Tapit NOVA ezBox
Turnkey Call Accounting Manual

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Document Revision Record

ABV	Description
160919	New Template
161118	Changes to connecting to the network, browser image, and username and password information (pages 4,5, 10)

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Getting Started

Step 1.   Connect ezBox PC to the network.   **p. 3**
(**p. 4** for ezBox <u>Enhanced</u>)

Step 2.   Set up access to ezBox either via Remote Desktop or   **p. 5**
by connecting a monitor, a keyboard and a mouse
directly to ezBox PC.

Please note:
Monitor is NOT provided by Trisys;
Keyboard and a mouse are **<u>ONLY</u>** included with
ezBox **<u>Enhanced</u>**.

Step 3.   TapitNOVA is already installed on the ezBox. Some of
the TapitNOVA settings are system specific. They
have to be configured so your call data is processed
correctly.

First, configure SMDR Service Manager.   **p. 6**

Second, enable TapitNOVA email feature – for   **p. 11**
reports and system notifications.

Third, refer to TapitNOVA manual and, if needed, set
up Users, Departments, Clients, DNIS Numbers and
Campaign, Matter Codes, Pricing, etc.

Connecting ezBox to your network

1. Connect your network cable to the **LEFT RJ-45** slot (when looking from the back).

2. Turn the ezBox PC on.
   By default, ezBox is configured to be a member of your Workgroup, and get the IP address from your DHCP server.

3. Open **Window Explorer** and browse to **Network**.

4. **TAPITNOVA** should appear as one of the computers listed.
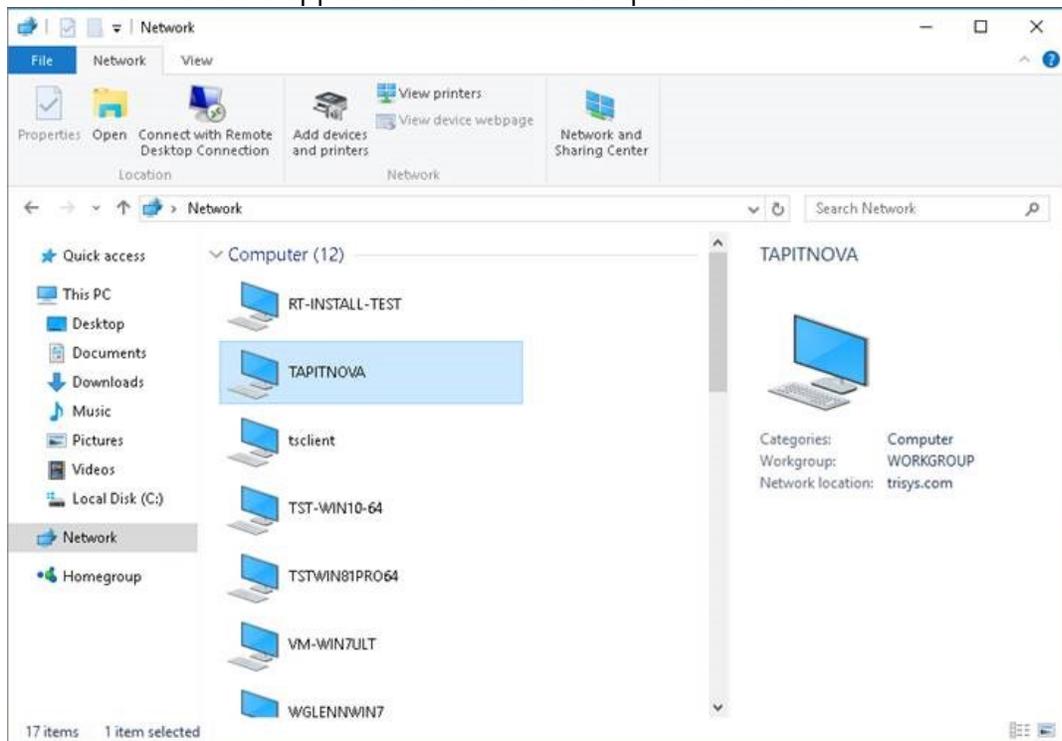
5. This will confirm it has been connected to your network.

Connecting ezBox *Enhanced* to your network

1. Connect your network cable to the **RJ-45** slot (on the back panel).

2. Turn the ezBox PC on.
   NOTE: the "rackmount" case has 2 switches that must be turned ON. One is located on the back of the PC next to the power cord. It must be **turned ON first**. Then, on the front panel (the left side, above the DVD), press the **LEFT button** to turn the PC on.
   NOTE: By default, ezBox is configured to be a member of your Workgroup, and get the IP address from your DHCP server.

3. Open **Window Explorer** and browse to Network.

4. **TAPITNOVA** should appear as one of the computers listed.
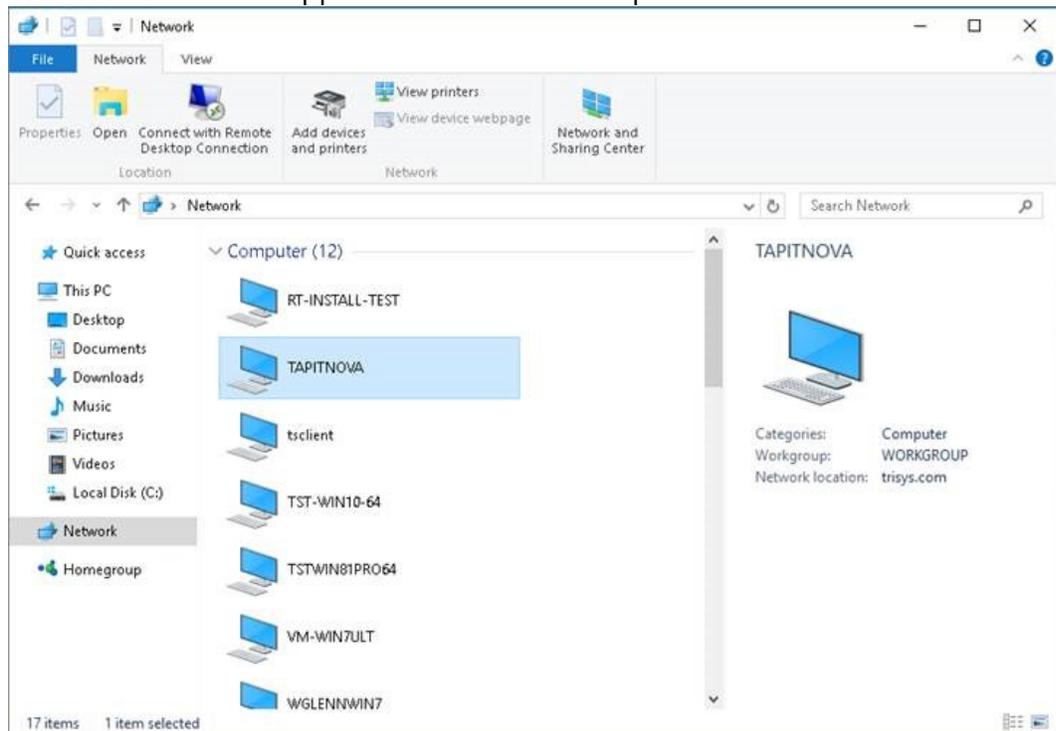
5. This will confirm it has been connected to your network.

Accessing ezBox

Once the ezBox PC is connected to the network you can access it in two ways.

1. By connecting a monitor, a keyboard and a mouse directly to the ezBox PC.
    Please note: a monitor, a keyboard and a mouse are not included in the ezBox
    purchase.

2. By remote desktop access; ezBox gets the IP address from your DHCP server as
    soon as it is connected to the network. Your network administrator will be able to
    provide the IP address for the for the remote connection to the ezBox.

3. Log in to the ezBox PC with default windows account:
    User Name: **admin**
    Password: **trisys123**

Configuring SMDR Service Manager

Before using TapitNOVA the SMDR Service Manager needs to be configured.

1. If you are not logged in to ezBox PC follow instructions on how to access ezBox from section above, Accessing ezBox.

2. The SMDR Service Manger may already be opened and minimized on your PC, if this is not the case, open SMDR Service Manager - **Start/TapitNOVA/SMDR Service Manager**.

3. Click on the **Action** menu.

4. Click on **Stop Service**. If **Stop Service** option is disabled (grayed out) it means the service is stopped already and you can proceed with pt.4.

5. Click on the **Settings** menu.

6. Click on **PBX Format**.

7. The **Current PBX Settings** screen comes up.
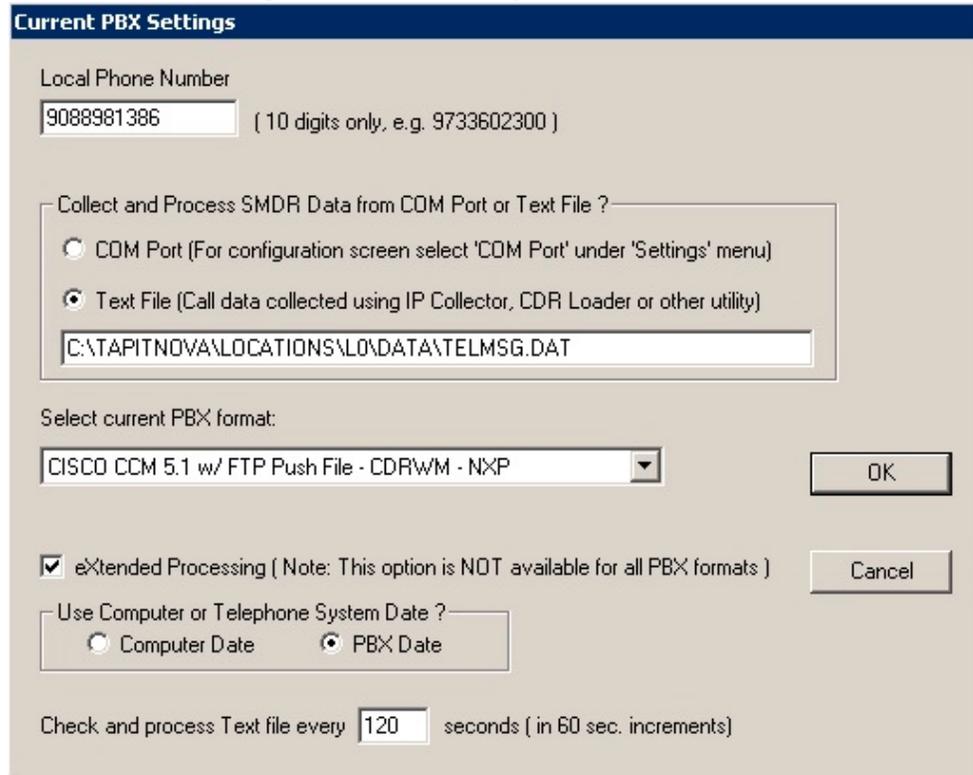
> Note: in case you have more than one location (you've purchased Remote Manager) this screen pertains to the Main location.

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

9. Depending on how Tapit is obtaining SMDR data click on one of the option 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.

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

11. **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.

12. **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**.

13. **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).

14. Click on **OK** to save settings.

15. 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.
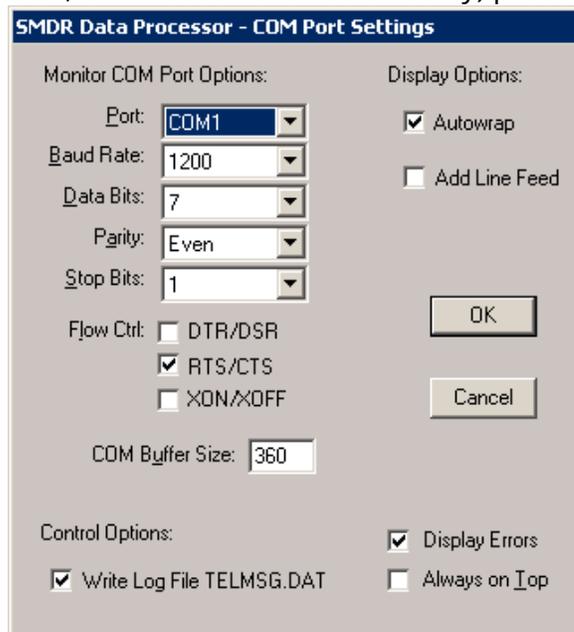
16. **Port** – click on the down arrow icon in the **Port** field to select a port on the computer the SMDR cable is connected to.

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

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

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

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

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

22. **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).

23. When finished click on **Action** and then **Start Service** to start data collection. The **SMDR Data Processor Service** has started and is ready to process call data.

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Accessing TapitNOVA via Internet Explorer

TapitNOVA interface is 100% Web based. You can access it from any PC with the connection to ezBox PC.

1. Open your Internet Explorer.
2. Type in the URL field: **http://tapitnova/TapitNova/** and press **ENTER**.
   The Tapit Call Accounting screen comes up.
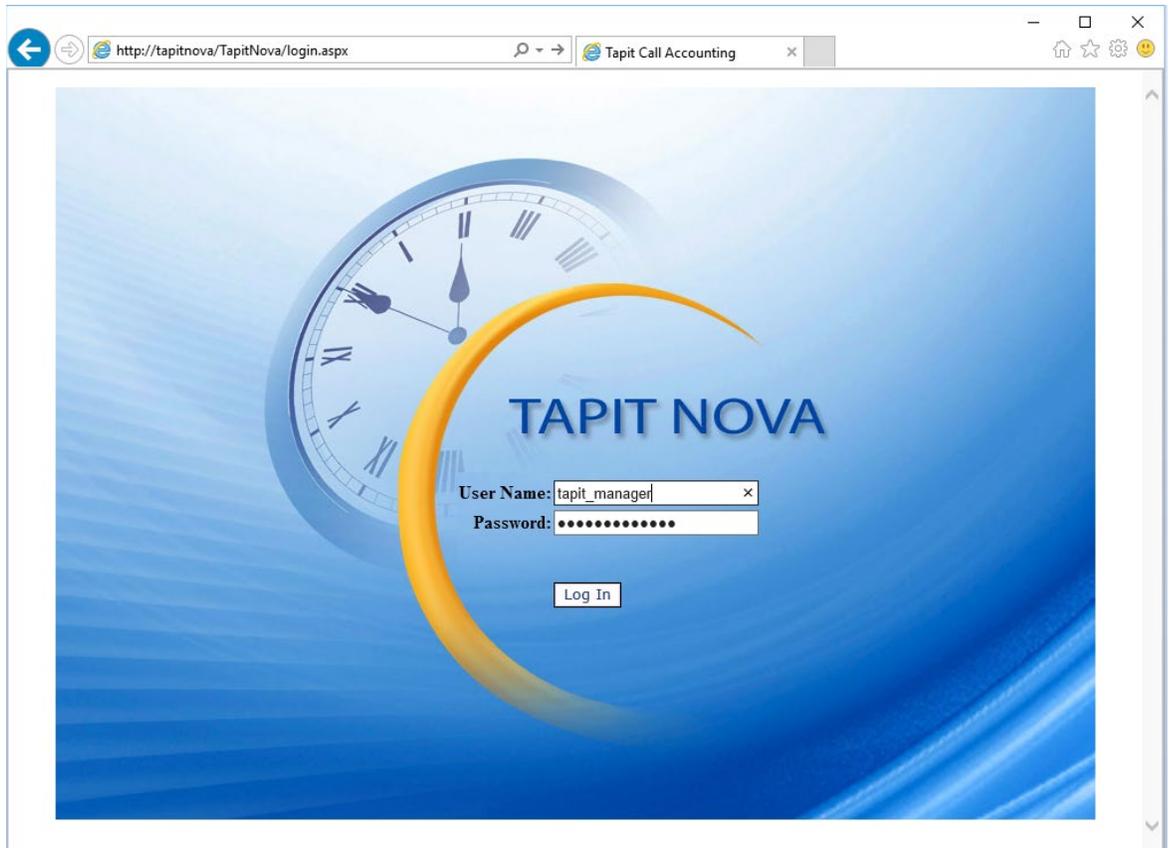
3. Login into TapitNOVA with the default login credentials (user name: tapit_manager and password: tapit_manager).
   Enter **tapit_manager** into both user name and password fields.
   Click on **Log In**.

"tapit_manager" is a default System Manager account. It works as both a user name and a password for logging in to TapitNOVA. This user account cannot be deleted. If you choose to change the password, please be sure to make note of it as there is no alternative password to access the system. You can create additional logins under System > Security.

Enabling TapitNOVA Email

We strongly recommend that you configure **Email** settings in TapitNOVA.
The **Email Settings** screen is used to enter email information needed for sending reports and/or system notifications.

1. Log in to the TapitNOVA application (follow instructions from the section above **Accessing TapitNOVA via Internet Explorer** on how to 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 **Email** link. The **Email** screen is displayed.

Email Settings

SMTP Server:

smtp.gmail.com

Port:

587

☑ **Use SSL**
☐ **Use Default Credentials**

From Email Address:

sender@gmail.com

From Email Name:

TAPIT NOVA

Password:

•

To Email Address (Separate multiple addresses with ;) :

recipient1@trisys.com; recipient2@trisys.com

Save

The above settings are for EXAMPLE ONLY. The correct settings for your SMTP server should be easily obtained from your Network administrator. Properly configured email settings are critical to optimal performance of TapitNova. It is the ONLY way that Nova can communicate with you.

5. **Host** – enter the name of the SMTP Server.

6.   **Port** – enter the port you would like to use to send email from TapitNOVA.

7.   **SSL** – check this option if you would like to use SSL certificate.

8.   **Use Default Credentials** – check this option if you would like to use **Default Network Credentials**. Otherwise, email will be sent anonymously.

9.   **From Email Address** – enter sender's valid email address.

10. **From Email Name** – enter the name to represent sender.

11. **Password** – enter password for SMTP Server authentication (optional, only if needed).

12. **Send Tapit Error Reports to** – enter recipient's valid email address.

Hardware Support and Warranty

Trisys takes great care to make sure that all our hardware systems (including all hardware and software components) are fully operational prior to shipping. The initial **one year** support and warranty is provided with the purchase of every system, and covers normal business use. Additional support and warranty may **only** be purchased while the system is still under support and warranty.

In the unlikely event that any component of our system malfunctions, we will fix or replace it as long as the system is under warranty.

The following is not covered under our support and warranty agreement. Trisys may consider repairing such a system; however, the repairs would be on a "Time and Material" basis:

The following voids the warranty:

Any modification made to the hardware or software components (as well as installation of any additional software) without prior written consent from Trisys will void the warranty;

Any damage to the system resulting from vandalism, software virus, power urge/outage, an act of nature, or any type of physical abuse.

Sending hardware systems to Trisys for warranty work:

Please make sure to obtain Work Order # from Trisys' technical support; then clearly display it on the package. Units received by Trisys without WO# will not be opened until all information is available. This may significantly delay the repair work.

Each hardware system sold by Trisys has the necessary operating system and hardware device drivers software included. When sending your system for repair, the **original software must** accompany the unit. If this software is not provided, Trisys will have to bill the client for the replacement cost.

It is client's responsibility to backup, if possible, any important data. Trisys will not be responsible for any data loss.

All systems sent back to Trisys for repair must be packaged well to minimize the damage in transit. We strongly recommend that the system be insured during shipping. Trisys will not be responsible for systems damaged in transit on the way to us.

Trisys' technical support will provide you with the shipping address of your unit.

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