **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**.

12. **Check and process Text file every…seconds** – this option becomes available when the **Load Calls from Text File** box is checked. The value entered in this box determines how often Tapit loads data from the text file (as opposed to the Call Load task that converts raw information into Tapit database format file).
13. Click on **OK** to save settings.
14. If Tapit 6 is collecting SMDR data via COM Port, open **Settings/Com Port**. However, if Tapit 6 is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader or another utility) proceed with point.



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

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