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

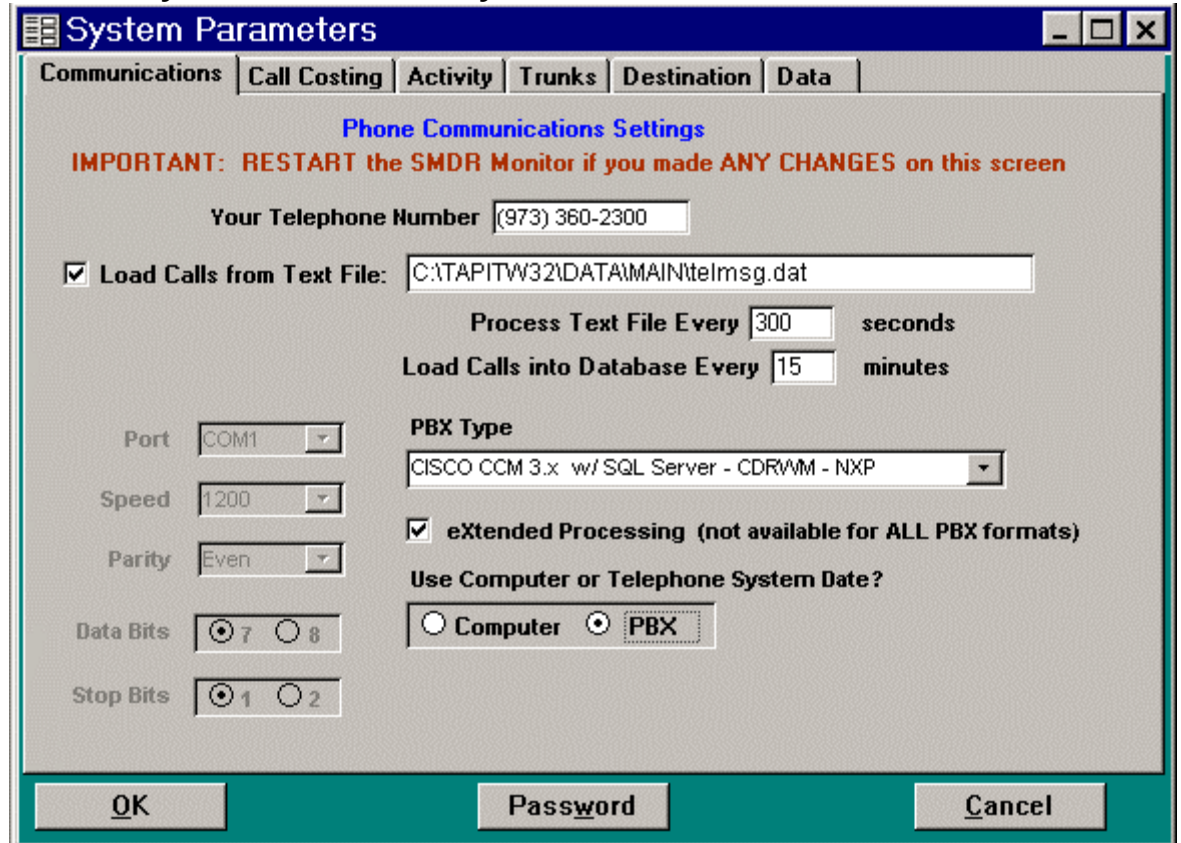
1. Install and set up TapitEx Multi-User – see instructions in the TapitEX manual or the Readme file.
2. If you are installing Tapit CDR Loader for **multiple nodes** with SQL Server Database install and set up Remote Manager – refer to the Remote Manager manual on the CD.
3. Install CDR Loader from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

## Setting up Tapit CDR Loader for Cisco

### Tapit Setup

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

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



The screenshot shows the 'System Parameters' dialog box with the 'Communications' tab selected. The title bar reads 'System Parameters'. Below the title bar are tabs for 'Communications', 'Call Costing', 'Activity', 'Trunks', 'Destination', and 'Data'. The main area is titled 'Phone Communications Settings' and contains the following fields and options:

- IMPORTANT: RESTART the SMDR Monitor if you made ANY CHANGES on this screen**
- Your Telephone Number: (973) 360-2300
- Load Calls from Text File:** C:\TAPITW32\DATA\MAIN\telmsg.dat
- Process Text File Every: 300 seconds
- Load Calls into Database Every: 15 minutes
- Port: COM1
- Speed: 1200
- Parity: Even
- Data Bits:  7  8
- Stop Bits:  1  2
- PBX Type:** CISCO CCM 3.x w/ SQL Server - CDR\WM - NXP
- eXtended Processing (not available for ALL PBX formats)**
- Use Computer or Telephone System Date?**
  - Computer
  - PBX

At the bottom of the dialog box are three buttons: **OK**, **Password**, and **Cancel**.

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

## Remote Manager Setup – ONLY for multiple nodes

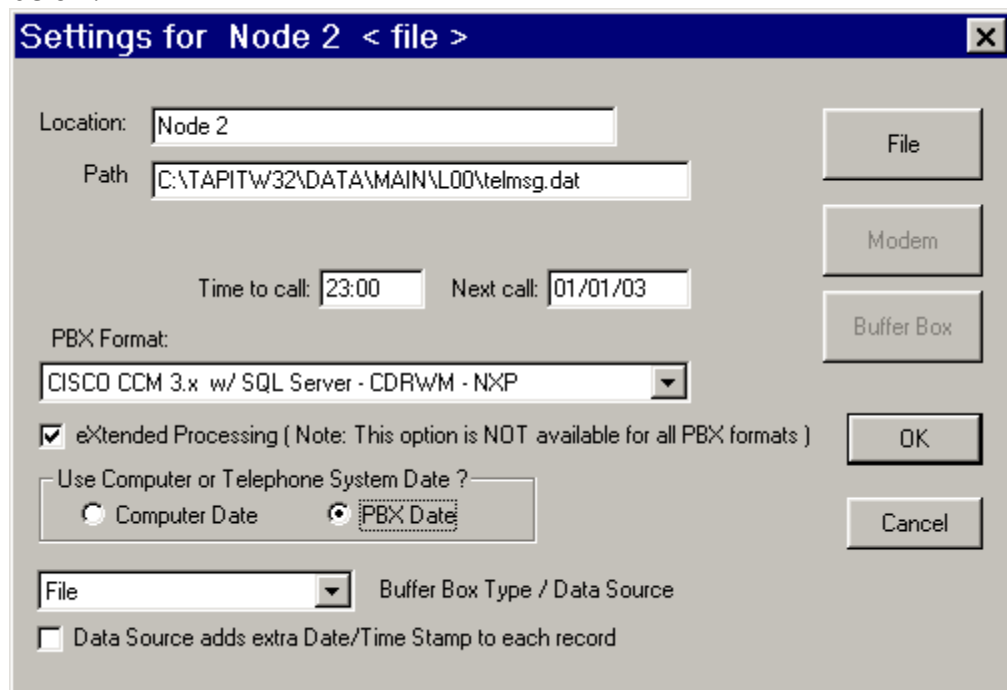
**Note:** Each node requires one location (the Main location can be used too).

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

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

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

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



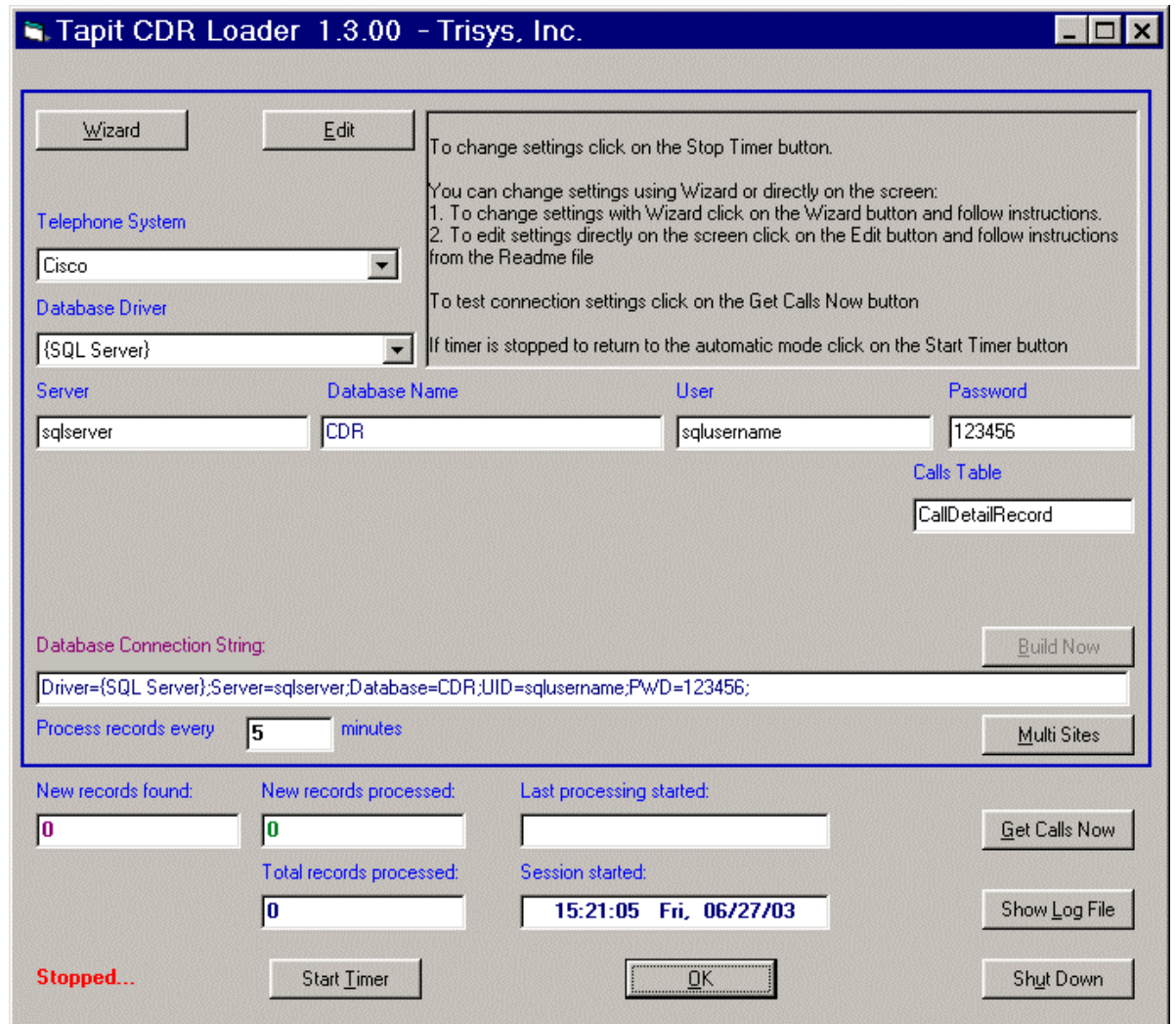
Each location should have the following options set:

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

## Tapit CDR Loader Setup

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

### Settings for SQL Server Database:



**Tapit CDR Loader 1.3.00 - Trisys, Inc.**

Wizard Edit

To change settings click on the Stop Timer button.

You can change settings using Wizard or directly on the screen:  
 1. To change settings with Wizard click on the Wizard button and follow instructions.  
 2. To edit settings directly on the screen click on the Edit button and follow instructions from the Readme file

To test connection settings click on the Get Calls Now button

If timer is stopped to return to the automatic mode click on the Start Timer button

Telephone System: Cisco

Database Driver: {SQL Server}

Server	Database Name	User	Password
sqlserver	CDR	sqlusername	123456

Calls Table: CallDetailRecord

Database Connection String: Driver={SQL Server};Server=sqlserver;Database=CDR;UID=sqlusername;PWD=123456; Build Now

Process records every 5 minutes Multi Sites

New records found: 0 New records processed: 0 Last processing started:

Total records processed: 0 Session started: 15:21:05 Fri, 06/27/03

Stopped... Start Timer OK Shut Down Get Calls Now Show Log File

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

## Appendix A

### Manual Editing – Setting Up CDR Loader for Single Node

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

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**.  
The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Edit**. The name of this button changes to **Lock/Apply**.
4. If needed make the appropriate changes to the following fields:
  - Telephone System** - select Cisco
  - Database Driver** - must be "{SQL Server}"
  - Server** - enter SQL Server name
  - Database Name** - the default value is **CDR**
  - User** – SQL Server **User Name**
  - Password** – SQL Server **User Password**
  - Calls Table** – the default value is **CallDetailRecord**
5. Click on the **Build Now** button to create the **Database Connection String** entry.  
This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the entries above and click on **Build Now**.  
**Do not modify this field manually.**
6. If required, enter new values in **Process record every \_\_\_minutes** and **Main Output File** fields.  
It is recommended to accept defaults.
7. To save changes, click on the **Lock/Apply** button.
8. Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.
9. Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file. Copy the following settings into this file.

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

Save and close this file.

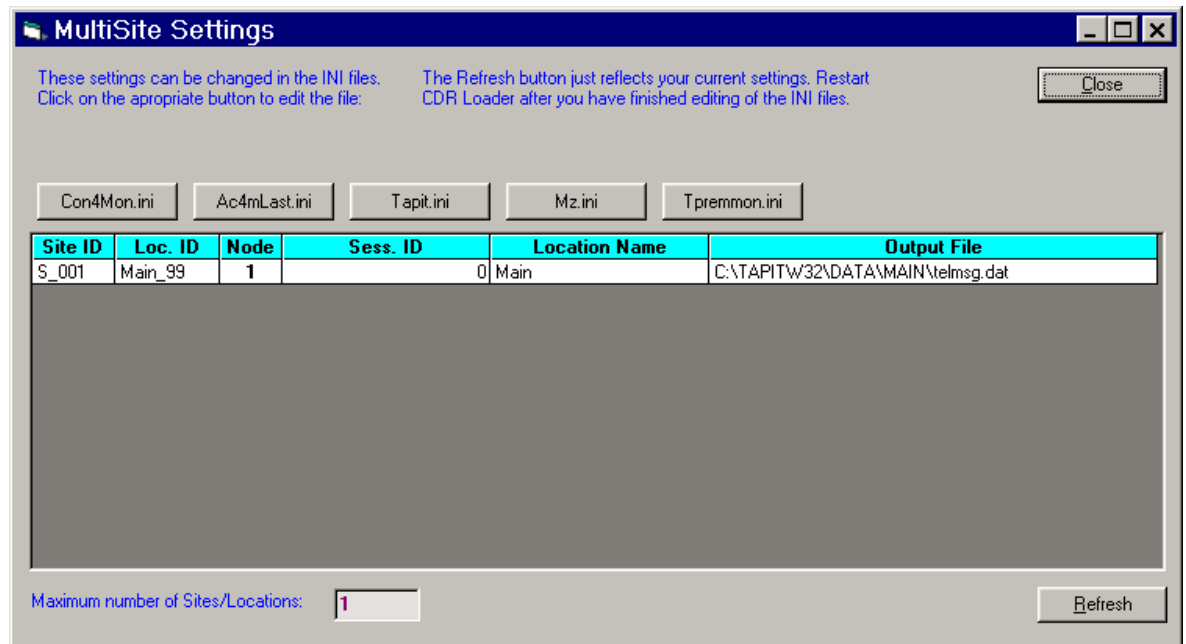
## Tapit CDR Loader Start-Up file for Cisco

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

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

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

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



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

## Manual Editing – Setting Up CDR Loader for Multiple Nodes

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

1. Open **Tapit CDR Loader (Start/Tapit CDR Loader/CDR Loader)**.  
The **CDR Loader** screen appears.
2. Click on **Stop Timer**. The name of this button changes to **Start Timer**.
3. Click on **Edit**. The name of this button changes to **Lock/Apply**.
4. If needed make the appropriate changes to the following fields:
  - Telephone System** - select Cisco
  - Database Driver** - must be "{SQL Server}"
  - Server** - enter SQL Server name
  - Database Name** - the default value is **CDR**
  - User** – SQL Server **User Name**
  - Password** – SQL Server **User Password**
  - Calls Table** – the default value is **CallDetailRecord**
5. Click on the **Build Now** button to create the **Database Connection String** entry.  
This field represents the database connection string with user name and password as shown on the screen above. It is based on the entries in the fields above it. To edit **Database Connection String** value, change the entries above and click on **Build Now**.  
**Do not modify this field manually.**
6. If required, enter new values in **Process record every \_\_\_minutes** and **Main Output File** fields.  
It is recommended to accept defaults.
7. To save changes, click on the **Lock/Apply** button.
8. Click on the **Multi Sites** button. The **MultiSite Settings** screen appears. If this is a new installation this screen is empty.

- Click on the **Con4Mon.ini** button. Your default text editor opens the **Con4Mon.ini** file.  
Copy the following settings into this file. Edit site entries to reflect your node numbers.

**Note: The Max\_S entry reflects the number of your nodes. Each S\_xxx entry must correspond to existing node and appropriate location code.**

**For example: We created location with a default name "New Location 02" and then renamed it to "Node 5". Remote Manager automatically assigned Comm\_1 code to that location.**

**The "S\_003=5,Comm\_01" entry (in the example below) associates node 5 and location code Comm\_01 with site S\_003.**

**;Reference table to handle multiple nodes:**

**[Multi\_S]**

**;must be = total/max number of locations used**

**;(if last S\_xxx is S\_004 then Max\_S=4)**

**Max\_S = 4**

**S\_001=1,Main\_99**

**S\_002=3,Comm\_00**

**S\_003=5,Comm\_01**

**S\_004=8,Comm\_02**

**;where S\_xxx=Node\_id,Loc\_name**

**Save** and close this file.

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

**[Common]**

**TapitDir=C:\TAPITW32\DATA\MAIN**

**CurrLoc=0**

**;RemTimer - timer setting required for multiple nodes/locations**

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

**RemTimer=300**

**[Main\_99]**

**Location=Main**

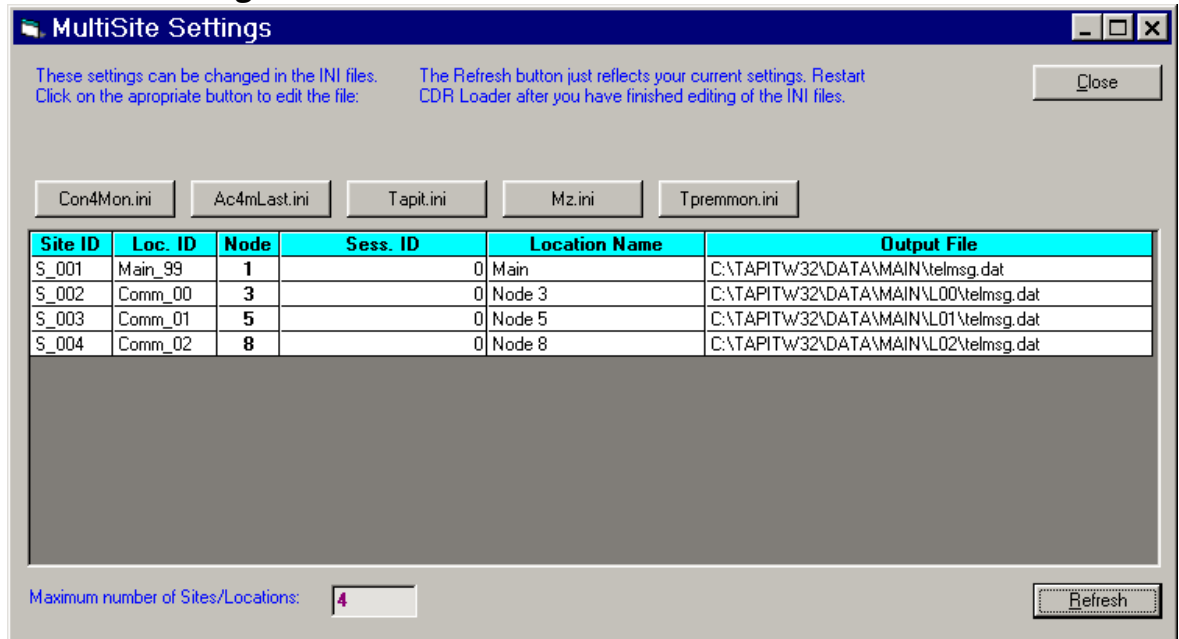
**LocDir=C:\tapitw32\Data\Main\TAPITDB.MDB**

**LocActive=1**

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



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



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

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

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

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TRISYS INC.

## Tapit CDR Loader Start-Up file for Cisco

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