Tapit NOVA
Call Accounting
Manual

TRISYS INC.

Table of Contents

Document Revision Record

ABV	Description
160920	New Template
160929	Added Shoretel Integration

Related Documentation

Document Name
TapitNOVA Call Accounting Read Me First
Upgrading TapitEX to TapitNOVA

TapitNOVA Call Accounting Manual

Copyright © 2016 Trisys, Inc.

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

Minimum System Requirements

- Internet Access
- Monitor Resolution 1024 x 768
- Windows 7/8.1/10 Pro/2008 R2*/2012*
  (* require for 10+ concurrent users)
- IIS (IIS 7 and higher requires IIS 6 compatibility enabled for Windows)
- MS Internet Explorer 10 or higher
- RS 232 port for SMDR collection (if required for PBX interface)
- Intel Core 2 DUO processor or AMD equivalent
- 4 GB of RAM
- 250 GB Hard Drive
- 80 GB of free space on C: Drive

*(Please note that in order to use the **e-mail features** of the software, obtain your company's **SMPT Server configuration** information from your network administrator.)

Installation

Before Installing TapitNOVA

❖ 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.

❖ TapitNOVA 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 TapitNOVA installation:

- Disable **UAC** (User Account Control) in Control Panel
- Enable **MS .NET Framework 3.5** (on Win 8 / 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** and **WebDAV Publishing** must be enabled)

The following components are going to be installed from TapitNOVA DVD or download:

- Adobe PDF Reader
- SQL Server 2008 Express w/ Advanced Services (**specifically configured** for TapitNOVA). You **must** allow it to be installed from this DVD. Please note no other SQL Server software should be installed on the PC.

Note: When installing or using TapitNOVA on Windows 8.1 or higher you must right-click on any TapitNOVA related applications and components and select Run as Administrator even if you are logged in as an Administrator.

To enable IIS 6 Management Compatibility (Windows 7 and 2008)

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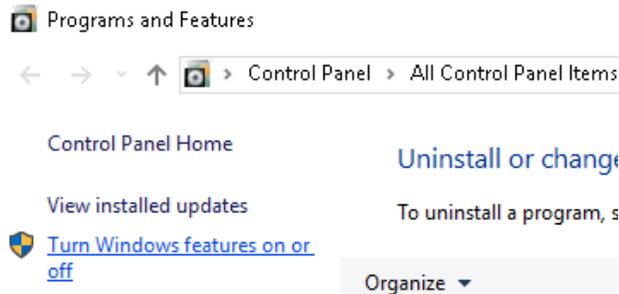
In Vista, if User Account Control is not disabled, accept the warning to elevate privileges for the Windows Features dialog to appear

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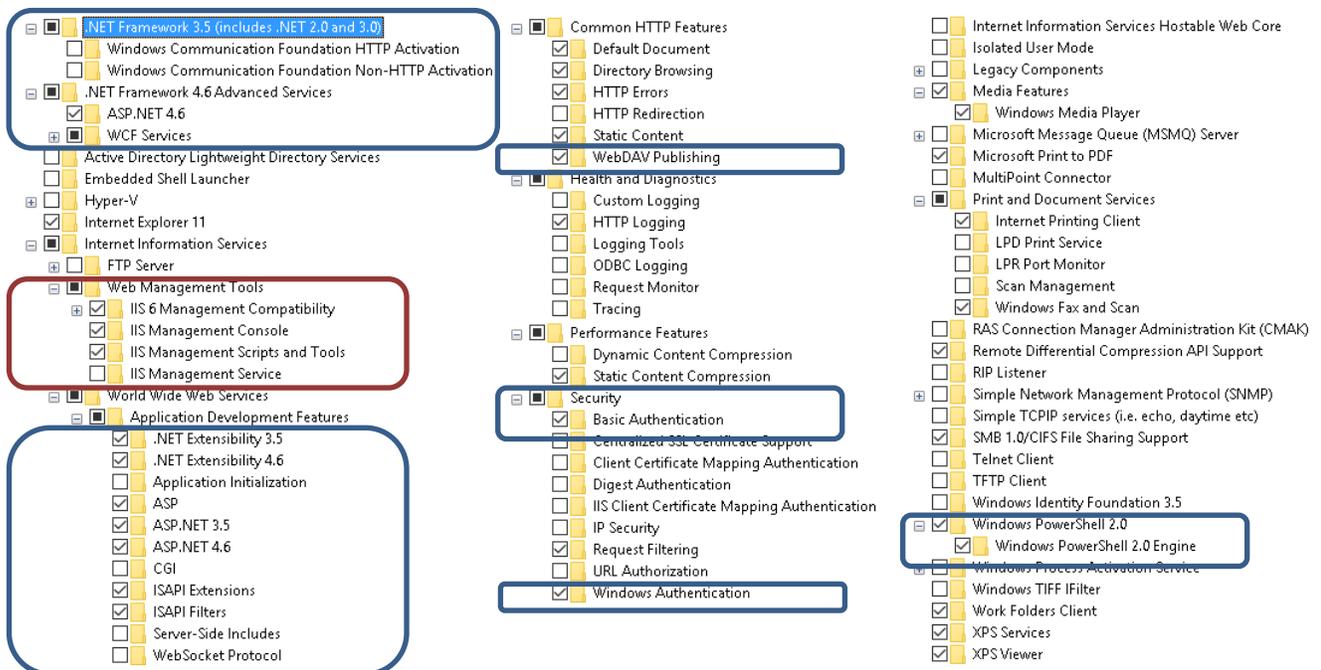
5. Click on **OK**. System will process your request and turn **IIS 6 Management Compatibility** on.

Installing TapitNOVA Prerequisites

You have to have administrative privileges on this PC. When installing on Vista or Windows 7 please install this software "As Administrator".

Note: When Installing or Using Tapit Nova on Windows 8.1 or higher you must Right Click on any TapitNOVA related applications and components and select Run as Administrator even though you are logged in as an Administrator.

IIS, MS .NET Framework 3.5 SP1, and Windows PowerShell 1.0 have to be already installed on this PC.

TapitNOVA Prerequisites Installation will install **MS Windows Installer 4.5** and **SQL Server 2008 Express Advanced w/ Report Service** on your PC.

1. Insert the TapitNOVA DVD into the DVD drive. If installing from a TapitNOVA DVD Download, browse to the folder where the download was extracted and right-click on STARUPN.EXE and select Run as Administrator.
   The **Trisys Installation Manager** screen is displayed.
   If this screen is not displayed automatically then use the **Run** command on the **Start** Windows menu by typing D:\StartupN.exe, where D represents your DVD drive, in the **Open** text box and clicking on **OK**.
2. Click on **Install Prerequisites**.
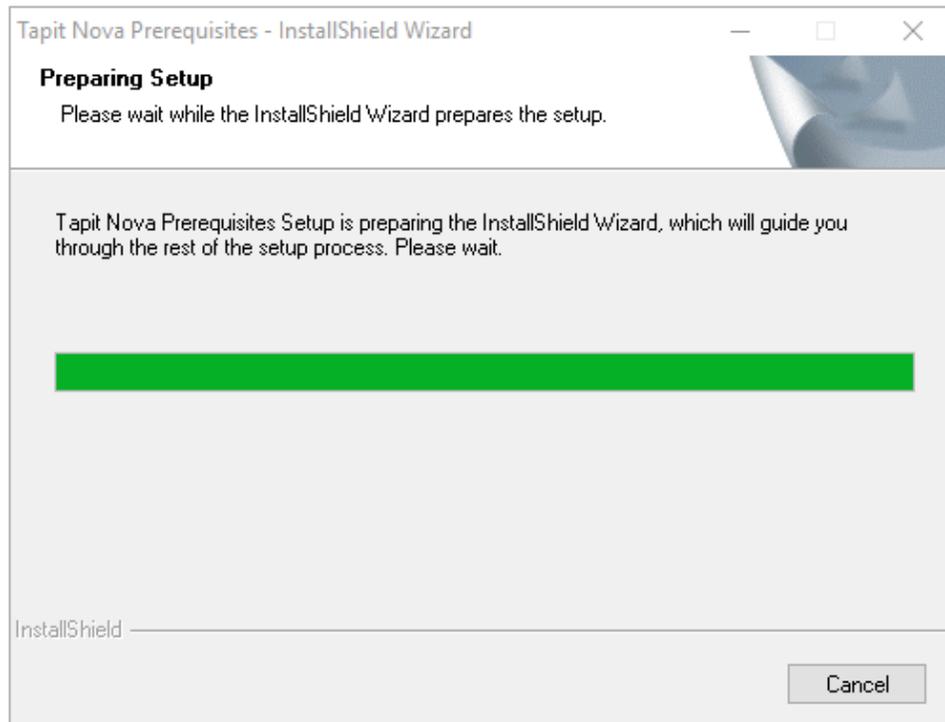
3. The **TapitNOVA Prerequisites Installation – Step 1 - Details** screen is displayed. Click on **Next**. Setup program checks for the required components: **IIS**, **.Net Framework** and **PowerShell**. This may take few minutes. Please wait.
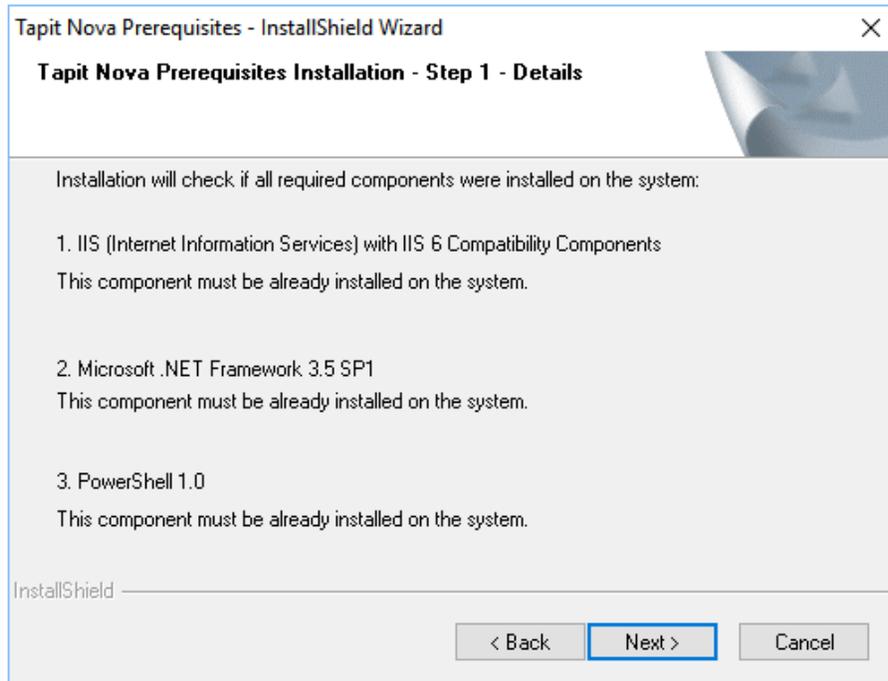
4. If all required components are found, the **TapitNOVA Prerequisites Installation – Step 2 – Details** screen is displayed. Click on **Next**. Setup will begin installation process of **Windows Installer**.
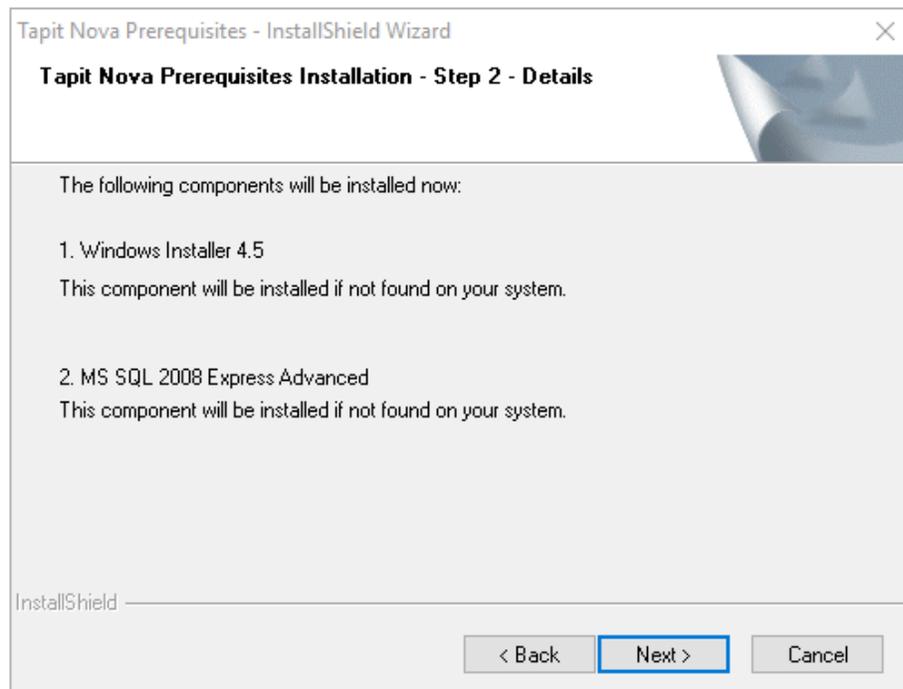
5. Setup program prompts you to reboot the system after it is finished with **Windows Installer** installation. Click **Yes** to reboot the PC.

6. The system comes back up and TapitNOVA Prerequisites installation starts up automatically.
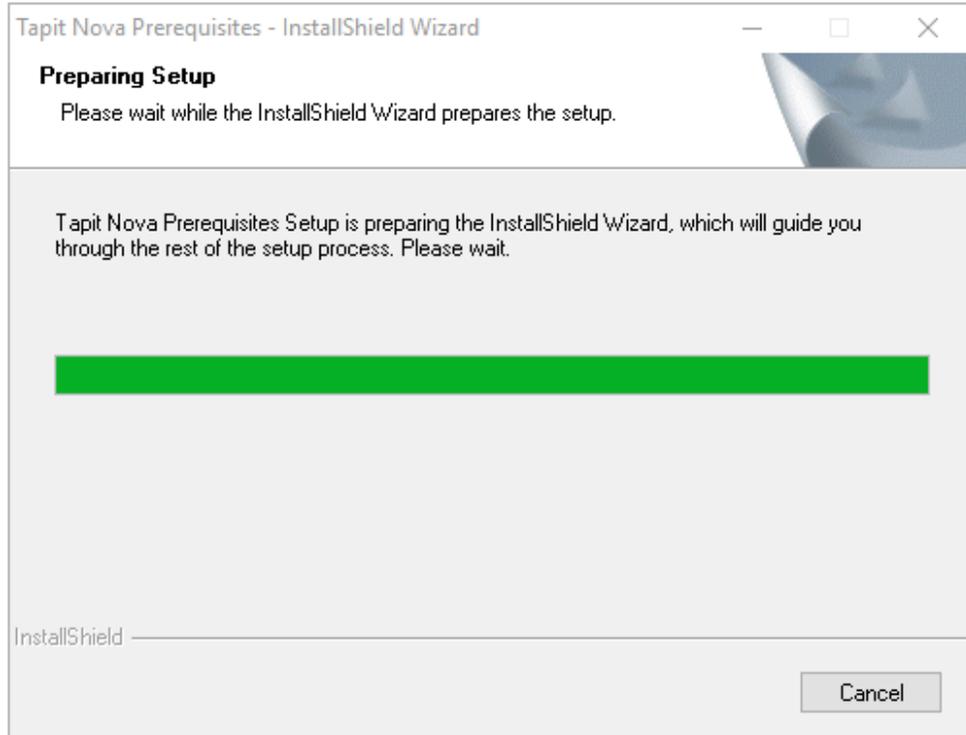
7. Click on **Next** to continue TapitNOVA Prerequisites Installation.
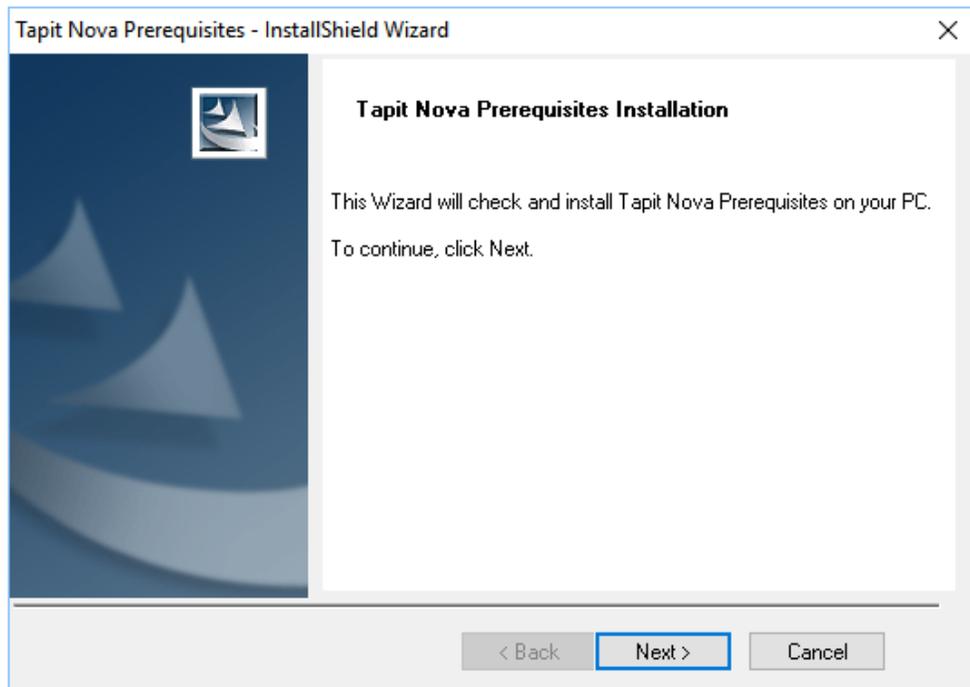
8. Select **I accept the terms of the license agreement** option and click on **Next**.
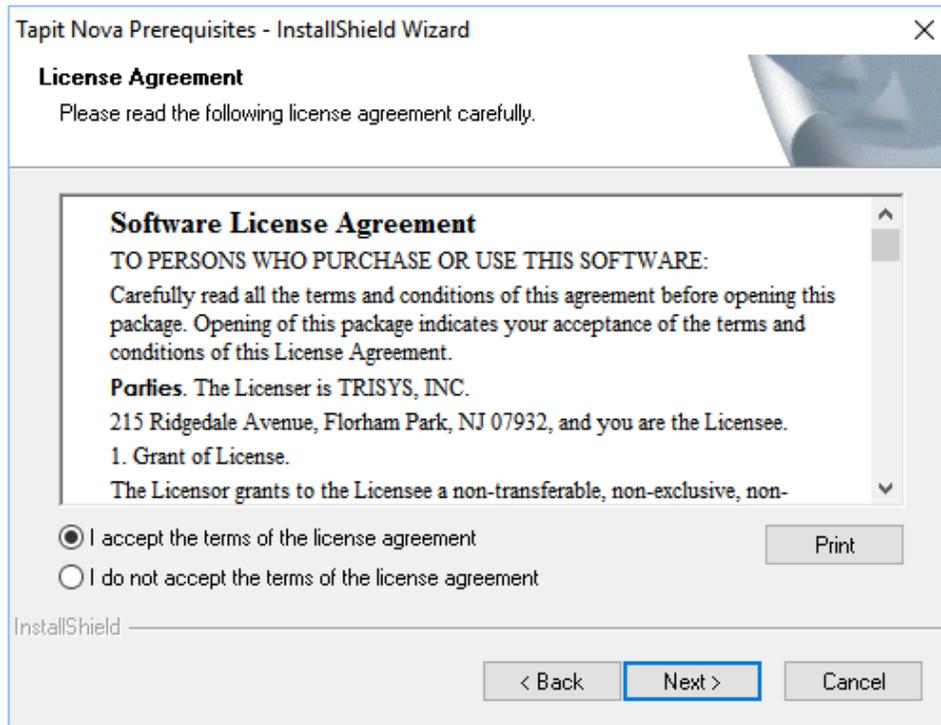
9. The **TapitNOVA Prerequisites Installation – Step 1 – Details** screen is displayed. Click on **Next**. Setup program checks for the required components: **IIS**, **.Net Framework** and **PowerShell**. This may take few minutes. Please wait.
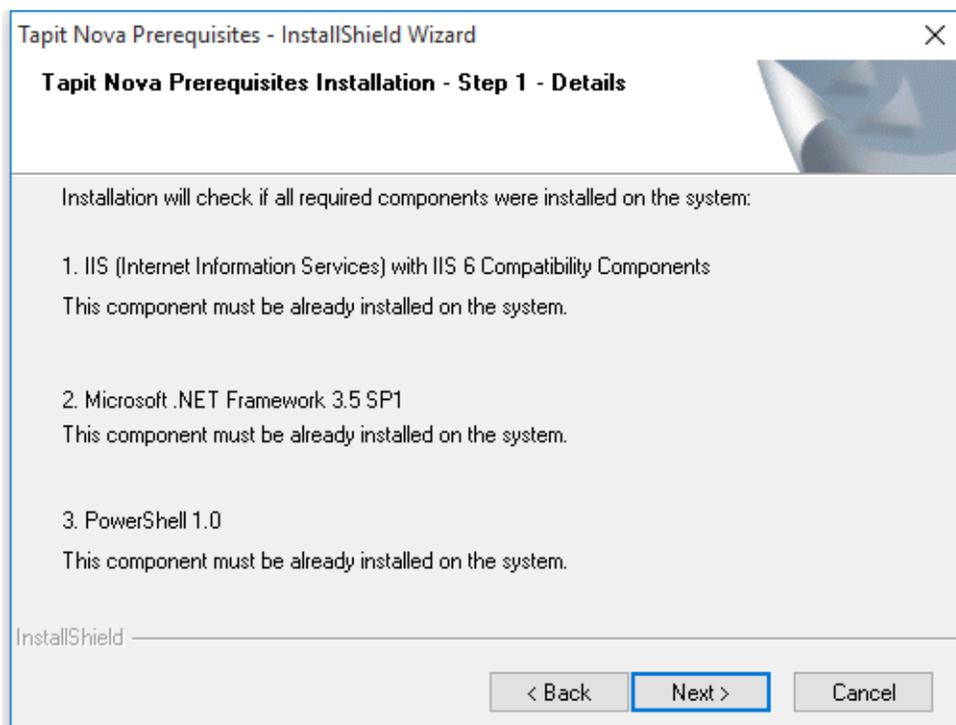
10. If all required components are found, the **TapitNOVA Prerequisites Installation – Step 2 – Details** screen is displayed. Click on **Next**. Setup will begin installation of **MS SQL 2008 Express Advanced**.
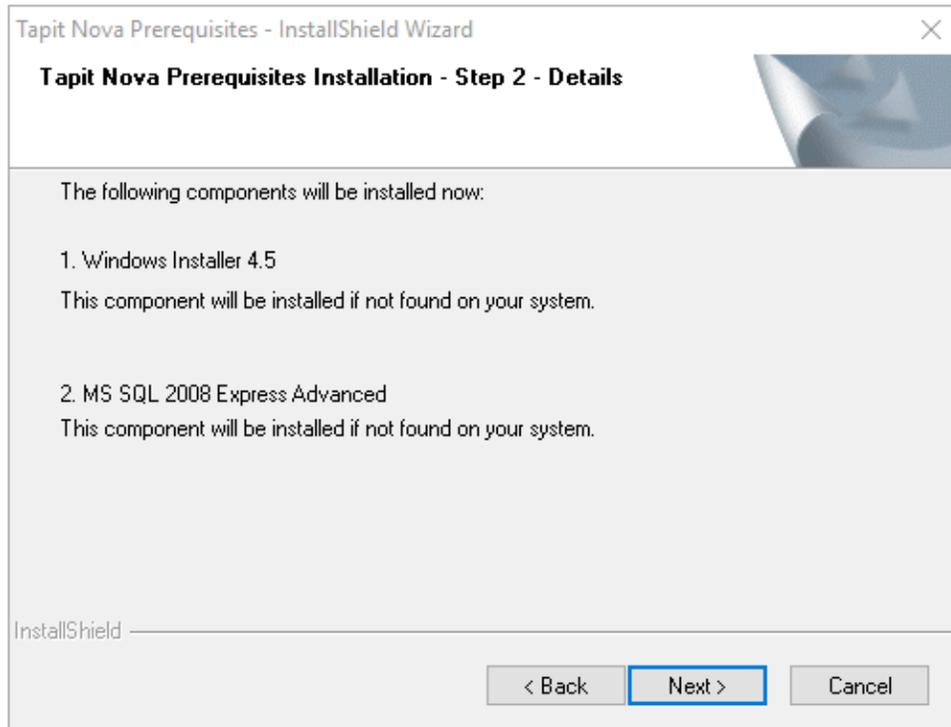
11. Click **Yes** to confirm the installation of **MS SQL 2008 Express Advanced**.
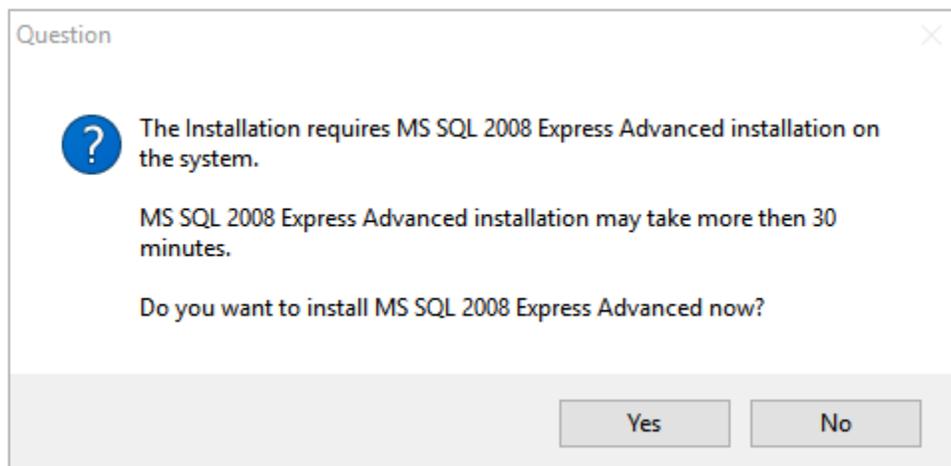
12. Installing **MS SQL 2008 Express Advanced** may take some time. Please wait.
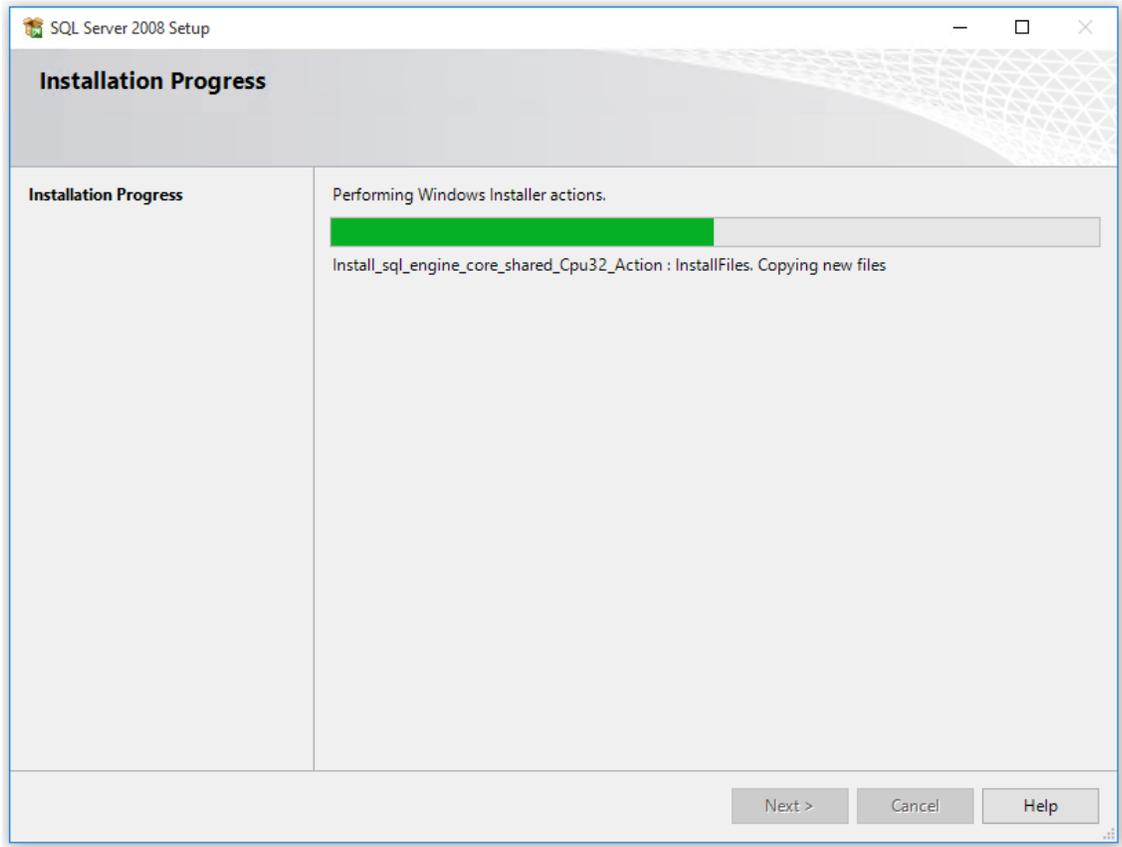
13. SQL Server Installation requires you to reboot the PC. You will be prompted by setup program with the message below. Click on **Yes** to restart the PC.
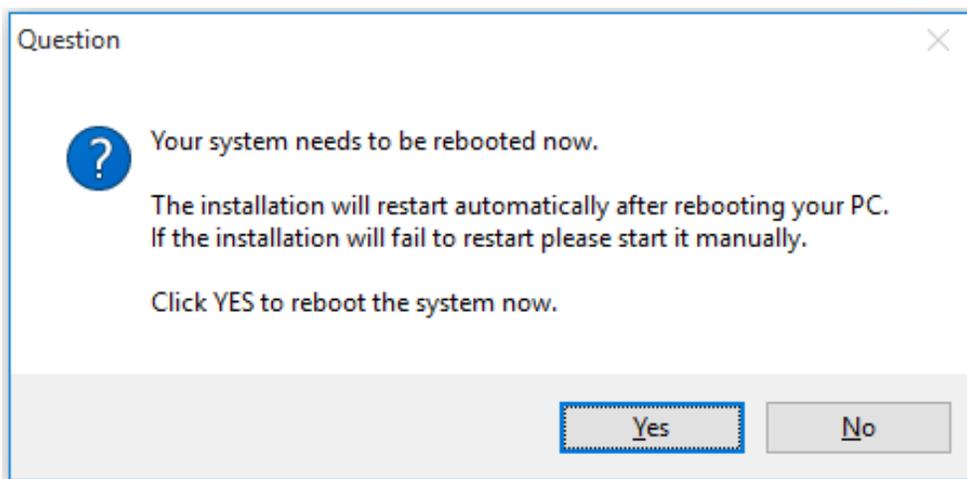
14. The system comes back up and TapitNOVA Prerequisites installation continues automatically.

15. Click on **Next** to continue TapitNOVA Prerequisites Installation.
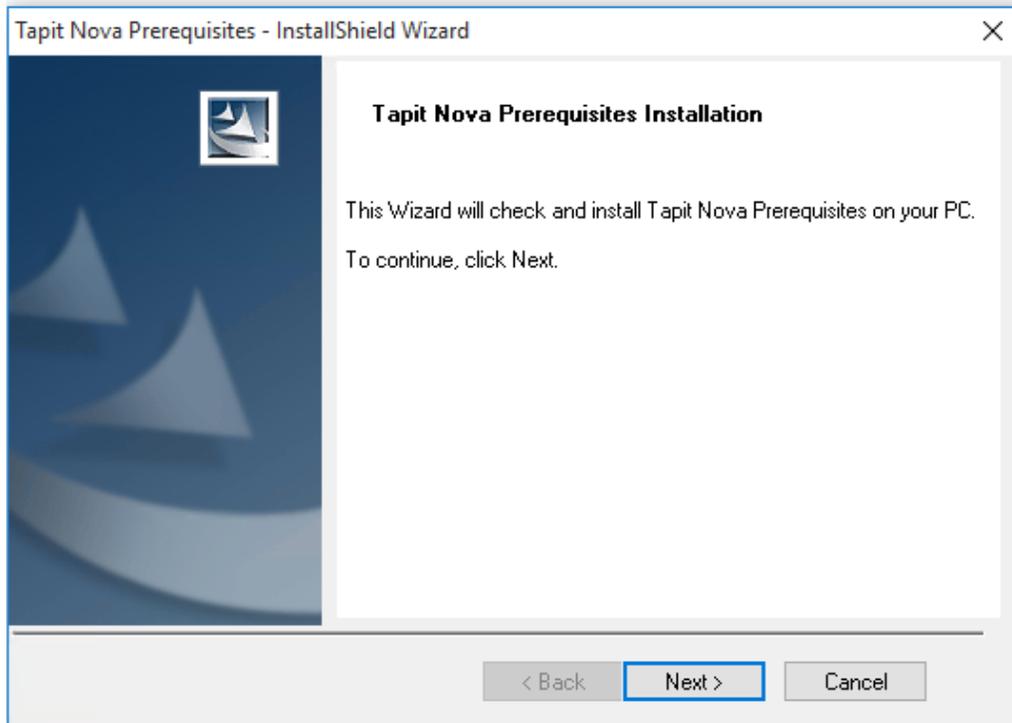
16. Select **I accept the terms of the license agreement** option and click on **Next**.
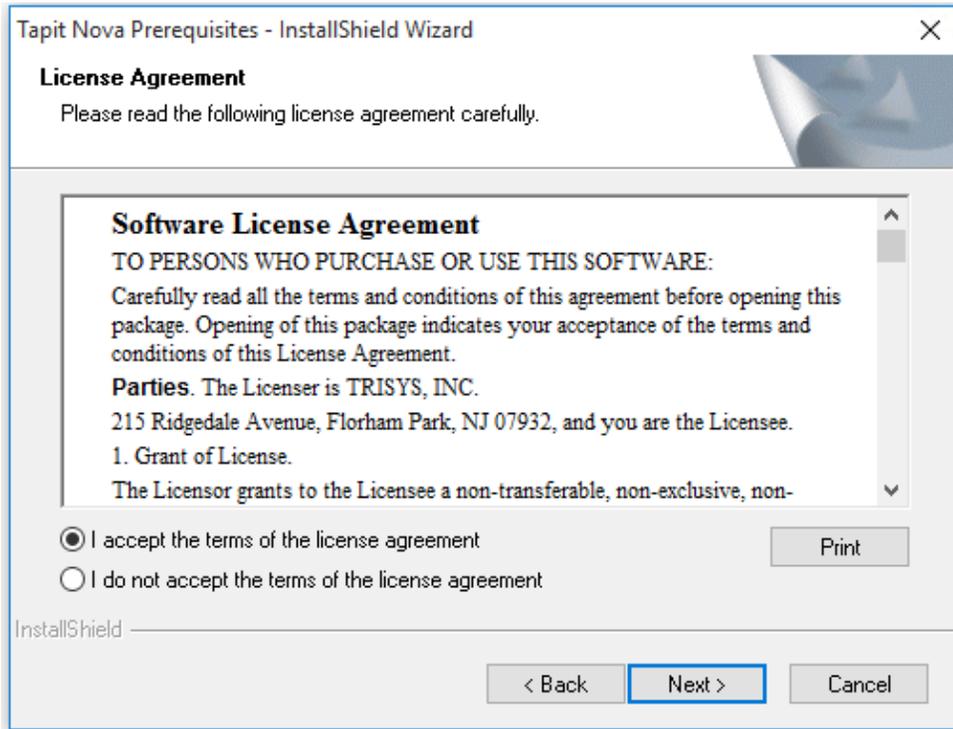
17. The **TapitNOVA Prerequisites Installation – Step 1 – Details** screen is displayed. Click on **Next**. Setup program checks for the required components: **IIS**, **.Net Framework** and **PowerShell**. This may take few minutes. Please wait.
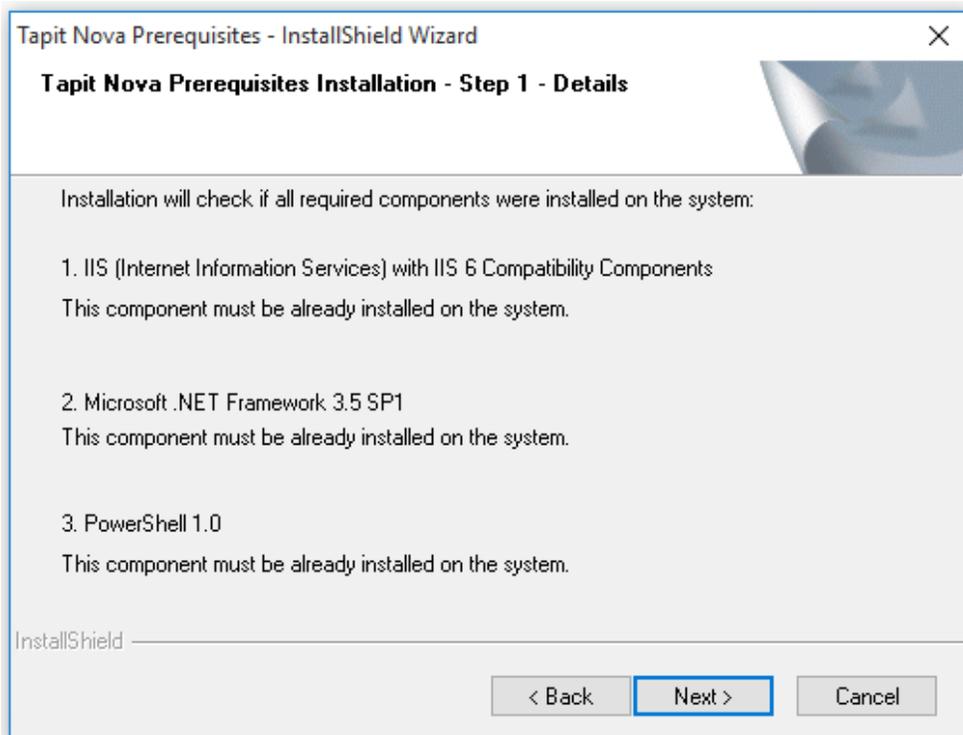
18. If all required components are found, the **TapitNOVA Prerequisites Installation – Step 2 – Details** screen is displayed. Click on **Next**.
Setup will begin installation of **MS SQL 2008 Express Advanced**.
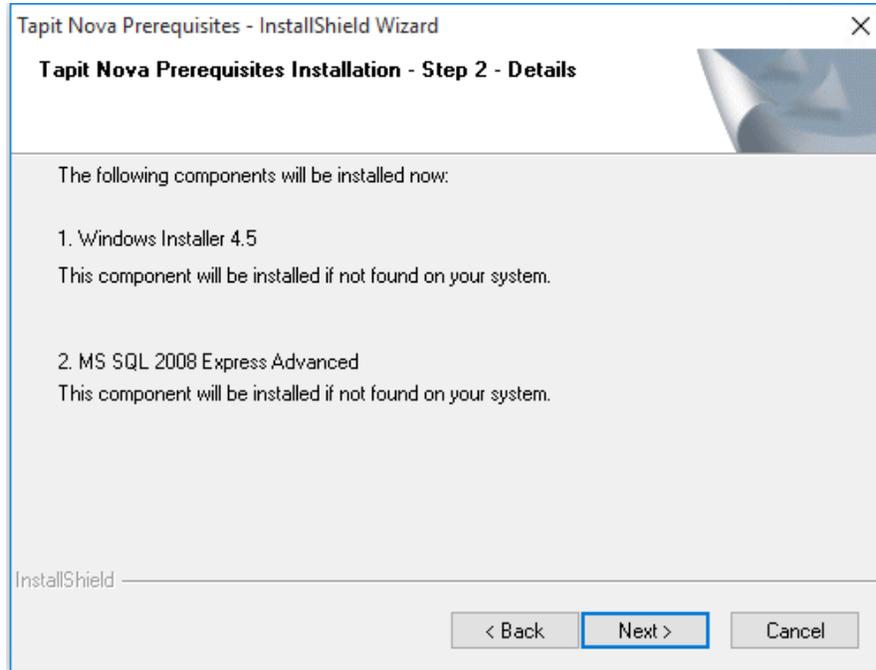
19. The **TapitNOVA Prerequisites Installation Details – Step 3** screen is displayed. Click on **Next**. Setup will begin installation of **SQL Server** and **Reporting Services**. This may take some time. Please wait.
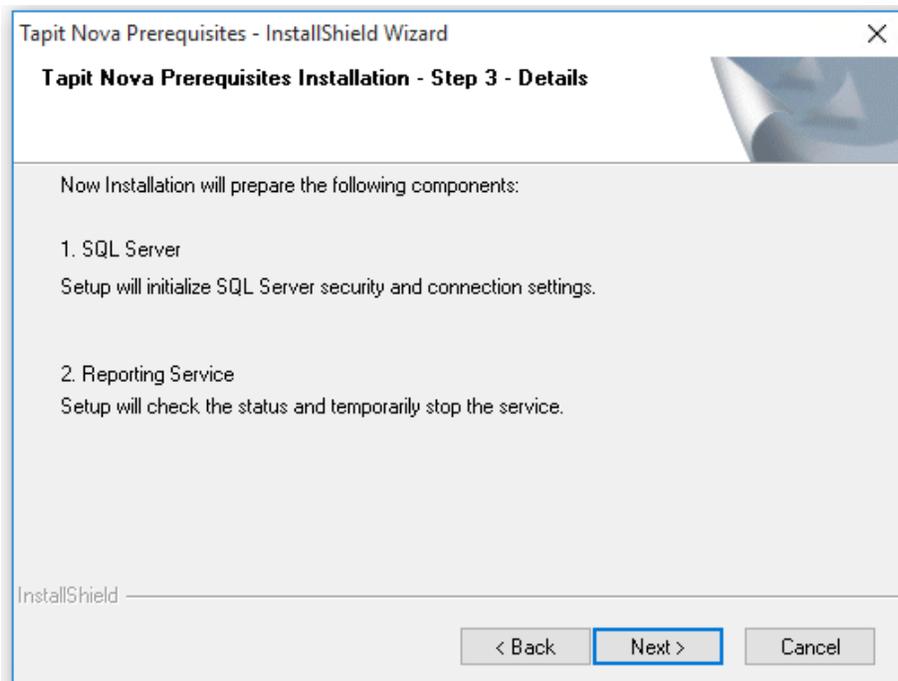
20. System prompts you to reboot the PC.

21. After the PC is rebooted, make sure TapitNOVA DVD is still in the DVD drive. Go to the DVD drive via Windows Explorer. Double-click on the **StartupN.exe** file. Alternately, use the **Run** command on the **Start** Windows menu by typing D:**StartupN.exe**, where D represents your DVD drive, in the **Open** text box and clicking on **OK**.

22. The TapitNOVA Installation Manager screen comes up. Click on **Install**.
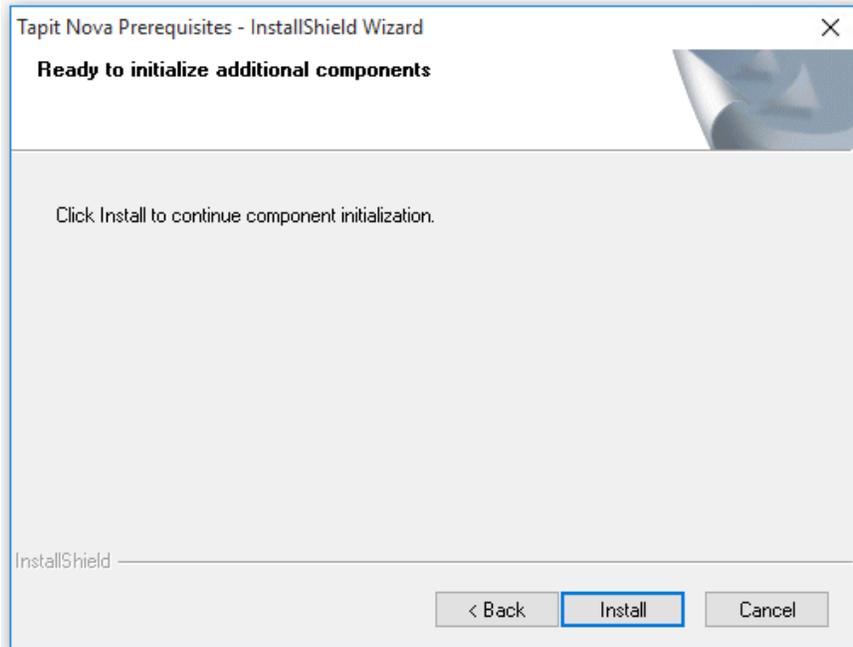
Setup program will finish installation of prerequisites.
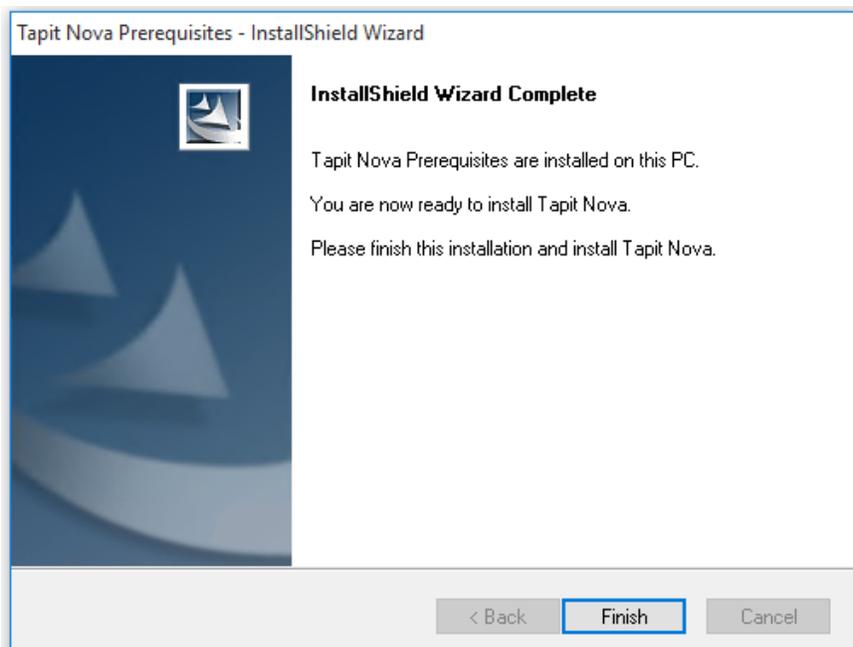
23. Please proceed with the section below to install TapitNOVA.

Installing TapitNOVA

You have to have administrative privileges on this PC.
When installing on Vista or Windows 7 please install this software "As Administrator"

IIS, MS .NET Framework 3.5 SP1, and Windows PowerShell 1.0 have to be already installed on this PC.

Installation of TapitNOVA Prerequisites has to be successfully completed.

1. If your **TapitNOVA Installation Manager** screen is not already open, insert Tapit DVD into the DVD drive. If installing from a TapitNOVA DVD Download, browse to the folder where the download was extracted, right-click on STARUPN.EXE and select Run as Administrator.
    The **Trisys Installation Manager** screen is displayed.
    If this screen is not displayed automatically then use the **Run** command on the **Start** Windows menu by typing D:\StartupN.exe, where D represents your DVD drive, in the **Open** text box and clicking on **OK**.
2. Click on **Install TapitNOVA**.
3. The **TapitNOVA Installation** screen comes up. Click on **Next**.
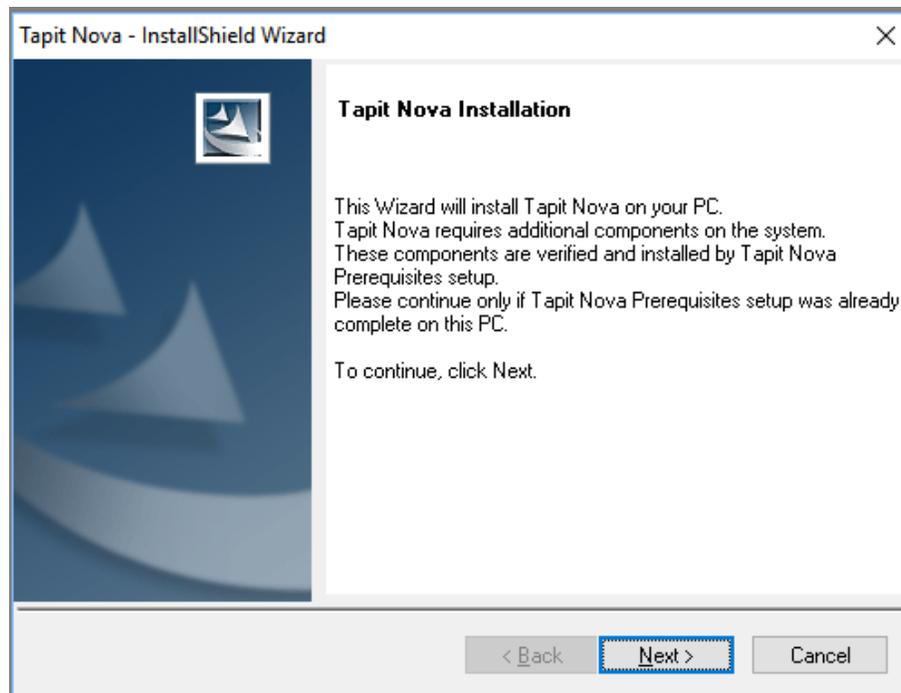
4. The **License Agreement** screen is displayed. Read the license agreement and click on **I accept the terms of the license agreement** to continue. Click on **Next.**
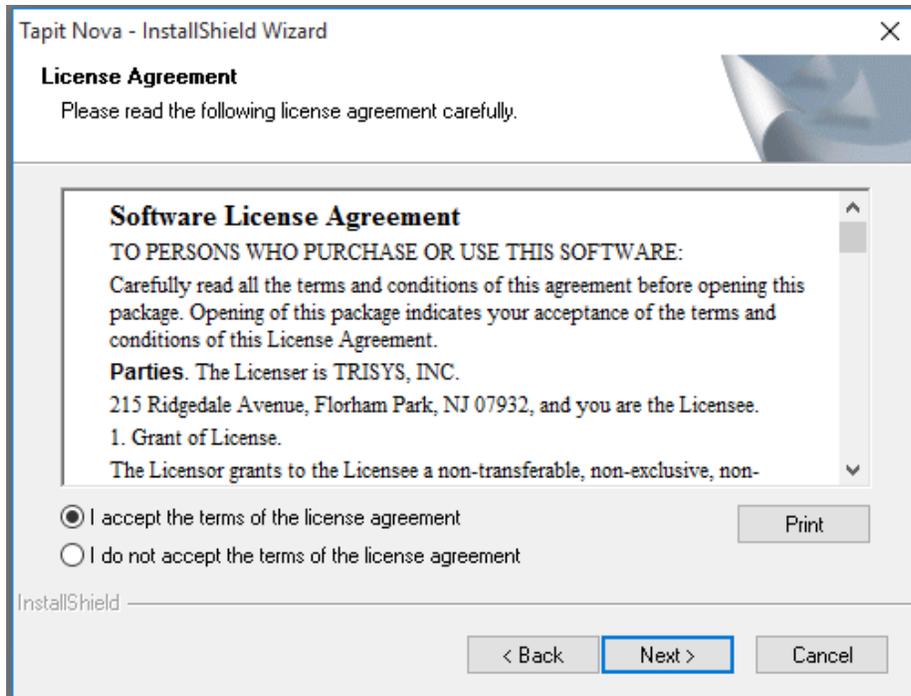
5. The **TapitNOVA Installation – Step 1 - Details** screen shows up. Click on **Next**. Installation program is verifying that **TapitNOVA Prerequisites** (see section above for information on INSTALLING TapitNOVA PREREQUISITES) are installed on the PC. Please wait, this may take few minutes.
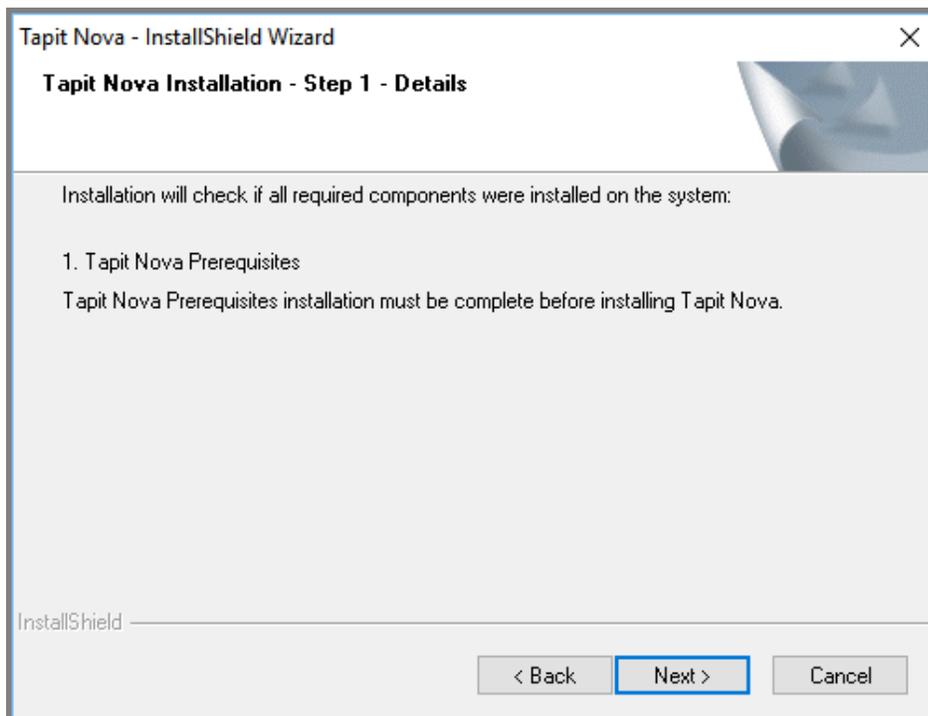
6. If you have a serial number enter it into the **Serial Number** field exactly how it appears on the label, otherwise leave this field empty and TapitNOVA will be installed as a trial version.
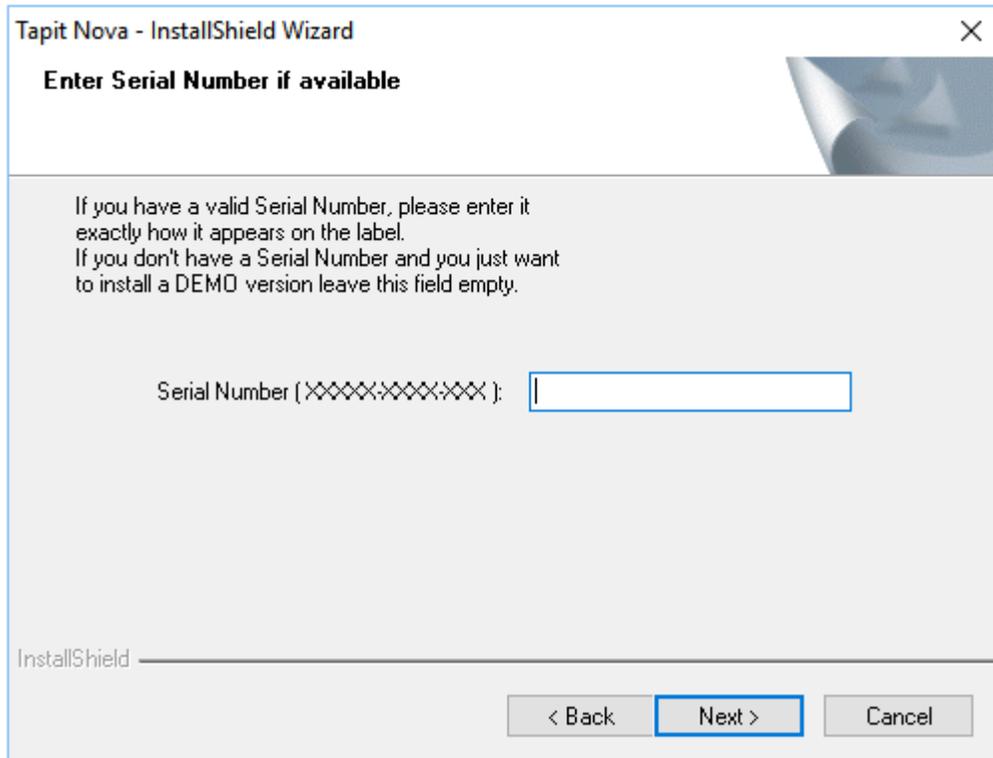
7. Click on **Next**.
Tapit processes the serial number. Product information message is displayed. Click on **Yes**. In case you have not entered any serial number, TapitNOVA will install as a trial version and the following message will be displayed. Click on **Yes**.
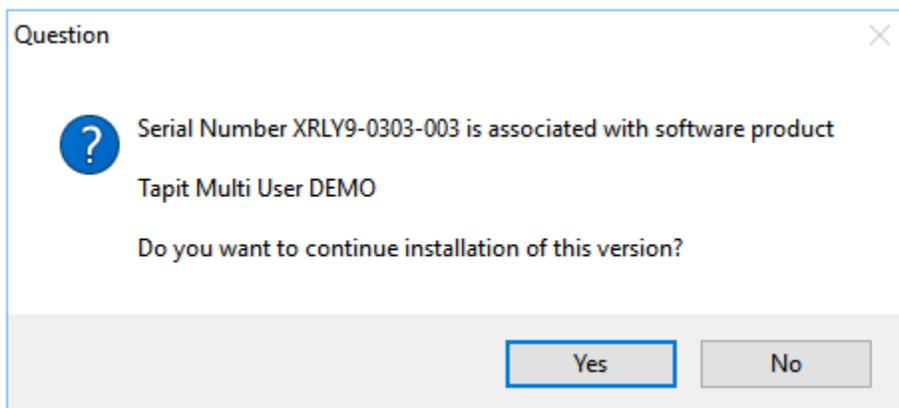
8. The **TapitNOVA Installation Detail – Step 2** screen shows up. Click on **Next**. Installation program prepares TapitNOVA components for installation. Please wait, this may take some time.
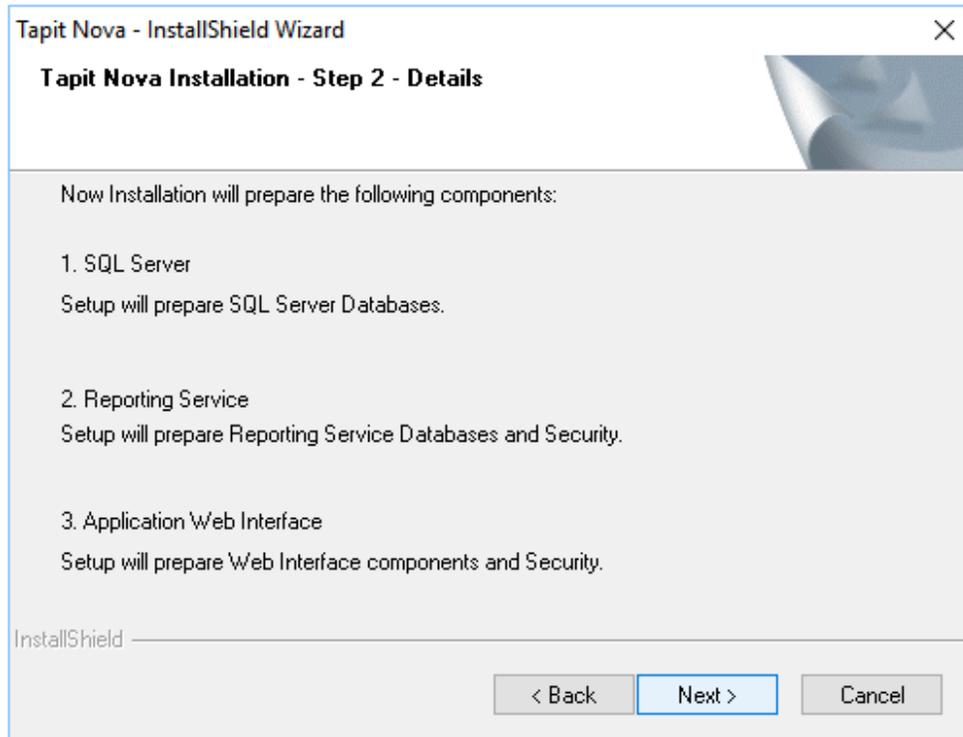
9. The **Ready to Install the Program** screen comes up. Click on **Install**.
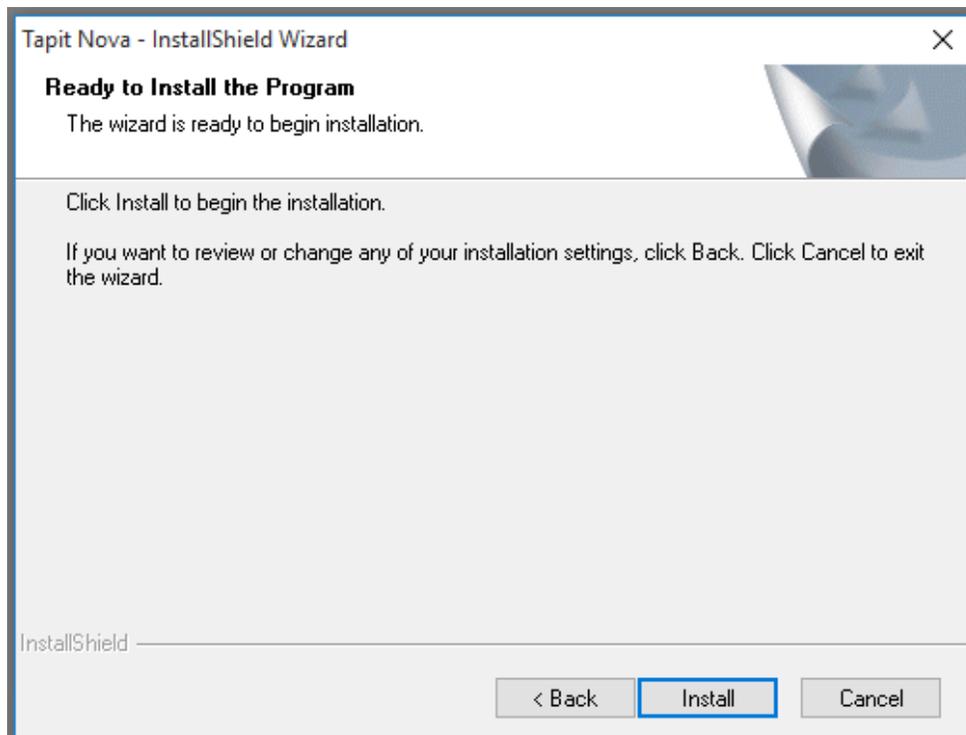
10. Installation is in progress. Please wait until it is completed. Do not interrupt this process. It may take some time.
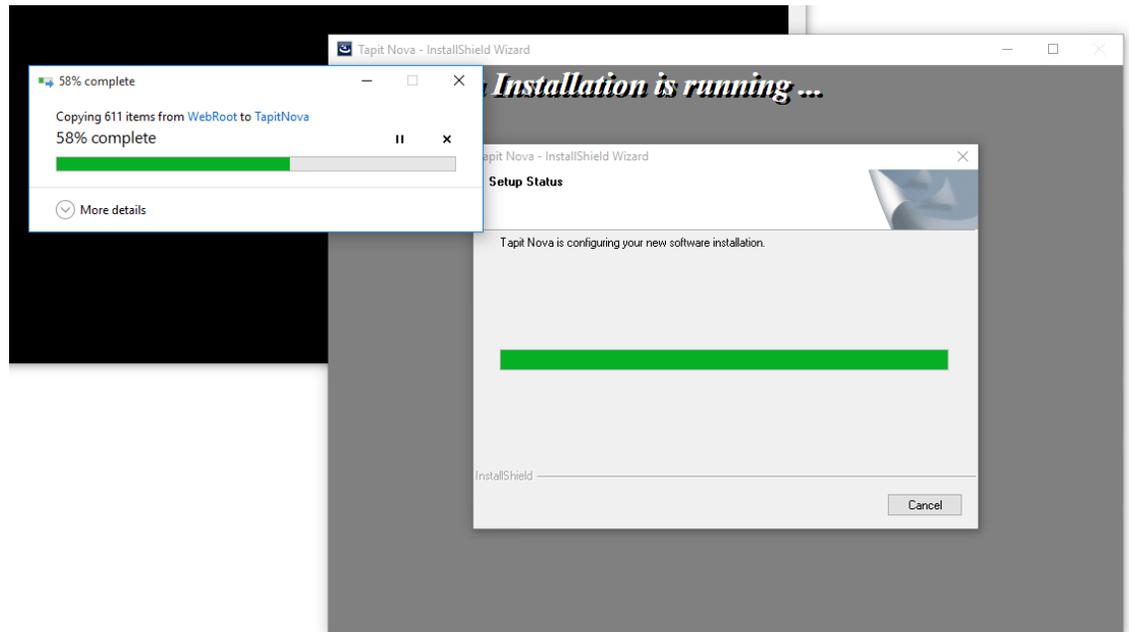
Do not interrupt this process. It may take some time.

11. TapitNOVA files have been installed. Click on **Finish**.
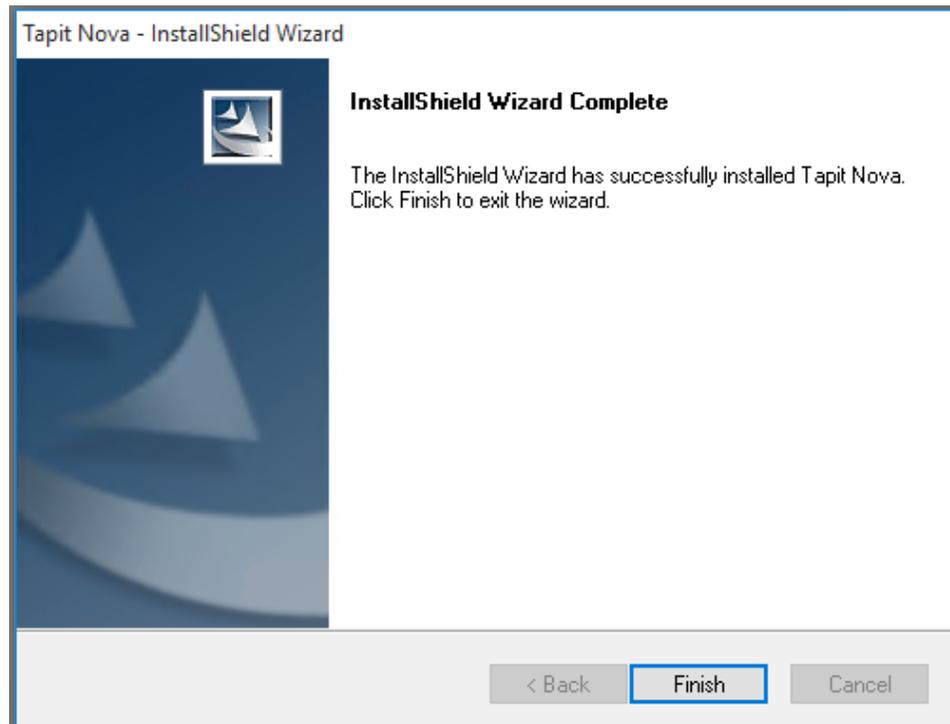
12. TapitNOVA Installation will download latest updates from Trisys website. Click on Yes to the information message. You have to have Internet access.
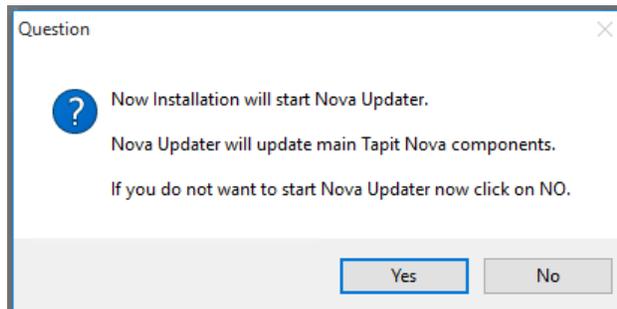
13. The update begins. Do not interrupt this process. It may take some time.
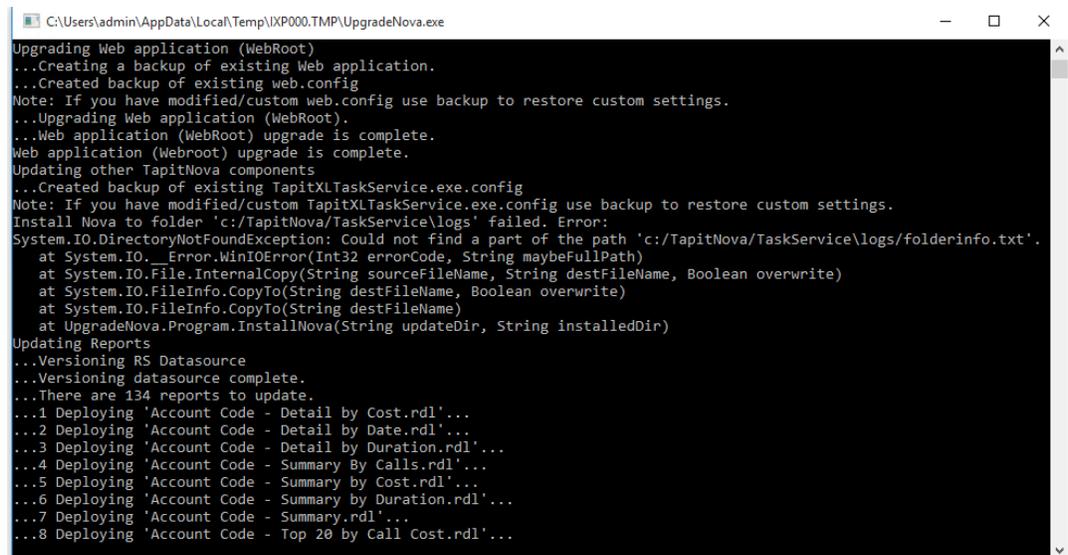
14. TapitNOVA Installation program will display a message regarding **SMDR Service Manager**. We recommend clicking on **Yes** to this message and setup **SMDR Service Manager** at this time. However, if you would like to do it later, click on **No**. If you have clicked on **No** you will have to setup **SMDR Service Manager** before using the TapitNOVA application. To open **SMDR Service Manager** at a later time go to the **Start/Programs/TapitNOVA/SMDR Service Manager**.
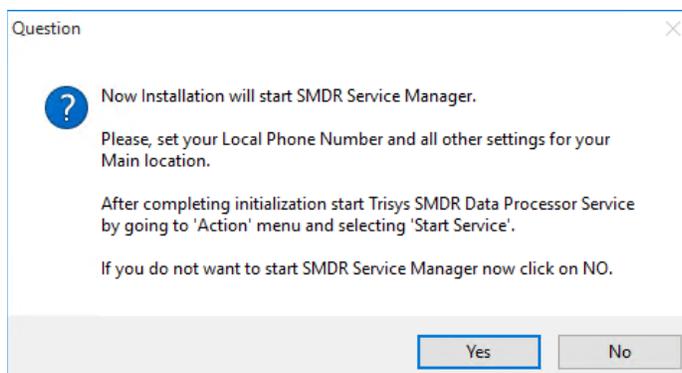
15. If you clicked on **Yes SMDR Service Manager** opens and the message is displayed asking you to specify the **Local Phone Number** and **PBX Output Format**. Click on **OK**.

> **SMDR Service Manager** ☒
>
> Local phone number is not specified!
>
> PBX data format is not specified!
>
> Please enter Local Phone Number and PBX Data Format otherwise calls are not going to be processed correctly.
>
> OK

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

> **Current PBX Settings**
>
> Local Phone Number
> `9733602300`   (10 digits only, e.g. 9733602300)
>
> ─ Collect and Process SMDR Data from COM Port or Text File ? ─
>   ○ COM Port (For configuration screen select 'COM Port' under 'Settings' menu)
>   ● Text File (Call data collected using IP Collector, CDR Loader or other utility)
>   `C:\TAPITNOVA\LOCATIONS\L0\DATA\TELMSG.DAT`
>
> Select current PBX format:
> `CISCO CCM 5/7 w/ FTP Push File - CDRWM - NXP` ▼   OK
>
> ☑ eXtended Processing (Note: This option is NOT available for all PBX formats)   Cancel
>   ─ Use Computer or Telephone System Date ? ─
>   ○ Computer Date   ● PBX Date
>
> Check and process Text file every `120` seconds (in 60 sec. increments)

Note: in case you have more than one location (you've purchased Remote Manager) this screen pertains to the Main location.

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 or another utility.

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

eXtended Processing - this option is not available for ALL PBX formats. For some PBX formats it is checked by default. 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 loads data from the text file (as opposed to the Call Load task that converts raw information into Tapit database format file).

17. Click on **OK** to save changes.
18. **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. 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.
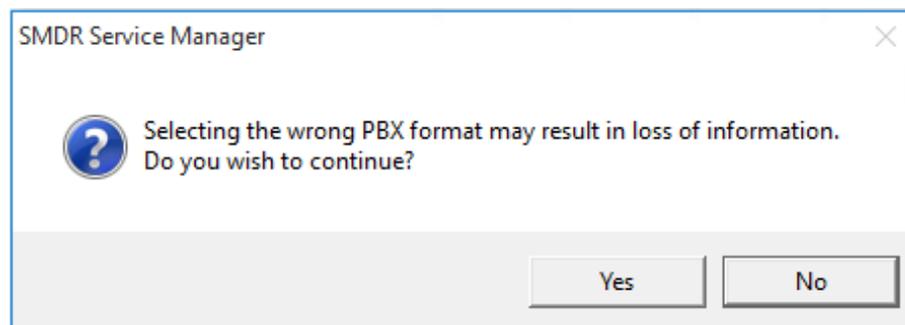
19. **Trisys SMDR Service Manager** is open and a registration message is displayed as a reminder to register Tapit software. It is very important to register your Tapit promptly. Tapit will stop functioning if you do not register it 30 days from the date of installation. See page 38 for REGISTRATION instructions. Click on **OK**.
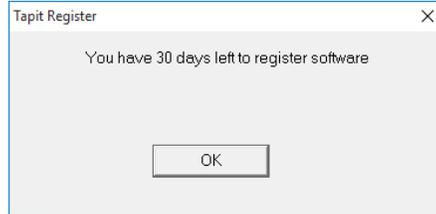
20. If TapitNOVA is collecting SMDR data via COM Port, open **Settings/Com Port** on **the Trisys SMDR Service Manger** screen. However, if TapitNOVA is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader or another utility) proceed with point 21 on page 29.
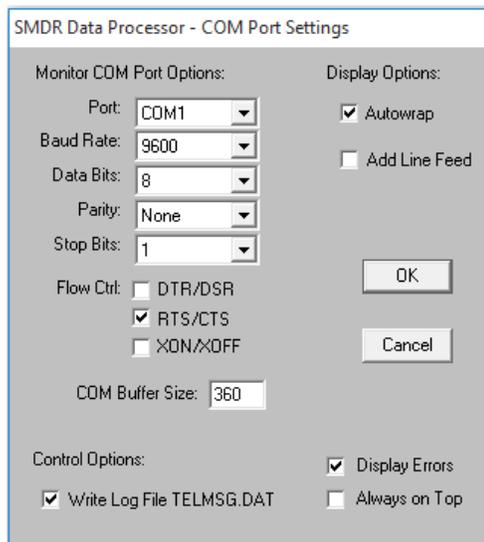
Port - click on the down arrow icon in the **Port** field to select a port on the computer the SMDR cable is connected to.
Baud Rate - click on the down arrow icon in the **Baud Rate** field to select a transmission speed the phone system is set at.
Data Bits - click on the down arrow icon in the **Data 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 80).

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 where the Tapit database is stored).
Display Errors - check this box if you wish Tapit to display communication errors in the SMDR Monitor window.
Always on top - check this if you wish SMDR Monitor icon or window to be always on the foreground of the desktop.

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.
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).

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

```
SMDR Service Manager < Nova > < Service Stopped > < Application Closed > < Console Closed > < File mode >

Action   Settings   Test   About

Checking if Test Console is open...
Result: Test Console not detected.


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

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

Application Started and Ready now.

Select Settings->Info to see current Information.

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

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

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

```
SMDR Service Manager < Nova > < Service Running > < Application Closed > < Console Closed > < File mode >

Action   Settings   Test   About
Checking if SMDR Monitor is open...
Result: SMDR Monitor not detected.

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

Application Started and Ready now.

Select Settings->Info to see current Information.

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

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

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

23. Open TapitNOVA by double-clicking on the TapitNOVA icon on your desktop or from **Start/Programs/TapitNOVA/TapitNOVA**.

24. **TapitNOVA Login** screen is displayed. Enter generic pass code, **tapit_manager**, into both user name and password fields.

"tapit_manager" is the default username and password to TapitNOVA. This user account cannot be deleted. You can create additional user logins under [Security](#) [page 229]. 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 Nova

Setup Wizard is displayed. Click on **Next**.
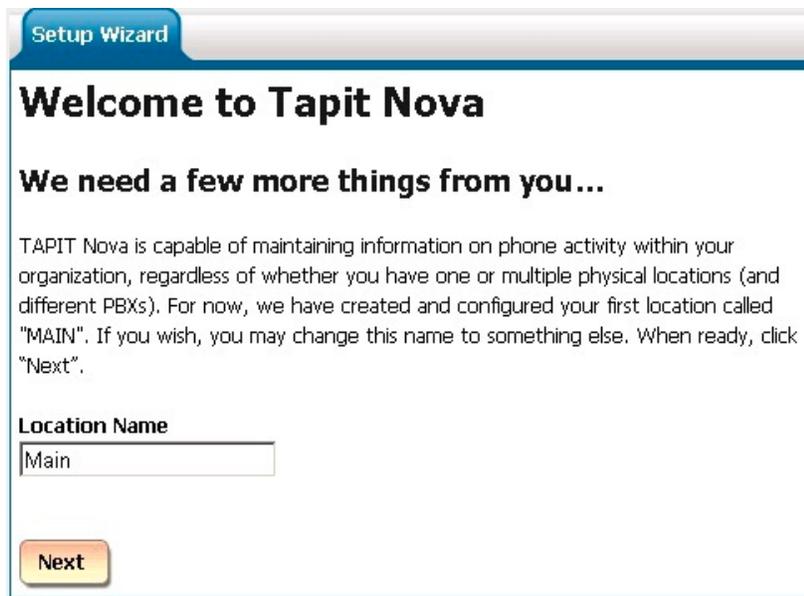
25. Verify the local phone number for the **Main** location. Click on **Next**.
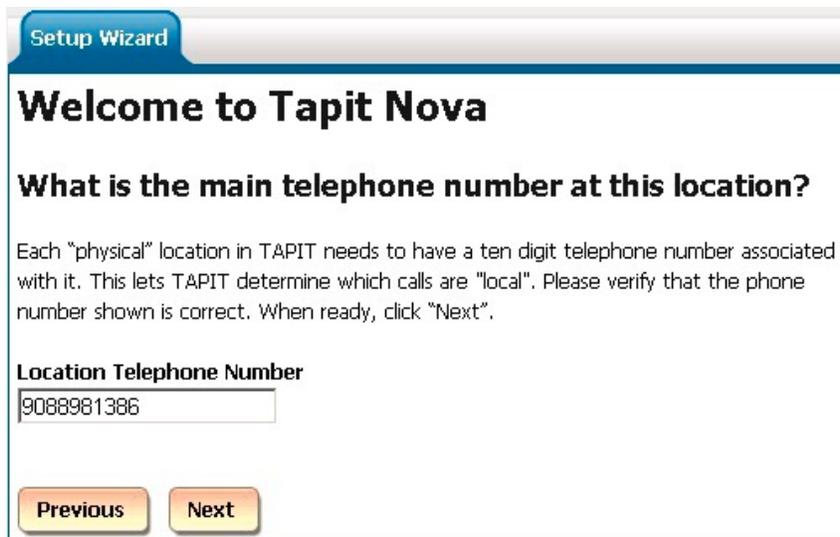
26. The email settings screen is displayed. This screen is used to enter email information for system notifications.

    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 TapitNOVA.
    - **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 TapitNOVA.
    - **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 error messages from TapitNOVA when certain errors occur during TapitNOVA's processes.

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

Host:
smtpservername

Port:
25

☐ Use SSL
☐ Use Default Credentials

From Email Address:
jims@trisys.com

From Email Name:
Jim Smith

Password:

To Email Address (Separate multiple addresses with ;) :
admin@trisys.com

27. Depending on if this is an upgrade or a first time TapitNOVA installation click on one of the options on this screen.
Click on **Finish**.

If you have clicked on the This is the first time I'm using Tapit option the installation and setup are completed and TapitNOVA application is ready to use. Call Loader task is scheduled automatically.

Otherwise, if you have clicked on "I have an older version of Tapit..." follow instructions from the section below.

Upgrading TapitEX to TapitNOVA

Note: the upgrade from TapitEX can be run later if you wish. In that case select the option "**This is the first time I'm using TapitNOVA**". Later, when you're ready, select the Upgrade Tapit task under Tasks.

1. Install **TapitNOVA** following the above instructions. Make sure you have selected **I have an older version of Tapit** option on the last page of the **Setup Wizard**. Click on **Finish** in the **Setup Wizard**, if you haven't done so already.
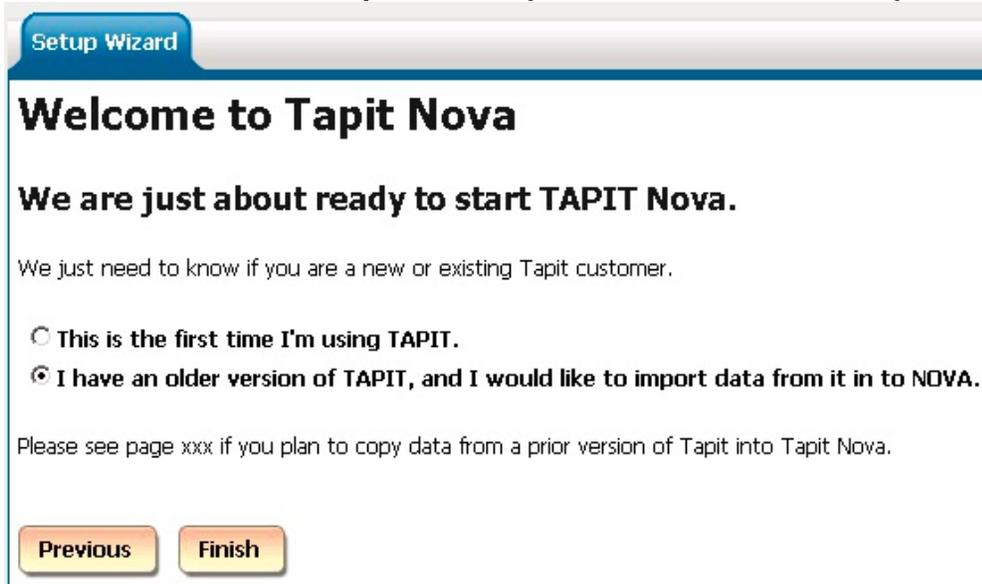
2. **TapitNOVA** application opens. Click on the **System** button.
3. Click on the **Locations** tab.
4. Click on the **Call Costing** link. Make sure **Call Costing** settings reflect settings in the old Tapit version.
5. Click on the **Activity** link. Make sure **Activity** settings reflect settings in the old Tapit version. Verify the **Account / Authorization Code Processing Options** match the same options in old Tapit version.
6. Click on the **Dialing Patterns** link. Make sure **Dialing Patterns** settings reflect settings in the old Tapit version.
7. Click on the **Pricing** link. Make sure the **Pricing** table is empty. Pricing settings will be imported automatically later from the old version of Tapit.
8. Click on the **Dest Code Pricing** link. Make sure **Dest Code Pricing** settings reflect settings in the old Tapit version.
9. If you had trunks and trunk groups defined in Web Reports for Tapit EX, enter the same trunks and trunk groups into TapitNOVA via **Trunks** and **Trunk Groups** links.
10. Minimize TapitNOVA application and prepare old Tapit database for import by following steps below.

11. You can make old Tapit database accessible to TapitNOVA for import by copying the old **Main** folder to the PC where TapitNOVA is installed. The **Main** folder of the old version of Tapit is a subfolder of **TapitW32\Data** folder.
    To move **Main** folder to the PC where TapitNOVA is installed:
    a. Create **TapitOld** folder on your C drive (C:\TapitOld)
    b. Copy **Main** folder from **TapitW32\Data** (old Tapit folder) to the **C:\TapitOLd** folder on the PC where TapitNOVA is located.
12. Go back to the TapitNOVA application, or if you closed it, open it by clicking on the TapitNOVA icon on your desktop.
13. Click on the **System** button.
14. Click on the **Tasks** tab.
15. Select **Upgrade Tapit** task from the **Create a new Task** list.
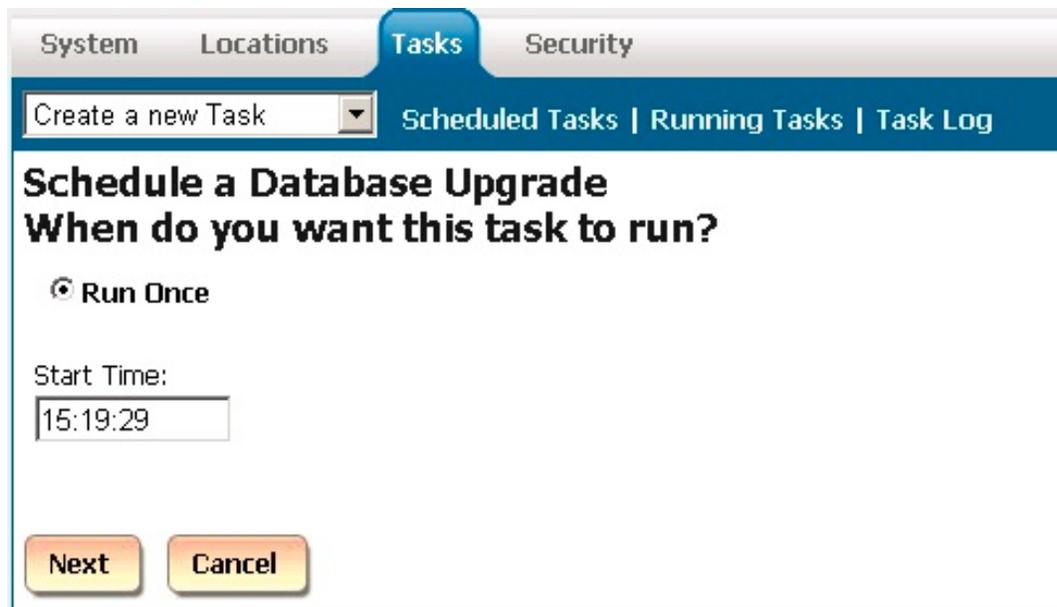
16. Accept default current time to run this task at once. Click on **Next**.
17. If you have purchased Remote Manager, select a location name you are currently upgrading from the **Pick the location you wish to upgrade** list. Otherwise, accept default Main location.

    Enter a path and a file name of the old Tapit database into the field below.
    In our example, the screen below reflects the path to the local copy of the old Tapit database – **C:\TapitOld\Main\Tapitdb.mdb**.

18. Fill out the email information and click on **Finish**. The task has been scheduled and starts running right away.
An email message will be sent by the system to the recipient's email address from the **To** field once the task is completed.

19. Click on the **Running Tasks** link. The **Upgrade** task is listed on the **Currently Running Tasks** list. If the **Upgrade** task is not listed, it is already completed. You can verify that by checking the **Task Log**.
Task Log has a list of all completed tasks.

20. To view upgrade details, click on the UPGRADE task on the **Currently Running Tasks** list. The **Active Task Detail** screen appears.

The **Task Status** section displays description of the task.

The **Progress** section displays current information about the running task
Counter – how many call records have been imported so far.
Counter Max – the total number of call records to be imported.
Avg Recs/Sec – how many records per second are being imported.
Avg Secs/Rec – how many seconds it takes to import one call record.
Elapsed Time – how much time has passed since the start of upgrade.
Estimated Run Time – approximately how long the upgrade will take.

The **Warning** section displays warnings and errors. To see updated **Task Details** click on the **Refresh** button.

If the task appears to be "hung" and you are not certain that the task is working, click on **Verify** and then click on **Refresh** to see the current status.

If for some reason you need to stop the task click on the **Stop Task** button. However, this is not recommended, because it can produce unpredictable results in call data.

To go back to the **Currently Running Tasks** list, click on **Return to Active Tasks**.

21. Once upgrade task is completed it will disappear from the **Currently Running Tasks** list. You will be able to find it on the **Tasks – Completed** list located on the **Task Log** tab.

Tasks - Completed Next Page

Started ⇕	Ended ⇕	Task ⇕	User ⇕	Freq. ⇕	Loc. ⇕	Message	Status ⇕

22. If you have more than one location to upgrade (if you are upgrading old Tapit with Remote Manager) you need to repeat points 2-22 for each location's database.

Registration

---

1. Go to where the **TapitNOVA** server is installed.
2. Go to **Start** -> **Programs** -> **TapitNOVA** -> **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 a lot of time for users who frequently view the same reports Reports can be added to the dashboard or removed from it via the **Manage Dashboard** screen.

To add a new Dashboard item

1. Log in to TapitNOVA.
2. If you have not yet assigned any reports to the dashboard, the **Manage Dashboard** screen is displayed.
   Otherwise, your dashboard is populated with reports. In that case, to open the **Manage Dashboard** screen, click on the **Manage Dashboard** link located in the upper left-hand corner above the reports.

   Manage Dashboard

3. Go to the **Create a new Dashboard Item** section and click on the down-arrow of the **Report Groups** field. The list of available report groups appears.
   Click on the desired report group name to select it.

   Report Groups
   Extension ▼

4. Click on the down-arrow of the **Reports** field to pull down the list of available reports for the selected report group. Click on the desired report name.

   Reports
   Extension - Expanded Detail by Date ▼

5. Click on the down-arrow of the **Call Filters** field 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).

   Call Filters
   Todays Calls for ext 114 ▼

6. 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**.

   Report Title Override
   Extension Detail for Today for ext 114

7. Dashboard reports are refreshed with new call data in minute intervals. Enter the length of the minute interval into the **Refresh report every…minutes**.

Refresh report every `10` minutes.

In our example, we have added "Extension – Expanded Detail by Date" report to the dashboard. The report is based on the predefined filter "Todays Calls for ext 114". Dashboard will display this report under the new title "Extension Detail for Today for ext 114". The report displays detail today's data for extension 114 refreshed every 10 minutes.

8. Click on **Save Report** to save changes or **Cancel** to start over.
9. After saving, the **Current Reports on Your Dashboard** list reflects newly added report.

Current Reports on Your Dashboard

Extension - Expanded Detail by Date

The **Create a New Dashboard Item** screen is refreshed and ready for a new entry.

10. Repeat pt. 3 through 9 until you are satisfied with the dashboard reports.

To edit an existing Dashboard item

1. Log in to TapitNOVA.
2. Click on the **Manage Dashboard** link located in the upper left-hand corner above the reports.

Manage Dashboard

3. Click on the report name on the **Current Reports on Your Dashboard** list to select it.
   The lower part of the screen **is populated with the report information.**
   You start making appropriate changes.
4. Click on the down-arrow of the **Report Groups** field to change a report group. Select the desired report group from the list.

Report Groups

Extension

5. Click on the down-arrow of the **Reports** field to change a report. Click on the desired report name.

Reports

Extension - Summary

6. Click on the down-arrow of the **Call Filters** field 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 (see page 70 to create a predefined filter).

   Call Filters

   Yesterdays Calls

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**.

   Report Title Override

   Extension Summary - Yesterdays Calls

8. The dashboard reports are refreshed with new data in minute intervals. Enter the length of the minute interval into the **Refresh report every...minutes**.

   Refresh report every 10 minutes.

9. Click on **Save Report** to save changes or **Cancel** to start over.
10. The **Create a new Dashboard Item** screen is displayed. You can create a new report or edit another report.

To delete an existing Dashboard item

1. Log in to TapitNOVA.
2. Click on the **Manage Dashboard** link located in the upper left-hand corner above the reports.

   Manage Dashboard

3. Select the report name from the **Current Reports on Your Dashboard** list.
4. Click on the **Delete** button.
5. Click **OK** to the confirmation message.
   The report name is removed from the **Current Reports** list.

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 first tab of your dashboard.

1. Log in to TapitNOVA.
2. Click on the **Manage Dashboard** link located in the upper left-hand corner above the reports.

Manage Dashboard

3. Click on the report name you want to move to the first dashboard tab.

Current Reports on Your Dashboard

User - Summary
Department - Summary
Miscellaneous - Expanded Detail

Move Up   Move Down

In our example, we have selected the **Miscellaneous – Expanded Detail** report which is currently occupying the last tab of our dashboard.

4. Click on the **Move Up** button enough times to place the report on the top of the list.

Current Reports on Your Dashboard

Miscellaneous - Expanded Detail
User - Summary
Department - Summary

Move Up   Move Down

5. Click on **Return to Dashboard**. The selected report is displayed on the first tab of the dashboard. In our example, the **Miscellaneous - Expanded Detail** report moved up to the first tab.

Miscellaneous - Expanded Detai	User - Summary	Department - Summary

Manage Dashboard

|◀ ◀ 1 of 61 ▶ ▶| ⇐   Find | Next   🖨 ✉

Miscellaneous - Detail by Date
• Location: Main
•• Date: 12/9/2008
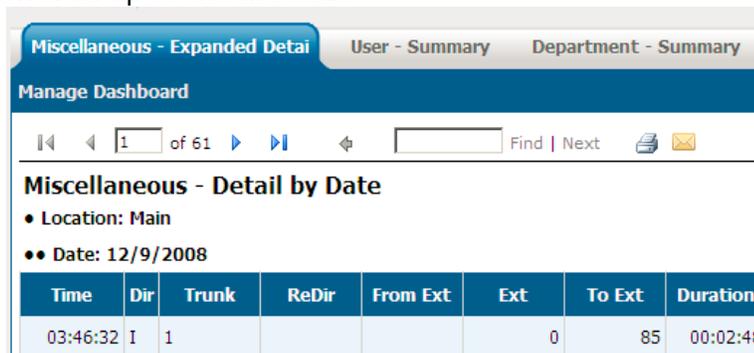
Time	Dir	Trunk	ReDir	From Ext	Ext	To Ext	Duration
03:46:32	I	1			0	85	00:02:48

6. You can move other reports up or down in the same way to organize your dashboard.

Reports

Generating Reports

TapitNOVA offers variety of reports. The reports can be created using the previously saved filters or by entering filter criteria manually.

Generate Report using a predefined search filter

A user can save search criteria for future use. Report screen displays saved filters in a list located next to the list of report names. A user may select any of the predefined filters instead of entering search criteria manually when creating a report.

1. Log in to TapitNOVA.
2. Click on the top **Reports** button.
3. The **Select a report and filter:** screen is displayed.
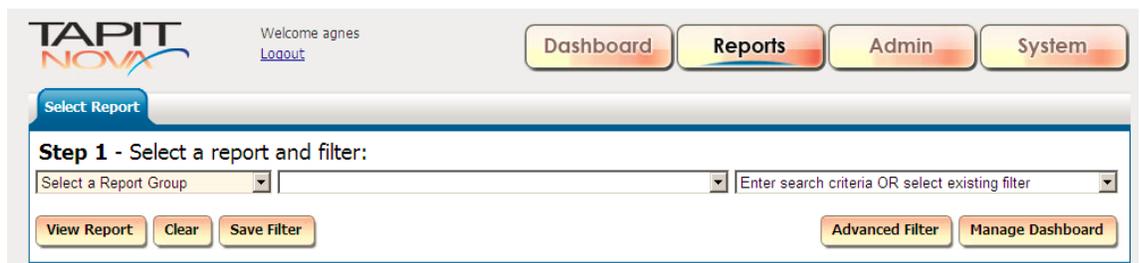
4. The **Select a Report Group** drop-down list on the left contains report group names. Click on the down-arrow and select a report group.
5. The next list is dynamically populated with the report names corresponding to the selected report group. Click on the down-arrow and select a report name. The report filter screen opens below.
6. If you want to display filter criteria on the report check the **Display filter on report** box.

7. Select a predefined filter from the list located in the right-hand upper corner of the screen.
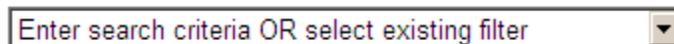
We have selected a previously saved filter for internal calls only, for one day in December, 2008.

The report filter screen reflects the predefined search criteria.
The date range fields are populated with a range from the filter (month of December 2008).

Enter a date range: 12/01/08 ▦ - 12/31/08 ▦

The **Internal** call direction option is checked.

Direction
☐ Incoming
☐ Outgoing
☑ Internal

8.   Click on **View Report** to generate a report.

Generate Report using manually entered search criteria

The report filter screen offers a wide variety of search criteria to satisfy clients reporting needs.

Location filter criteria

Provided you have purchased the Remote Manager software, you can generate a report either for all locations or a particular location.

Location: Main ▾

If you have purchased Remote Manager and you would like to run a report for only one location, click on the down-arrow of the **Location** list and select the location name. Otherwise, the report will be created for all locations.

If you do not have Remote Manger, you have only one location – Main. Reports will always be created for Main location.

Date filter criteria

You can specify a date range or use a variety of predefined date options.

Enter a date range: 12/01/2009 ▦ - 12/15/2009 ▦

To enter a date range type start and end dates into the **Enter a date range** fields, or select dates using calendar controls.
Note: both date range fields have to be populated with valid dates. When running a report for one day, enter the same date into both text boxes. In our example: the report is created for call data collected on 8/31/09.

Enter a date range: 08/31/09 ▦ - 08/31/09 ▦

To select one of the predefined date options select a date interval from the "**or select an interval"** list.

There are several predefined date intervals: **Today**, **Yesterday**, **Week To Date**, **Last Week**, **Month To Date**, **Last Month**, **Year To Date**, **Last Year**.

Time filter criteria

You can specify a time frame or use a variety of predefined time options.

To enter a time frame type start and end time into the **Enter a time range** fields Time must be entered in military format -"mm:hh" i.e. 09:00 for 9:00 AM and 17:00 for 5:00 PM. In our example, the report will display all call records collected at or after 9:00 AM and before 5:00 PM.

To select one of the predefined time options select a time interval from the **or select an interval** list

There are several predefined time intervals.
Each of these intervals will display call activity within some time frame from the current time.
For example, if you select **Within 1 minute** at 10:29:00 AM, all call records with the start time within the last minute (from 10:28:00 AM to 10:29:00 AM) are going to be included in the report. Therefore, a call starting at 10:28:11 AM is going to be displayed, but call starting 10:27:55 is not going to be on the report.

Note: When selecting one of the shorter time intervals, you have to schedule the **Call Loading** task to run at an appropriate time interval as well.
For example, selecting **Within 1 minute** would not produce desired results if **Call Loading** was scheduled to run every 10 minutes. In that case the **Call Loading** task would have to be re-scheduled to run every 30 seconds.

Extension filter criteria

The **Extension** field represents a telephone extension a call record is associated with.
The report filter screen offers flexibility in **Extension** search criteria.
You can include or exclude extension ranges or individual extensions.

1. Click on the **Extension** field label.

   Extension:

   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for extensions entered here.
   Select **Exclude** option if you would like to run a report for all extensions **except** the extension numbers entered here.
3. You can enter extension range, or individual extensions, or both.
   To enter extension range, type a start extension and an end extension separated by a hyphen into the top text box i.e.101-114 and click on **Add**.
   To enter an individual extension, type an extension into the top text box i.e. 200 and click on Add.
4. Repeat point 3 as needed.
5. Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes.
   The **Extension** filter field reflects entered search criteria.

   Example of the **Include** option:
   Extensions listed on the **Current Selections** list will be the only extensions included in the report.
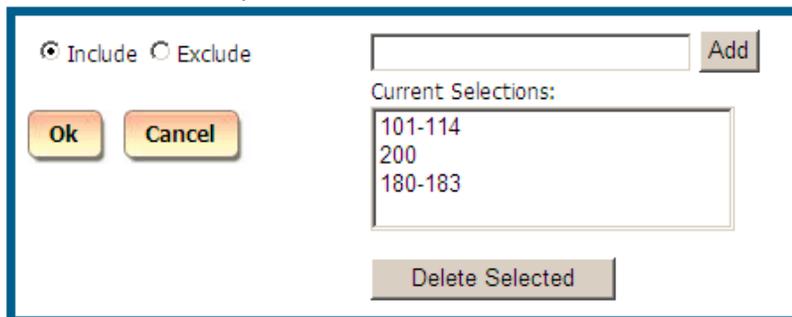
Clicking on **OK** closes the **Include/Exclude** window and populates the **Extension** field with filter criteria.

Extension: | 101-114, 200, 180-183

According to the above criteria 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.

Example of the **Exclude** option:
The report will include all extensions except the ones listed on the **Current Selections** list.
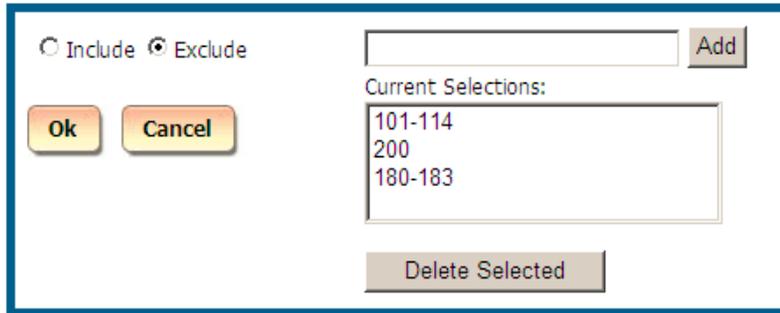
Clicking on **OK** closes the **Include/Exclude** window and populates the **Extension** field with filter criteria.

Extension(-): | 101-114, 200, 180-183

(-) suffix indicates that the displayed extensions are excluded from the report. According to the above 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. The report filter screen offers flexibility in **Xfr To Extension** search criteria. You can include or exclude extension ranges or individual extensions.

1. Click on the **Xfr To Extension** field label.
   Xfr To Extension:
   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for extensions entered here.
   Select **Exclude** option if you would like to run a report for all extensions except the ones entered here.
3. You can enter extension range, or individual extensions, or both.
   To enter extension range, type a start extension and an end extension separated by a hyphen into the top text box i.e.185-187 and click on **Add**.
   To enter an individual extension, type an extension into the top text box i.e. 101 and click on **Add**.
4. Repeat point 3 as needed.

5. Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes. The **Xfr To Extension** filter field reflects entered search criteria.

    Example of the **Include** option:
    Extensions listed on the **Current Selections** list will be the only extensions included in the report.
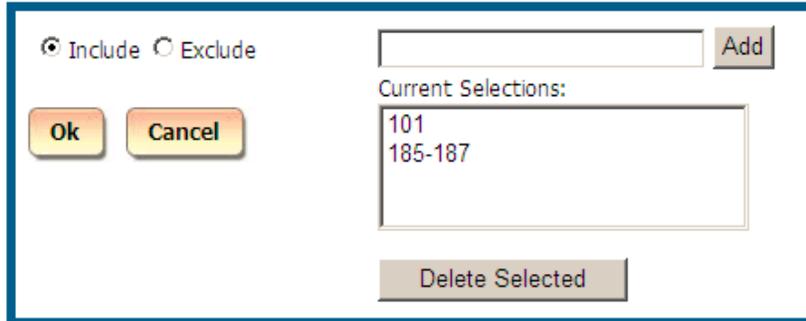
    Clicking on **OK** closes the Include/Exclude window and populates the **Xfr To Extension** with filter criteria.

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

    Example of the **Exclude** option:
    The report will include all extensions except the ones listed on the **Current Selections** list.

    Clicking on **OK** closes the **Include/Exclude** window and populates the **Xfr To Extension** field with filter criteria.

    (-) suffix indicates that the displayed extensions are excluded from the report. According to the above criteria the report will include all extensions from the **Xfr To Extension** field except displayed extensions: 101, 185, 186, and 187.

1

Example of the **Exclude** option:
The report will include all extensions except the ones listed on the **Current Selections** list.
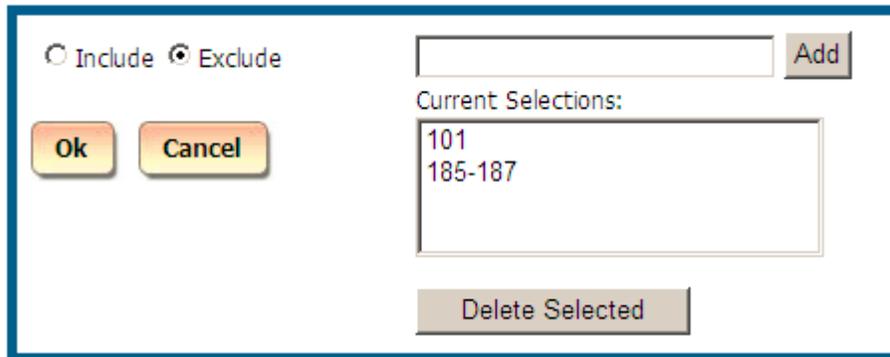
Clicking on **OK** closes the **Include/Exclude** window and populates the **Xfr From Extension** field with filter criteria.

(-) suffix indicates that the displayed extensions are excluded from the report. According to the above 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

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

1.   Click on the **Account Code** field label.

The **Include/Exclude** window opens.

2.   Select **Include** option if you would like to generate a report only for account codes entered here.
Select **Exclude** option if you would like to run a report for all account codes **except** the ones entered here.

3.   You can enter account code range, or individual account codes, or both.
To enter account code range, type a start account code and an end account code separated by a hyphen into the top text box i.e. 1000-1002 and click on Add.
To enter an individual account code, type an account code into the top text box i.e. 1010 and click on Add.

4.   Repeat point 3 as needed.

5.   Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes. The **Account Code** filter field reflects entered search criteria.

Example of the **Include** option:

Account codes listed on the Current Selections list will be the only account codes included in the report.
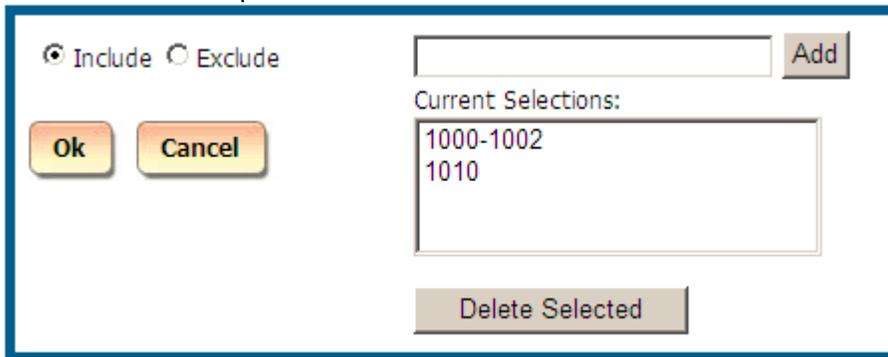
Clicking on **OK** closes the **Include/Exclude** window and populates the **Account Code** field with filter criteria.

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

Example of the **Exclude** option:

The report will include all account codes except the ones listed on the Current Selections list.

Clicking on **OK** closes the **Include/Exclude** window and populates the **Account Code** field with filter criteria.

(-) suffix indicates that the displayed account codes are excluded from the report. According to the above 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

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

1. Click on the **Matter Code** field label.

    Matter Code:

    The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for matter codes entered here. Select **Exclude** option if you would like to run a report for all matter codes **except** the ones entered here.
3. You can enter matter code range, or individual matter codes, or both.
    To enter matter code range, type a start matter code and an end matter code separated by a hyphen into the top text box i.e. 4441-4444 and click on Add.
    To enter an individual matter code, type a matter code into the top text box i.e. 4446 and click on Add.
4. Repeat point 3 as needed.
5. Click on OK when you are satisfied with the search criteria. The Include/Exclude window closes. The **Matter Code** filter field reflects entered search criteria.

    Example of the **Include** option:
    Matter codes listed on the Current Selections list will be the only matter codes included in the report.
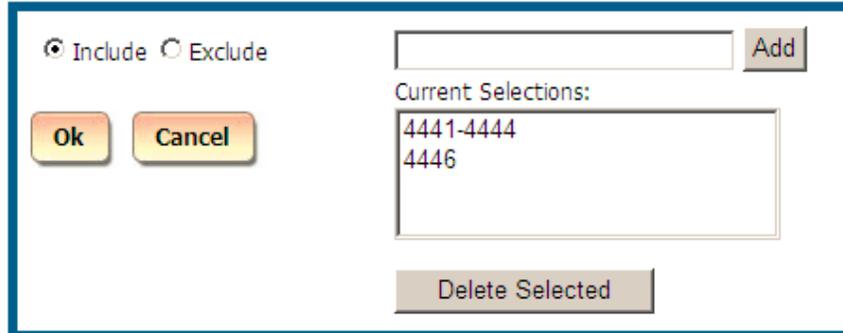
Clicking on **OK** closes the **Include/Exclude** window and populates the **Matter Code** field with filter criteria.

Matter Code: 4441-4444, 4446

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

Example of the **Exclude** option:
The report will include all matter codes except the ones listed on the **Current Selections** list.

Clicking on **OK** closes the **Include/Exclude** window and populates the **Matter Code** field with filter criteria.

(-) suffix indicates that the displayed matter codes are excluded from the report. According to the above 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

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

1. Click on the **Authorization Code** field label.

The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for authorization codes entered here.
Select **Exclude** option if you would like to run a report for all authorization codes except the ones entered here.
3. You can enter authorization code range, or individual authorization codes, or both.
To enter authorization code range, type a start authorization code and an end authorization code separated by a hyphen into the top text box i.e. 1561-1564 and click on **Add**.
To enter an individual authorization code, type an authorization code into the top text box i.e. 1567 and click on **Add**.
4. Repeat point 3 as needed.
5. Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes. The **Authorization Code** filter field reflects entered search criteria.

Example of the **Include** option:
Authorization codes listed on the Current Selections list will be the only authorization codes included in the report.
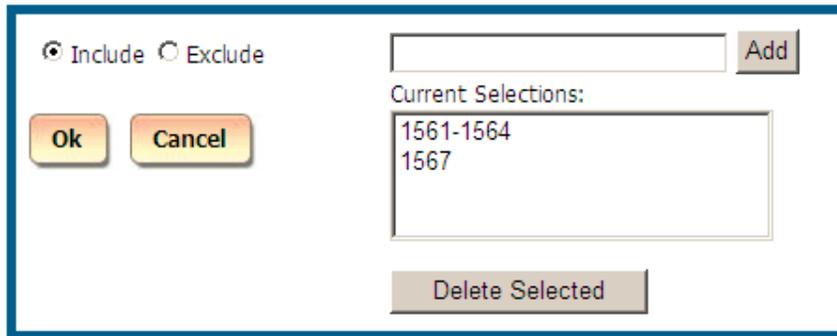
Clicking on OK closes the Include/Exclude window and populates the **Authorization Code** field with filter criteria.

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

Example of the **Exclude** option:
The report will include all authorization codes except the ones listed on the Current Selections list.
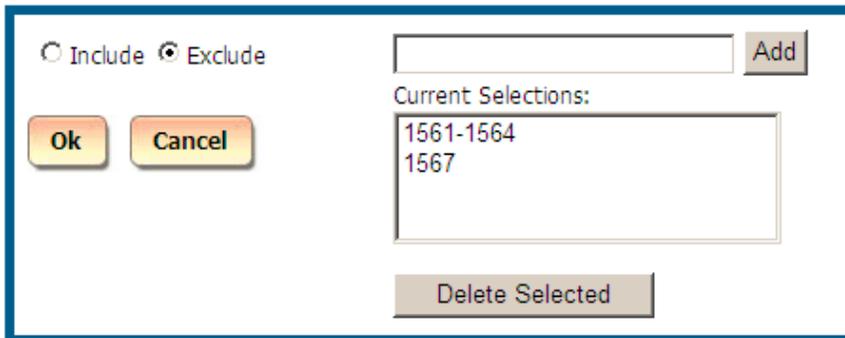
Clicking on OK closes the Include/Exclude window and populates the **Authorization Code** field with filter criteria.

(-) suffix indicates that the displayed authorization codes are excluded from the report. According to the above 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

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

1. Click on the **Area Code** field label.

   Area Code:

   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for area codes entered here.

   Select **Exclude** option if you would like to run a report for all area codes except the ones entered here.
3. You can enter area code range, or individual area codes, or both.

   To enter area code range, type a start area code and an end area code separated by a hyphen into the top text box i.e. 908-973 and click on **Add**.

   To enter an individual area code, type an area code into the top text box i.e. 210 and click on **Add**.
4. Repeat point 3 as needed.
5. Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes. The **Area Code** filter field reflects entered search criteria.

   Example of the **Include** option:

   Area codes listed on the **Current Selections** list will be the only area codes included in the report.
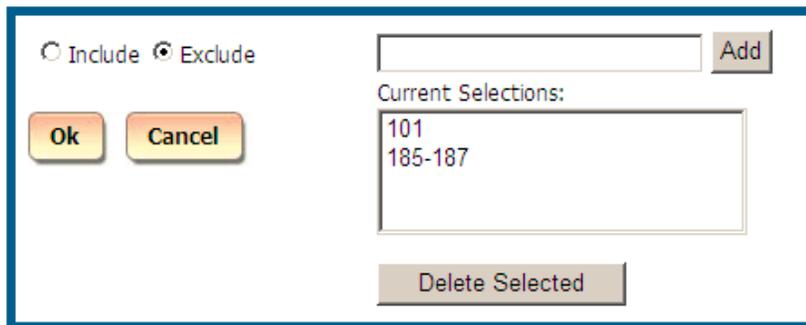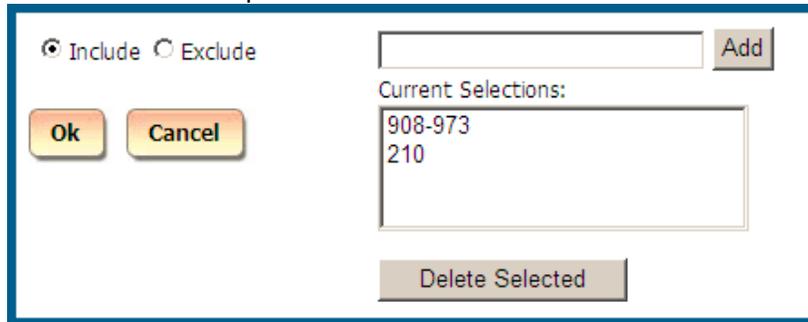

   Clicking on **OK** closes the **Include/Exclude** window and populates the **Area Code** field with filter criteria.

   Area Code: 908-973, 210

   According to the above criteria the report will be generated only for the following area codes from the **Area Code** field: 908 through 973, and 210.

Example of the **Exclude** option:
The report will include all area codes except the ones listed on the **Current Selections** list.

Clicking on **OK** closes the **Include/Exclude** window and populates the **Area Code** field with filter criteria.

(-) suffix indicates that the displayed area codes are excluded from the report. According to the above 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 from associated with them **Call Notes**. You can include or exclude call records according to the assigned **Call Notes**.

1. Click on the **Call Note** field label.

   Call Note:

   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for call records with **Call Notes** that contain text entered here.
   Select **Exclude** option if you would like to run a report for all call records except the ones with **Call Notes** that contain text entered here.
3. You can enter text from multiple **Call Notes**. You can enter any text within the note. For example, to bring back call records with **Call Note** "December Holiday Special", one could enter the following text: "Dec", "December", "Holiday", or "Special".
   Type a **Call Note** or a partial **Call Note** into the top text box i.e. and click on **Add**.
4. Repeat point 3 as needed.
5. Click on **OK** when you are satisfied with the search criteria. The **Include/Exclude** window closes. The **Call Note** filter field reflects entered search criteria.

Example of the **Include** option:
Call records associated with call notes listed in the **Current Selections** list will be the only call records included in the report.
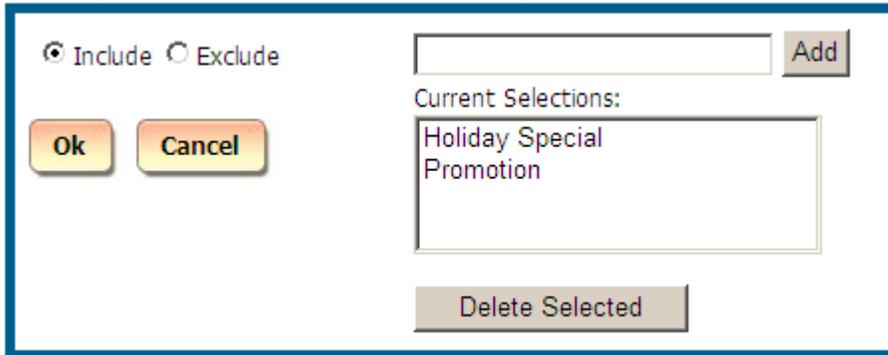
Clicking on **OK** closes the **Include/Exclude** window and populates the **Call Notes** field with filter criteria.

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

Example of the **Exclude** option:
The report will include all records except call records that contain **Call Notes** listed on the **Current Selections** list.

Clicking on **OK** closes the **Include/Exclude** window and populates the **Call Notes** field with filter criteria.

(-) suffix indicates that call records with the displayed call notes are excluded from the report. According to the above criteria the report will include all records except the call records with the call notes that contain "Holiday Special" and/or "Promotion".

Length – call length filter criteria

The **Length** field represents the duration of the call.
You can run a report for call records with the particular call duration, shorter than the specified call duration, or longer than the duration threshold.

Enter the desired duration threshold into the **Length** field.

Length:　　　　　　 > ▼ 00:01:00

Click on the down arrow and select an appropriate conditional sign for your search criteria.
You have a choice of:
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)

Length should be entered in one of the following formats:
00:01:00 or 00:01 – one minute
01:00:00 or 01:00 – one hour
00:00:01 – one second
In our example, we have set the length to "> 00:01:00" in order to bring back longer than 1 minute call records.

Ring Length filter criteria

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

Enter the desired ring duration threshold into the **Ring Length** field.

Ring Length:　　　　 > ▼ 00:00:50

Click on the down arrow and select an appropriate conditional sign for your search criteria.
You have a choice of:
greater than sign (>) – will include all call records with a ring duration above the entered threshold (**>** 00:01:00 -all calls with a ring duration longer than 1 minute will be included)
less than sign (<) – will include all call records with a ring duration below the entered threshold (**<** 00:01:00 -all calls with a ring duration shorter than 1 minute will be included)

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

Ring Length should be entered in one of the following formats:
00:01:00 or 00:01 – one minute
01:00:00 or 01:00 – one hour
00:00:01 – one second
In our example, we have set the ring length criteria to ">00:00:50". The report will display call records with a ring period longer than 50 seconds.

Hold Length filter criteria

The **Hold Length** field indicates how long a call stayed on hold.
You 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.

Enter the desired hold duration threshold into the **Hold Length** field.

Click on the down arrow and select an appropriate conditional sign for your search criteria.
You have a choice of:
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)

Hold Length should be entered in one of the following formats:
00:01:00 or 00:01 – one minute
01:00:00 or 01:00 – one hour
00:00:01 – one second
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.
You 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.

Enter desired cost threshold in dollars into the **Cost** field.

Cost: > ▼   1.00

Click on the down arrow and select an appropriate conditional sign for your search criteria.
You have a choice of:
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

You can include or exclude trunk numbers from a report.

1. Click on the **Trunk** field label.
   Trunk:
   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for call records for trunks entered here.
   Select **Exclude** option if you would like to run a report for all call records **except** the call records with trunks entered here.
3. Type a trunk number into the top text box, i.e. 1, and click on **Add**.
   Repeat the above until you are satisfied with the trunk search criteria.
4. Click on **OK**. The **Include/Exclude** window closes. The **Trunk** filter field reflects entered search criteria.

   Example of the **Include** option:
   Call records with trunks listed on the Current Selections list will be the only records included in the report.

Clicking on OK closes the Include/Exclude window and populates the **Trunk** field with filter criteria.

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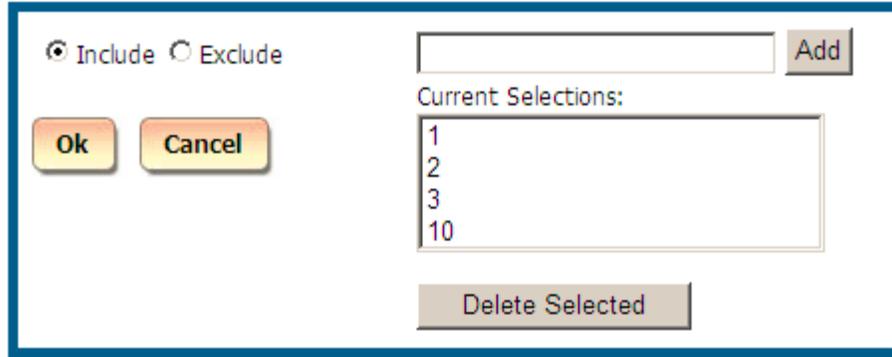
According to the above criteria, the report will be generated only for the call records for the following trunks: 1, 2, 3, and 10.

Example of the **Exclude** option
The report will include call records except the call records for trunks listed on the **Current Selections** list.
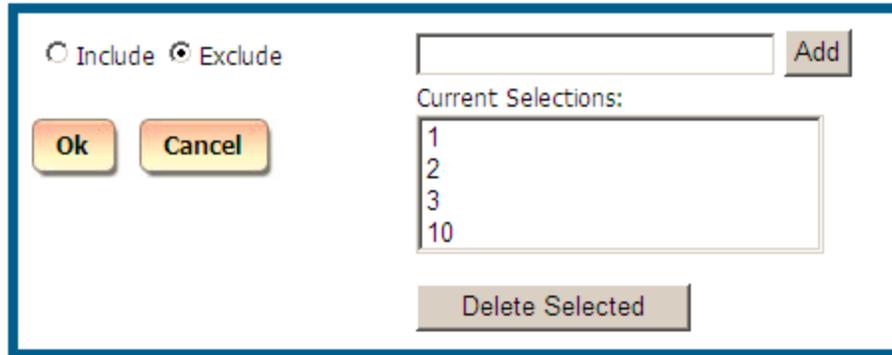
Clicking on **OK** closes the **Include/Exclude** window and populates the **Trunk** field with filter criteria.

Trunk(-):	1, 2, 3, 10

(-) suffix indicates that the displayed trunks are excluded from the report. According to the above 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. You can include or exclude call records associated with redirect trunk numbers from a report.

1. Click on the **Trunk2** field label.

   Trunk2:

   The **Include/Exclude** window opens.

2. Select **Include** option if you would like to generate a report only for call records with the redirect trunks entered here.
   Select **Exclude** option if you would like to run a report for all call records except the call records with redirect trunks entered here.

3. Type a trunk number into the top text box, i.e. "1", and click on Add. Repeat the above until you are satisfied with the redirect trunk search criteria

4. Click on **OK**. The **Include/Exclude** window closes. The **Trunk2** filter field reflects entered search criteria.

   Example of **Include** option:
   Call records with redirect trunks listed on the **Current Selections** list will be the only records included in the report.
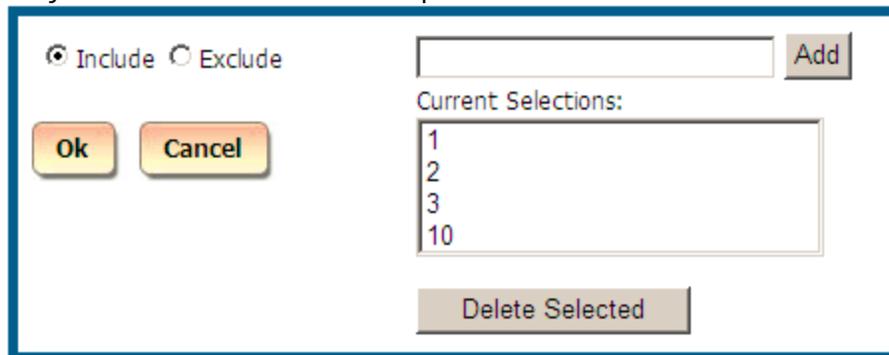
Clicking on **OK** closes the **Include/Exclude** window and populates the **Trunk2** field with filter criteria.

   Trunk2:   1, 2, 3, 10

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

Example of **Exclude** option:
The report will include all call records **except** the call records with redirect trunks listed on the **Current Selections** list.
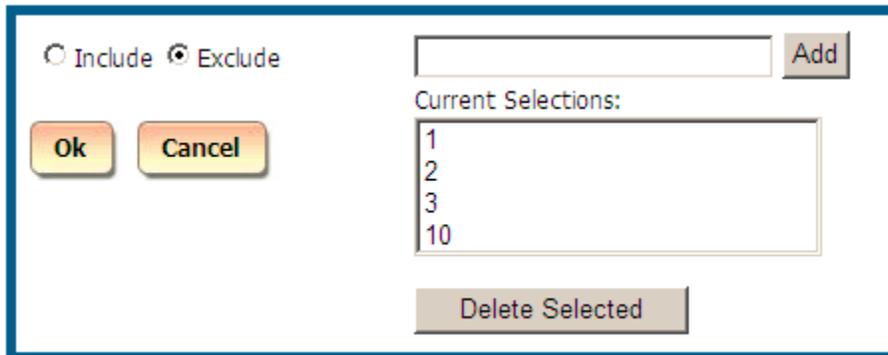
Clicking on **OK** closes the **Include/Exclude** window and populates the **Trunk2** field with filter criteria.

(-) suffix indicates that the displayed trunks are excluded from the report. According to the above criteria the report will include all call records except the call records with the following redirect trunks: 1, 2, 3, and 10.

Telephone Number filter criteria

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

1. Click on the **Telephone Number** field label.

    The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for call records associated with telephone numbers entered here.
    Select **Exclude** option if you would like to run a report for all call records except the call records associated with the telephone numbers entered here.
3. Type a telephone number into the top text box, i.e. 9733602300, and click on **Add**. Repeat the above until you are satisfied with the telephone number search criteria
4. Click on **OK**. The **Include/Exclude** window closes. The **Telephone Number** filter field reflects entered search criteria.

Example of the **Include** option:
Call records with telephone numbers listed on the **Current Selections** list will be the only records included in the report.
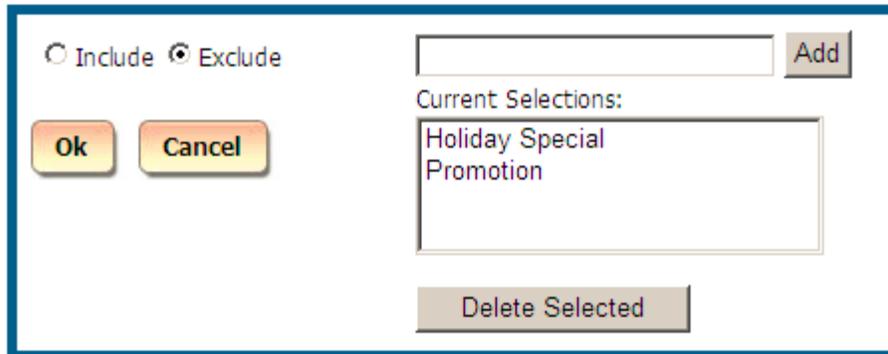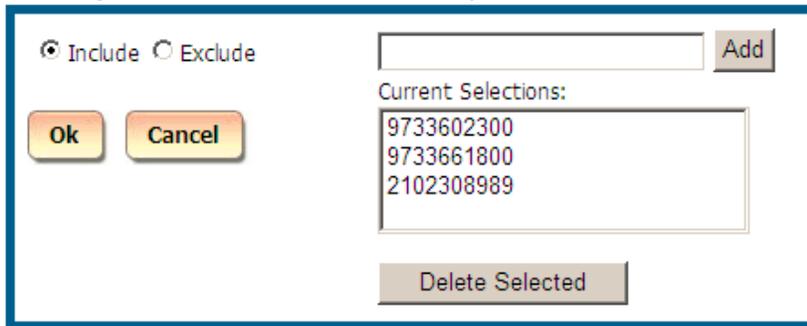

Clicking on **OK** closes the **Include/Exclude** window and populates the **Telephone Number** field with filter criteria.

According to the above criteria the report will be generated only for call records associated with the following telephone numbers: 9733602300, 9733661800, and 2102308989.

Example of the **Exclude** option:
The report will include all call records except the call records associated with the telephone numbers listed on the **Current Selections** list.
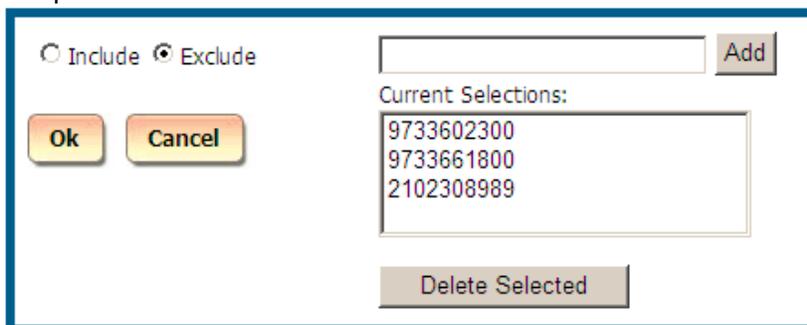
Clicking on **OK** closes the **Include/Exclude** window and populates the **Telephone Number** field with filter criteria.

(-) suffix indicates that the displayed telephone numbers are excluded from the report. According to the above criteria, the report will include all call records except the call records associated with the following telephone numbers: 9733602300, 9733661800, and 2102308989.

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. You can filter a report on the **DNIS Number** by including or excluding call records associated with specified **DNIS Numbers**.
Note: DNIS reports will only work in TapitNOVA if your phone system provides that information in the SMDR we receive.

1. Click on the **DNIS Number** field label.

   DNIS Number:

   The **Include/Exclude** window opens.
2. Select **Include** option if you would like to generate a report only for call records associated with DNIS numbers entered here.
   Select **Exclude** option if you would like to run a report for all call records except the call records associated with the DNIS numbers entered here.
3. Type a DNIS number into the top text box, i.e. 8005552222, and click on **Add**.
   Repeat the above until you are satisfied with the DNIS number search criteria
4. Click on **OK**. The **Include/Exclude** window closes. The **DNIS Number** filter field reflects entered search criteria.

   Example of the **Include** option:
   Call records with DNIS numbers listed on the **Current Selections** list will be the only records included in the report.
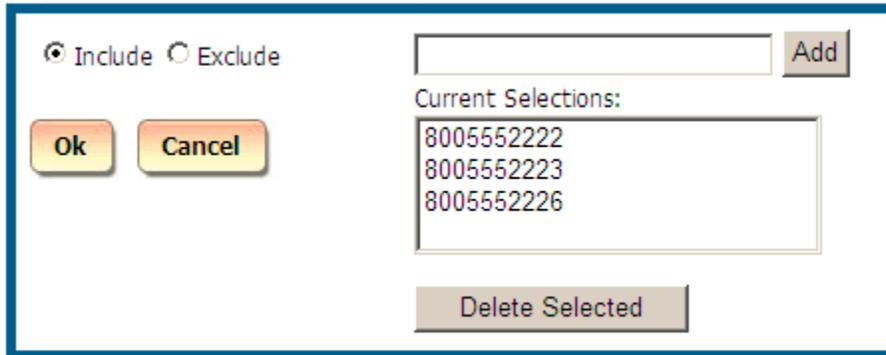
Clicking on **OK** closes the **Include/Exclude** window and populates the **DNIS Number** field with filter criteria.

DNIS Number: 8005552222, 8005552223, 8005552

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

Example of the **Exclude** option:

The report will include all call records except the call records associated with the DNIS numbers listed on the **Current Selections** list.

Clicking on OK closes the Include/Exclude window and populates the **DNIS Number** field with filter criteria.

(-) suffix indicates that the displayed DNIS numbers are excluded from the report. According to the above criteria, the report will include all call records except the call records associated with the following DNIS numbers: 8005552222, 8005552223, and 8005552226.

Users filter criteria

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

You 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 "Operator, 100" from the **Users** list. Our report will display call records only for user "Operator, 100".
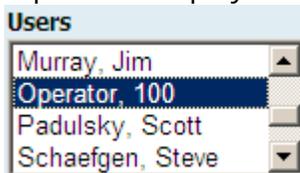
Clients filter criteria

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

You 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.

For example, we have selected the client "MPD Printing" from the **Clients** list. Our report will display call records only for client "MPD Printing".
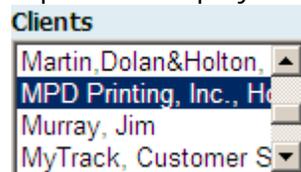
Departments filter criteria

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

You 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.

For example, we have selected the department "Analytics" from the **Departments** list. Our report will display call records only for department "Analytics".
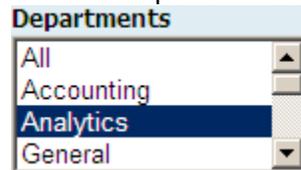
Trunk Groups filter criteria

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. Select a location form the **Location** list.

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.

For example, we have selected the trunk group "TRGroup1" from the **Trunk Groups** list. Our report will display call records only for trunk group "TRGroup1".
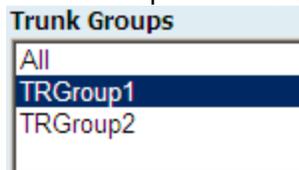
DNIS Campaigns filter criteria

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

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.

For example, we have selected the DNIS Campaign "Channel 40 Add" from the **DNIS Campaigns** list. Our report will display call records only for DNIS Campaign "Channel 40 Add".
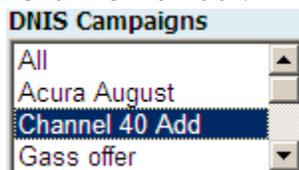
Direction filter criteria

By default all calls regardless of call direction are included in a report.

To display calls for a specific direction check the box corresponding to it. You can select multiple direction types at the same time by checking more than one box. In our example, a report will bring up only internal calls.
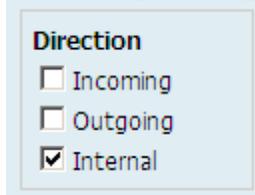
Direction
- ☐ Incoming
- ☐ Outgoing
- ☑ Internal

Transfer filter criteria

Check the **Transfer** option to include only transferred calls in a report.
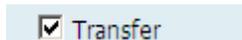
☑ Transfer

Status filter criteria

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.
You can select multiple status options by checking multiple options.
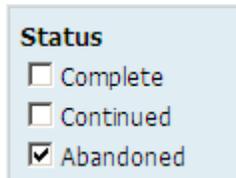
Status
- ☐ Complete
- ☐ Continued
- ☑ Abandoned

In our example, a report will bring up only abandoned calls.

Calls filter criteria

By default all calls, regardless of their origin or destination, are included in a report (**All** option is selected).
To create a report for only one type of calls click on the corresponding to it option button.
You can select only one call type at a time.
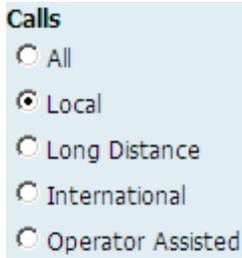
Calls
- ○ All
- ◉ Local
- ○ Long Distance
- ○ International
- ○ Operator Assisted

In our example, a report will bring up only local calls.

To create a predefined filter

If you have set all desired search criteria, you can save your search as a predefined filter and reuse it in future. Click on the **Save Filter** button.

Enter the name of the filter and a short description. We have set the Direction to Internal and entered a one day date range of "12/09/08".
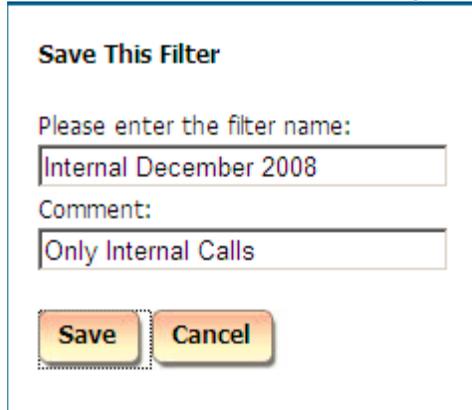
Save This Filter

Please enter the filter name:
Internal December 2008

Comment:
Only Internal Calls

Save   Cancel

Click on **Save.**

Note: the filter selection in the right upper corner of the basic filter screen reflects the name of the newly saved search filter.

Internal December 2008

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.

☑ Display filter on report

To view the report

If you are satisfied with the search criteria click on the **View Report** button**.**

The report screen comes up. Refer to the section, **Working with Report View Screen** for further instructions.

Working with Report View Screen

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

To navigate through report pages

Use arrows located in the upper left corner of the report screen 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 go back to the parent report

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

To search for a specific value in the report

You can search for a specific value in the report.
For example to find the phone number 9733602300, enter the number into the **Find** box and click on **Find**.

The report has advanced to page 29

The phone number 9733602300 has been highlighted

Click on **Next** to go to the next instance of 9733602300 located on page 30.

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.

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in a pdf format.

To export the report

Click on the export icon to export the report.

Exported reports may be saved as .PDF, Work, or Excel Documents.

To add a note to the call record

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

To add a note to a call record click on the value in the first column of the call record of the detail report.

Date	Time	Duration	Ring	Hold	Dir	Cost	From Ext
12/09/08	10:49:19	00:00:45	00:00:02	00:00:00	N	$0.00	2

In our example the first column displays date. When you click on the date field the report toolbar expands and displays a note icon.

Click on the note icon to open the note editor.
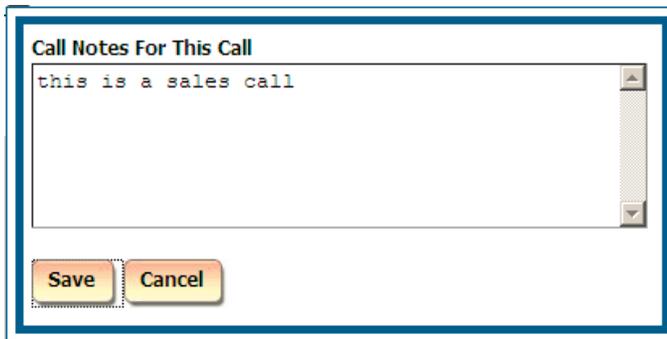
Type in a short description of the call and click on **Save**.

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 drill down to a detail report

Summary reports have a drill-down capability.

Extension - Summary by Calls
- Location: Main

Ext	In	Out	Intr	Calls	Duration	Avg Dur	Ring
0	102	0	4	106	05:07:42	00:02:54	00:07:41
109	24	53	19	96	02:49:01	00:01:46	00:12:24
18 Arnold, Brad	24	34	19	77	03:39:05	00:02:51	00:11:05
101	41	14	10	65	01:54:38	00:01:46	00:05:38

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. Pointing to the extension 109 displays a tool tip with the name of the **Tapit User** associated with this extension. Clicking on the number 109 invokes a detail report for this extension.

Extension - Expanded Detail
- Location: Main
- ● Extension: 109 (Arnold, Brad)

Date	Time	Duration	Ring	Hold	Dir	Cost
12/09/08	09:19:37	00:00:29	00:00:00	00:00:00	N	$0.00
12/09/08	09:20:19	00:00:43	00:00:02	00:00:00	I	$0.00
12/09/08	09:21:02	00:11:00	00:00:02	00:00:00	I	$0.00
12/09/08	09:29:34	00:00:40	00:00:02	00:00:00	I	$0.00
12/09/08	09:32:20	00:04:28	00:00:19	00:00:00	O	$0.45
12/09/08	09:39:03	00:00:25	00:00:02	00:00:00	I	$0.00
12/09/08	09:42:32	00:00:57	00:00:06	00:00:00	O	$0.10

Replay and Screen Logger

The first column of a detail report provides a gateway to multiple features. Some of them are dependent on the type of the system you have purchased. Clicking on the value in the first column displays a new toolbar.

If **Replay Voice Recording** has been purchased, a voice recording associated with the call record plays automatically.

If **Screen Logger** screen capture system has been purchased, clicking on the eye icon displays PC activity corresponding to an extension of the call record.

Report Scheduler

The **Report Scheduler** screen displays a list of the scheduled reports. Each report name is listed along with the name of the filter used to generate the report, and the information on how frequently the report will be run and who scheduled it.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	agnes	Monthly	09/01/09 12:00:00	Phone Number - Summary by Calls (PhoneNmbersFilter)

This screen is used to schedule TapitNOVA reports to run automatically daily, weekly, monthly, within time interval, or only once.

To schedule a new report

1. Log in to TapitNOVA.
2. Click on the **Reports** button located on the top of the screen.
3. Click on the **Report Scheduler** tab.
4. Click on the **Schedule Report** button to start the wizard.

Schedule a Report

When do you want this task to run?

○ Run Once
⊙ Daily
○ Weekly
○ Interval
○ Monthly

Start Time:
23:00

Next   Cancel

Select how frequently you would like to run the report.

Run Once – the report will run only once at a time specified in the **Start Time** field. For example, if a report is scheduled to run at 23:00 (11:00 PM) the system waits until 11:00 PM and runs the scheduled report. The system does not run the scheduled report again.

Daily - the report will run every day at a time specified in the **Start Time** field. 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.

Weekly – checking this option expands the **Schedule a Report** screen.

○ Run Once
○ Daily
◉ Weekly
○ Interval
○ Monthly

Start Time:
23:00

Run only on the selected day of the week

  ○ **Sunday** ◉ **Monday** ○ **Tuesday** ○ **Wednesday**
  ○ **Thursday** ○ **Friday** ○ **Saturday**

In addition to **Start Time** the days of the week are displayed. The report can be scheduled to run every week on a selected day of the week at a time specified in the **Start Time** field. For example, if a report is scheduled to run at 23:00 (11:00 PM) on Monday, the system waits until 11:00 PM every Monday and runs the scheduled 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.

○ Run Once
○ Daily
○ Weekly
◉ Interval
○ Monthly

Run every:
2 Hours ▼

Following our example above, a report is scheduled to run every 2 hours.

Monthly – checking this option expands the **Schedule a Report** screen.

○ Run Once
○ Daily
○ Weekly
○ Interval
● Monthly

Start Date:
09/01/2009

Start Time:
12:00

In addition to **Start Time**, the **Start Date** field is displayed. The report can be scheduled to run every month on a selected day of the month at a time specified in the **Start Time** field. For example, to run report the end of each month, set **the Start Date** to the first of the month and the **Start Time** to 12:00 (12:00 AM).

5. Click on **Next**. Select the report you wish to run screen comes up.

Select the report you wish to run

Report Groups
Phone Number

Reports
Phone Number - Summary by Calls

Call Filters
PhoneNmbersFilter

☑ Display filter on report

If the existing Call Filters do not give you the calls you are looking for, go to the
Reports

Report Title Override
Phone Number Summary by Calls Monthly
Use this field to display a custom title on the report.

Previous   Next   Cancel

6. Click on the down-arrow of the **Report Groups** list and select a report group.
7. Click on the down-arrow of the **Reports** list and select a report name.

8. Click on the down-arrow of the **Call Filters** list and select a report filter name. If none of the existing filters fits the desired report criteria, click on the **Reports** link and create a new filter.

9. If you would like the filter criteria to be displayed on the report, check the **Display filter on report** box.

10. Enter the report title you would like to see on the report into **Report Title Override**. If you are happy with the default report name leave this field empty.

11. Click on **Next**. The **Email Results** screen appears.

12. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com**;**recipient2@trisys.com**;**recipient3@trisys.com.

13. Enter the email subject into the **Subject** field.

14. Enter the email text into the **Message** field.

15. Click on **Finish**. The **Currently Scheduled Tasks** list comes up.

16. The newly scheduled report is added to the list.

17. If you wish to schedule another report, click on the Schedule Report button.

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.

○ Run Once
○ Daily
○ Weekly
◉ Interval
○ Monthly

Run every:
2 Hours ▼

Following our example above, a report is scheduled to run every 2 hours.

Monthly – checking this option expands the **Schedule a Report** screen.

○ Run Once
○ Daily
○ Weekly
○ Interval
◉ Monthly

Start Date:
09/01/2009 🗓

Start Time:
12:00

In addition to **Start Time**, the **Start Date** field is displayed. The report can be scheduled to run every month on a selected day of the month at a time specified in the **Start Time** field. For example, to run report the end of each month, set **the Start Date** to the first of the month and the **Start Time** to 12:00 (12:00 AM).

6. Click on **Next**. If you need to edit the report group, name, call filter or title, make appropriate changes here.

Select the report you wish to run

Report Groups

| Phone Number | ▼ |

Reports

| Phone Number - Summary by Calls | ▼ |

Call Filters

| PhoneNmbersFilter | ▼ |

☑ **Display filter on report**

If the existing Call Filters do not give you the calls you are looking for, go to the
Reports

Report Title Override

| Phone Number Summary by Calls Monthly |

Use this field to display a custom title on the report.

[Previous] [Next] [Cancel] [Delete]

7. If you need to change the report group, click on the down-arrow of the **Report Groups** list and select a report group.
8. If needed, select a different report from the **Reports** list.
9. To change the report filter, click on the down-arrow of the **Calls Filters** list and select a report filter name. If none of the existing filters fits the desired report criteria, click on the **Reports** link and create a new filter.
10. If you would like the filter criteria to be displayed on the report, check the **Display filter on report** box.
11. Enter the report title you would like to see on the report into **Report Title Override**. If you are happy with the default report name leave this field empty.

12. Click on **Next**. The **Email Results** screen appears. You can edit email information here.

Email Results

** Separate multiple email addresses by semicolons (;)

To:

`recipient@trisys.com`

CC:

BCC:

Subject:

`Tapit Nova Report`

Message:

`Please see the attached.`

Previous   Finish   Cancel

13. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com**;**recipient2@trisys.com**;**recipient3@trisys.com.
14. Enter the email subject into the **Subject** field.
15. Enter the email text into the **Message** field.
16. Click on **Finish**. The changes to the scheduled report have been saved.

To delete existing scheduled report

1. Log in to TapitNOVA.
2. Click on the **Reports** button located on the top of the screen.
3. Click on the **Report Scheduler** tab.
4. If there is a report already scheduled the **Report Scheduler** screen opens up with the list of scheduled tasks. Click on the scheduled report you want to delete. The Report Scheduler wizard opens reflecting the selected report information.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	agnes	Monthly	09/01/09 12:00:00	Phone Number - Summary by Calls (PhoneNmbersFilter)

5. Click on the **Delete** button. Click **OK** to the confirmation message. The report has been removed from the **Currently Scheduled Tasks** list. If that was the only report scheduled, the tasks list does not appear at all. The screen changes to the first page of the **Report Scheduler** wizard.

ADMIN

Users

Users are people within your organization. Their information, in TapitNOVA, is maintained via **Users** screen.
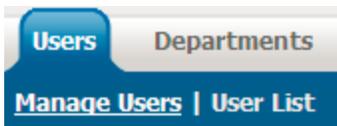
Manage Users – this link opens a screen where you can add or edit a user.

User List – this link opens a report with user names and the corresponding information.

Manage Users

<u>**To add a new user**</u>

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Users** tab.
4. The **Users** screen opens on the **Manage Users** page by default.
   Enter user's information into the **Create a New User** screen located to the right of the **Available Users** list.

Create a New User

Last Name: Smith
First Name: John
Department: Accounting
Email: smith@trisys.com
Location: Main
Extensions at this location: Add
201
202
Delete Selected Extensions
Authorization Code: 957854
Surcharge / Call: 1.50
Surcharge / Minute: .20
Multiplier / Call: 2

5. **Last Name** – enter user's last name.
6. **First Name** – enter user's first name.
7. **Department** – if a user belongs to a department, select it here.
8. **Email** – enter user's email address.
9. **Extensions at this location**, **Authorization Code**, **Surcharge/Call**, **Surcharge/Minute**, and **Multiplier/Call** fields are location specific. If you haven't purchased Remote Manager, you have only one location.
   Otherwise, select a location this user is associated with.

10. Add extensions associated with this user and the selected location. Enter an extension number into the **Extensions at this location** field and click on **Add**. The extension is moved to the list below. You can also remove extensions by selecting one or a group of extensions and clicking on **Delete Selected Extensions**.
11. Enter user's authorization code (if any) into the **Authorization Code** field. This field accepts only digits.
12. Enter user's surcharge per call (if any) in dollars into the **Surcharge/Call** field i.e. 1.50 = one dollar and fifty cents of surcharge per call.
13. Enter user's surcharge per minute (if any) in dollars into the **Surcharge/Minute** field i.e. .20 = twenty cents of surcharge per minute.
14. Enter a multiplier per call (if any) into the **Multiplier** field i.e. 2 = each total call cost for this extension will be multiplied by two.
15. If you have purchased Remote Manager and this user has extensions at more than one location, repeat pt. 9 through 14 until you enter all information for all locations for this user.
16. Click on **Save**. New user (Smith John) has been added to the list of users.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting user records.

To edit an existing user

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Users** tab.
4. The **Users** screen opens on the **Manage Users** page by default.
   Click on a user you would like to edit on the **Available Users** list. You can sort the list using list headers and navigate it with paging controls located on the bottom of the list.
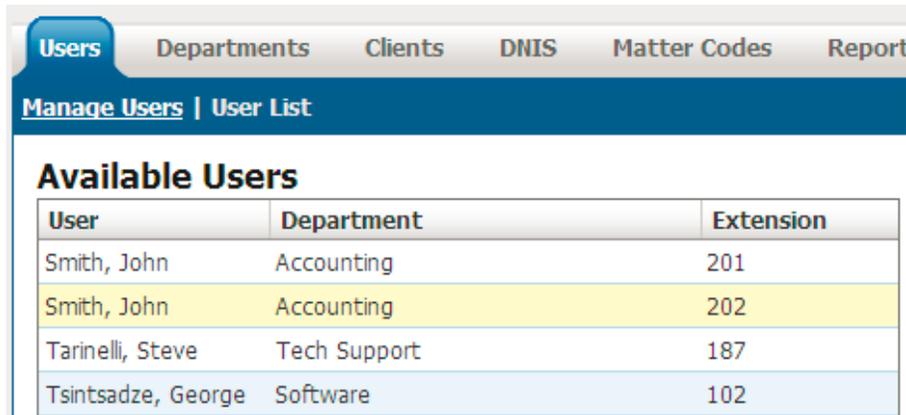
5. The right pane of the screen reflects user's information. If needed, make appropriate changes to **Last Name**, **First Name**, **Department,** and **Email** fields.

6. **Extensions at this location**, **Authorization Code**, **Surcharge/Call**, **Surcharge/Minute**, and **Multiplier/Call** fields are location specific. If you haven't purchased Remote Manager, you have only one location.
   Otherwise, select a location you would like to edit from the **Location** list.

7. Add or remove extensions associated with this user and the selected location. To add an extension, enter an extension number into the **Extensions at this location** field and click on **Add**.
   The extension is moved to the list below. To remove extensions, select one or a group of extensions and click on **Delete Selected Extensions**.

8. Change the remaining fields as needed:

9. Enter user's authorization code (if any) into the **Authorization Code** field. This field accepts only digits.

10. Enter user's surcharge per call (if any) in dollars into the **Surcharge/Call** field i.e. 1.50 = one dollar and fifty cents of surcharge per call.

11. Enter user's surcharge per minute (if any) in dollars into the **Surcharge/Minute** field i.e. .20 = twenty cents of surcharge per minute.

12. Enter a multiplier per call (if any) into the **Multiplier** field i.e. 2 = each total call cost for this extension will be multiplied by two.

13. If you have purchased Remote Manager and you would like to edit more than one location for this user, repeat pt. 9 through 14 until you enter correct information for all locations for this user.

14. Click on **Save**.
    Changes have been saved.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting user records.

To delete an existing user

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Users** tab.
4. The **Users** screen opens on the **Manage Users** page by default.
   Click on a user you would like to edit on the **Available Users** list. You can sort the list using list headers and navigate it with paging controls located on the bottom of the list.
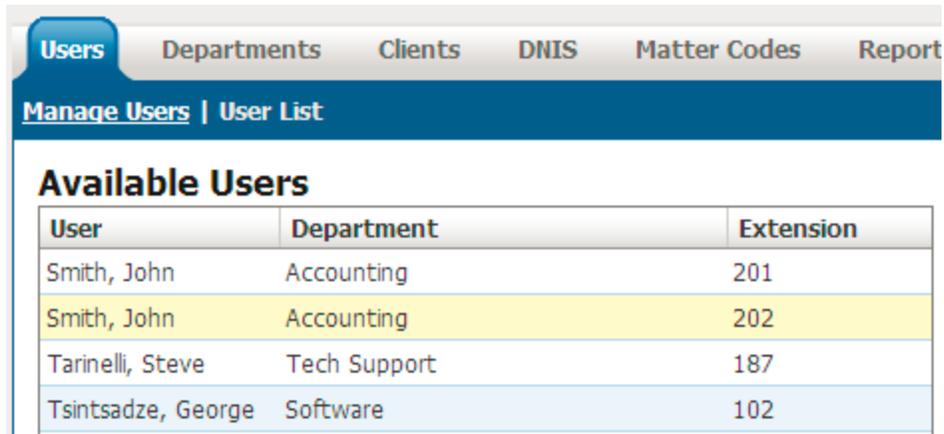
5. The right pane of the screen reflects user's information.
6. Click on **Delete**.
7. Click **OK** to the confirmation message. The record has been deleted.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting user records.

User List

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Users** tab.
4. The **Users** screen appears. Click on the **User List** link. The **Current Users** report is displayed. The **Current Users** report lists all users entered into TapitNOVA along with the **Department**, **Email**, **Extension**, **Authorization Code** and **Location** information

User Name ⇕	Department ⇕	Email ⇕	Ext. ⇕	Auth. Code ⇕	Location ⇕
Agee, Angela	Sales	angela@trisystems.com	119	92684	Main
Agee, Angela	Sales	angela@trisystems.com	220	92684	Main
Arnold, Brad	Sales		999		Ramsey
Arnold, Brad	SuperSales	brad@trisystems.com	888	92668	Ramsey
Arnold, Brad	Sales		109		Main
Conference, Room	General		145		Main

To work with User List

To sort the report

The report can be sorted by each column header.

The two arrows next to the field name indicate that this field is not sorted. To sort the report by the **User Name** field click on the arrows next to the **User Name** header.

The report is sorted by **User Name** from A-Z. The ascending sort order is indicated by the up arrow adjacent to the field name.

Click on the up arrow to change the sort direction. The report is sorted by **User Name** from Z-A. The descending sort order is indicated by the down arrow adjacent to the field name.

To navigate through report pages

Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value in the report

You can search for a specific value in the report.

For example to find a user with last name Smith, enter "smith" into the **Find** box and click on **Find**.

smith   Find | Next

The report has advanced to page 2

◄◄ ◄ 2 of 3 ► ►►

The last name Smith has been highlighted

Smith, John	Accounting	smith@trisys.com	201

Clicking on **Next** takes us to the next instance of Smith if there is any.

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.

Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Users List

Message:
please see the attached

Email   Cancel

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com**;**recipient2@trisys.com**;**recipient3@trisys.com.

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format.

Departments

Departments screen is used to maintain department's information. It has two sections. The left section is a tree list of departments reflecting their hierarchy. The left pane of the screen is an entry form used to create and edit departments.

To navigate the available departments tree list

You can navigate it by clicking on list items.

Available Departments

```
☐ General
    ┊   ┈ Accounting
    ┊   ┈ Analytics
    ┊   ┈ IT
    ┊   ┈ Reserved Extensions
    ┊   ┈ Software
    ┊   ┈ Tech Support
    ┊   ┈ Voicemail
☐ Sales
        ☐ Hardware Sales
            ┊   ┈ Global Sales
            ┊   ┈ Regional Sales
        ┈ Maintenance Sales
```
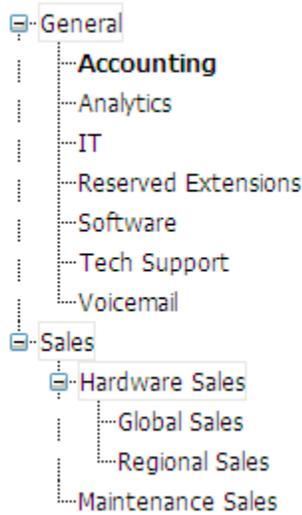
Departments with sub-departments have node buttons with a minus sign when expanded, or a plus sign when closed.

Clicking on a closed node (with a plus sign) expands the list of sub-departments.

```
⊞ General
      ↓
☐ General
    ┊   ┈ Accounting
    ┊   ┈ Analytics
    ┊   ┈ IT
    ┊   ┈ Reserved Extensions
    ┊   ┈ Software
    ┊   ┈ Tech Support
    ┊   ┈ Voicemail
```
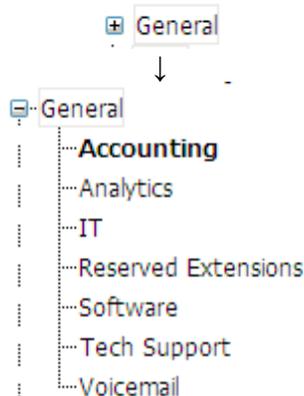
Clicking on an expanded node (with minus sign) closes the list of sub-departments.
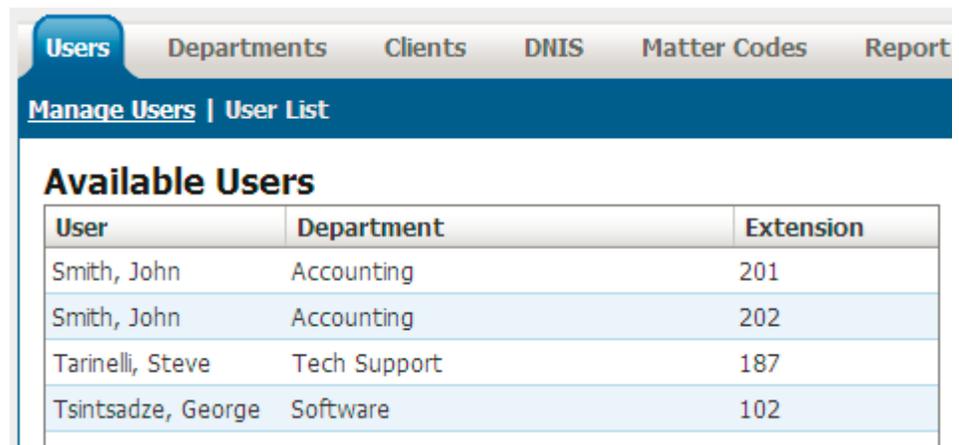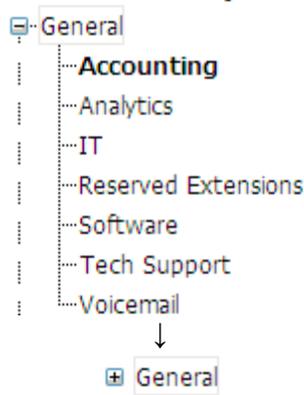

To add a new department

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Departments** tab.
4. The **Departments** screen appears. The right pane displays **Create a New Department** screen.
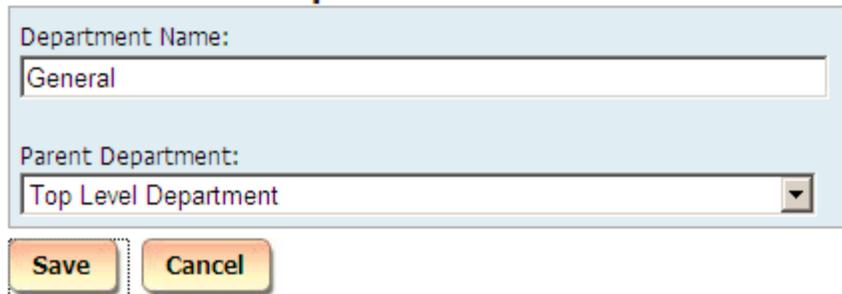
5. Enter the name of the department into the **Department Name** field.
6. If you would like to make this department a sub-department of another department, select a department from the **Parent Department** list. Otherwise, leave the default value (**Top Level Department**) to indicate that this is a top level department. There can be up to three levels of departments. The highest level (top level) cannot be a sub department of another department.
7. Click on **Save**. The **Available Departments** list reflects newly added department.

To edit an existing department

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Departments** tab.

4. The **Departments** screen appears. The left pane displays the **Available Departments** tree list. Click on a department name you would like to edit. Note: Departments with plus signs next to them contain sub-departments. Click on the plus sign to expand the list of sub-departments

Available Departments
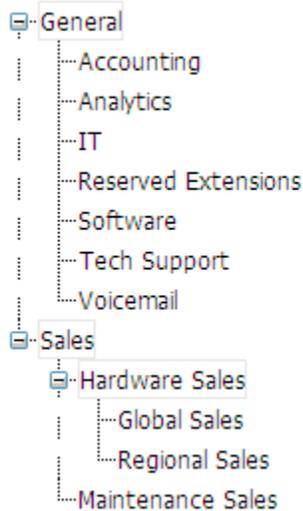
- General
    - Accounting
    - Analytics
    - IT
    - Reserved Extensions
    - Software
    - Tech Support
    - Voicemail
- Sales
    - Hardware Sales
        - Global Sales
        - Regional Sales
    - Maintenance Sales

5. The right pane of the screen populates with the department's information. Change the department name as needed.

Modify or Delete This Department

Department Name:

Accounting

Parent Department::

General

Save   Delete   New   Cancel

6. If you would like to make this department a sub-department of another department, select a department from the **Parent Department** list. Otherwise, leave the default value (**Top Level Department**) to indicate that this is a top level department. There can be up to three levels of departments. The highest level (top level) cannot be a sub department of another department.
7. Click on **Save**. Changes have been saved.

To delete an existing department
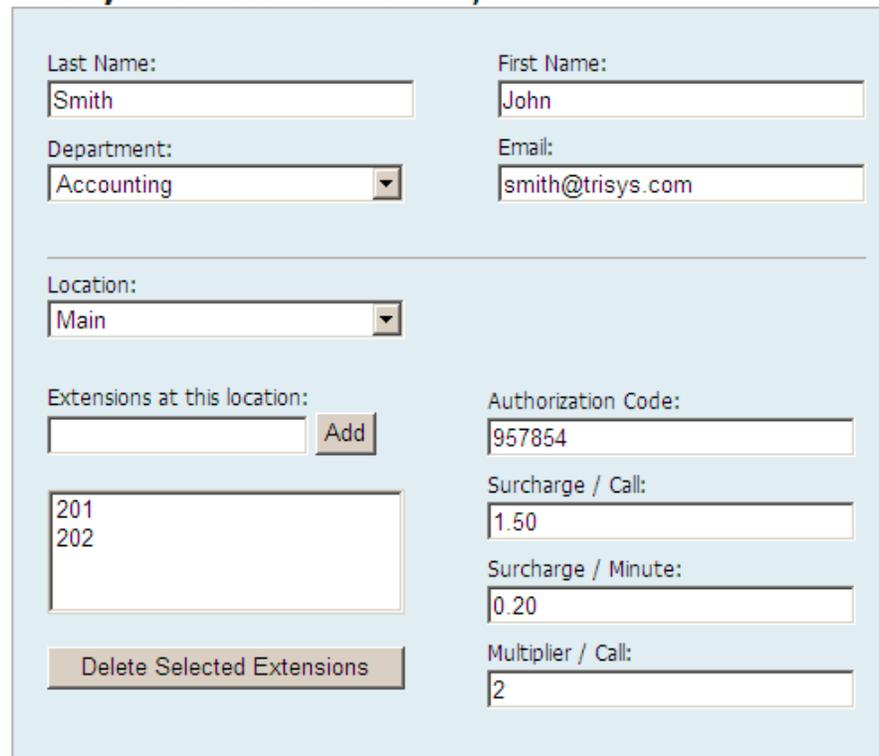
Deleting a department will also delete its sub-departments.

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Departments** tab.
4. The **Departments** screen appears. The left pane displays the **Available Departments** tree list.
   Click on a department name you would like to delete.
   Note: Departments with plus signs next to them contain sub-departments.
   Click on the plus sign to expand the list of sub-departments

5. The right pane of the screen populates with the department's information.

6. Click on **Delete**.
7. Click **OK** to the confirmation message. The department has been deleted and has disappeared from the **Available Departments** list.

Clients

Clients can be your organization's business partner, vendors, resellers, customers, etc. Once they are entered into the system, TapitNOVA 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.
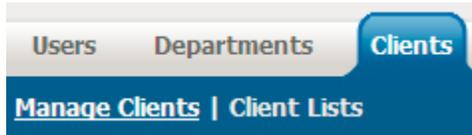
Manage Clients – this link opens a screen where you can add or edit a user,

Client Lists – this link opens a screen with reports on client information.

Manage Clients

The **Manage Clients** screen is used to add, edit, or delete clients.

To add a new client

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Clients** tab.
4. The **Clients** screen opens on the **Manage Clients** page by default.
    Go to **Create a New Client** section of the screen and enter client information.

5. **Client Last Name** – enter client's last name.
6. **Client First Name** – enter client's first name.
7. **Company Name** – enter the client's company name.
8. **Address, City, State, Zip, Country** – enter the client's address information.
9. **Email** – enter client's email address.

10. Add phone numbers associated with this client. Enter phone number into the **Add a new Telephone Number** field and click on **Add**. Phone number is moved to the list below. This field accepts digits only.
    You can also remove phone numbers by selecting one or a group of numbers and clicking on **Delete Selected**.
11. Enter client's account code into the **Account Code** field. This field accepts digits only.
12. Click on **Save**.
    New client (Smith John) has been added to the list of clients.

Available Clients

Client	Phone Number	Acct Code
O'Connor, Robert	7189233072	1040
O'Connor, Robert	7189233212	1040
Palmer, Bill	8003629876	1035
Polychronopoulos, Kathy	9083224927	1017
Puglisi Agatha, Aggie	7188966500	1056
Smith, John	8005681111	1026
Smith, John	8005681112	1026

To edit an existing client

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Clients** tab.
4. The **Clients** screen opens on the **Manage Clients** page by default.
5. Click on a client you would like to edit on the **Available Clients** list. You can sort the list using list headers and navigate it with paging controls located on the bottom of the list.

Available Clients

Client	Phone Number	Acct Code
O'Connor, Robert	7189233072	1040
O'Connor, Robert	7189233212	1040
Palmer, Bill	8003629876	1035
Polychronopoulos, Kathy	9083224927	1017
Puglisi Agatha, Aggie	7188966500	1056
Smith, John	8005681111	1026
Smith, John	8005681112	1026

6. The right pane of the screen is populated with client's information.

Modify or Delete Client: Smith

Client Last Name:
Smith

Client First Name:
John

Company Name:
Smith & Co.

Address:
100 Church Lane

City:
Greensborough

State:
North Carolina

Zip:
27560

Country:
USA

Email:
smith@smithco.com

Add a new Telephone Number:

[Add]

Current Telephone Numbers:
8005681111
8005681112

[Delete Selected]

Account Code:
1026

[Save] [Delete] [New] [Cancel]

7. Make appropriate changes to Client **Last Name**, Client **First Name**, **Company Name, address** and **Email** fields.
8. Add or remove the phone numbers if required. To add a phone number, enter it into the **Add a new Telephone Number** field and click on **Add**. Phone number is moved to the list below. This field accepts digits only. To remove phone numbers select one or a group of numbers and clicking on **Delete Selected**.
9. Change client's account code if needed. This field accepts digits only.
10. Click on **Save**. Changes have been saved.

To delete an existing Client

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Clients** tab.
4. The **Clients** screen opens on the **Manage Clients** page by default.

5.   Click on a client you would like to delete on the **Available Clients** list. You can sort the list using list headers and navigate it with paging controls located on the bottom of the list.

Available Clients

Client	Phone Number	Acct Code
O'Connor, Robert	7189233072	1040
O'Connor, Robert	7189233212	1040
Palmer, Bill	8003629876	1035
Polychronopoulos, Kathy	9083224927	1017
Puglisi Agatha, Aggie	7188966500	1056
Smith, John	8005681111	1026
Smith, John	8005681112	1026

6.   The right pane of the screen is populated with client's information.

Modify or Delete Client: Smith

Client Last Name:
Smith

Client First Name:
John

Company Name:
Smith & Co.

Address:
100 Church Lane

City:
Greensborough

State:
North Carolina

Zip:
27560

Country:
USA

Email:
smith@smithco.com

Add a new Telephone Number:

Add

Current Telephone Numbers:
8005681111
8005681112

Delete Selected

Account Code:
1026

Save   Delete   New   Cancel

7.   Click on **Delete**.
8.   Click **OK** to the confirmation message. The record has been deleted.

Client Lists

There are two reports to choose from. **Client List** report displays basic client information; **Client List by Area Code** shows client information grouped by the area code of the phone numbers associated with clients.

Client List Report

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Clients** tab.
4. The **Clients** screen appears. Click on the **Client Lists** link. The **Client List** report is displayed by default.
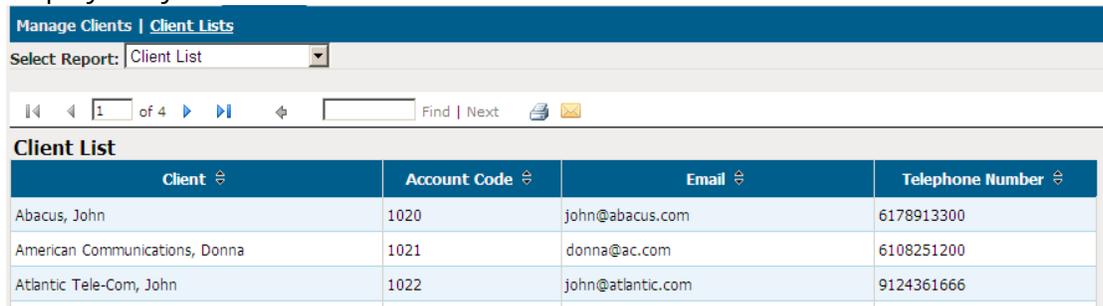
5. The **Client List** report lists all clients entered into TapitNOVA along with the **Account Code**, **Email** and **Telephone Number**.

To sort the report
The report can be sorted by column headers.
The two arrows next to the field name indicate that the field is not sorted. To sort the report by the **Client** field click on the arrows next to the **Client** header.

The report is sorted by **Client** from A-Z. The ascending sort order is indicated by the up arrow adjacent to the field name.

Click on the up arrow to change the sort direction. The report is sorted by **Client** from Z-A. The descending sort order is indicated by the down arrow adjacent to the field name.

To navigate through report pages

|◄   ◄ | 1 | of 17   ►   ►|

Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value in the report

You can search for a specific value in the report.

For example to find a client with last name Smith, enter "smith" into the **Find** box and click on **Find**.

| smith | Find | Next

The report has advanced to page 2

|◄   ◄ | 2 | of 3   ►   ►|

and the last name Smith has been highlighted

| Smith, John | 5498456 | trisys@trisys.com |

Clicking on **Next** takes us to the next instance of Smith if there is any.

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.

Email Results
** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Client Lists

Message:
please see the attached

[Email] [Cancel]

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format.

Client List by Area Code Report

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Clients** tab.
4. The **Clients** screen appears. Click on the **Client Lists** link. The **Client List** report is displayed by default. Select the **Client List by Area Code** report from the **Select Report** list.

To navigate through report pages

|◀   ◀   [1   ] of 17   ▶   ▶|

Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value in the report
You can search for a specific value in the report.
For example to find a client with last name Smith, enter "smith" into the **Find** box and click on **Find**.

[smith   ] Find | Next

The report has advanced to page 2

|◀   ◀   [2   ] of 3   ▶   ▶|

The last name Smith has been highlighted

| Smith, John | 5498456 | trisys@trisys.com |

Clicking on **Next** takes us to the next instance of Smith if there is any.

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.

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format.

DNIS Numbers

The **DNIS Numbers** screen is used to add, edit and delete DNIS numbers. The screen has two parts. The left hand side pane is a list of **Active DNIS Numbers**. The right hand side is the entry screen used to add new DNIS numbers or edit existing ones. **Note:** DNIS reports will only work in TapitNOVA if your phone system provides that information in the SMDR we receive.

To add a new DNIS number

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. The **DNIS** screen opens on the **DNIS Numbers** page by default.
   Go to **Create a New DNIS Number** screen located on your right hand side and enter DNIS Number information.
5. **DNIS Number** – enter DNIS Number.
6. **Description** – enter DNIS Number Description.

Create a New DNIS Number

DNIS Number:

8005554549

Description:

Honda Service

Save   Cancel
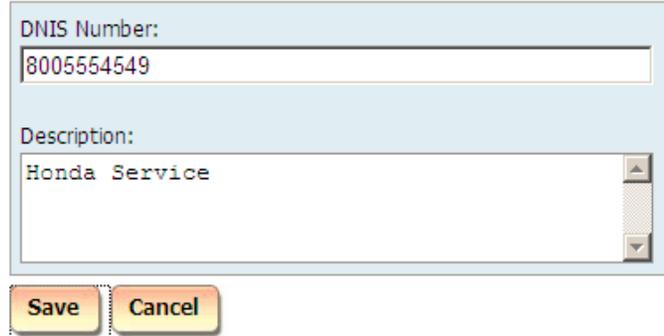
7. Click on **Save**.
   New DNIS number has been added to the **Active DNIS Numbers** list.

Active DNIS Numbers

DNIS #	Description
8005554546	Honda 1
8005554547	Acura 1
8005554548	Honda 2
8005554549	Honda Service
8005554550	Service
8005554551	Acura 2
8005554552	Honda 3
8005554553	Acura3

To edit an existing DNIS number

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. The **DNIS** screen opens on the **DNIS Numbers** page by default.
   Click on the DNIS number you would like to edit on the **Active DNIS Numbers** list.
   The right pane of the screen populates with DNIS information.

Modify or Delete this DNIS Number

DNIS Number:

8005554549

Description:

Honda Service

[Save] [Delete] [New] [Cancel]
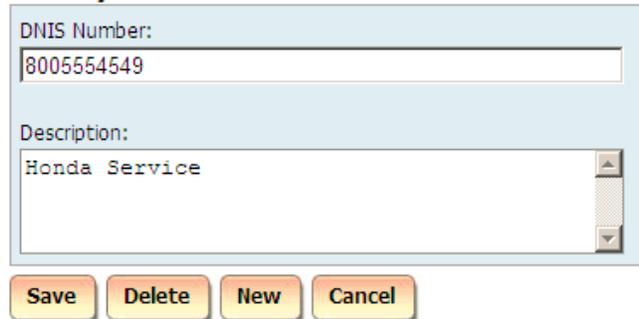
5. Make appropriate changes to **DNIS Number** and **Description**. The DNIS Number field accepts only digits.
6. Click on **Save**. Changes have been saved.

To delete an existing DNIS number

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. The **DNIS** screen opens on the **DNIS Numbers** page by default.
   Click on the DNIS number you would like to delete on the **Active DNIS Numbers** list. Click on it to select the DNIS record.
   The right pane of the screen populates with DNIS information.

Modify or Delete this DNIS Number

DNIS Number:

8005554549

Description:

Honda Service

[Save] [Delete] [New] [Cancel]
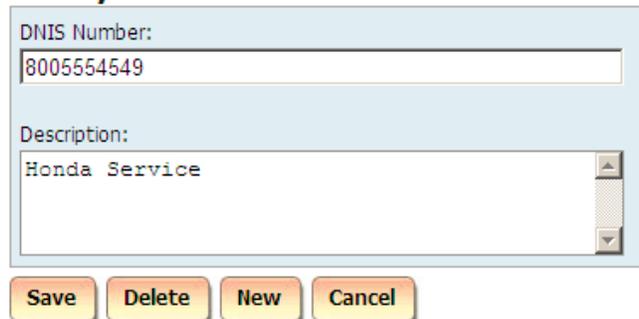
5. Click on **Delete**. Click **OK** to the confirmation message. The record has been deleted.

DNIS Campaigns

1. The **DNIS Campaigns** screen is used to add, edit or delete campaigns.
2. Log in to TapitNOVA.
3. Click on the **Admin** button located on the top of the screen.
4. Click on the **DNIS** tab.
5. Click on the **DNIS Campaigns** link. The **Available Campaigns** screen appears. It displays campaigns active between today and a date a month ago (i.e. if today is 9/16/09 then the date frame will be 8/16/09 to 9/16/09). If you are looking for a campaign running within a different time frame adjust the date range on the top of the screen accordingly and click on the **Go** link.

To create a new DNIS Campaign

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. Click on the **DNIS Campaigns** link. The screen displays a list of currently active campaigns.
5. Click on the **New Campaign** button. The **Schedule Campaign** screen is displayed.
6. Enter the campaign name into the **Campaign Name** field and a short description into the **Description** field.
7. Enter the start date and the end date for the campaign into **Start** and **End** fields respectively.

8.   Click on **Next**.
9.   At least one DNIS number has to be assigned to the campaign. Select a DNIS number or a group of numbers from the **Available DNIS #s** list and click on **>** button to add them to the **Selected DNIS #s** list. You can also use **>>** button to move all items from **Available DNIS #s** to the **Selected DNIS #s** list.
     To remove numbers from the **Selected DNIS #s** list, click on the number, and then click on the **<** button. If you would like to remove all items from the **Selected DNIS #s** list, click on the << button and all DNIS numbers will be moved to the **Available DNIS #s** list.

Schedule a Campaign

Assign DNIS numbers to the campaign

Available DNIS #s		Selected DNIS #s
8005554547 8005554549 8005554550	>> > < <<	8005554546

Previous   **Finish**   **Cancel**
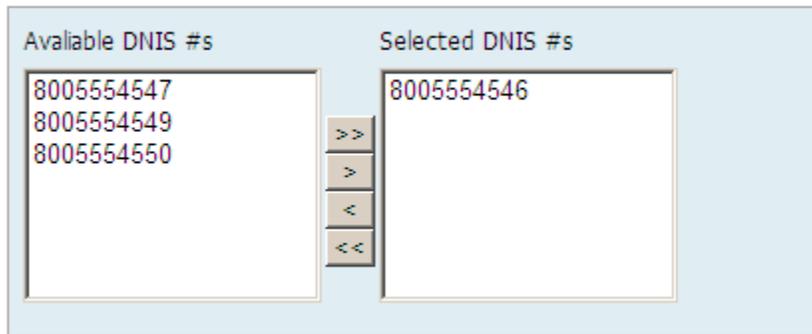
10. Click on the **Finish** button.
     The **Available Campaigns** screen shows up. It displays campaigns active between today and a date a month ago (i.e. if today is 9/16/09 then the date frame will be 8/16/09 to 9/16/09). If the new campaign is running within that time frame it is listed. Otherwise, if you would like to see the newly added campaign, adjust the time frame on the top of the screen accordingly and click on the **Go** link.

Available Campaigns   Display campaigns between: 8/16/2009 And 9/16/2009 Go

Campaign	Description	Start Date	End Date
No Money Down Star Ledger	Star Ledger add - Honda.	09/01/2009	09/30/2009

New Campaign

To edit an existing DNIS Campaign

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. Click on the **DNIS Campaigns** link.
   The screen displays a list of currently active campaigns.

5. Click on the campaign name you want to edit. If the desired campaign is not on the list, adjust the date range on the top of the screen to reflect campaign active time and click on **Go** link.
   The **Schedule Campaign** screen is displayed.
   Make appropriate changes to the **Campaign Name** field and the **Description** field.
6. Enter the start date and the end date for the campaign into **Start** and **End** fields respectively.

7. Click on **Next**.

8. Add or remove DNIS numbers as needed. At least one DNIS number has to be assigned to the campaign.
Select a DNIS number or a group of numbers from the **Available DNIS #s** list and click on **>** button to add them to the **Selected DNIS #s** list. You can also use **>>** button to move all items from **Available DNIS #s** to the **Selected DNIS #s** list.
To remove numbers from the **Selected DNIS #s** list click on the number and click on the **<** button.
If you would like to remove all items from the **Selected DNIS #s** list, click on the << button and all DNIS numbers will be moved to the **Available DNIS #s** list.

9. Click on the **Finish** button. The changes have been saved.
The **Available Campaigns** screen shows up. It displays campaigns active between today and a date a month ago (i.e. if today is 9/16/09 then the date frame will be 8/16/09 to 9/16/09). If the campaign, you just edited, is running within that time frame it is listed. Otherwise, if you would like to see the newly added campaign, adjust the date range using date fields on the top of the screen accordingly and click on the **Go** link.

To delete an existing DNIS Campaign

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. Click on the **DNIS Campaigns** link. The screen displays a list of currently active campaigns.

5. Click on the campaign name you want to delete. If the desired campaign is not on the list, adjust the time frame on the top of the screen to reflect campaign active time and click on **Go** link. The **Schedule Campaign** screen is displayed.

6. Click on **Delete**.
7. Click **OK** to the confirmation message. The campaign has been deleted.

DNIS Lists

There are two DNIS Lists reports to choose from. The **DNIS Numbers List** report lists all DNIS numbers entered into TapitNOVA along with their description, assigned campaigns, campaigns descriptions and campaigns start dates and end dates.

The **Campaign List by Start Date** shows all campaign names together with their descriptions, start dates, end dates and associated DNIS numbers.

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **DNIS** tab.
4. The **DNIS** screen appears. Click on the **DNIS Lists** link. The **DNIS Numbers List** report is displayed by default. To view the **Client List by Area Code** report, select it from the **Select Report** list.

   To navigate through report pages

   |◁ ◁ 1 of 17 ▷ ▷|

   Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value in the report
   You can search for a specific value in the report. For example to find campaigns with a phrase "Honda", enter "Honda" into the **Find** box and click on **Find**.

   Honda   Find | Next

   The report has advanced to page 2

   |◁ ◁ 2 of 3 ▷ ▷|

   The phrase "Honda" has been highlighted

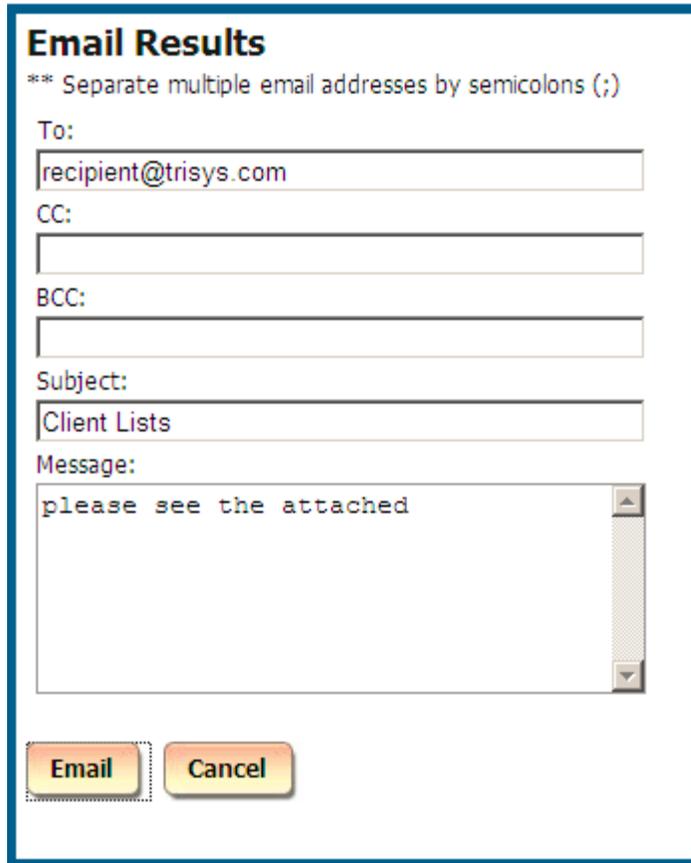   8005554546   Honda 1
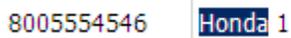
   Clicking on **Next** takes us to the next instance of "Honda" if there is any.

   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.

Email Results
** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:
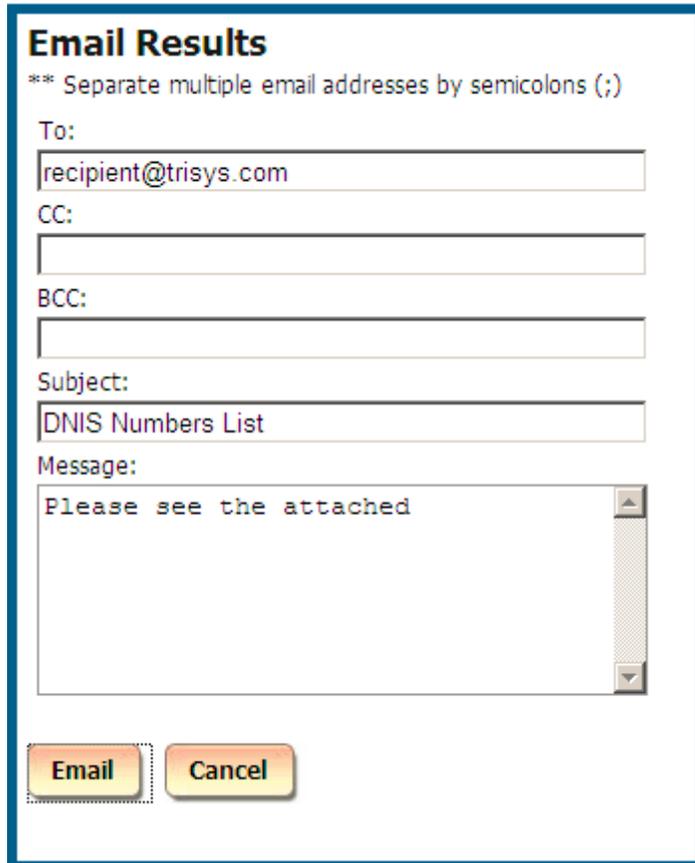
Subject:
DNIS Numbers List

Message:
Please see the attached

[Email] [Cancel]

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format.

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 TapitNOVA reports based on matter codes to reflect statistics on calls in regards to product A and product B.

The Matter Code screen is used to enter and edit matter code numbers.

To add a new Matter Code

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Matter Code** tab.
4. The **Matter Code** screen opens on the **Manage Matter Codes** page by default. Go to **Create a new Matter Code** screen located on your right hand side and enter matter code information.
5. **Matter Code** – enter a matter code number (digits only).
6. **Description** – enter matter code description.

Create a new Matter Code

Matter Code:

888

Description:

Replay ATS

Save   Cancel
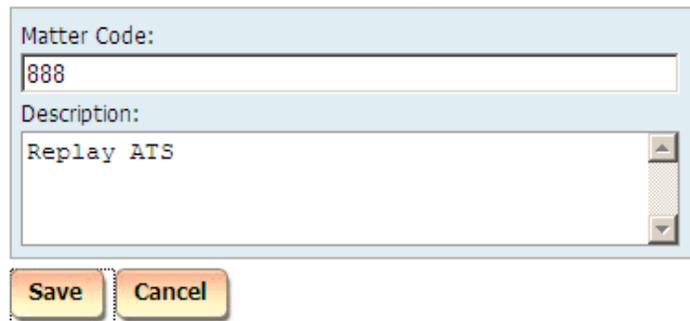
7. Click on **Save**.
   New matter code (888) has been added to the **Active Matter Codes** list.

Active Matter Codes

Matter Code	Description
111	Replay T1
222	Replay ST
333	Replay VoIP
444	TAPIT NOVA
555	TALITY
666	Screen Logger
777	Replay DS
888	Replay ATS

To edit an existing Matter Code

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Matter Code** tab.
4. The **Matter Code** screen opens on the **Manage Matter Codes** page by default.
5. Select a desired matter code from the **Active Matter Codes** list.

Active Matter Codes

Matter Code	Description
111	Replay T1
222	Replay ST
333	Replay VoIP
444	TAPIT NOVA
555	TALITY
666	Screen Logger
777	Replay DS
888	Replay ATS

6. The **Modify or Delete this Matter Code** screen reflects selected matter code information.

Modify or Delete this Matter Code

Matter Code:

111

Description:

Replay T1

Save   Delete   New   Cancel

7. **Matter Code** – change a matter code number if needed (digits only).
8. **Description** – change a matter code description is needed.
9. Click on **Save**.
   Changes have been saved.

To delete an existing Matter Code

1. Log in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Matter Code** tab.
4. The **Matter Code** screen opens on the **Manage Matter Codes** page by default.
5. Select a matter code you would like to delete from the **Active Matter Codes** list.

Active Matter Codes

Matter Code	Description
111	Replay T1
222	Replay ST
333	Replay VoIP
444	TAPIT NOVA
555	TALITY
666	Screen Logger
777	Replay DS
888	Replay ATS

6. The **Modify or Delete this Matter Code** screen reflects selected matter code information.

Modify or Delete this Matter Code

Matter Code:
111

Description:
Replay T1

Save Delete New Cancel

7. Click on **Delete**. Click **OK** to the confirmation message. The matter code record has been deleted.

Matter Codes List

Matter Codes List is a report listing matter code numbers and their descriptions.

1. Log-in to TapitNOVA.
2. Click on the **Admin** button located on the top of the screen.
3. Click on the **Matter Codes** tab.
4. The **Matter Codes** screen appears. Click on the **Matter Codes Lists** link. The **Matter Codes List** report is displayed by default.

Matter Codes

Matter Code ⇕	
1111	Replay T1
222	Replay ST
333	Replay VoIP

5. The **Matter Codes List** report lists all matter codes along with their descriptions.

   To sort the report
   The report can be sorted by column headers.
   The two arrows next to the field name indicate that the field is not sorted. To sort the report by the **Matter Codes** field click on the arrows next to the **Matter Codes** header.

   Matter Code ⇕

   The report is sorted by **Matter Codes** from A-Z. The ascending sort order is indicated by the up arrow adjacent to the field name.

   Client ▲

   Click on the up arrow to change the sort direction. The report is sorted by **Matter Codes** from Z-A. The descending sort order is indicated by the down arrow adjacent to the field name.

   Client ▼

   To navigate through report pages

   |◀   ◀   [1]   of 17   ▶   ▶|

   Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value in the report

You can search for a specific value in the report.

For example to find matter codes with the phrase "Replay", enter "Replay" into the **Find** box and click on **Find**.

Replay   Find | Next

"Replay" has been found and highlighted

1111   Replay T1
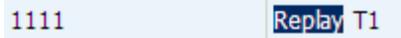
Clicking on **Next** takes us to the next instance of "Replay" if there is any.

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.

Email Results

** Separate multiple email addresses by semicolons (;)

To:

recipient@trisys.com

CC:

BCC:

Subject:

report

Message:

please see the attached

Email   Cancel

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format

SYSTEM

System

Global Status Report

The **Status** screen is the first screen of the **System** tab. It provides a user with the **Global Status** report on TapitNOVA system. The report gives a user a summary of all system information accumulated in one place. If needed, it can be printed or emailed. This is especially useful when communicating with Tapit technical support.

To navigate through the Global Status report

A user can navigate through the report using paging controls located on the tool bar above the report header.

|◀   ◀   [1   ] of 4   ▶   ▶|

To find a specific value in the Global Status report

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**.

[Trisys, Inc.] Find | Next

"Trisys, Inc." has been found on page six and it has been highlighted

Setting Name	Value
AppCompany	Trisys, Inc.

A user can click on **Next** to find another instance of "Trisys, Inc." in the report.

To print the Global Status report

The **Global Status** report can be printed by clicking on the print icon 🖨 located on the tool bar above the report header.

To email the Global Status report

A user can email the **Global Status** report.

Click on the envelope icon ✉ to email the report.

The **Email Results** screen comes up.

Email Results

** Separate multiple email addresses by semicolons (;)

To:

admin@trisys.com

CC:

BCC:

Subject:

Message:

[Email] [Cancel]

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Click on the **Email** button. The status reports have been emailed as an attachment in pdf format.

Database Usage

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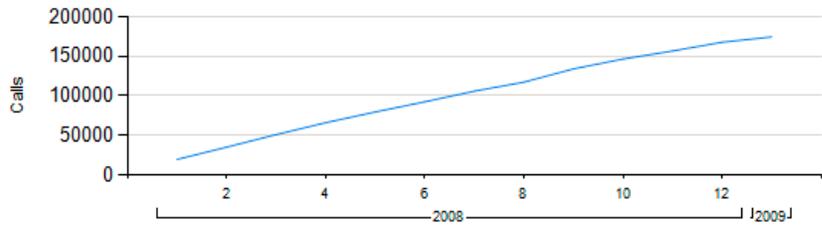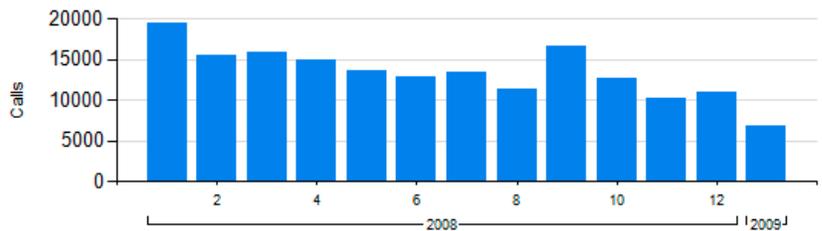
Advanced Filter

Advanced Filter indicates if the TapitNOVA Report Advanced Filter feature is turned on or off. Advanced Filter is disabled by default.

Global Status

ADVANCED_FILTER

Setting Name	Value
Enabled	No

Email

The **Email** page displays all information entered in the System/Email screen. It shows what SMTP Server is being used, email address, port etc. To change any settings on this page, you need to edit them using **System/Email** screen (see for EMAIL section).

Global Status
EMAIL

Setting Name	Value
EnableSsl	1
FromEmailAddress	murray.jim@gmail.com
FromName	TapitNova
Host	smtp.gmail.com
Port	587
TapitAdminEmail	jim.murray@yahoo.com
UseDefaultCredentials	0

Replay

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

Global Status
REPLAY

Setting Name	Value
IsInstalled	Yes

Setup

The **Setup** page lists TapitNOVA system parameters.

Global Status

SETUP

Setting Name	Value
AppCompany	Trisys, Inc.
AppDate	9/22/2009
AppDir	C:\TapitNova\TpLoader\
AppIniFile	C:\TapitNova\TpLoader\tploader.ini
AppProduct	Tapit Nova TpLoader
AppTitle	TpLoader
AppVer	5.1.0.82
CompID	VWPC-35ND-6U2U-YN2U
GlobalDir	C:\TapitNova\

Destination Codes

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

To search the Destination Code list

To find a specific destination code, enter the code into the **Destination Codes beginning with:** search field and click on **Go**.

You can also use partial destination codes to display a list of codes beginning with the same set of digits. To accomplish that, enter at least first three digits of the destination code into the **Destination Codes beginning with:** search field and click on **Go**.

For example to view all destination codes starting with "0112", you need to enter "0112" into the search field and click on **Go**. The **Destination Codes** list displays only destination codes starting with "0112".

Destination Codes beginning with: [0112] [Go]

Dest Code	City	State	Country
01120	EGYPT		EGYPT
011212	MOROCCO-KI		MOROCCO-KI
011213	ALGERIA		ALGERIA
011216	TUNISIA		TUNISIA
011218	LIBYAN ARA		LIBYAN ARA

To add a new INTERNATIONAL destination code

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **System** tab.
4. Click on the **Destination Codes** link. The **Destination Codes** screen is displayed. The right pane of the screen displays **Create a New Destination Code** entry screen.

5. **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".
6. **Intl. Prefix** – enter the international code ("011").
7. **Country Code** – enter the country code (For example: "20" for Egypt).
8. **Trunk** – enter the international code ("011").
9. **City** – enter the description for the international destination code. This description will identify the destination code on TapitNOVA reports (for example "Egypt").
10. **State** – leave this field empty.
11. **Country** – copy the value you've entered into the **City** field (in our example - "Egypt").

12. Click on **Save**.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.

To add a new DOMESTIC destination code

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **System** tab.
4. Click on the **Destination Codes** link. The **Destination Codes** screen is displayed. The right pane of the screen displays **Create a New Destination Code** entry screen.

5. **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".
6. **Intl. Prefix** – leave this field empty.
7. **Country Code** –leave this field empty.
8. **Trunk** – enter the Trunk (in our example - "908").
9. **City** – enter city (in our example – "SUMMIT").
10. **State** – enter state (in our example – "NJ").
11. **Country** – enter "USA".
12. Following our example, we end up with the following entries:

13. Click on **Save**.

> **It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.**

To edit an existing INTERNATIONAL destination code

1.   Log in to TapitNOVA.
2.   Click on the **System** button located on the top of the screen.
3.   Click on the **System** tab.
4.   Click on the **Destination Codes** link. The **Destination Codes** screen is displayed.
5.   Find the destination code you want to edit. To locate a destination code, enter at least first three digits of the desired code into the **Destination Codes beginning with:** search field and click on **Go**.

6.   Click on the destination code you want to edit. The right pane of the screen displays destination code information.

7.   **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.
8.   **Intl. Prefix** – international code associated with the destination code ("011"). Edit this entry if an international code has changed.
9.   **Country Code** – the country code associated with the destination code (For example: "20" for Egypt). Edit this entry if a country code has changed.
10. **Trunk** –the international code associated with the destination code ("011"). Edit this entry if an international code has changed.
11. **City** – enter an identifier for the international destination code. This identifier will be displayed on TapitNOVA reports (for example "Egypt"). Edit this entry if you would like to create a new identifier for the destination code.
12. **State** – leave this field empty.
13. **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.
14. Click on **Save**.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.

To edit an existing DOMESTIC destination code

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **System** tab.
4. Click on the **Destination Codes** link. The **Destination Codes** screen is displayed.
5. Find the destination code you want to edit. To locate a destination code, enter at least first three digits of the desired code into the **Destination Codes beginning with:** search field and click on **Go**.

6. Click on the destination code you want to edit. The right pane of the screen displays destination code information.

7. **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". Edit this entry if either a Trunk or an exchange has changed.
8. **Intl. Prefix** – leave this field empty.
9. **Country Code** –leave this field empty.
10. **Trunk** – the Trunk (in our example - "919"). Edit this entry if either an Trunk has changed
11. **City** –city associated with the destination code (in our example – "SMITHFIELD"). Edit this entry if the city associated with the destination code has changed.
12. **State** – state associated with the destination code (in our example – "NC"). Edit this entry if the state associated with the destination code and exchange has changed.
13. **Country** – this is a domestic destination code – leave this entry at "USA".
14. Click on **Save**.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.

To delete an existing DOMESTIC destination code

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **System** tab.
4. Click on the **Destination Codes** link. The **Destination Codes** screen is displayed.
5. Find the destination code you want to delete. To locate a destination code, enter at least first three digits of the desired code into the **Destination Codes beginning with:** search field and click on **Go**.

6. Click on the destination code you want to delete. The right pane of the screen displays destination code information.

7. Click on the **Delete** button.
8. Click on **OK** to the confirmation message. The destination code is deleted.

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting destination information.

Call Editor

<u>To add a new call record</u>

1. Click on the **New** button - a new blank record appears.
2. Start entering the call record information. The **Dir And Status** field can have the following values: **O** - outgoing calls Depending on the output of your phone system the incoming call entries can be a variation of **I**, **X**, **C**, **A** where **I** stands for incoming, **X** - transferred, **C** – continued, **A**-abandoned (i.e. **IX**, **IXC**, **IA**) **N** - internal calls.
3. Click on **Exit** (changes are saved automatically).

<u>To edit an existing call record</u>

1. Click on the field where the information is to be edited and using the **Delete** or the **Backspace** keys on your keyboard erase the existing information. Enter the new data.
2. Click on **Exit** (changes are saved automatically).

<u>To delete an existing call record</u>

1. Click any place on the record to be deleted and click on the **Delete** button.
2. Click on **Exit** (changes are saved automatically).

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 TapitNOVA Remote Manager, and you have remote locations, this screen allows you to switch locations and manage their settings individually.

Status

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Click on the **Status** link. The **Status** screen is displayed.
5. The top of the screen provides location drop-down list and menu links. A user selects a desired location from the list – by default Main location is selected.
6. The left pane of the screen displays selected location name, its telephone number and status.

Location

Change Location Name:

Main

Telephone Number:

9733603600

Location Status: **Active**

Save

Location Settings

7. The **Location Settings** button opens the **Location Settings** report. This report lists all settings for a selected location. It can be printed or emailed.
8. The right pane of the **Status** screen displays information regarding call loading for the selected location.

Call Loader Status

Last Load	Calls	Status
10/2/2009 1:29:05 PM	0	File C:\TapitNova\Locations\L0\Data\tpoutwx.dat not found. No new records to process.

Last 20 Calls for this Location

Date	Time	Extension	Phone #	Duration
01/19/09	16:49:09	112	78	00:00:07
01/19/09	16:47:00	200	12153581635	00:00:07
01/19/09	16:45:11	185	16266419155	00:01:28
01/19/09	16:41:02	0	3016955500	00:00:53
01/19/09	16:40:28	112	4178614655	00:00:00
01/19/09	16:40:28	9997	4178614655	00:08:33
01/19/09	16:40:13	0	4178614655	00:08:46
01/19/09	16:37:56	185	16266419155	00:04:06
01/19/09	16:37:54	108		00:13:36
01/19/09	16:36:26	112	15027364228	00:02:16

Page 1 of 2

Refresh

9. **Last Load** – date and time of the most recent call load to TapitNOVA for the selected location.
10. **Calls** – calls loaded during the last call load for the selected location.
11. **Status** – status of the last call load. If there was a problem with loading calls, the description of the issue is displayed here.
12. **Last 20 Calls for this Location** – the list of the last 20 calls loaded to TapitNOVA for the selected location.
13. To update call loading information, click on the **Refresh** button.
14. To navigate the **Last 20 Calls for this Location** list, use the paging controls on the bottom of the list.

Page 1 of 2

Location Settings Report

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Click on the **Status** link. The **Status** screen is displayed.
5. Select a location from the **Select a location** list.
6. Click on the **Location Settings** button. The **Location Settings** report is displayed. The report gives a user a summary of all configuration settings for a selected location.

To navigate through the Location Settings report

A user can navigate through the report using paging controls located on the tool bar above the report header.

| ◀◀ ◀ | 1 | of 4 ▶ ▶◀ |

To find a specific value in the Location Settings report

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 "SMDR." enter the name into the **Find** box and click on **Find**.

| SMDR | Find | Next |

"SMDR" has been found on page six and it has been highlighted.

Setting Name	Value
AppName	SMDR Loader

A user can click on **Next** to find another instance of "SMDR" in the report.

To print the Location Settings report

The **Location Settings** report can be printed by clicking on the print icon located on the tool bar above the report header.

To email the Location Settings report
A user can email the **Location Settings** report.
Click on the envelope icon ✉ to email the report.
The **Email Results** screen comes up.

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com**;**recipient2@trisys.com**;**recipient3@trisys.com.

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Click on the **Email** button. The status reports have been emailed as an attachment in pdf format.

To change location name and phone number

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Click on the **Status** link. The Status screen is displayed.
5. Select a location from the **Select a location** list.
6. The left pane of the screen displays selected location name, its telephone number and status. Make appropriate changes.

Location

Name:

Main

Telephone Number:

9733602300

Location Status: **Active**

Save

7. Click on 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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Call Costing** link. The Call Costing screen is displayed.

6. **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.
7. 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.
8. **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.

9. 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

10. **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.

11. **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.

12. **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.

13. **Would you like to surcharge calls which cost $0.00?**
    Check this option if you would like to surcharge calls that cost $0.00.

14. **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%.

15. **Zero Plus Pricing @** – this field holds prices and surcharges for operator assisted calls.

16. **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).

17. Click on **Save** to save changes.

Activity

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

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Activity** link. The **Activity Settings** screen is displayed.

Activity Settings

Store call records with:

Call Direction:
☑ Outgoing ☑ Incoming ☑ Internal

☑ Include Local Calls

Calls Longer Than: 00:01:02

Account / Authorization Code Processing Options:
○ Separate Account & Authorization Codes (when both are present)
○ User Authorization Code Only
◉ Client Account Code
   Matter Code Length: 3

Save

6. **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.
7. **Include Local Calls** – check this option if you want to store local calls. This option is checked by default.
8. **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.

9. **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.

10. **Exclude Activity For:**

If you do not want to store activity for a particular extension, enter it into the **Extensions** field and click on **Add**. The extension is added to the list. Any calls for this extension are not going to be stored in the Tapit database.

11. To remove an extension from the list, select it and click on **Delete Selected**. Once an extension is removed from the list, calls associated with that extension are going to be stored in Tapit database.

12. If you do not want to store activity for a particular trunk number, enter it into the **Trunks** field and click on **Add**. The trunk number is added to the list. Any calls for this trunk are not going to be stored in the Tapit database.

13. To remove a trunk from the list, select it and click on **Delete Selected**. Once a trunk is removed from the list, calls associated with that trunk are going to be stored in Tapit database.

14. Click on **Save** to save changes.

Dialing Patterns

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

To define 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 NNNTTTTTTTTTTTT where NNN, is 494 that has been added to the number by the telephone system. NNN tells TapitNOVA 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 add a new dialing pattern

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Dialing Patterns** link. The **Dialing Patterns** screen is displayed. The **Create a New Dialing Pattern** entry form is displayed on the right-hand side of the screen.
6. Type in a new dialing pattern into the **Dialing Pattern** field.
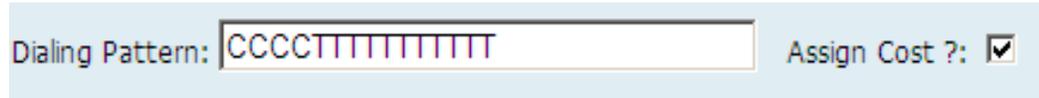
7. Click on the **Assign Cost** check box if you would like to price phone calls associated with this dialing pattern.
8. Click on **Save** to save the new dialing pattern.

To edit an existing dialing pattern

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Dialing Patterns** link. The **Dialing Patterns** screen is displayed
6. Click on the dialing pattern you want to edit on the **Available Patterns** list.

7. The right hand side of the screen reflects selected dialing pattern information. In our case the dialing pattern is CCCCTTTTTTTTTTTT and it is priced.
8. If you would like to change dialing pattern enter a new one into the **Dialing Pattern** field.
9. Check or uncheck the **Assign Cost** check box depending if you would like to price calls associated with this dialing pattern or not.
10. Click on **Save** to save changes.

> **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 TapitNOVA 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.

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 are 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

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 164 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. Follow the instructions below to activate incoming calls pricing.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Call Costing** link. The **Call Costing** screen is displayed.
6. 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.
7. Click on **Save** to save changes.

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

Follow the instructions below if call rates are dependent on the time of the day.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed. The **Price settings** list is located on the left-hand side of the screen. It shows the **Number Dialed** codes. The right hand side displays **Create a new Price setting** entry form. 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.
6. Enter the new **Number Dialed** code into the **Number Dialed** field.

Number Dialed:
201

7. Enter the start time of the first daily interval in military time format into the first **Start Time** field.
8. Enter the rate for the first minute and the next minute into the **First** and the **Next** fields for this daily time interval.
9. Enter the start time of the second daily time interval into the second **Start Time** field.
10. Enter rate for the first minute and the next minute into the **First** and the **Next** fields for this daily time interval.
11. 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.

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

12. Click on **Save**.

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 164 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

Follow the instructions below if a call rate is the same throughout the day.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed.
   The **Price settings** list is located on the left-hand side of the screen. It shows the **Number Dialed** codes.
   The right hand side displays **Create a new Price setting** entry form.
   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.
6. Enter the new **Number Dialed** code into the **Number Dialed** field.

Number Dialed:

201

7. 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.

   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 (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

8. Click on **Save**.

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 164 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

Follow the instructions below if a call rate is the same throughout the day.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed.
   The **Price settings** list is located on the left-hand side of the screen. It shows the **Number Dialed** codes.
   The right hand side displays **Create a new Price setting** entry form.
   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.
6. Enter the new **Number Dialed** code into the **Number Dialed** field.

7. 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.

8. Click on **Save**.

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 164 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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link.
   The **Pricing** screen is displayed. The **Price Settings** list is located on the left-hand side of the screen. It displays number dialed codes.

   Price Settings

800
877
973411
L
NNN
NNN555
QQQ
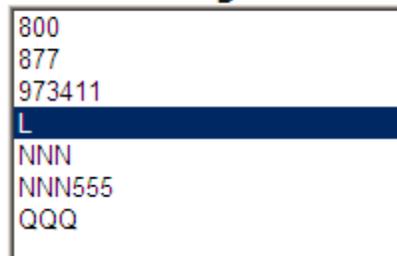
6. Click on a number dialed code associated with the price setting you would like to edit. The **Modify or Delete this Price Settings** form reflects pricing information for the selected code.

   Modify or Delete this Price Setting
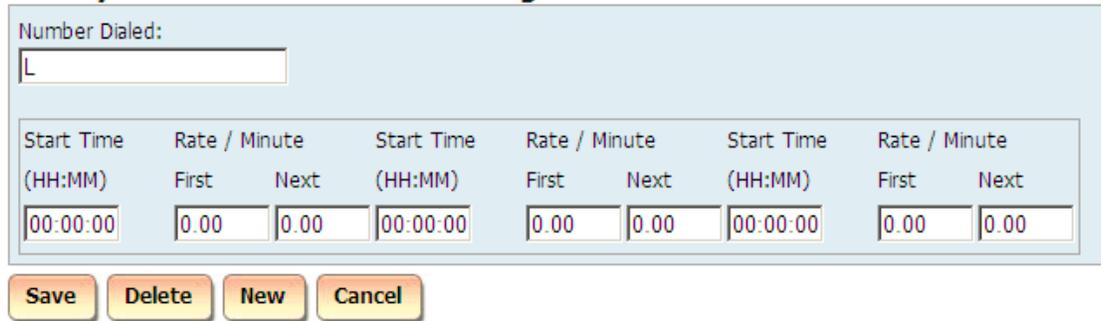
   Number Dialed:

L

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	0.00	0.00	00:00:00	0.00	0.00	00:00:00	0.00	0.00

   Save   Delete   New   Cancel

7. If needed, change the **Number Dialed** code.

   Number Dialed:

201

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

12. 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.

    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 (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

13. Click on **Save**.

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 164 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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed.
    The **Price Settings** list is located on the left-hand side of the screen. It displays number dialed codes.

6. Click on a number dialed code associated with the price setting you would like to edit. The **Modify or Delete this Price Settings** form reflects pricing information for the selected code.

7. If needed, change the **Number Dialed** code.

8. 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.

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

9. Click on **Save**.

**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 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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed.
    The **Price Settings** list is located on the left-hand side of the screen. It displays number dialed codes.

Price Settings

```
800
877
973411
L
NNN
NNN555
QQQ
```

6. Click on a number dialed code associated with the price setting you would like to edit. The **Modify or Delete this Price Settings** form reflects pricing information for the selected code.

7. If needed, change the **Number Dialed** code.

8. 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.

9. Click on **Save**.

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 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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Pricing** link. The **Pricing** screen is displayed.
   The **Price Settings** list is located on the left-hand side of the screen. It displays number dialed codes.

6. Click on a number dialed code associated with the price setting you would like to edit. The **Modify or Delete this Price Settings** form reflects pricing information for the selected code.

   Click on the **Delete** button.

7. Click **OK** to the confirmation message. The pricing record has been deleted.

Dest Code Pricing

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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list. The destination code list is displayed.
5. Filter the destination code list to display only destination codes you would like to mark as **Local**.

   To find a specific destination code, enter the code into the **Destination Codes beginning with:** search field and click on **Go**.

   You can also use partial destination codes to display a list of codes beginning with the same set of digits. To accomplish that, enter at least first three digits of the destination code into the **Destination Codes beginning with:** search field and click on **Go**.

   For example to view all destination codes starting with "973", you need to enter "973" into the search field and click on **Go**. The **Destination Codes** list displays only destination codes starting with "973".

   Destination Codes beginning with: 973 [Go]

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

✓	Dest Code	City	State	Country	Plan

   To select a group or an individual destination code, check boxes next to destination codes.

	Dest Code	City	State	Country	Plan
☐	973	AREA CODE	NJ	USA	L
☐	973200	LITTLE FAL	NJ	USA	L
☐	973201	WHIPPANY	NJ	USA	L
☐	973202	NEWARK	NJ	USA	L
☐	973203	MORRISTOWN	NJ	USA	L
☐	973204	NEWARK	NJ	USA	
☐	973205	NEWARK	NJ	USA	
☐	973206	MORRISTOWN	NJ	USA	

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after changing pricing plan information for destination codes.

To clear destination codes pricing plan

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list. The destination code list is displayed.
5. Filter the destination code list to display only destination codes you would like reset. Resetting will erase **Local** pricing plan assignment.

   To find a specific destination code, enter the code into the **Destination Codes beginning with:** search field and click on **Go**.

   You can also use partial destination codes to display a list of codes beginning with the same set of digits. To accomplish that, enter at least first three digits of the destination code into the **Destination Codes beginning with:** search field and click on **Go**.

   For example to view all destination codes starting with "973", you need to enter "973" into the search field and click on **Go**. The **Destination Codes** list displays only destination codes starting with "973".

   Destination Codes beginning with: 973 Go

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

✓	Dest Code	City	State	Country	Plan

   To select a group or an individual destination code, check boxes next to destination codes.

Destination Codes beginning with: 973 Go

☐	Dest Code	City	State	Country	Plan
✓	973	AREA CODE	NJ	USA	L
✓	973200	LITTLE FAL	NJ	USA	L
✓	973201	WHIPPANY	NJ	USA	L
✓	973202	NEWARK	NJ	USA	L
✓	973203	MORRISTOWN	NJ	USA	L
☐	973204	NEWARK	NJ	USA	
☐	973205	NEWARK	NJ	USA	

7. Wait until the **Destination Codes selected** label on the right hand-side panel reflects the number of selected destination codes.
    It may take some time.

5 Destination Codes selected

8. Select **L-Local** from the **Select a Pricing Plan** list on the right-hand side.

Apply a Pricing Plan to the selected code(s)
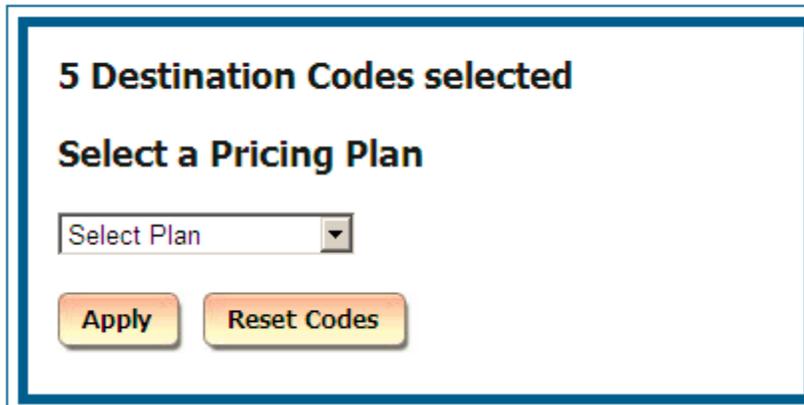
5 Destination Codes selected

Select a Pricing Plan

Select Plan ▼

Apply   Reset Codes

9. Click on the **Reset Codes** button.
10. Click **OK** to the confirmation message. Local pricing plan has been erased for the selected destination codes.

Destination Codes beginning with: 973   Go

	Dest Code	City	State	Country	Plan
☐	973	AREA CODE	NJ	USA	
☐	973200	LITTLE FAL	NJ	USA	
☐	973201	WHIPPANY	NJ	USA	
☐	973202	NEWARK	NJ	USA	
☐	973203	MORRISTOWN	NJ	USA	
☐	973204	NEWARK	NJ	USA	

It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after changing pricing plan information for destination codes.

Trunks

To add a new trunk

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Trunks** link. The **Create a new Trunk** screen is displayed.
6. Enter trunk number into the **Trunk** field.

Create a new Trunk

Trunk:

`11120`

Save   Cancel

7. Click on **Save.**
8. The **Active Trunks** list reflects newly added trunk.

Active Trunks

```
1
10
11
11120
```

To edit an existing trunk

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Trunks** link. The **Create a new Trunk** screen is displayed.
6. Select a trunk you would like to edit from the Active Trunks list.

Active Trunks

```
1
10
11
11120
```

7. Edit trunk number in the **Trunk** field.

Modify or Delete this Trunk

Trunk:

`11020`

Save   Delete   New   Cancel

8. Click on **Save**.
    The **Active Trunks** list reflects revised trunk.

To delete an existing trunk

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Trunks** link. The **Create a new Trunk** screen is displayed.
6. Select a trunk you would like to delete from the Active Trunks list.

7. Click on **Delete.**
8. Click on **OK** to the confirmation message. The trunk has been deleted.

Trunk Groups

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

To add a new trunk group

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Trunk Groups** link. The **Create a new Trunk Group** screen is displayed.
6. Enter trunk group number into the **Trunk Group** field.

7. Select a trunk or a group of trunks from the Available Trunks list.
   To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.
   To select list entries that are not consecutive, press and hold down CTRL, and then click each item.
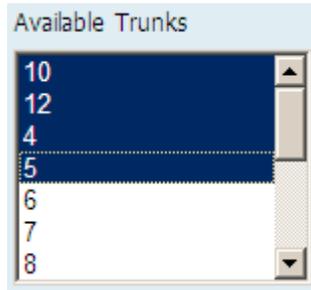
8. Assign trunks to the new trunk group by moving them from the Available Trunks list to the Selected Trunks list.
   Use one of the arrow controls to move trunks between the lists.

   >> moves all contents of the Available Trunks list to the Selected Trunks list.
   > moves selected trunks from the Available Trunks list to the Selected Trunks list.
   < removes selected trunks from the Selected Trunks list and moves them to the Available Trunks list.
   << removes all contents of the Selected Trunks list and moves them to the Available Trunks list.

In our example we used > button to move the selection of trunks to the Selected Trunks list.

Trunk Group:
TRGroup3

Available Trunks

6
7
8
1
880
881
882

Selected Trunks

10
12
4
5
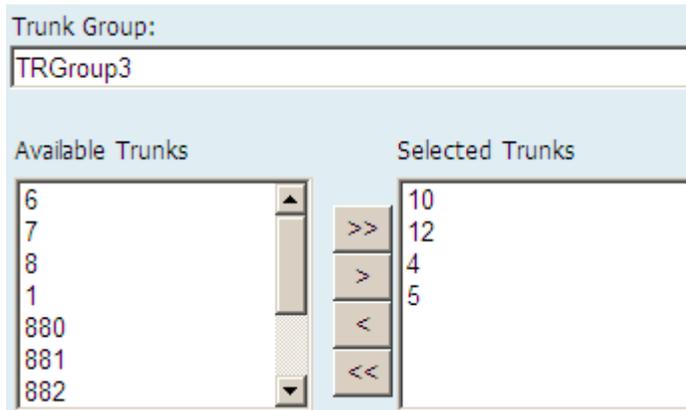
9.   Verify the Selected Trunks list contains all trunks you would like to assign to the new group and click on Save.
10. The new trunk group has been added to the **Available Trunk Groups** list.

Available Trunk Groups

TRGroup1
TRGroup2
TRGroup3

To edit an existing trunk group

1.   Log in to TapitNOVA.
2.   Click on the **System** button located on the top of the screen.
3.   Click on the **Locations** tab.
4.   Select a location from the **Select a location** list.
5.   Click on the **Trunk Groups** link.
6.   Select trunk group you would like to edit from the Available Trunk Groups list. The right pane of the screen displays Trunk Group information.

Available Trunk Groups

TRGroup1
TRGroup2
TRGroup3

7.   If needed, edit the trunk group number in the **Trunk Group** field.

Trunk Group:
TRGroup3
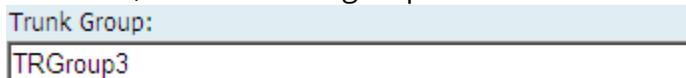
8.   Trunks listed on the **Selected Trunks** list are assigned to the selected trunk group. You can change trunk assignment for this trunk group by removing trunks from the **Selected Trunks** list or adding trunks from the **Available Trunks** list.

9. To assign more trunks to the trunk group select trunks from the **Available Trunks** list.
    To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.
    To select list entries that are not consecutive, press and hold down CTRL, and then click each item.
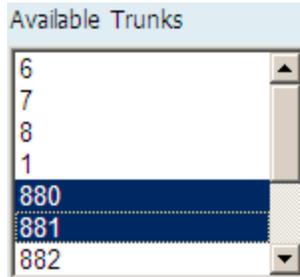
Use one of the arrow controls to move trunks to the **Selected Trunks** list.
>> moves all contents of the **Available Trunks** list to the **Selected Trunks** list.
> moves selected trunks from the **Available Trunks** list to the **Selected Trunks** list.

In our example we used > button to move the selection of trunks to the **Selected Trunks** list.
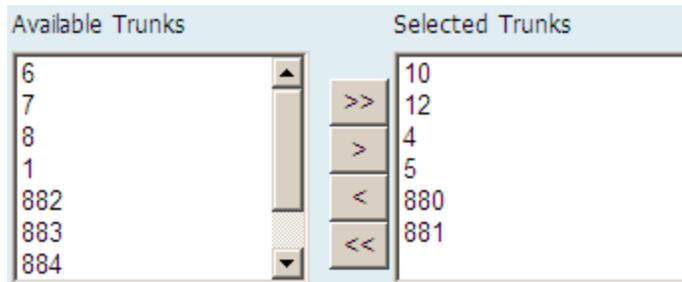
10. To remove trunks from the trunk group select trunks from the **Selected Trunks** list.
    To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.
    To select list entries that are not consecutive, press and hold down CTRL, and then click each item.
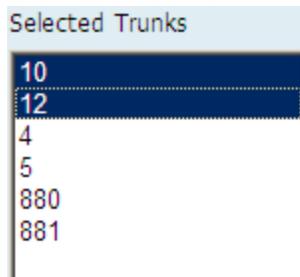
Use one of the arrow controls to remove the selection from the **Selected Trunks** list.

< removes selected trunks from the **Selected Trunks** list and moves them to the **Available Trunks** list.

<< removes all contents of the **Selected Trunks** list and moves them to the **Available Trunks** list.

In our example we used < button to remove the selection of trunks from the **Selected Trunks** list.
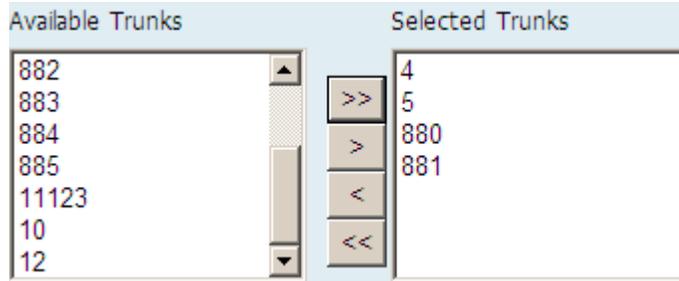
11. Verify the **Selected Trunks** list contains all trunks you would like to assign to the trunk group and click on **Save**. Changes have been saved.

To delete an existing trunk group

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Locations** tab.
4. Select a location from the **Select a location** list.
5. Click on the **Trunk Groups** link.
6. Select trunk group you would like to edit from the **Available Trunk Groups** list. The right pane of the screen displays **Trunk Group** information.

7. Click on **Delete.**
8. Click on **OK** to the confirmation message. The trunk group has been deleted and all assigned to it trunks have been released.

Report Scheduling

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

To create a new Report task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Run a Report** task.

5. The **Schedule a Report** screen comes up.

6. Select an appropriate option under **When do you want this task to run?**
    You have a choice of the following:

    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.

    - ● Run Once
    - ○ Daily
    - ○ Daily (Monday - Friday)
    - ○ Weekly
    - ○ Interval
    - ○ Monthly

    Start Time:
    17:00

    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.

    - ○ Run Once
    - ● Daily
    - ○ Daily (Monday - Friday)
    - ○ Weekly
    - ○ Interval
    - ○ Monthly

    Start Time:
    8:30

    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.

    - ○ Run Once
    - ○ Daily
    - ● Daily (M - F)
    - ○ Weekly
    - ○ Interval
    - ○ Monthly

    Start Time:
    8:30

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.

When do you want this task to run?

○ Run Once
○ Daily
○ Daily (Monday - Friday)
○ Weekly
○ Interval
● Monthly

Start Date:
12/10/2009 📅

Start Time:
16:30

7. Click on **Next**. The **Select the report you wish to run** is displayed.
8. Click on the down-arrow of the **Report Groups** field to expand the list of the available report groups.
   Click on the desired report group to select it.
   Report Groups
   [Extension ▼]

9. Click on the down-arrow of the **Reports** field to pull down the list of available reports for the selected report group.
   Click on the desired report name.
   Reports
   [Extension - Expanded Detail by Date ▼]

10. Click on the down-arrow of the **Call Filters** field 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 (see <u>page 70</u> to create a predefined filter).
    Call Filters
    [Todays Calls for ext 114 ▼]

11. Check the **Display filter on report** box, if you would like to see filter criteria detail on the scheduled report.
    ☑ **Display filter on report**

12. If you would like to substitute the report name with a custom title, type a new title in the **Report Title Override** field.
    Report Title Override
    [Extension Detail for Today for ext 114]

13. Click on **Next**. **Email Results** screen appears.

14. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
15. Enter the email subject into the **Subject** field.
16. Enter the email text into the **Message** field.
17. Click on **Finish**.
18. The newly created Report task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	Extension - Expanded Detail by Date (Todays Calls for ext 114)

To edit an existing Report task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	mike	Daily	12/06/09 20:22:00	Extension - Summary (MS 12092008)
BACKUP	jim	Daily	12/07/09 15:11:35	
RECOST	agnes	Daily	12/07/09 15:24:00	
REPORT	jim	Daily	12/07/09 16:38:00	Extension - Summary (AAAA Replay Filter)
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	Extension - Expanded Detail by Date (Todays Calls for ext 114)

5. The **Schedule a Report** screen comes up.

Schedule a Report

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ● Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:

`08:30`

[Next] [Cancel]

6. To edit this setting, select an option under **When do you want this task to run?**
    You have a choice of the following:

    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.

    - ● Run Once
    - ○ Daily
    - ○ Daily (Monday - Friday)
    - ○ Weekly
    - ○ Interval
    - ○ Monthly

    Start Time:

    `17:00`

    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.

○ Run Once
◉ Daily
○ Daily (Monday - Friday)
○ Weekly
○ Interval
○ Monthly

Start Time:

8:30

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.

○ Run Once
○ Daily
◉ Daily (M - F)
○ Weekly
○ Interval
○ Monthly

Start Time:

8:30

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.

○ Run Once
○ Daily
○ Daily (Monday - Friday)
◉ Weekly
○ Interval
○ Monthly

Start Time:

8:30

Run only on the selected day of the week

○ Sunday   ○ Monday ○ Tuesday   ○ Wednesday
○ Thursday ◉ Friday   ○ Saturday

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.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ● Interval
- ○ Monthly

Run every:
4 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.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ● Monthly

Start Date:
12/10/2009 📅

Start Time:
16:30

7. Click on **Next**. The **Select the report you wish to run** is displayed.
8. Click on the down-arrow of the **Report Groups** field. The list of available report groups appears.
   Click on the desired report group name to select it.
   Report Groups
   Extension ▼

9. Click on the down-arrow of the **Reports** field to pull down the list of available reports for the selected report group. Click on the desired report name.

Reports

Extension - Expanded Detail by Date

10. Click on the down-arrow of the **Call Filters** field 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 (see <u>page 70</u> to create a predefined filter).

Call Filters

Todays Calls for ext 114

11. Check the **Display filter on report** box, if you would like to see filter criteria detail on the scheduled report.

☑ **Display filter on report**

12. If you would like to substitute the report name with a custom title, type a new title into the **Report Title Override field**.

Report Title Override

Extension Detail for Today for ext 114

13. Click on **Next**. **Email Results** screen appears.

Email Results

** Separate multiple email addresses by semicolons (;)

To:

recipient@trisys.com

CC:

cc_recipient@trisys.com

BCC:

bcc_recipient@trisys.com

Subject:

Ext 114 Daily Report

Message:

Please see the attached report for today's calls for ext 114.

14. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
15. Enter the email subject into the **Subject** field.
16. Enter the email text into the **Message** field.
17. Click on **Finish**.
18. The **Currently Scheduled Tasks** screen reflects changes made to the report task.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	Extension - Expanded Detail by Date (Todays Calls for ext 114)

To delete an existing Report task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to delete.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
REPORT	mike	Daily	12/06/09 20:22:00	Extension - Summary (MS 12092008)
BACKUP	jim	Daily	12/07/09 15:11:35	
RECOST	agnes	Daily	12/07/09 15:24:00	
REPORT	jim	Daily	12/07/09 16:38:00	Extension - Summary (AAAA Replay Filter)
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	Extension - Expanded Detail by Date (Todays Calls for ext 114)

5. The **Schedule a Report** screen comes up.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ● Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
8:30

[Next] [Cancel] [Delete]
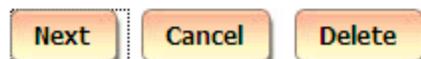
6. Click on **Delete**. The task has been deleted.

Scheduling Call Loading

To create a new Call Load task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Load Calls** task.

5. The **Schedule Call Loading** screen comes up.

6. The only option under **When do you want this task to run?** is **Interval**.
   The report will run at a specified time interval.
   For example, the screen above shows that call loading is set up to run every 30 seconds.
7. Click on **Next**. The location selection screen is displayed.
8. Select the location for which you would like to load calls.

9. Click on **Next**. **Email Results** screen appears.

Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:
cc_recipient@trisys.com

BCC:
bcc_recipient@trisys.com

Subject:
Calls were loaded in TapitNova

Message:
Call Load Task

10. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
11. Enter the email subject into the **Subject** field.
12. Enter the email text into the **Message** field.
13. Click on **Finish**.
14. The newly created **LOAD** task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time
LOAD	agnes	Interval	12/10/09 16:25:05

To edit an existing Call Load task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	
REPORT	mike	Daily	12/06/09 20:22:00	E
BACKUP	jim	Daily	12/07/09 15:11:35	
RECOST	agnes	Daily	12/07/09 15:24:00	
REPORT	jim	Daily	12/07/09 16:38:00	E
LOAD	agnes	Interval	12/10/09 16:25:05	
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	E
LOAD	agnes	Weekly	12/16/09 14:21:51	

5. The **Schedule Call Loading** screen comes up.

Schedule Call Loading
When do you want this task to run?

⊙ Interval

Run every:
30 Sec.

Next   Cancel

6. The only option under **When do you want this task to run?** is **Interval**. The report will run at a specified time interval For example, the screen above shows call loading set up to run every 30 seconds. Change the time interval as needed.
7. Click on **Next**. The location selection screen is displayed.
8. If needed, select a different location. Calls will be loaded for the selected location.

Load calls into location:
Main

9. Click on **Next**. **Email Results** screen appears.

Email Results
** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:
cc_recipient@trisys.com

BCC:
bcc_recipient@trisys.com

Subject:
Calls were loaded in TapitNova

Message:
Call Load Task

10. Make desired changes to this screen.
    Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
11. Enter the email subject into the **Subject** field.
12. Enter the email text into the **Message** field.
13. Click on **Finish**.
14. The **Currently Scheduled Tasks** screen displays revised **LOAD** task.

Task	User	Frequency	Next Run Time
LOAD	agnes	Interval	12/10/09 16:25:05

To delete an existing Call Load task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	T
REPORT	mike	Daily	12/06/09 20:22:00	E
BACKUP	jim	Daily	12/07/09 15:11:35	
RECOST	agnes	Daily	12/07/09 15:24:00	
REPORT	jim	Daily	12/07/09 16:38:00	E
LOAD	agnes	Interval	12/10/09 16:25:05	
REPORT	agnes	Daily (Monday - Friday)	12/10/09 16:30:00	E
LOAD	agnes	Weekly	12/16/09 14:21:51	

5. Scheduled a report screen comes up.

Schedule Call Loading
When do you want this task to run?

⊙ Interval

Run every:
[5 Min. ▼]

[Next] [Cancel] [Delete]

6. Click on **Delete**

Reindex Database

To create a new Reindex Database task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Reindex Database** task.

   Reindex Database ▼ | Scheduled Tasks | Running Tasks | Task Log
5. The **Schedule a Database Reindex** screen comes up.

Schedule a Database Reindex
When do you want this task to run?

⊙ Run Once

Start Time:
17:00

[Next]   [Cancel]

6. The only option under **When do you want this task to run?** is **Run Once**.
   A report will run only once at a specified time.
   For example, the screen above shows Reindex set up to run once at 5:00 PM.
7. Click on **Next**. The location selection screen is displayed.
8. Select a location to reindex.

Schedule a Database Reindex
Reindex calls into location:
Main ▼

Select Reindex Type
⊙ Simple (Reindexes changes made to Client, User, or Department tables only)
○ Complete (Reindexes all changes)

[Previous]   [Next]   [Cancel]

9. Select one of the options under the **Select Reindex Type**.
   Simple – reindexes changes made to Client, User, or Department tables only.
   Complete – reindexes all changes made to the Tapit database.
10. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to reindex. See page 43, section, for instructions on using filter screen.

11. Click on **Next**. **Email Results** screen appears. Enter

Schedule a Database Reindex
Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Calls were re-indexed in TapitNova

Message:
Database Reindex Task

Previous   Finish   Cancel

12. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.

13. Enter the email subject into the **Subject** field.

14. Enter the email text into the **Message** field.

15. Click on **Finish**.

16. The newly created **Reindex** task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time

To edit an existing Database Reindex task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.
   The **Schedule a Database Reindex** screen comes up.
   If needed, change the time of reindex.
5. Click on **Next**. The location selection screen is displayed.
6. If needed, select a different location to reindex.

Schedule a Database Reindex

Reindex calls into location:

    Main   ▼

Select Reindex Type

   ⦿ Simple (Reindexes changes made to Client, User, or Department tables only)
   ◯ Complete (Reindexes all changes)

    [Previous]   [Next]   [Cancel]

7. Select one of the options under the **Select Reindex Type**.
   Simple – reindexes changes made to Client, User, or Department tables only.
   Complete – reindexes all changes made to the Tapit database.
8. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to reindex. See page 43, section, for instructions on using filter screen.
9. Click on **Next**. **Email Results** screen appears.

Schedule a Database Reindex
Email Results
** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Calls were re-indexed in TapitNova

Message:
Database Reindex Task

[Previous] [Finish] [Cancel]

10. Make appropriate changes to this screen.
Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
11. Enter the email subject into the **Subject** field.
12. Enter the email text into the **Message** field.
13. Click on **Finish**. Reindex task is saved with new schedule information.

To delete an existing Database Reindex task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The Currently Scheduled Tasks list is displayed.
4. Click on the task you would like to edit. The **Schedule a Database Reindex** screen comes up.
5. Click on **Delete**

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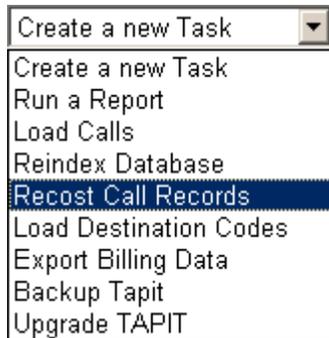
To create a new Call Recosting task – Recosting with Tapit Carrier

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

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Recost Call Records** task.

Create a new Task

- Create a new Task
- Run a Report
- Load Calls
- Reindex Database
- Recost Call Records
- Load Destination Codes
- Export Billing Data
- Backup Tapit
- Upgrade TAPIT

5. The **Schedule Call Recosting** screen comes up.

Schedule Call Recosting
When do you want this task to run?

⊙ Run Once

Start Time:
17:00

[Next] [Cancel]

6. The only option under **When do you want this task to run?** is **Run Once**.
   A report will run only once at a specified time.
   For example, the screen above shows Recost set up to run once at 5:00 PM.
7. Click on **Next**. The location selection screen is displayed.
8. Select a location to recost.

Schedule Call Recosting

Recost calls at location:

Main

Type of Recosting

⦿ Tapit Carrier ◯ Custom

9. Select the **Tapit Carrier** option under the **Select Reindex Type**.
   <u>**Tapit Carrier**</u> – calls are priced according to the Tapit Pricing and city and destination settings.
   <u>**Custom**</u> – a user can define price adjustments to apply to Tapit calls. See the section below on how to **Custom** Recost Tapit calls.
10. Click on **Next**. **Recost Scope** options are displayed.

Schedule Call Recosting

Recost Scope

◯ Check this option if changes where made to the Pricing Table only.

⦿ Check this option if changes were made to the call or city and state destination table

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.

11. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to recost. See <u>page 43</u>, section, for instructions on using filter screen.
12. Click on **Next**. **Email Results** screen appears.

Schedule Call Recosting
Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Calls were re-priced in TapitNova

Message:
Have a nice day!

[Previous] [Finish] [Cancel]

13. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
14. Enter the email subject into the **Subject** field.
15. Enter the email text into the **Message** field.
16. Click on **Finish**.
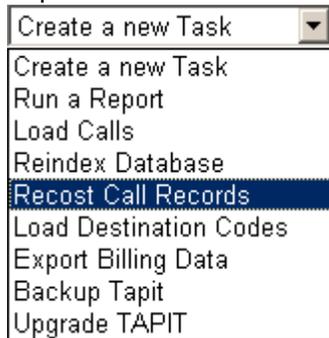17. The newly created **Recost** task is listed on the **Currently Scheduled Tasks** screen.

To create a new Call Recosting task – Custom Recosting

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 a percentage to be added or subtracted to the cost of Tapit calls.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.

4. Expand the **Create a new Task** list and select the **Recost Call Records** task.

5. The **Schedule Call Recosting** screen comes up.

6. The only option under **When do you want this task to run?** is **Run Once**.
   A report will run only once at a specified time.
   For example, the screen above shows Recost set up to run once at 5:00 PM.
7. Click on **Next**. The location selection screen is displayed.
8. Select a location to recost.

9. Select the **Custom** option under the **Select Reindex Type**.
   Custom – a user can define price adjustment to apply to Tapit calls
   Tapit Carrier – calls are priced according to the Tapit Pricing. See section above
   for instructions on how to recost calls with **Tapit Carrier**.

10. 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.

    The screen below shows Custom Recosting where 50 cents is going to be added to each call record.

11. Click on **Next**. **Recost Scope** options are displayed.

    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.

12. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to recost. See <u>page 43</u>, section, for instructions on using filter screen.

13. Click on **Next**. **Email Results** screen appears.

**Schedule Call Recosting
Email Results**

** Separate multiple email addresses by semicolons (;)

To:

recipient@trisys.com

CC:

BCC:

Subject:

Calls were re-priced in TapitNova

Message:

Have a nice day!

Previous   Finish   Cancel

14. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
15. Enter the email subject into the **Subject** field.
16. Enter the email text into the **Message** field.
17. Click on **Finish**.
18. The newly created **Recost** task is listed on the **Currently Scheduled Tasks** screen.

To edit an existing Call Recosting task

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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.

3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.
   The **Schedule Call Recosting** screen comes up.
   If needed, change the time of recosting.
   Click on **Next**. The location selection screen is displayed.
5. If needed, select a different location to recost.

Schedule Call Recosting
Recost calls at location:
Main

Type of Recosting
⦿ Tapit Carrier ◯ Custom

6. You can change **Type of Recosting** option.
   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 you 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.
7. Click on **Next**.
8. If you have selected **Tapit Carrier**, the **Recost Scope** options are displayed. Otherwise, please proceed with the next step.

Schedule Call Recosting
Recost Scope
◯ Check this option if changes where made to the Pricing Table only.
⦿ Check this option if changes were made to the call or city and state destination table

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.

9. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to recost. See , section, for instructions on using filter screen.
10. Click on **Next**. **Email Results** screen appears.

Schedule Call Recosting
Email Results

** Separate multiple email addresses by semicolons (;)

To:

recipient@trisys.com

CC:

BCC:

Subject:

Calls were re-priced in TapitNova

Message:

Have a nice day!

[Previous]   [Finish]   [Cancel]

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.

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

11. Enter the email subject into the **Subject** field.
12. Enter the email text into the **Message** field.
13. Click on **Finish**.
14. The **Currently Scheduled Tasks** screen displays revised **Recost** task.

To delete an existing Call Recosting task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The Currently Scheduled Tasks list is displayed.
4. Click on the task you would like to edit.
   The **Schedule Call Recosting** screen comes up.
5. Click on **Delete.**

Load Destination Codes

Load Destination Codes task loads the city state destination table updates into the Tapit database.

To create a new Load Destination Codes task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Load Destination Codes** task.
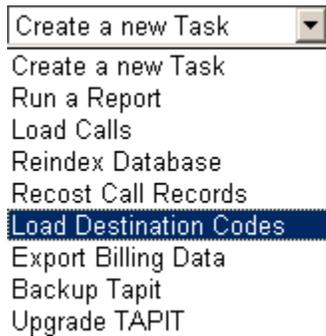
5. The **Schedule Loading New Destination Codes** screen comes up.

6. The only option under **When do you want this task to run?** is **Run Once**.
   A report will run only once at a specified time.
   For example, the screen above shows destination codes set up to load once at 5:00 PM.
7. Click on **Next**.
   Enter a path and a file name of the destination codes file, or click on Browse and locate the file using Windows Explorer.

Schedule Loading New Destination Codes

Destination Code file name:

C:\TapitNova\CityState\TRB0A973.360   Browse...

Press to upload file to server

8.   Click on the **Press to upload file to server** button.
9.   Click on **Next**. **Email Results** screen appears. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields. When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
10. Enter the email subject into the **Subject** field.
11. Enter the email text into the **Message** field.
12. Click on **Finish**.

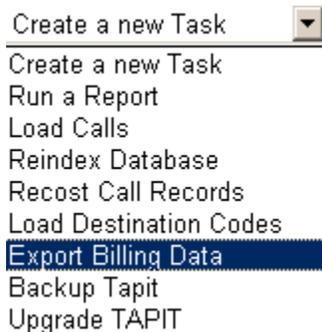**To edit an existing Load Destination Codes task**

1.   Log in to TapitNOVA.
2.   Click on the **System** button located on the top of the screen.
3.   Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4.   Click on the task you would like to edit.
     The **Schedule Loading New Destination Codes** screen comes up.
     If needed, change the time of loading destination codes.
5.   Click on **Next**.
     If needed enter a different path and a file name of the destination codes file, or click on Browse and locate the file using Windows Explorer.

Schedule Loading New Destination Codes

Destination Code file name:

C:\TapitNova\CityState\TRB0A973.360   Browse...

Press to upload file to server

6.   If file name or path has changed, click on the **Press to upload file to server** button.
7.   Click on **Next**. **Email Results** screen appears.
     Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
     When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
8.   Enter the email subject into the **Subject** field.
9.   Enter the email text into the **Message** field.
10. Click on **Finish**.

To delete an existing Load Destination Codes task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to delete. The **Schedule Loading New Destination Codes** screen comes up.
5. Click on **Delete**.

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. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Run a Report** task.

```
Create a new Task          ▼
Create a new Task
Run a Report
Load Calls
Reindex Database
Recost Call Records
Load Destination Codes
Export Billing Data
Backup Tapit
Upgrade TAPIT
```

5. The **Schedule a Billing Export** screen comes up.

Schedule a Billing Export
When do you want this task to run?

- ○ Run Once
- ⦿ Daily
- ○ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
19:00:49

[Next]   [Cancel]

6. Select an appropriate option under **When do you want this task to run?**
    You have a choice of the following:

    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.

    ⊙ Run Once
    ○ Daily
    ○ Daily (Monday - Friday)
    ○ Weekly
    ○ Interval
    ○ Monthly

    Start Time:
    | 17:00 |

    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.

    ○ Run Once
    ⊙ Daily
    ○ Daily (Monday - Friday)
    ○ Weekly
    ○ Interval
    ○ Monthly

    Start Time:
    | 8:30 |

    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.

    ○ Run Once
    ○ Daily
    ⊙ Daily (M - F)
    ○ Weekly
    ○ Interval
    ○ Monthly

    Start Time:
    | 8:30 |

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.

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ● Weekly
- ○ Interval
- ○ Monthly

Start Time:

8:30

Run only on the selected day of the week

- ○ Sunday ○ Monday ○ Tuesday ○ Wednesday
- ○ Thursday ● Friday ○ Saturday

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.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ● Interval
- ○ Monthly

Run every:

4 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.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ◉ Monthly

Start Date:
12/10/2009

Start Time:
16:30

7. Click on **Next**.
   Select the location you would like to export billing data from.
8. Select one of the billing system formats from the options provided under **Select which billing system you want to export to**.

Schedule a Billing Export

Select location to extract billable calls:
Main

Select which billing system you want to export to

- ◉ ASCII - Comma Delimited
- ○ TimeSlips V8
- ○ TimeSlips
- ○ PC Law
- ○ TABS III
- ○ Barrister
- ○ Omega
- ○ Juris
- ○ Juris CSV
- ○ Pro Law
- ○ Jonas

Previous   Next   Cancel

9. Click on **Next**. The filter screen shows up. Set up filter criteria to select call data to recost. See page 43, section, for instructions on using filter screen.

10. Click on **Next**. **Email Results** screen appears.

Schedule a Billing Export
Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
Calls were exported for billing in TapitNova

Message:
Have a nice day!

[Previous] [Finish] [Cancel]

11. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
12. Enter the email subject into the **Subject** field.
13. Enter the email text into the **Message** field.
14. Click on **Finish**.
15. The newly created Export Billing Data task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
EXP4BILL	agnes	Daily	01/20/10 19:00:49	

To edit an existing Export Billing Data task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
LOAD	jim	Interval	01/19/10 17:20:00	
REINDEX	agnes	Run Once	01/19/10 18:00:00	
BACKUP	jim	Daily	01/19/10 18:12:18	
LOAD	jim	Interval	01/20/10 13:54:00	
EXP4BILL	agnes	Daily	01/20/10 19:00:49	
REPORT	jim	Daily (M - F)	01/26/10 17:38:00	Extension - Summary (AAAA Replay Filter)
REPORT	jim	Monthly	02/12/10 17:39:00	Extension - Summary (AAAA Replay Filter)
REINDEX	mike	Monthly	02/12/10 20:10:44	

5. The **Schedule a Billing Export** screen comes up.

Schedule a Billing Export
When do you want this task to run?

- ○ Run Once
- ● Daily
- ○ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
19:00:49

[Next] [Cancel] [Delete]

6. Select an appropriate option under **When do you want this task to run?** You have a choice of the following:

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.

- ◉ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
17:00

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.

- ○ Run Once
- ◉ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
8:30

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.

- ○ Run Once
- ○ Daily
- ◉ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
8:30

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.

7. Click on **Next**.
   If needed select a different location you would like to export billing data from.
8. Select one of the billing system formats from the options provided under **Select which billing system you want to export to**.

9. Click on **Next**. 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.

10. Click on **Next**. **Email Results** screen appears.

Schedule a Billing Export
Email Results

** Separate multiple email addresses by semicolons (;)

To:

recipient@trisys.com

CC:

BCC:

Subject:

Calls were exported for billing in TapitNova

Message:

Have a nice day!

[Previous]   [Finish]   [Cancel]

11. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
    When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
12. Enter the email subject into the **Subject** field.
13. Enter the email text into the **Message** field.
14. Click on **Finish**.
15. The newly created Export Billing Data task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
EXP4BILL	agnes	Daily	01/20/10 19:00:49	

To delete an existing Export Billing Data task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

Currently Scheduled Tasks

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
LOAD	jim	Interval	01/19/10 17:20:00	
REINDEX	agnes	Run Once	01/19/10 18:00:00	
BACKUP	jim	Daily	01/19/10 18:12:18	
LOAD	jim	Interval	01/20/10 13:54:00	
EXP4BILL	agnes	Daily	01/20/10 19:00:49	
REPORT	jim	Daily (M - F)	01/26/10 17:38:00	Extension - Summary (AAAA Replay Filter)
REPORT	jim	Monthly	02/12/10 17:39:00	Extension - Summary (AAAA Replay Filter)
REINDEX	mike	Monthly	02/12/10 20:10:44	

5. The **Schedule a Billing Export** screen comes up.

Schedule a Billing Export
When do you want this task to run?

- ○ Run Once
- ⊙ Daily
- ○ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
`19:00:49`

[Next] [Cancel] [Delete]

6. Click on **Delete**. The task has been deleted.

Backup Tapit

You can schedule the **Backup Tapit** task to create backup copies of Tapit databases

To create a new Backup Tapit task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Expand the **Create a new Task** list and select the **Run a Report** task.

5. The **Schedule a Database Backup** screen comes up.

6. Select an appropriate option under **When do you want this task to run?**
    You have a choice of the following:

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.

- ⊙ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
17:00

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.

- ○ Run Once
- ⊙ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
8:30

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.

- ○ Run Once
- ○ Daily
- ⊙ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
8:30

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.

○ Run Once
○ Daily
○ Daily (Monday - Friday)
◉ Weekly
○ Interval
○ Monthly

Start Time:
8:30

Run only on the selected day of the week
○ Sunday   ○ Monday ○ Tuesday   ○ Wednesday
○ Thursday ◉ Friday   ○ Saturday

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.

When do you want this task to run?

○ Run Once
○ Daily
○ Daily (Monday - Friday)
○ Weekly
◉ Interval
○ Monthly

Run every:
4 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.

When do you want this task to run?

○ Run Once
○ Daily
○ Daily (Monday - Friday)
○ Weekly
○ Interval
● Monthly

Start Date:
12/10/2009

Start Time:
16:30

7. Click on **Next**. **Email Results** screen appears.

Schedule a Database Backup
Email Results
** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com
CC:

BCC:

Subject:
The TapitNova database has been backed up
Message:
Have a nice day!

[Previous] [Finish] [Cancel]

8. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
   When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
9. Enter the email subject into the **Subject** field.

10. Enter the email text into the **Message** field.
11. Click on **Finish**.
12. The newly created Export Billing Data task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
BACKUP	agnes	Daily	01/20/10 19:25:48	

To edit an existing Backup Tapit task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

LOAD	jim	Interval	01/20/10 13:54:00	
EXP4BILL	agnes	Daily	01/20/10 19:00:49	
BACKUP	agnes	Daily	01/20/10 19:25:48	
REPORT	jim	Daily (M - F)	01/26/10 17:38:00	Extension - Summary (AAAA Replay Filter)

5. The **Schedule a Database Backup** screen comes up.

Schedule a Database Backup
When do you want this task to run?

- ○ Run Once
- ⊙ Daily
- ○ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
19:25:48

[Next] [Cancel] [Delete]

6. Select an appropriate option under **When do you want this task to run?** You have a choice of the following:

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.

When do you want this task to run?

- ○ Run Once
- ○ Daily
- ○ Daily (Monday - Friday)
- ○ Weekly
- ○ Interval
- ● Monthly

Start Date:
12/10/2009

Start Time:
16:30

7. Click on **Next**. **Email Results** screen appears.

Schedule a Database Backup
Email Results

** Separate multiple email addresses by semicolons (;)

To:
recipient@trisys.com

CC:

BCC:

Subject:
The TapitNova database has been backed up

Message:
Have a nice day!

[Previous] [Finish] [Cancel]

8. Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
   When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com;recipient2@trisys.com;recipient3@trisys.com.
9. Enter the email subject into the **Subject** field.

10. Enter the email text into the **Message** field.
11. Click on **Finish**.
12. The newly created Export Billing Data task is listed on the **Currently Scheduled Tasks** screen.

Task	User	Frequency	Next Run Time	Task Name (Filter Name)
BACKUP	agnes	Daily	01/20/10 19:25:48	

To delete an existing Backup Tapit task

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
4. Click on the task you would like to edit.

LOAD	jim	Interval	01/20/10 13:54:00	
EXP4BILL	agnes	Daily	01/20/10 19:00:49	
BACKUP	agnes	Daily	01/20/10 19:25:48	
REPORT	jim	Daily (M - F)	01/26/10 17:38:00	Extension - Summary (AAAA Replay Filter)

5. The **Schedule a Database Backup** screen comes up.

Schedule a Database Backup
When do you want this task to run?

- ○ Run Once
- ⊙ Daily
- ○ Daily (M - F)
- ○ Weekly
- ○ Interval
- ○ Monthly

Start Time:
19:25:48

Next   Cancel   Delete

6. Click on **Delete**. The task has been deleted.

Scheduling an Upgrade Tapit task

The **Upgrade Tapit** task imports **Users**, **Clients**, **Pricing** information and **Call Data** from old Tapit database into TapitNOVA.

However, settings for the **Status**, **Call Costing**, **Activity**, **Dialing Patterns**, **Dest Code Pricing**, **Trunks** and **Trunk Groups** screens, under the System\Locations tab, have to be re-entered manually to match old Tapit settings.

If you are upgrading old Tapit with Remote Manager, this task needs to be run separately for each location. Each location needs to be upgraded only once. Running this task more than once for the same database will result in duplicate data.

See page 33, UPGRADING Tapit EX TO TapitNOVA, for instructions on upgrading older version of Tapit screen.

Currently Running Tasks

The **Currently Running Tasks** screen displays a list of tasks that are in progress. It is also a gateway to the task's details.

This screen is very useful for monitoring progress of tasks that take a long time to complete. Upgrade Tapit, Reindex Database can be examples of such tasks.

1. Click on the **System** button located on the top of the screen.
2. Click on the **Tasks** tab. The **Currently Scheduled Tasks** list is displayed.
   In our example the **Upgrade** task is listed on the **Currently Running Tasks** list.

3. To view upgrade details, click on the task on the **Currently Running Tasks** list. The **Active Task Detail** screen appears.

The **Task Status** section displays description of the task.
The **Progress** section displays current information about the running task
Counter – how many call records have been imported so far.
Counter Max – the total number of call records to be imported.
Avg Recs/Sec – how many records per second are being imported.
Avg Secs/Rec – how many seconds it takes to import one call record.
Elapsed Time – how much time has passed since the start of upgrade.
Estimated Run Time – approximately how long the upgrade will take.
The **Warning** section displays warnings and errors.

To see updated **Task Details** click on the **Refresh** button.

If the task appears to be "hung" and you are not certain that the task is working, click on **Verify** and then click on **Refresh** to see the current status.

If for some reason you need to stop the task click on the **Stop Task** button. However, this is not recommended, because it can produce unpredictable results in call data.

To go back to the **Currently Running Tasks** list, click on **Return to Active Tasks**.

4. Once upgrade task is completed it will disappear from the **Currently Running Tasks** list. You will be able to find it on the **Tasks – Completed** list located on the **Task Log** tab.

Task Log

The **Task Log** screen is a list of completed tasks.

Tasks - Completed Tasks

Started ⇕	Ended ⇕	Task ⇕	User ⇕	Freq. ⇕	Loc. ⇕	Message	Status ⇕
01/25/10 09:26	09:27	REPORT			-1		Complete
01/25/10 09:26	09:26	LOAD	tapit_manager	Interval	0		Complete
01/25/10 09:25	09:25	LOAD	tapit_manager	Interval	0		Complete

To sort the list

The Tasks list can be sorted by each column header except Message. The two arrows next to the field name indicate that this field is not sorted. To sort the report by the start date and time click on the arrows next to the **Started** header.

Started ⇕

The report is sorted by start date and time from A-Z. The ascending sort order is indicated by the up arrow adjacent to the field name.

Started ▲

Click on the up arrow to change the sort direction. The report is sorted by start date and time from Z-A. The descending sort order is indicated by the down arrow adjacent to the field name.

Started ▼

To navigate through list pages

|◀ ◀ [1] of 17 ▶ ▶|

Use paging controls in the upper left corner of the screen to navigate through report 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 search for a specific value on the list

You can search for a specific value on the list.
For example to find an upgrade task, enter "upgrade" into the **Find** box and click on **Find**.

upgrade   Find | Next

Clicking on **Next** takes us to the next instance of "upgrade" if there is any.

To print the list

Click on the printer icon 🖨 to print the list.

To email the list

Click on the envelope icon ✉ to email the list.
The **Email Results** screen comes up.

Enter the recipient's email address into the **To** field. If required, enter email addresses into **CC** and **BCC** fields.
When entering multiple email addresses use semicolons to separate them i.e. recipient1@trisys.com**;**recipient2@trisys.com**;**recipient3@trisys.com.

Enter the email subject into the **Subject** field.

Enter the email text into the **Message** field.

Make sure the **Report** box on the bottom of the screen is checked.

Click on the **Email** button. The report has been emailed as an attachment in pdf format.

Security

Access to TapitNOVA 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 TapitNOVA application.

Administrator – a user account with this security level will have access only to **Dashboard**, **Reports** and **Admin** sections of TapitNOVA. **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 TapitNOVA 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 TapitNOVA. If you would like to use the Security feature of TapitNOVA to restrict access to the application, it is recommended to create another System Manager password and delete the generic account.

To create a new TapitNOVA user account

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Security** tab. The **Current TapitNOVA Logins** list is displayed.

Manage a Login

Login Identity

User Name

test_user

Password

••••••••

Email

user@trisys.com

Comment

This user is a System Manager

Login Role

○ User   ○ Administrator   ◉ System Manager

Account Status

◉ Active   ○ Deactivated

Save   Cancel

4. Click on the **Create a New Login** button.
5. Enter a user name and a password. The password has to be a least 7 characters long.
6. Enter email address for this user account into the **Email** field.
7. Enter account description into the **Comment** field.
8. Select one of the security level options under **Login Role**.

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

    Administrator – a user account with this security level will have access only to **Dashboard**, **Reports** and **Admin** sections of TapitNOVA. **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 TapitNOVA will not be available for this user.
    Note: each of the above security levels can be restricted by a variety of permissions.

9. Accept the default **Active** option under the **Account Status**.
10. Click on **Save**.

11. Once the account is saved the **Current TapitNOVA Logins** list is displayed. To assign permissions to the newly created account, find it on the list and click on it.

User	Created	Last Login	Email	Role	Active
test_user	1/21/2010 6:42:13 PM	1/21/2010 6:42:13 PM	user@trisys.com	system_manager	Yes

12. The **Manage a Login** screen comes up.
    Click on the **Create a new permission** button.
13. Select one of the options under **Select a Permission Type**. Permission type indicates what kind of permission you are going to create. In our example we have selected **Extensions**.

Select a Permission Type
- ○ Account Codes
- ○ Authorization Codes
- ○ Clients
- ○ Departments
- ○ DNIS Numbers
- ⦿ Extensions
- ○ Locations
- ○ Recordings
- ○ Report Groups
- ○ Users

14. Click on **Next**.
    Following our example select an extension number or a group of extensions from the **Available** list.
    To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.
    To select list entries that are not consecutive, press and hold down CTRL, and then click each item.

    Once extensions are selected, click on > button to add them to the **Selected** list. You can also use >> button to move all items from the **Available** list to the **Selected** list.

    To remove extensions from the **Selected** list select an extension number or a group of extensions and click on the < button. If you would like to remove all items from the **Selected** list, click on the << button and extensions will be moved to the **Available** list.

Select Extensions for this permission

Grant or deny access to these items
- ◉ Grant ○ Deny

15. Click on one of the options under **Grant or deny access to these items**.
    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.
16. Click on **Next**. This screen displays summary of the newly created permission. If this is correct, click on **Finish**.
    Otherwise, you can click on **Previous** and edit the permission.

Here is your permission

Grant access to calls containing the following Extensions: 100, 102, 105, 106, 107,

17. The **Login Permissions** screen reflects newly added permission.

Login Permissions

Object	Permission
Extensions	Grant access to calls containing the following Extensions: 100, 102, 105, 106, 107,

18. Follow points 12 through 17 to add permissions for different permission types. When all desired permissions are assigned to the user account, click on **New** to create another user account, or click on **Cancel** to go back to the **Current TapitNOVA Logins** list.

To edit existing TapitNOVA user account

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Security** tab. The **Current TapitNOVA Logins** list is displayed.
   Click on a user account you would like to edit.

User	Created	Last Login	Email	Role	Active
test_user	1/21/2010 6:42:13 PM	1/21/2010 6:42:13 PM	user@trisys.com	system_manager	Yes

4. The **Manage a Login** screen comes up.

Manage a Login

Login Identity

User Name

test_user

Password

Email

user@trisys.com

Comment

This user is a System Manager

Login Role

○ User   ○ Administrator   ⊙ System Manager

Account Status

⊙ Active   ○ Deactivated

[Save]   [Delete]   [New]   [Cancel]

5. If needed change the existing user name and the password. The password has to be a least 7 characters long.
6. Enter email address for this user account into the **Email** field.
7. Enter account description into the **Comment** field.

8. If you would like to change a security level for this user account, select one of the security level options under **Login Role**.

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

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

   System Manager – this is the highest level of security. This user will be able to access all features of the TapitNOVA application.
   Note: each of the above security levels can be restricted by a variety of permissions.

9. If you would like this user to have no access to TapitNOVA click **Deactivated** option under the **Account Status**. You can activate it at any time later, by selecting **Active** option.
10. You can assign new permissions to this user account or edit existing ones.
   To assign a new permission click on the **Create a new permission** button.
   To change existing permissions click on the desired permission on the **Login Permissions** list.
11. **If you are assigning a new permission** you need to select one of the options under **Select a Permission Type**. Permission type indicates what kind of permission you are going to create. In our example we have selected **Extensions**.

Select a Permission Type
- Account Codes
- Authorization Codes
- Clients
- Departments
- DNIS Numbers
- ● Extensions
- Locations
- Recordings
- Report Groups
- Users

If you are editing an existing permission, this screen is grayed out. You will not be able to make changes to the permission type. If you would like to delete this permission, click on the **Delete** button. Otherwise, proceed with the next step.

Select a Permission Type

- ○ Account Codes
- ○ Authorization Codes
- ○ Clients
- ○ Departments
- ○ DNIS Numbers
- ● Extensions
- ○ Locations
- ○ Recordings
- ○ Report Groups
- ○ Users

[Next] [Cancel] [Delete]

12. Click on **Next**.
    Following our example select an extension number or a group of extensions from the **Available** list. To select consecutive list entries, click the first item, press and hold down SHIFT, and then click the last item.
    To select list entries that are not consecutive, press and hold down CTRL, and then click each item.

    Once extensions are selected, click on > button to add them to the **Selected** list. You can also use >> button to move all items from the **Available** list to the **Selected** list.

    To remove extensions from the **Selected** list select an extension number or a group of extensions and click on the < button. If you would like to remove all items from the **Selected** list, click on the << button and extensions will be moved to the **Available** list.

Select Extensions for this permission

13. Click on one of the options under **Grant or deny access to these items**.
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.

14. Click on **Next**. This screen displays summary of the newly created permission. If this is correct, click on **Finish**.
Otherwise, you can click on **Previous** and edit the permission.

Here is your permission

Grant access to calls containing the following Extensions: 100, 102, 105, 106, 107,

15. The **Login Permissions** screen reflects created or edited permission.

Object	Permission
Extensions	Grant access to calls containing the following Extensions: 100, 102, 105, 106, 107,

16. Follow points 12 through 17 to add or edit permissions for different permission types. When all desired permissions are assigned to the user account, click on **Save** to save changes to the user account.

TapitNOVA Call Accounting Manual

To delete existing TapitNOVA user account

Deleting the user account permanently removes it from TapitNOVA.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Security** tab. The **Current TapitNOVA Logins** list is displayed.
   Click on a user account you would like to edit.

User	Created	Last Login	Email	Role	Active
test_user	1/21/2010 6:42:13 PM	1/21/2010 6:42:13 PM	user@trisys.com	system_manager	Yes

4. The **Manage a Login** screen comes up.

Manage a Login

Login Identity

User Name

test_user

Password

Email

user@trisys.com

Comment

This user is a System Manager

Login Role

○ User ○ Administrator ● System Manager

Account Status

● Active ○ Deactivated

Save   Delete   New   Cancel

5. Click on **Delete**. Click OK to the confirmation message.

Document #: TNCAM– 190218   Page | 232   Updated on 02/18/2019

To activate/deactivate an existing TapitNOVA user account

There may be time when you would like to temporarily deactivate user account and to reinstate it at a later time.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Security** tab. The **Current TapitNOVA Logins** list is displayed. Click on a user account you would like to activate or deactivate.

User	Created	Last Login	Email	Role	Active
test_user	1/21/2010 6:42:13 PM	1/21/2010 6:42:13 PM	user@trisys.com	system_manager	Yes

4. The **Manage a Login** screen comes up.

Manage a Login

Login Identity

User Name

test_user

Password

Email

user@trisys.com

Comment

This user is a System Manager

Login Role

○ User ○ Administrator ◉ System Manager

Account Status

◉ Active ○ Deactivated

[Save] [Delete] [New] [Cancel]

5. If you would like to reinstate the user account click on the **Activate** option under **Account Status**. Otherwise, to temporarily disable this account, click on the **Deactivated** option. Deactivated user will not be able to access TapitNOVA at all.

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
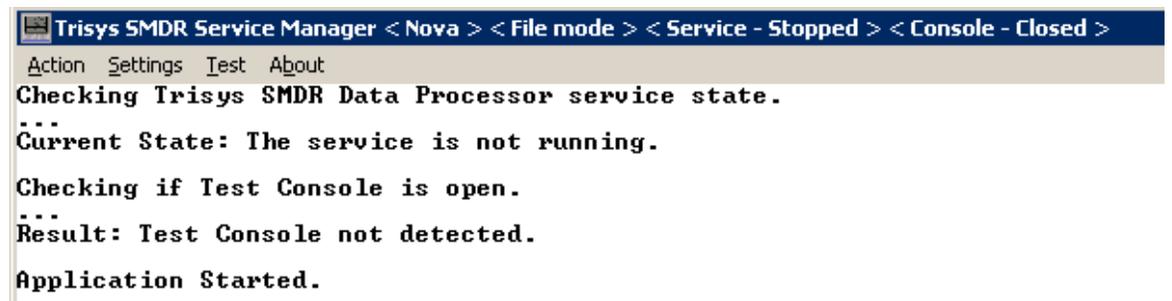
Action Menu (SMDR Service Manager)

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**.

<u>**To start collecting calls**</u>

1. Open SMDR Service Manager (**Start/TapitNOVA/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.

<u>**To stop collecting calls**</u>

1. Open SMDR Service Manager (**Start/TapitNOVA/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.

<u>**To test SMDR data collection with Test Console**</u>

1. Open SMDR Service Manager (**Start/TapitNOVA/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/TapitNOVA/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 not available for ALL PBX formats. For some PBX formats it is checked by default. 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 TapitNOVA is collecting SMDR data via COM Port, open **Settings/Com Port**. However, if TapitNOVA is collecting SMDR data from text file (SMDR data is collected via IP Collector, CDR Loader or another utility) proceed with point 22.

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.

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/TapitNOVA/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 Monito**r 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.
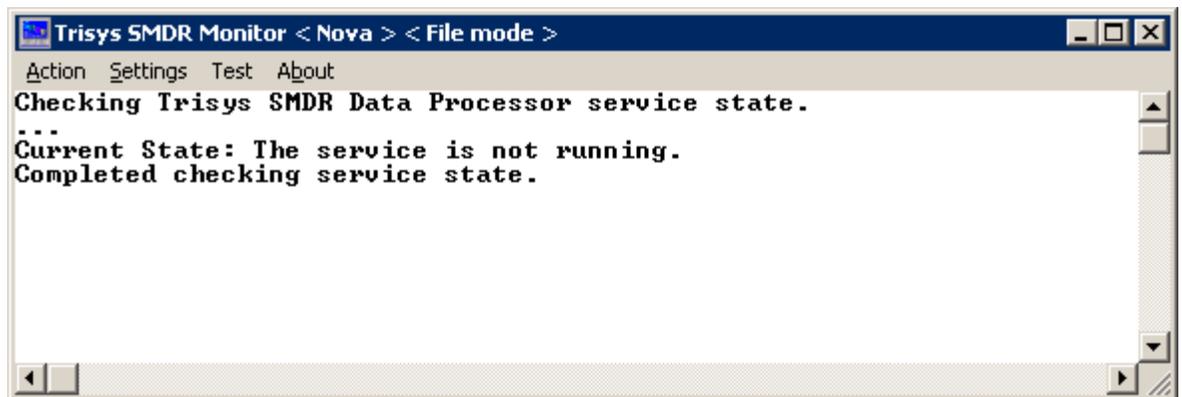
5.   **SMDR Monitor Action** menu has following options:

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, go to .

---

1.   Open SMDR Service Manager (**Start/TapitNOVA/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 not available for ALL PBX formats. For some PBX formats it is checked by default. 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 TapitNOVA is collecting SMDR data via COM Port, open **Settings/Com Port**. However, if TapitNOVA 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.

REPLAY NOVA

Replay Player

Replay Nova Player is available only with the purchase Replay Recording solution.

To Play a Voice Recording

Voice Recordings can be played via TapitNOVA detail reports.

1. Log in to TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.
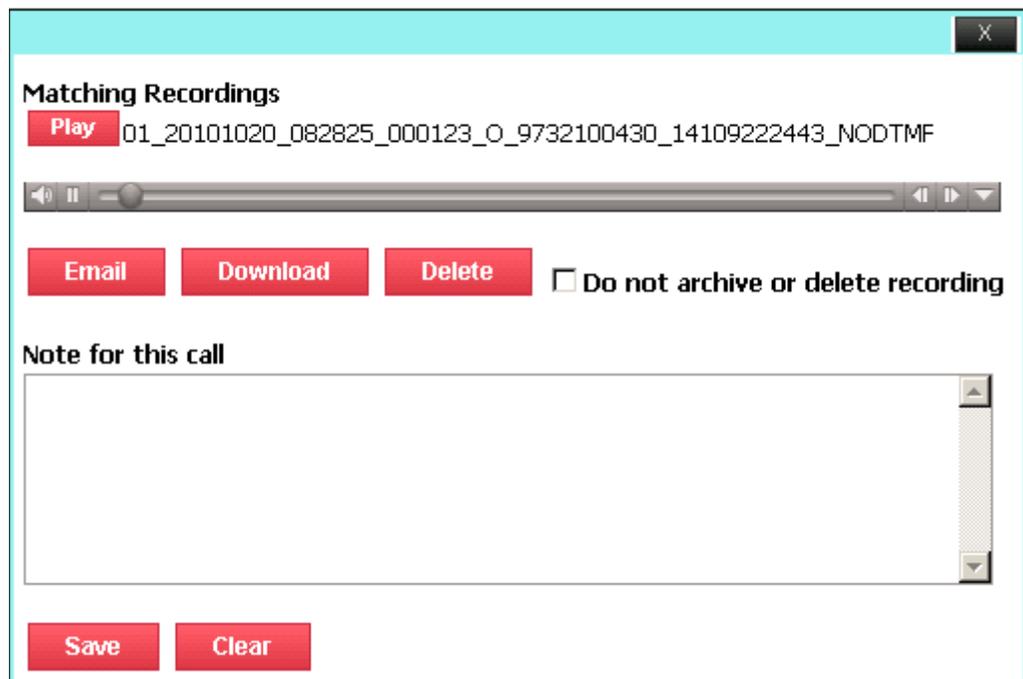
5. The corresponding recording plays automatically. At times Replay may find more than one recording. In that case Replay will automatically play the first recording on the list. If you would like to play another recording from the displayed list, click on the **Play** button corresponding to it.

To Email a Voice Recording

Voice Recordings can be emailed to the desired recipients, provided email settings are entered into TapitNOVA (System\System\Email, see page 127).

The Email button is not displayed unless TapitNOVA user is granted a permission to Email recordings (via System\Security).

1. Log in To TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.

5. Most of the time Replay displays one recording, however, sometimes, Replay may find more than one voice file. The top most recoding plays automatically and is the selected one.
   If you would like to email another recording on the list, click on the **Play** button next to it to select it.

6. Click on **Email**.

7. Enter recipient's email address into the **To** field. If you wish, you can enter the cc and bcc email addresses in the corresponding fields.
8. Enter the email subject into the **Subject** field.
9. Enter your message into the **Message** field.
10. Click on **Email**. The message with the voice file attachment has been emailed.

To Download a Voice Recording

The Download button is not displayed unless the TapitNOVA user is granted a permission to download recordings (via System\Security)

1. Log in To TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.

5. Most of the time Replay displays one recording, however, sometimes, Replay may find more than one voice file. The top most recoding plays automatically and is the selected one.
    If you would like to download another recording on the list, click on the **Play** button next to it to select it.
6. Click on **Download**.
7. Internet Explorer displays the message prompting you to either run or save the file.
8. Click on **Save**.
    Save the file to the desired location.

To Delete a Voice Recording

The Delete button is not displayed unless TapitNOVA user is granted a permission to delete recordings.

1. Log in To TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.

5. Most of the time Replay displays one recording, however, sometimes, Replay may find more than one voice file. The top most recoding plays automatically and is the selected one.
   If you would like to email another displayed recording, click on the **Play** button next to it to select it.
6. If the **Do not archive or delete recordings** check box is checked, the **Delete** button is hidden. Click on the **Do not archive or delete recordings** check box to show **Delete** button.
7. Click on **Delete**.
8. Click **OK** to the confirmation message.
9. Voice file is deleted. A new empty file is created and a file name is reflecting the deletion date.
10. If a user tries to play this file again, he will receive a message "This file has been deleted".

To Exclude a Voice Recording from Scheduled Archive\Delete

By default all voice files are included in the scheduled archive\delete. The archive or delete is scheduled via Replay Nova Manager. Once the recordings are archived or deleted, they are not available for playing via TapitNOVA detail reports.
A user may decide that a recording must be available for playing for an extended period of time and thus it has to be excluded for scheduled archive\delete.
The **Do not archive or delete recordings** option is used to mark a voice recording KEEP and exclude it from scheduled file maintenance.

The Do not archive or delete recordings checkbox is not displayed unless TapitNOVA user is granted a permission to keep recordings (via System\Security).

1. Log in To TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.

5. Most of the time Replay displays one recording, however, sometimes, Replay may find more than one voice file. The top most recoding plays automatically and is the selected one. If you would like to select another recording on the list, click on the Play button next to it.

6. Click on the **Do not archive or delete recording** check box.
☑ Do not archive or delete recording This Voice file will not be archived or deleted next time the scheduled archive\delete takes place.

To Include a Voice Recording into automatic Archive\Delete

By default all voice files are included in the scheduled automatic archive\delete. However, at times, a recording that has been previously excluded from scheduled file maintenance, has to be released.

The Do not archive or delete recordings checkbox is not displayed unless TapitNOVA user is granted a permission to keep recordings (via System\Security).

1. Log in To TapitNOVA.
2. Run a detail activity report. (For example: the Miscellaneous – Detail by Date report). See page 43 on how to generate a report.
3. Find a desired call record and click on a field in a first column of the report (for example: the Time field on the Miscellaneous – Detail by Date report)
4. The Replay Player shares the screen with the Call Note feature. It is displayed in the upper right corner of the report.

5. Most of the time Replay displays one recording, however, sometimes, Replay may find more than one voice file. The top most recoding plays automatically and is the selected one. If you would like to select another recording on the list, click on the Play button next to it.

6. Click on the **Do not archive or delete recording** check box to uncheck it. ☐ Do not archive or delete recording This voice file will be archived or deleted next time the scheduled archive\delete takes place.

To create a user with Replay permissions

In order to be able to listen to the voice files TapitNOVA users have to be granted **recordings** permissions. A user can be permitted to listen, keep and delete the recordings.

Select the Replay functions this login may perform

Replay function
☑ Listen to recordings ☑ Delete recordings ☑ Keep Recordings ☑ Email/Download Recordings

[Previous] [Next] [Cancel] [Delete]

Listen to recordings – a user is allowed to listen to voice recordings.

Keep recordings – a user is allowed to exclude a voice recording from the scheduled archive or delete.

Delete recordings - a user is allowed to delete individual voice recordings using the Replay Player.

Email/Download Recordings – a user is allowed to email or download individual voice recordings.

To allow user delete, keep, email/download recordings a user has to be granted permission to listen to recordings.

The below are the guidelines on how to create a user with recordings permissions.

1. Log in to TapitNOVA.
2. Click on the **System** button located on the top of the screen.
3. Click on the **Security** tab. The **Current TapitNOVA Logins** list is displayed.

Manage a Login

Login Identity

User Name

test_user

Password

••••••••

Email

user@trisys.com

Comment

This user is a System Manager

Login Role

○ User   ○ Administrator   ◉ System Manager

Account Status

◉ Active   ○ Deactivated

Save   Cancel

4. Click on the **Create a New Login** button.
5. Enter a user name and a password. The password has to be a least 7 characters long.
6. Enter email address for this user account into the **Email** field.
7. Enter account description into the **Comment** field.
8. Select one of the security level options under **Login Role**.

    System Manager – this is the highest level of security. This user will be able to access all features of the TapitNOVA application.
    Administrator – a user account with this security level will have access only to **Dashboard**, **Reports** and **Admin** sections of TapitNOVA. **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 TapitNOVA will not be available for this user.
    Note: each of the above security levels can be restricted by a variety of permissions.

9. Accept the default **Active** option under the **Account Status**.
10. Click on **Save**.

11. Once the account is saved the **Current TapitNOVA Logins** list is displayed. To assign permissions to the newly created account, find it on the list and click on it.

User	Created	Last Login	Email	Role	Active
test_user	1/21/2010 6:42:13 PM	1/21/2010 6:42:13 PM	user@trisys.com	system_manager	Yes

12. The **Manage a Login** screen comes up.
Click on the **Create a new permission** button.
13. Select the Recording option under **Select a Permission Type**.

Select a Permission Type

- ○ Account Codes
- ○ Authorization Codes
- ○ Clients
- ○ Departments
- ○ DNIS Numbers
- ○ Extensions
- ○ Locations
- ◉ Recordings
- ○ Report Groups
- ○ Users

[Next]   [Cancel]

14. Click on **Next**.

Select the Replay functions this login may perform

Replay function
☑ Listen to recordings ☑ Delete recordings ☑ Keep Recordings ☑ Email/Download Recordings

[Previous]   [Next]   [Cancel]   [Delete]

Click on the options you would like to grant to the user.
Listen to recordings – a user is allowed to listen to voice recordings.
Keep recordings – a user is allowed to exclude a voice recording from the scheduled archive or delete.
Delete recordings - a user is allowed to delete individual voice recordings using the Replay Player.
Email/Download Recordings – a user is allowed to email or download individual voice recordings.

To allow user delete, keep, email/download recordings a user has to be granted permission to listen to recordings.

15. Click on **Next**. This screen displays summary of the newly created permission. If this is correct, click on **Finish**.
    Otherwise, you can click on **Previous** and edit the permission.

Here is your permission

Grant access to the following Replay functions: Listen to recordings, Delete recordings, Keep recordings, Email/Download Recordings

Previous   Finish   Delete   Cancel

16. The **Login Permissions** screen reflects newly added permission.

Login Permissions

Object	Permission
Recordings	Grant access to the following Replay functions: Listen to recordings, Delete recordings, Keep recordings, Email/Download Recordings

Phone System Integration

Shoretel Integration

Once TapitNOVA is installed, there are two choices for configuring the collection and processing of the necessary SMDR Data.

To set up the PBX Settings:

1. Go to Start -> Programs -> Tapit Nova -> SMDR Service Manager
2. Go to Action -> Stop Service
3. Go to Settings -> PBX Format
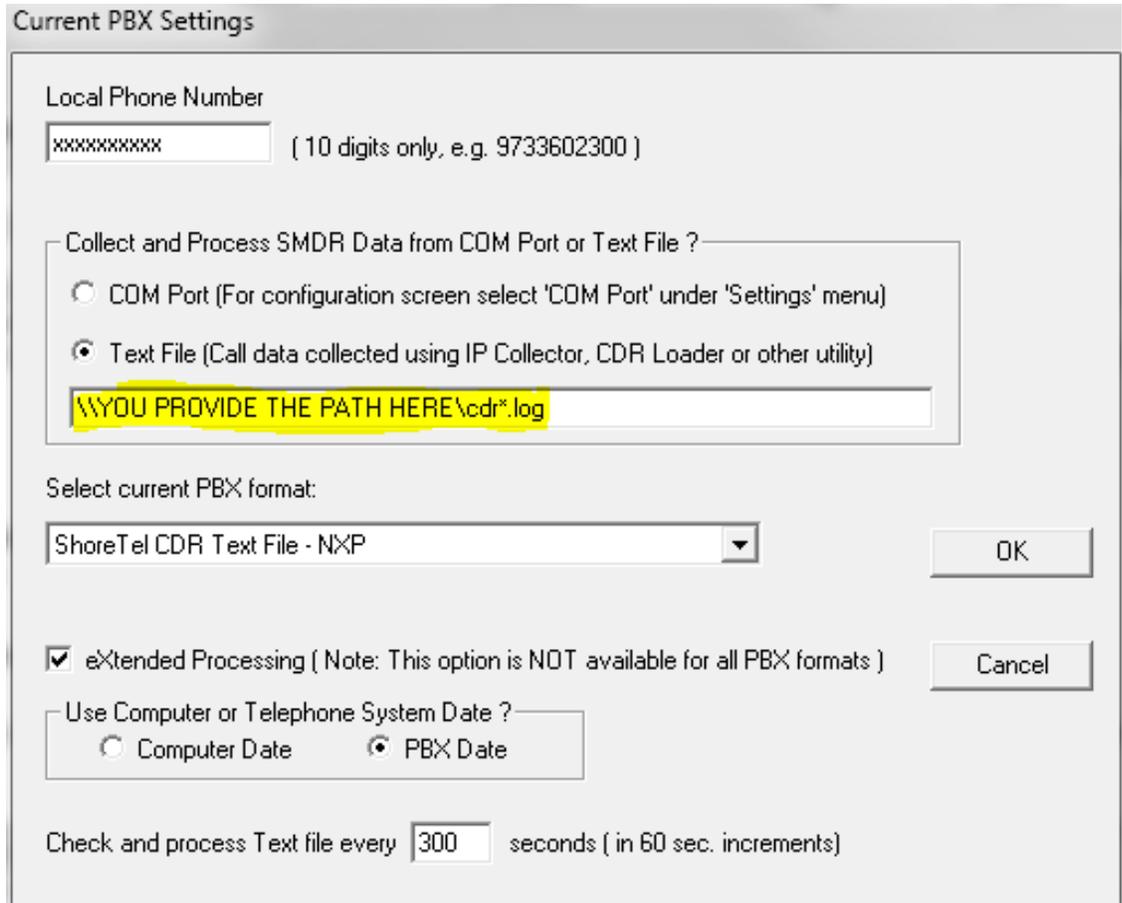
4. Select one of the two following configuration options:
    A. Text File
       This option requires the path to the log files created by the ShoreTel system. The path is to be provided by ShoreTel during setup. TapitNOVA's SMDR Service Manager uses these files to create a database from which TapitNOVA queries.

Since ShoreTel cdr*.log files start at midnight, data is unavailable until it is released. In order to test if this setup works properly, you must run reports for the previous day. Therefore, all reports will be a day behind at all times.

If the customer requires call records more than once a day, the text file option is not for them.

If this solution does not work for the customer because they wish to have current day data, please select to use COM Port.

B. <u>COM Port</u>
For data to be sent to the SMDR Service Manager as a call is completed, please connect a COM Port between the TapitNOVA setup and the PBX. This will allow the SMDR to immediately add calls to the database. Here the reports will be updated when calls end.

Trisys Inc.
187 Columbia Turnpike
Suite 484
Florham Park, NJ 07932

www.trisys.com

Phone: 973-360-2300
Fax: 973-360-2222
Email: general@trisys.com