

IMPORTANT

When upgrading your TAPIT software make sure that all call accounting data has been exported before you begin the installation process.

Registration Settings:

<i>SERIAL NUMBER:</i>	
<i>COMPUTER ID:</i>	
<i>REGISTRATION NUMBER:</i>	

Once you have your TAPIT software functioning properly copy your phone system settings onto this page and save it for future reference

<i>PORT:</i>	
<i>SPEED:</i>	
<i>PARITY:</i>	
<i>DATA BITS:</i>	
<i>STOP BITS:</i>	
<i>PBX TYPE:</i>	
<i>DATE SELECTION (PBX OR COMPUTER):</i>	

Contents

Contents	i
Introduction	1
Introduction - Overview	1
System Requirements	1
Installation	2
Before installing your software	2
Installing Tapit Single User.....	3
Setting up TAPIT Single User.....	3
Installing Tapit Multi-User.....	6
TAPIT Server Installation.....	6
Setting up TAPIT Server.....	6
TAPIT Client Installation.....	6
Setting up TAPIT Client	6
NOTE FOR NOVELL NETWARE 3.11 USERS.....	7
Upgrading TAPIT 2000 using different serial number.....	7
Upgrading TAPIT 2000 to a new version of TAPIT 2000 using same serial number.....	7
Reinstalling TAPIT 2000	8
Upgrading TAPIT for Windows to TAPIT 2000	8
Upgrading TAPIT for DOS to TAPIT 2000.....	9
Registration	11
Main Menu	12
Main Menu - Overview	12
Users/Departments	13
Overview	13
Users.....	13
Departments.....	14
Hierarchy Tree.....	17
Clients	18
Managing Clients.....	18
Reports	20
Generating Reports.....	20
Statistics	26
Statistics Concepts.....	26
To generate statistical graph.....	26
System Maintenance	28
System Maintenance - Overview.....	28
System Parameters	29
System Parameters Screen.....	29
Communications.....	29
Call Costing.....	31
Activity.....	31

Trunks.....	32
Destination.....	32
Call Editor	34
Working with Call Editor	34
TAPIT Pricing	35
Pricing Call Records.....	35
Reindex Database	38
Reindexing.....	38
Recosting	39
Recosting Call Records	39
Dialing Patterns	40
Working with Dialing Patterns	40
Report Scheduler	42
Using Report Scheduler.....	42
Data Maintenance	43
Data Maintenance Concepts	43
Export.....	43
Import.....	43
Call Records Maintenance.....	44
Export to Billing Software.....	45
Import Tapit DOS Data	45
Import V&H Data.....	45
Report Designer	46
Creating Custom Reports	46
Fraud Alert	48
Fraud Alert Features	48
Parameters	48
Delete Log File.....	49
Test Alarms	49
Trunks.....	50
Extensions	50
Dialed Numbers.....	51
Database Repair Utility	53
Using Repair Utility	53
SMDR Monitor	55
Understanding SMDR Monitor	55
SMDR Monitor Menu Options:.....	56
Action.....	56
Settings.....	56
PBX.....	57
Software License Agreement	58
Contents.....	58
Technical Support	60
Technical Support from Trisys, Inc.	60
Troubleshooting	60

TAPIT End of the Month Procedures.....	61
To Prevent Data Loss	61
SMDR ALARM	63
REQUIREMENTS	63
Hardware:.....	63
Supported Operating Systems:	63
Software Requirements:	63
INSTALLATION	64
Before installing SMDR Alarm.....	64
Installing SMDR Alarm	64
USER INSTRUCTIONS	65
Setting up the SMDR Alarm	65
Setting up Phone Number tracking	67
Example of the Phone Number tracking	68
Understanding the TPSALARM.LOG file.....	68
WEB REPORTS	70
REQUIREMENTS	70
Hardware:.....	70
Windows NT and Windows 2000 software requirements:.....	70
Windows 98 software requirements:	70
INSTALLATION	71
Before installing Tapit Web Reports.....	71
Installing Tapit Web Reports	71
Installing Tapit Web Reports on a Windows NT or Windows 2000 computer other than the TAPIT Server machine.	72
USER INSTRUCTIONS	77
TROUBLESHOOTING WEB REPORTS	78
Index	79

Introduction

Introduction - Overview

- TAPIT is a call management and accounting software package designed to report on the phone activity of a business.
- It is a tool to help identify and control expenses, provide statistical information, and assist in overall management of the business.
- TAPIT collects all available information about incoming and outgoing calls from your telephone equipment and stores it for later processing.
- TAPIT is a real-time system, which means that all phone activity data is current to the minute.
- TAPIT has an on-line help facility. Any time you need more information about a specific screen, just press **F1** key and related help screen will be displayed.

System Requirements

Minimum System Requirements

- Pentium™ 133 MHz Based PC
- 32 MB RAM
- Microsoft™ Windows 95/98/NT/2000
- 150 MB free disk space
- One RS232 port connection to the PBX® SMDR port
- Power Management feature of your system must be disabled

Assumptions

This manual assumes that you are familiar with using a mouse, as well as with the common Microsoft Windows elements i.e. Scroll Bars, Selecting Menu Items etc. For detailed description on these elements please refer to Microsoft Windows User Guide.

Installation

Before installing your software

In an effort to separate possible hardware and software issues we need to confirm the presence of clear SMDR data (this will tell us if the connection between PBX and computer is intact). To do that we'll use a communications software called HyperTerminal®, which comes bundled with Microsoft® Windows. Please take the following steps:

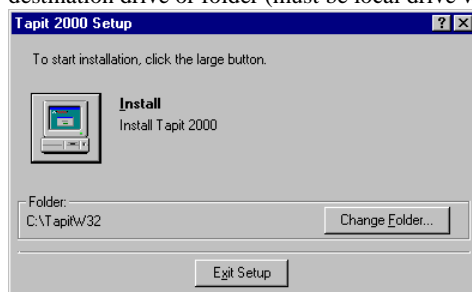
1. Click on **Start**
2. Click on **Programs**
3. Click on **Accessories**
4. Click on **HyperTerminal®**
5. Double-click **Hypertrm.exe**
6. Enter name for session, i.e. SMDR Test. Click **OK**
7. Using the arrow on the right of **Connect using:** select **Direct to Com X** (where X= the number of the comport connected to the PBX). Click **OK**
8. Configure COM Port settings as per PBX specifications. Click **OK**
9. Proceed with Step 10, unless you get a message **Unable to open Com X**. If you see this message, you will need to change the **X** value (use a different Com Port). Here is what you need to do:
 - Click **File** on the Menu Bar
 - Click **New Connection**
 - Go back to Step 6
10. You should see "Connected" in the left lower corner with elapsed time counter.
11. At this stage, if you have everything configured properly, every time you hang up after a completed call, you should see legible call data displayed on the screen.
12. If clear data is displayed write down communication parameters and exit **HyperTerminal**. Now you can proceed with the installation of Trisys, Inc. software.
13. However, if **NO** data or "garbled" is displayed you may have a problem with either your cable (between PBX and the Com Port) or PBX's SMDR port. At this stage you should contact you Phone Dealer for help.

Installing Tapit Single User

1. Insert TAPIT 2000 CD into the CD ROM drive. Trisys StartUp Manager screen is displayed.



2. Click on **Install TAPIT 2000**. TAPIT 2000 Setup screen appears. Click on **Continue**.
3. Click on **OK** button on the next screen to install TAPIT 2000 in TAPITW32 folder on drive C: or click on **Change Folder** button to change a destination drive or folder (must be local drive with available required free disk space). **TAPIT 2000 Setup** screen appears.



4. Click on **Install** button/icon to continue (or click on **Change Folder** button to change a destination drive or folder). Program installs TAPIT files and updates your system.
5. Program displays a message asking if your TAPIT software has a serial number. If you have a serial number click on **YES**, otherwise click on **NO** and TAPIT will be installed as a trial version.
6. TAPIT displays **Enter Serial Number** screen. Enter your TAPIT software serial number. Click on **OK**.
7. TAPIT 2000 processes the serial number. Product information message is displayed. Click on **OK**.
8. Setup program displays a registration message as a reminder to register TAPIT software.
It is very important to register your TAPIT 2000 promptly. TAPIT will stop functioning if you do not register it 30 days from the date of installation.
You can find registration instructions on page 9 of this manual, “Getting Started” booklet included with your package or TAPIT CD in **register.txt** file.
9. When installation is completed the installation program displays a message “TAPIT 2000 Setup was completed successfully”. Click on **OK**. It is recommended to restart the computer. Next step is to proceed with **Tapit Setup**.
10. Go to **START/Programs/TAPIT 2000** and run **TAPIT Setup** - see **Setting up TAPIT Single User** instructions following this section.

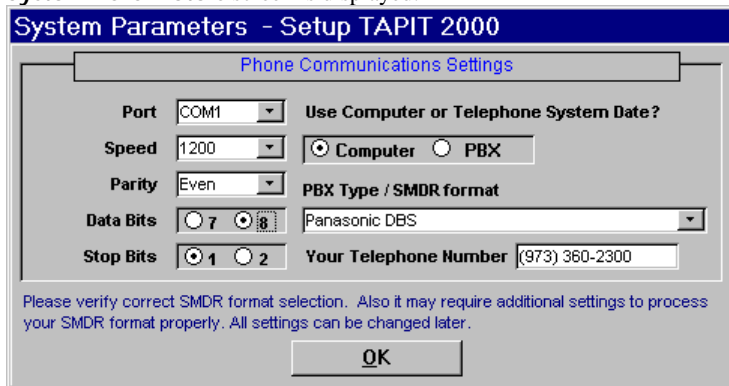
Setting up TAPIT Single User

1. When the program installation is completed you can proceed with the configuration of TAPIT so it will communicate with the phone system properly.
Open **Setup** program by clicking on **Start/Programs/Tapit 2000/Tapit Setup**.
A message with product information is displayed. This message contains the TAPIT Serial Number. Verify that the number is correct and click on **Yes**.

2. **TAPIT 2000 Setup** screen appears. This screen displays your software serial number and product description.



3. Click on **START SETUP** button.
4. The setup program will display a message indicating your database location and will ask you if you want to keep the current location settings. We recommend the default directory is accepted (that is where program files were installed). However, a different drive and/or directory may be specified if i.e. there is not enough free disk space on the drive where application files were installed. Click on **Yes** to accept the default location.
5. **System Parameters** screen is displayed.



Note: All settings for this screen can be changed in the TAPIT 2000 application on Maintenance/System Parameters screen.

6. Click on the **down arrow** in the **Port** field to select a port the SMDR cable is connected to.
7. Click on the **down arrow** icon in the **Speed** field to select the phone system transmission speed/ baud rate.
8. Click on the **down arrow** icon in the **Parity** field to select the phone system parity setting.
9. Click on **7** or **8** in the **Data Bits** fields to select the phone system data bits setting.
10. Click on **1** or **2** in the **Stop Bits** fields to select the phone system stop bits setting.
11. Click on the **Computer** or **PBX** in the **Use Computer or Telephone System Date?** field to specify whether date information for the call records is going to be processed based on the computer or PBX date.
The default setting for this option is **Computer**. However, if you are certain that your PBX is generating a valid date you can change this setting to **PBX**.
12. Click on the **down arrow** icon in the **PBX Type**. Select your telephone system type (that TAPIT computer is connected to) from the list.
If an incorrect selection is made your data will be processed incorrectly or not at all.
13. Click on the **Telephone Number** field and enter your main telephone number (do not use 800 number).
14. Click on **OK**.
Setup program will ask if you have a V&H Data Diskette. This is an optional pricing table that can be purchased with TAPIT.

15. If you have purchased V&H pricing tables, click on **Yes**.
TAPIT starts loading V&H pricing tables. This process will take several minutes.
You can also load V&H pricing files later directly from the TAPIT application.
Otherwise, click on **No**.
16. If setup is completed successfully, click on **EXIT**, otherwise print out a log file (go to **SHOW LOG** and click on the **Print** button) and call Trisys Technical Support at 973 360 2300 option 3.
17. If everything is complete **reboot** your computer.
18. Verify the TAPIT Monitor is running and start your TAPIT application by clicking on **Start/Programs/Tapit 2000/Tapit 2000**.
To confirm that TAPIT is collecting data run a detail activity report for the day.

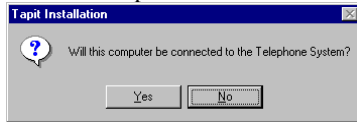
Installing Tapit Multi-User

TAPIT Server Installation

1. One of the computers on the network must be configured as an administrative station. This is where data from the phone equipment will be collected. The administrative station (TAPIT Server) is the only computer that has to go through the TAPIT registration process.
2. To prepare the database folder go into Windows Explorer, find the TapitW32 folder, and under TapitW32 create a new folder called **DATA**. This folder **DATA** must be shared with read/write access on the network. Under **DATA** create a new folder called **MAIN**; this is the folder where the Tapit database has to be stored.

Note: Wherever you will decide to store your data the basic rule for the TAPIT Server setup is: Tapit Database must be stored in the subfolder of the shared folder.

3. Follow the instructions from **Installing Tapit Single User** section above (page 3) pt. 1 through 6.
4. TAPIT 2000 processes the serial number. The product information message is displayed followed by the message:



Click on **Yes**.

5. The setup program displays a registration message as a reminder to register the TAPIT software.
6. When installation is completed the installation program displays a message "TAPIT 2000 Setup was completed successfully". Click on **OK**. It is recommended to restart the computer.

Setting up TAPIT Server

1. When the program installation is completed you can proceed with the configuration of TAPIT so it will communicate with the phone system properly.
Open **Setup** program by clicking on **Start/Programs/Tapit 2000/Tapit Setup**.
A message with product information is displayed. This message contains the TAPIT Serial Number. Verify that the number is correct and click on **Yes**.
2. **TAPIT 2000 Setup** screen appears. This screen displays your software serial number and product description.
3. Click on **START SETUP** button.
4. The message "Will this computer be connected to the Telephone System?..." appears. Click on **Yes**.
5. The Setup program will display a message indicating your database location and will ask you if you want to keep the current location settings. Tapit database must be stored in a **MAIN** folder created prior to installing Tapit on sever machine (refer to pt.2 of Server Installation section above).
Click on **No** to reject the current location.
6. The message "...Store Tapit in the default folder for Tapit/w Multi-user Access?" appears. Click on **Yes**.
7. Follow instructions from page 4 - **Setting up TAPIT Single User** pt.5 - pt.18

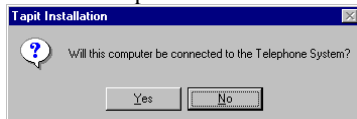
Note: Maintenance option can be accessed only on the TAPIT Server Computer. Also when making any changes on the Maintenance Screen (i.e. Reindex, Data Maintenance or Recosting) make sure that TAPIT applications on all Client computers are closed.

TAPIT Client Installation

Client installation has to be performed on every workstation that will be used to access TAPIT data.

Insert Trisys Software CD in the CD ROM drive. **Trisys StartUp Manager** screen is displayed.

1. Follow the instructions from **Installing Tapit Single User** section above (page 3) pt. 1 through 6.
2. TAPIT 2000 processes the serial number. Product information message is displayed followed by the message:



Click on **NO** since this is a client computer and is not going to be connected to PBX.

3. When installation is completed the Setup program displays a message "TAPIT 2000 Setup was completed successfully". Click on **OK**. It is recommended to restart the computer.

Setting up TAPIT Client

Before running TAPIT Setup, at the client computer **map a network drive to the folder DATA** previously shared on the TAPIT Server machine. For example, if you have mapped it as drive **T:** then the path to the Tapit database on the T: drive will look like: **T:\MAIN\TAPITDB.MDB**.

1. The next step is to configure TAPIT 2000 on the client station, so it will communicate with the database correctly.
Open setup by clicking on **Start/Programs/TAPIT 2000/TAPIT Setup**.

2. The message "Do you want to locate Tapit Database Now? (Recommended)" appears. Click on **Yes**.
3. The file browser window is displayed. Locate the previously mapped network drive and the database in the MAIN folder. Click on **Open**.
4. If setup is completed successfully, click on **EXIT**, otherwise print out a log file (go to **SHOW LOG** and click on a **Print** button) and call Trisys Technical Support at 973 360 2300 option 3.
5. In case everything went well **reboot** your computer.
6. To confirm that TAPIT Client is connected to the server run a detail activity report for the day.

Note: Maintenance option can be accessed only on the TAPIT Server Computer. Also when making any changes on the Maintenance Screen (i.e. Reindex, Data Maintenance or Recosting) make sure that TAPIT applications on all Client computers are closed.

NOTE FOR NOVELL NETWARE 3.11 USERS

Access Locking and Novell NetWare 3.11

When using data from a server back end, Access uses the locking facilities provided by that back end. There is a bug in NetWare 3.11 TTS (Transaction Tracking System) that can result in a server's abending when running certain Access queries or otherwise requesting a large number of locks. Each page of records Access locks uses one or more locks from the NetWare TTS. The defaults in NetWare allow a single workstation to have 500 locks at any given time. This results in a limit of 1M of data that Access can deal with in a single transaction. Since Access tries to lock every record involved in either an update or a delete query before actually carrying out the update or delete, it is quite possible to bump into this limit on a moderately large database.

The problem is that NetWare 3.11 reacts rather poorly to having its lock limit exceeded. It appears to count a lock violation every time it looks at the connection in question, which is still trying to lock more records. Eventually (in about 3-5 *minutes*) *some* internal table overflows, and the entire server goes down, with a frightening message that instructs you to cycle the power. There are two things you can do if this happens to you. The first is to increase the number of locks available, and the second is to apply the NetWare patch that prevents the abend of the server. (Very large queries can still fail, but at least the server doesn't fail along with them.) To increase the number of locks available, enter the following commands at the file server console or in your AUTOEXEC.NCF file:

```
set maximum record locks per connection = 10000
```

```
set maximum record locks = 200000
```

The first parameter is the most locks any single connection can have, and the second is the most the entire server can keep track of. These values (10,000 and 200,000) are the maximums that NetWare 3.11 can accommodate. By setting the maximum record locks per connection to 10,000, Access can handle a transaction up to 20MB. To fix the server abend problem, you need to download the latest NetWare 3.11 patch file. It can be found on CompuServe in the NOVFILES download area, as of this writing, the current version is 311PTD.ZIP. You will need to load two of the NLMs from this file, either directly from the server console or in your AUTOEXEC.NCF file:

```
load patchman.nlm
```

```
load ttsfix.nlm
```

This problem is specific to NetWare version 3.11 and has been fixed in later versions of NetWare.

Upgrading TAPIT 2000 using different serial number

This section of the manual pertains to a registered version of TAPIT 2000 that is being upgraded to a different type of TAPIT call accounting software (i.e. upgrading TAPIT 2000 Single-User to TAPIT 2000 Multi-User), or an upgrade takes place on a new computer.

In such cases please call Technical Support at 973 360 2300 in order to deactivate previous version of TAPIT and obtain registration number for a new version. Do not attempt to delete old version of TAPIT.

Upgrading TAPIT 2000 to a new version of TAPIT 2000 using same serial number.

Upgrading registered version of TAPIT 2000 on the same computer using the same serial number.

1. Click on the **Maintenance** icon on the TAPIT 2000 Main Menu of a current version of your software.
2. Click on **Data Maintenance**. **Data Maintenance** screen opens up on **Export** tab by default. Click **All** in the **Export** field for all data to be exported. The default folder is your current TAPIT 2000 folder. You may choose another folder if you wish. DO NOT Check "Delete Existing Data from Database". Click **Continue**. You will receive "Data Export Completed" message.
3. Click on **Call Records Maintenance** tab. Click on **Export & Keep Call Records**. Then specify the filename for the call records: Calls.txt. Click on **Continue**. At the filter screen, you **must enter the date range for the records you wish to keep** and click on **Continue**. You will receive "Call Records Export Completed" message. Exit from **Data Maintenance** screen.
4. Close TAPIT 2000 and TAPIT SMDR Monitor.
5. Go to Windows Explorer and locate the TAPITW32 folder. Rename the folder as TAPITOLD (if prompted with a warning by the operating system click on OK). Find TAPIT.INI and SERIAL.TXT files. TAPIT.INI file resides in the same folder where **TAPIT database is located**. If you are

not sure of its whereabouts open TAPIT program and press CTRL + F1 keys at the Main Menu screen. Copy both files to another folder as a backup.

6. Proceed with a new installation of TAPIT 2000.

Insert TAPIT 2000 CD into the CD ROM drive. Trisys StartUp Manager screen is displayed.

Click on **Install TAPIT 2000**. TAPIT 2000 Setup screen appears.

Click on **Continue** button. TAPIT 2000 is searching for the installed components.

Click on **OK** button to install TAPIT 2000 in TAPITW32 folder on drive C. (Note that **Change Folder** button allows for setting TAPIT destination path to different than default.) TAPIT 2000 Setup screen appears.

Click on **Install** button to continue. (Note that **Change Folder** button allows for setting TAPIT destination path to different than default)

Program installs TAPIT files and updates your system.

Program displays a following message: "Setup has found Serial Number (*your current serial number*). Is it your current valid Serial Number?" Click on **YES**.

Setup program displays a message "TAPIT 2000 Setup was completed successfully". Click on **OK**. (If prompted by system, restart the computer.)

7. Copy TAPIT.INI file from TAPITOLD folder into new TAPITW32 folder (where your TAPIT database files reside). Let it overwrite the existing file.
8. Go to **START/Programs/TAPIT 2000** and run **TAPIT Setup**. Note that while running TAPIT Setup, System Parameters screen reflects settings from your previous version of TAPIT. Do not change anything unless required. (For setup instructions see Setting up TAPIT on page 4 of this manual.)
9. After completing Setup go to **START/Programs/TAPIT 2000/TAPIT 2000**. TAPIT 2000 provides the following message: "TAPIT will be connected to the database...". Click **OK**.
10. From the **Main Menu**, click on **Maintenance**, click on **Data Maintenance**, click on **Import** tab, and then check all the boxes EXCEPT **V&H Data**. Do Not Check **ALL**. Go to **Directory** and change folder to C:\TAPITOLD. Click **Continue**. After import is finished, you will receive "Data Import Completed" message.
11. Click on **Call Records Maintenance**. Click on **Import Call Records**. Go to **Directory** and change the folder to **C:\TapitOld**. Go to **File Name** and enter the file name: Calls.txt. Click on **Continue**. At the filter screen, you **must enter the date range for the records you wish to keep** and click on **Continue**. After the import is finished, you will receive "Call Record Import Completed" message. Exit **Call Records Maintenance** screen.
If users or clients data has been imported click on **Reindex**. At the **Reindex Options** screen check the **full reindex** option and click on **Continue**. Do not interrupt this process.
12. To confirm successful import of data, run a **Detail Activity by Date** report from the **Report Menu**.
13. If everything is running smoothly after you have completed all the above, you may go back to Windows Explorer & delete the TAPITOLD folder.

Reinstalling TAPIT 2000

In case Trisys has to issue a new serial number for your software you will be advised to Technical Support and they will take you through the installation process. If you are reinstalling with the same serial number and have no data to export follow instructions below.

Open your Windows Explorer.

Go to **TAPITW32** folder.

Select **Setup** folder and delete it.

Now you can proceed with installing TAPIT 2000 - refer to the Installing TAPIT Single User (pg.3). Your system already has information about previously used serial number. While reinstalling TAPIT, program will ask you to either accept or reject existing serial number. Accept the number provided by the system.

Upgrading TAPIT for Windows to TAPIT 2000

In case you are upgrading TAPIT on the same computer:

Click on the **Maintenance** icon on the TAPIT Main Menu of a current version of your software.

Click on **Data Maintenance** and in the **Export** field click **All** for all data to be exported. The default folder is your current TAPIT folder. You may choose another folder if you wish. DO NOT Check "Delete Existing Data from Database". Click **Continue**. You will receive "Data Export Completed" message.

Click on **Call Records Maintenance** tab. Click on **Export & Keep Call Records**. Then specify the filename for the call records, Calls.txt. Click on **Continue**. At the filter screen enter the date range criteria for the records you wish to keep (leave it blank for all) & click on **Continue**. You will receive "Call Records Export Completed" message. Exit **Data Maintenance** screen.

Close TAPIT for Windows and TAPIT SMDR Monitor.

Go to Windows Explorer and locate the TAPITW folder. Rename the folder as TAPITOLD. Find TAPIT.INI. It resides in the same folder where **TAPIT database is located**. If you are not sure of its whereabouts open TAPIT program and press CTRL + F1 keys at the Main Menu screen. Copy both files to another folder as a backup.

Proceed with TAPIT 2000 installation.(see Installing TAPIT Single User on page.3)

Copy TAPIT.INI from TAPITOLD folder into new TAPITW32 folder (where TAPIT database files reside). Allow overwriting an existing file.

Go to **START/Programs/TAPIT 2000** and run TAPIT Setup. Note that while running TAPIT Setup, System Parameters screen will reflect settings from your previous version of TAPIT. Do not change anything unless required. (For setup instructions see Setting up TAPIT on page 4 of this manual.)

After completing **Setup**, go to **START/Programs/TAPIT 2000/TAPIT 2000**.

TAPIT 2000 provides the following message: "TAPIT will be connected to the database...". Click **OK**.

From the **Main Menu**, click on **Maintenance**, click on **Data Maintenance**, click on **Import** tab, and then check all the boxes **EXCEPT V&H Data**. Do Not Check **ALL**. Go to **Directory** and change folder to C:\TAPITOLD. Click **Continue**. After import is finished, you will receive "Data Import Completed" message.

Click on **Call Records Maintenance**. Click on **Import Call Records**. Go to **Directory** and change the folder to **C:\TapitOld**. Go to **File Name** and enter the file name: Calls.txt. Click on **Continue**. At the filter screen, you **must enter the date range for the records you wish to keep** and click on **Continue**. After the import is finished, you will receive "Call Record Import Completed" message. Exit **Call Records Maintenance** screen.

If users or clients data has been imported click on **Reindex**. At the **Reindex Options** screen check the **full reindex** option and click on **Continue**. Do not interrupt this process.

To confirm successful import of data, run a **Detail Activity by Date** report from the **Report Menu**.

If you have completed all the above and everything is running smoothly, you may go back to Windows Explorer & delete the TAPITOLD folder. It is recommended to delete the old TAPIT for Windows program group from the **START, Programs** menu (see MS Windows help).

In case you are upgrading TAPIT on the different computer:

Click on the **Maintenance** icon on the TAPIT Main Menu.

Click on **Data Maintenance** and in the **Export** field click **All** for all data to be exported. The default folder is your current TAPIT folder. You may choose another folder if you wish. DO NOT Check "Delete Existing Data from Database". Click on **Continue**. You will receive "Data Export Completed" message.

Click on **Call Records Maintenance** tab. Click on **Export & Keep Call Records**. Then specify the filename for the call records, **Calls.txt**. Click **Continue**. At the filter screen enter the date range criteria for the records you wish to keep (leave it blank for all) & click on **Continue**. You will receive "Call Records Export Completed" message. Exit **Data Maintenance** screen.

Close TAPIT for Windows and TAPIT SMDR Monitor.

Copy all the exported data files and TAPIT.INI file to an external storage. TAPIT.INI resides in the same folder where TAPIT database is located. If you are not sure of its whereabouts open TAPIT program and press **CTRL + F1** keys at the **Main Menu** screen. Keep this file as a backup.

Proceed with TAPIT 2000 installation on a new computer. See **Installing TAPIT Single User** on page 3.

Copy TAPIT.INI and all the exported data files from the external storage into new TAPITW32 folder. In case of TAPIT.INI allow it to overwrite existing file.

Run TAPIT Setup Program – **START/Programs/TAPIT 2000/TAPIT Setup**. Note that while running TAPIT Setup, System Parameters screen will reflect settings from your previous version of TAPIT. Do not change anything unless required. (For setup instructions see Setting up TAPIT on page 4 of this manual).

After completing Setup program, go to **START/Programs/TAPIT 2000/TAPIT 2000**.

TAPIT 2000 provides the following message: "TAPIT will be connected to the database...". Click **OK**.

From the **Main Menu**, click on **Maintenance**, click on **Data Maintenance**, click on **Import** tab, and then check all the boxes **EXCEPT V&H Data**. Do Not Check **ALL**. Go to **Directory** and set folder to C:\TAPITW32. Click **Continue**. After import is finished, you will receive "Data Import Completed" message.

Click on **Call Records Maintenance**. Click on **Import Call Records**. Go to **Directory** and change the folder to **C:\TapitOld**. Go to **File Name** and enter the file name: Calls.txt. Click on **Continue**. At the filter screen, you **must enter the date range for the records you wish to keep** and click on **Continue**. After the import is finished, you will receive "Call Record Import Completed" message. Exit **Call Records Maintenance** screen.

If users or clients data has been imported click on **Reindex**. At the **Reindex Options** screen check the **full reindex** option and click on **Continue**. Do not interrupt this process.

To confirm successful import of data, run a **Detail Activity by Date** report from the **Report Menu**.

Upgrading TAPIT for DOS to TAPIT 2000

Note that you need to have TAPIT for DOS version 2.9.8 or higher in order to be able to upgrade it to TAPIT 2000.

In case you have an earlier version of TAPIT for DOS your software package should include DOS upgrade disk with appropriate instructions. Only after your DOS package is upgraded you can start upgrading your software to TAPIT 2000.

Go to **C:\Tapit>** prompt and type **TPDBEXP** then press **ENTER**

Start TAPIT for DOS

Select **6** (System Maintenance)

Select **A** (Export for Billing)

Enter criteria for call records that you would like to be imported into TAPIT for Windows

Enter **0** (Zero) in **Select Billing Interface** field and press **F3**

Exit TAPIT using **F10** to the C:\TAPIT> prompt. You need to copy exported files to an external storage media. Floppy disk is used here as an example of such media. Insert a floppy disk into your floppy drive. Proceed with coping exported files to a floppy disk. Type the following:

```
copy tapit.txt a:\ - and press Enter
copy client.txt a:\ - and press Enter
copy dept.txt a:\ - and press Enter
copy user.txt a:\ - and press Enter
copy rates.txt a:\ - and press Enter
```

Install TAPIT 2000 – complete the instructions on page 3 of this manual.

Run TAPIT Setup – see the instructions on page 4.

Copy exported files from the floppy disk to TAPITW32 directory.

Start TAPIT 2000 - Programs/TAPIT 2000/TAPIT 2000

Click on **Maintenance** icon located on the **Main Menu** screen.

Click on Data Maintenance icon.

Click on **Import DOS** data (Assumes .txt files are in TAPITW32 host folder)

Click on **OK** when a message confirming the Import process is completed appears on the screen

Click on **Exit** to leave **Data Maintenance** screen

Run a **Detail Activity by Date** report to confirm import of call records.

Close any running programs, and exit out of Windows & reboot the computer.

Registration

It is very important to register your TAPIT 2000 promptly; otherwise it will stop functioning within 30 days from the date of installation.

The Trisys, Inc. Software registration process consists of two steps:

Step A: Obtaining a Registration number.

Step B: Registering the software using a registration number obtained in Step A.

Step A.

1. Go to **Start/TAPIT 2000/Register Tapit**.
2. Trisys Software Registration screen appears.

It contains following command buttons: How to Register the Software, Registration on the Internet, Registration via E-mail, by Fax or Phone.

How to Register the Software

Click on it if you need registration instructions.

Registration on the Internet: (Internet connection required)

- a. Click on the **Registration on the Internet** button. **Online Registration** screen appears.
- b. Click on **Internet** button. Your Internet browser will open the Trisys Home Page at www.trisys.com.
- c. Select **Registration** from the menu.
- d. Select the software you want to register. The **Online Registration** page appears.
- e. Print the **Online Registration** page.
- f. Continue the online registration following the PRINTED instructions starting from Step 2.

Registration via E-mail, by Fax or Phone:

- a. Click on the **Registration via E-mail, by Fax or Phone** button.
- b. Fill in the on-screen registration form. Required fields are marked with an asterisk (*).

Note: The telephone number is required to complete ALL registrations. Fax number is required when registering by fax (Print option) and E-mail address is required when sending information via e-mail (E-mail option).

Note: The following fields cannot be edited: Software Serial Number, Registration No. and Computer ID. Software Serial Number and Computer ID are generated by the installation process. Registration Number is displayed after software registration is completed.

When registering via e-mail:

Click on the **E-mail** button. The registration program automatically generates an e-mail message (this option will NOT work if a phone number or e-mail address is missing) and sends it to Trisys Technical Support. After Technical Support receives your request, they will e-mail a registration number to you.

When registering by fax:

Click on the **Print** button to print out the completed form (it will NOT print if a fax number or phone number are missing) and fax it to 973 360 2222. The form containing the registration number will be faxed back to you.

When registering by phone:

Call Trisys Technical Support at 973 360 2300 to obtain a registration number.

Note: To expedite the registration process, please have the registration form completed prior to calling Trisys Technical Support.

Step B.

To complete registration:

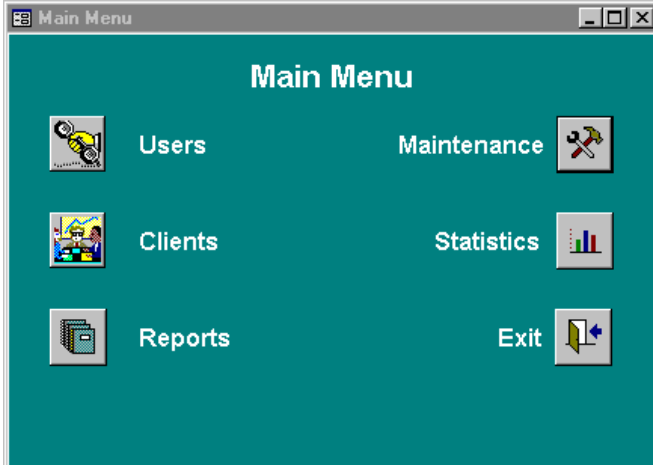
1. Once you have obtained a registration number, click on the **Register** button located on either **Online Registration** screen or **Registration via E-mail, by Fax or Phone** screen. The **Register** form appears.
2. Enter the registration number in the space provided and click on **Apply**. A confirmation message will appear on your screen, if registration is completed.

Main Menu

Main Menu - Overview

The **Main Menu** screen is displayed when you start TAPIT.

The buttons/icons on the menu allow you to access different options by clicking on them.



The top menu bar has the following options:

Main - offers access to each part of the Tapit program.

Window - contains the standard Windows' functions for aligning different screens:
Tile, Cascade, Arrange Icons, Hide, Unhide and Size to Fit.

Help - provides access to TAPIT's Help Screen alternatively to pressing **F1** key.

To close the TAPIT application click on the **Exit** button/icon or open the drop down **Main** menu bar option and click on **Exit**.

Before exiting, make sure **Main Menu** is the only screen open within TAPIT.

Users/Departments

Overview

The **Users/Departments** screen is used to define employees' names, extensions in addition to defining and assigning department information.

It is divided into two sections. The left section of the screen has 3 tabs: **Hierarchy**, **Departments** and **Users**.

The right-hand side contains detailed information and is dependent on the selection made in the list(left) section. When clicked, **Departments** and **Users** tabs, display the corresponding departments and users screens. A list of departments, or users appears on the left-hand side. You can navigate it by clicking on list's items. You can also sort by clicking on the header labels of the list. When a particular record is highlighted the right section of the **User/Department** screen displays its detail information. This screen allows you to change, add, or delete department's or user's data. **Hierarchy** tab shows **Hierarchy of Departments** tree on the left-hand side. The right side initially displays instructions but when any of the tree nodes is selected, the screen changes to an edit mode.

Users

Users screen is used to maintain employees' records. It has two sections. The left section is a list of users. You can navigate it by clicking on list's items. You can also sort by clicking on the header labels of the list. When a particular record is highlighted the right section displays user's detail information. This screen allows you to change, add, or delete user's data.

User	Department	Auth. Code	Extension
Arnold Brad	Sales	10109	353
Arnold Brad	Sales	10109	109
Arnold Brad	Sales	10109	353
Arnold Brad	Sales	10109	3701
DeNoia Mike	Sales	10108	308
DeNoia Mike	Sales	10108	350
DeNoia Mike	Sales	10108	108
Egidio Donn	Tech Support	10113	304
Egidio Donn	Tech Support	10113	113
Egidio Donn	Tech Support	10113	348
Egidio Donn	Tech Support	10113	3702
Gasta Frank	Sales	10111	341
Gasta Frank	Sales	10111	3703
Gasta Frank	Sales	10111	321
Gasta Frank	Sales	10111	111
George Donna	Sales	10180	180
George Donna	Sales	10180	343
Group Company	General		189
Group Sales	Sales		181
Group Tech Support	Tech Support		182
Hill Beth	Sales	10185	374

Adding new users

1. Click on the **Users** tab. The left section of the screen displays users' list. If you entered the users screen for the first time or none of the records is highlighted, the right section of the screen displays instructions, otherwise user detail information screen appears.
2. Click on **New** button located above the detail section.
3. Enter appropriate information into **User Last Name/Company** (press **Tab** key to move to the next field), **User First Name** and **Authorization Code** text boxes (if this function of the telephone system is utilized by your company, if not leave this field blank).
4. If TAPIT is pricing your calls and you want to surcharge this particular user's calls, go to **Surcharge Per Minute** or **Surcharge Per Call** field and enter dollar amount or click on **Multiplier** and enter % (percentage value). By surcharge or multiplier we mean extra money that will be applied on the top of the rate table that is used to price calls.
Note: Two types of surcharges and multiplier may be used at the same time
5. Click on a down arrow next to **Department** text box to open departments' list. Select appropriate department and click on it to assign it to the user.

6. Enter ext. number in the text box located below **Add>>** button. Click on **Add>>** or press **Enter**. Extension has been assigned to the user and is displayed in **Extension(s)** list box. To remove extension number from the list, select it and click on **Remove<<** button. Confirmation message appears. Click on **Yes**.
7. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
8. Click on **Exit**.

Editing or deleting users

1. If not active, click on the **Users** tab. The left section of the screen displays users' list. If you entered the users screen for the first time or none of the users is highlighted, the right section of the screen displays instructions, otherwise user detail information screen appears.
2. From the users list select a user to be edited and click on it (you can sort users list by clicking on list's header labels).
Go to the detail section.
Navigate with Tab and type in new values in any of **User Last Name/Company**, **User First Name**, **Authorization Code**, **Surcharge Per Minute**, **Surcharge Per Call** and **Multiplier** fields.
3. To change or assign department, click on a down arrow next to **Department** text box and open departments' list. Select appropriate department and click on it.
4. Enter ext. number in the text box located below **Add>>** button. Click on **Add>>** or press **Enter**. Extension has been assigned to the user and is displayed in **Extension(s)** list box. To remove extension number from the list, select it and click on **Remove<<** button. Confirmation message appears. Click on **Yes**.
5. To delete user's record, go to users' list and click on a user to be deleted.
6. Click on **Delete** button. The confirmation message appears. Click on **Yes**. The general instructions screen takes place of the detail screen and user is no longer found in the list section.
7. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
8. Click on **Exit**.

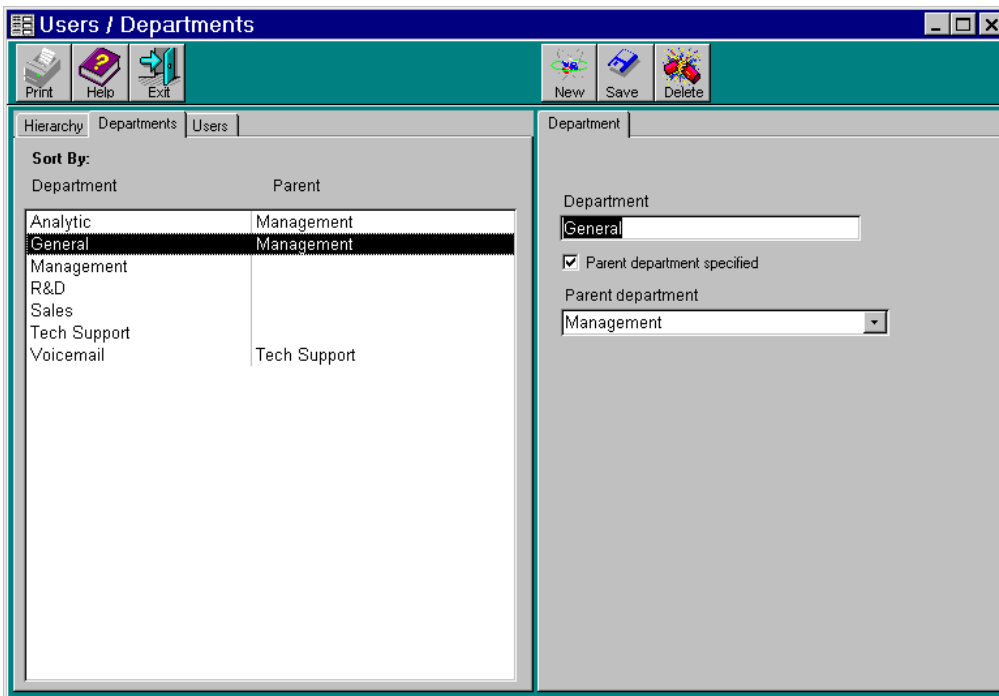
It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting user records.

Printing users list

1. Click on **Print** button. List of reports appears. You can print any listed report from this screen.
2. Select **List of Users** from the list of reports.
3. Click on **Open Report**.
4. Click on **Options**. Select **Print** and click on it.
5. When report has finished printing, close preview screen by clicking on **Options** and then **Exit**.

Departments

Departments screen is used to maintain departments' data. It has two sections. Left section is a list of departments. You can navigate it by clicking on list's items. You can also sort it by clicking on the header labels of the list. When a particular record is highlighted the right section displays department's detail information. This screen allows you to change, add, or delete department's data.



Adding new departments

1. Click on the **Departments** tab. The left section of the screen displays departments' list. If you entered the departments' screen for the first time or none of the departments is highlighted, the right section of the screen displays instructions, otherwise department detail information screen appears.
2. Click on **New** button located above the detail section of the screen.
3. Type in department's name. If this is a sub-department check **Parent** check box. Click on a down arrow next to **Parent department** text box and open departments' list. Select appropriate department and click on it.
4. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
5. Click on **Exit**.

Editing or deleting departments

1. If not active, click on **Departments** tab. The left section of the screen displays the departments' list. If you entered departments' screen for the first time or none of the departments is highlighted, the right section of the screen displays instructions, otherwise department information screen appears.
2. Click on a department to be edited (you can sort departments list by clicking on list's header labels).
3. Go to the detail section and type in changes to the department's name.
4. You can assign, change or remove a parent department.
To assign a parent department, check **Parent** check box and click on a down arrow next to **Parent department** text box. Departments' list opens. Select appropriate department and click on it. **To change existing parent department**, click on a down arrow next to **Parent department** text box. Departments' list opens. Select appropriate department and click on it.
To remove parent department, click on the **Parent** check box to uncheck it. Click on **Save**.
Note: Unlike proceeding cases, removing parent department is not reflected in the left-hand side departments' list right away. You have to click on the **Save** button to update the left section of the screen.
5. To delete a department, go to the list section and click on a department to be deleted.
Click on **Delete** button. The confirmation message appears. Click on **Yes**. General instructions screen takes place of the detail screen and user is no longer found in a list section.
6. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
7. Click on **Exit**.

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

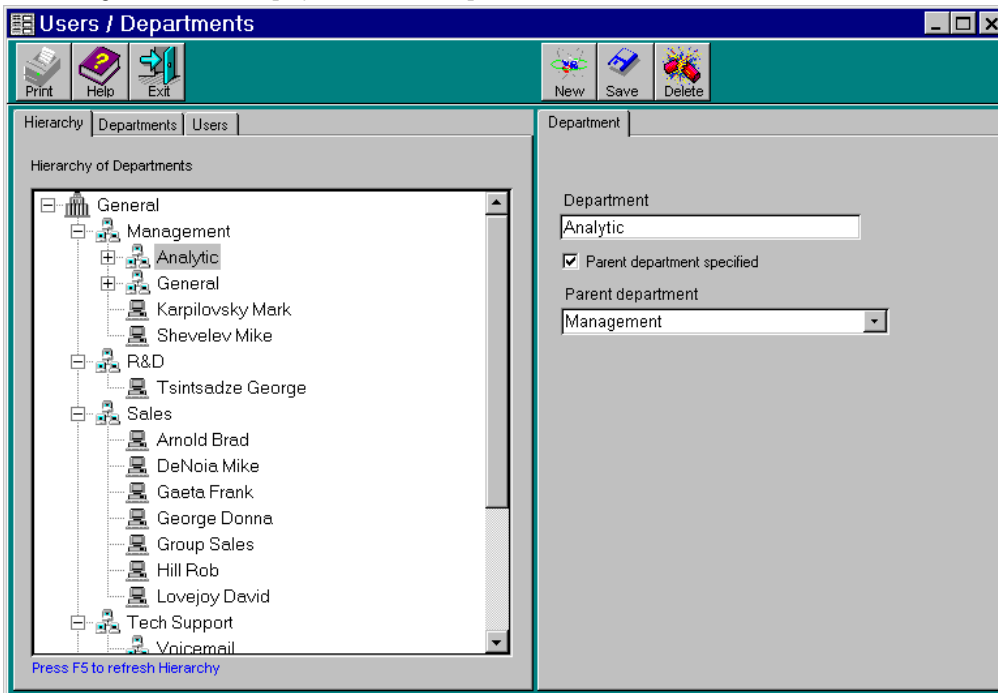
Printing departments list

1. Click on **Print** button. List of reports appears. You can print any listed report from this screen.
2. Select **List of Departments** from the list of reports.
3. Click on **Open Report**.

4. Click on **Options**. Select **Print** and click on it.
5. When report has finished printing, close preview screen by clicking on **Options** and then **Exit**.

Hierarchy Tree

Hierarchy Tree screen displays structure of departments and users.



1. If not active, click on **Hierarchy Tree** tab. The left section of the screen displays **Hierarchy of Departments Tree**. If you entered this screen for the first time or none of the nodes is selected, the right section of the screen displays instructions otherwise detail information screen (corresponding to your selection) appears.
2. Select any node by clicking on it. If the node is a department then department screen appears on your right-hand side. Correspondingly, if the node is a user then user screen appears in the detail section. You add, edit or delete departments or users from here.
3. Click on **Save** after you're done with any changes. If you are adding, editing or deleting any of the departments or users records from this screen, you must update the **Hierarchy Tree** when finished. In order to do this, click anywhere on a white space of the screen or press F5, otherwise changes will not be reflected.

Printing Hierarchy Tree

1. Click on **Print** button. List of reports appears. You can print any listed report from this screen.
2. Select **Department Hierarchy** from the list of reports.
3. Click on **Open Report**.
4. Click on **Options**. Select **Print** and click on it.
5. When report has finished printing, close preview screen by clicking on **Options** and then **Exit**.

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

Clients

Managing Clients

The **Client** screen is used to enter, view and edit client's information.

It contains two sections. The left section of the screen displays a list of clients.

You can navigate it by clicking on list's items. When a particular client's record is highlighted the right section of the **Clients** screen displays its detail information. The detail section allows you to add, edit or delete client's data.

The screenshot shows a software window titled "Clients". It has a menu bar with "Print", "Help", and "Exit". Below the menu bar are three buttons: "New", "Save", and "Delete". The window is divided into two main sections. The left section, titled "Clients", contains a table with columns "Client", "Acc. Code", and "Phone". The right section, titled "Client", contains a form for editing a client's information.

Client	Acc. Code	Phone
Abel Miriam	13300	7162653016
Abel Miriam	13300	7169083300
Abel Miriam	13300	7162821015
BATI John	26611	4089326611
Berrah Lue	23980	7908483980
Central Offices	124	9142211783
Cole Mike	35591	5758525591
Communications Specialists Joh	29111	6806999111
Custom Wiring House	32700	8883882700
Eastern Telematic House	99950	5184656163
Eastern Telematic House	99950	8885687226
Eastern Telematic House	99950	4175899950
Easy Frames	127	8606771341
GBS Corporation	123	2037488721
Gray Suit	43900	4132723900
Hoffman Telephone	125	6184952661
Law Offices of Jamel and Muss	54150	2375704150
Master Copies House	67763	8093727763
Mike Drager Incorporated House	50757	4084530757
Moriss, Dole & Holsten Mike	69595	4086439595
Shelby Cor	126	7138950600

The right section, titled "Client", contains the following fields and buttons:

- Client Last Name / Company:
- Client First Name:
- Account Code:
- Address 1:
- Address 2:
- City: State: ZIP code:
- Phone Numbers(s):
- Buttons: "Add >>" and "Remove <<"

Adding new client

1. Click on **New** button located above the detail section.
2. Enter data into **Client Last Name/Company**, **Client First Name**, **Account Code** and address fields. Press **Tab** key to move to the next field.
3. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
4. Click on **Exit**.

Editing or deleting clients

1. From the clients' list select a client's record to be edited and click on it (you can sort clients list by clicking on header labels of the list).
2. Go to the detail section of the screen. Navigate with **Tab** and type in new values in any of **Client Last Name/Company**, **Client First Name**, **Account Code**, and address fields.
3. Enter new phone number in the text box located below **Add>>** button. Click on **Add>>** or press **Enter**. Phone number has been assigned to a client and is displayed in **Phone Number(s)** list box. To remove phone number from the list, select it and click on **Remove<<** button. Confirmation message appears. Click on **Yes**.
You may use partial phone numbers (i.e.) 011 placed in the area code would assigned all international calls to this client or you can define area code and exchange.
4. Click on the field to be edited and type new values.
To add a new telephone number, click on the **New Phone** button and type new telephone number. To delete a telephone number, place a cursor on the telephone number to be erased and click on the **Delete Phone** button.
5. In order to delete client's record, go to clients' list and click on a client to be deleted.
6. Click on **Delete** button. The confirmation message appears. Click on **Yes**. General instructions screen takes place of the detail screen and user is no longer found in the list section.

7. Click on **Save**.
Note: Pressing **Enter** saves any changes prior to it.
8. Click on **Exit**.

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

Printing Clients List

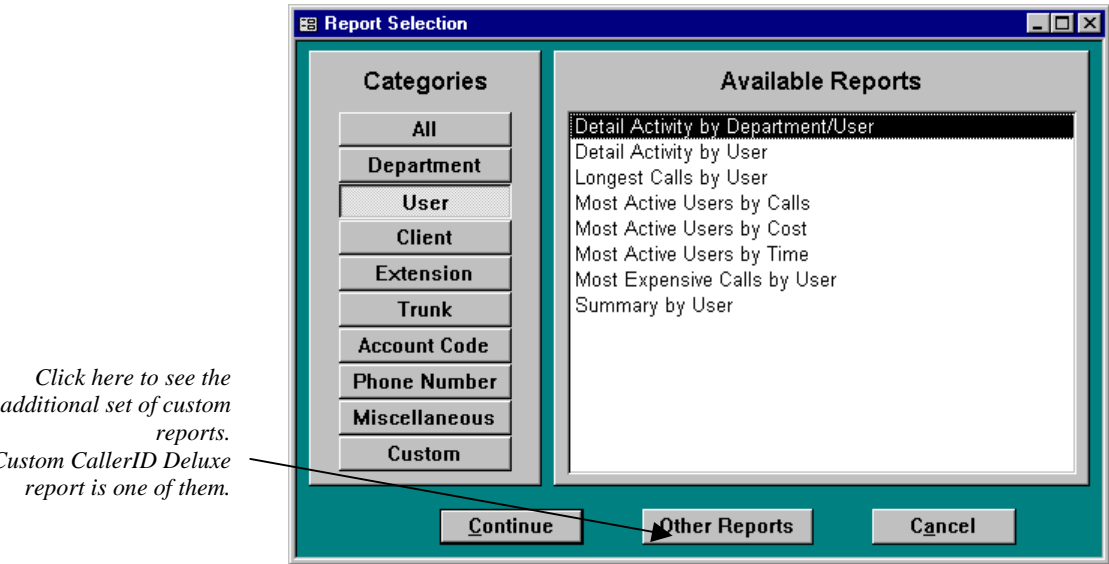
1. Click on **Print** button. List of reports appears. You can print any listed report from this screen.
2. Select appropriate report from the list of reports.
3. Click on **Open Report**.
4. Click on **Options**. Select **Print** and click on it.
5. When report has finished printing, close preview screen by clicking on **Options** and then **Exit**.

Reports

Generating Reports

The **Report Selection** screen lists available report groups and individual report names that may be generated. We recommend you try all of the reports at least once to see the difference among the reports, and then choose reports you will be running in the future.

Note: **Other Reports** button located on the bottom of the **Report Selection** screen. Click on it to invoke **Special Reports** screen. These additional reports cannot be modified or used with **Report Scheduler**.

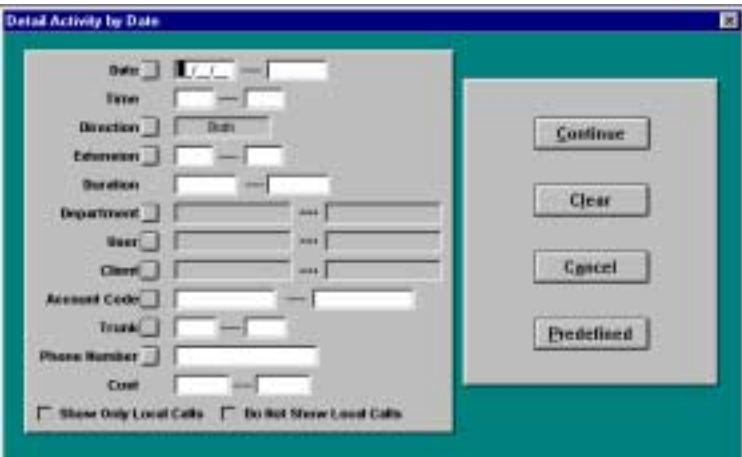


Go back to the **Reports Selection** screen. Click on the report group buttons to see available reports. For example: **All** button displays all reports, **User** button brings up only user related reports and clicking on **Custom** button displays reports built with a **Report Designer** (see **Report Designer** chapter later in this manual).

Running a report

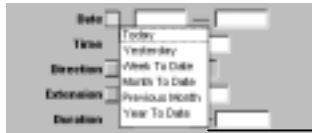
Select a report (by clicking on its name) and click on **Continue**. Filter screen is displayed.

The same screen is used in other parts of TAPIT, please read the following section carefully.



Available options are:

1. Date



You **must enter a start and end date** for the data to be reported on the report or click on the button next to the word **Date** and make a selection from the pull down list.

When the date selection or entry is made a + sign appears next to the **Date** field.

To clear the selection, click on the same button again. A + sign disappears.

2. Time

Enter start time and end time (leave these fields blank to generate a report without any time restrictions).

3. Direction

The default value is **Both** for both incoming and outgoing call types.

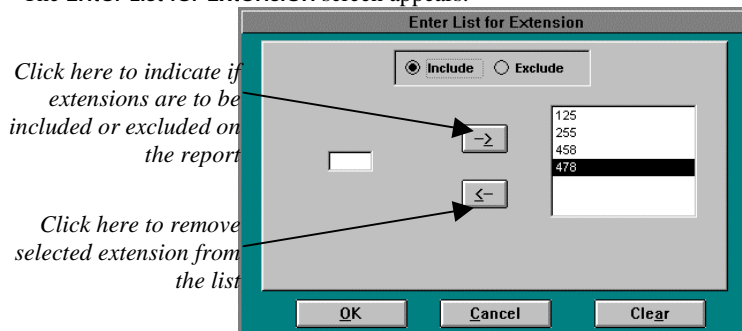
You may click on the button next to the word **Direction** and select either **Incoming** or **Outgoing** calls. The button displays a + sign. To reset to default, click on same button again.

4. Extensions

To include all extensions on the report leave both fields empty.

Otherwise, enter a range of extensions or for more flexibility click on the button next to the word **Extension**.

The **Enter List for Extension** screen appears.



Click here to indicate if extensions are to be included or excluded on the report

Click here to remove selected extension from the list

This screen allows you to create a list of extensions to be included or excluded from the report.

Depending on what you need to do, check one of the option buttons **Include** or **Exclude** located on the top of the selection screen.

In order to create extension listing enter extensions one at a time into a small text box on the left side of the screen and click on the right arrow to transfer it to the list on the right side of the screen.

Click on **OK** button to confirm the selection, **Cancel** to abort the selection and exit from this screen or the **Clear** button to erase all changes and start over.

In case any selection is entered, a + sign appears on next to the word **Extension** and a dotted line between the fields to indicate that it is a list of extensions.

To edit extension selection

Click on the button next to the word **Extension**, make the modifications and click on the **OK** button.

To remove extension selection

Click on the button next to the word **Extension**, click on the **Clear** button and click on the **OK** button.

5. Duration

This field is used to specify the duration of call records to be included in the report.

For example:

Enter 00:01:00 in the first field and 00:10:00 in the second field to display calls longer than 1 min. and shorter than 10 min.

Enter 00:05:00 in the first field and leave the second field blank to display all calls longer than 5 min.

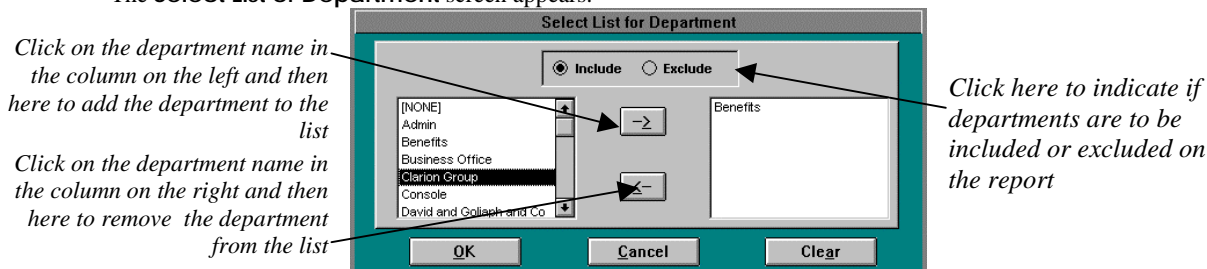
To clear both fields click on the button next to the word **Duration**.

6. Department

To include all departments on the report leave both fields empty.

To include or exclude departments, click on the button next to the word **Department**.

The **Select List for Department** screen appears.



Click on the department name in the column on the left and then here to add the department to the list

Click on the department name in the column on the right and then here to remove the department from the list

Click here to indicate if departments are to be included or excluded on the report

Depending on what you need to do check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen. Select department's name from the list on the left side of the screen and transfer it to the list on the right side by clicking on the right arrow. Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over.

If any selection is entered, a + sign appears on the button next to the word **Department** and a dotted line between the fields to indicate that it is a list of departments.

To edit department selection

Click on the button next to the word **Department**, make the modifications and click on the **OK** button

To remove department selection

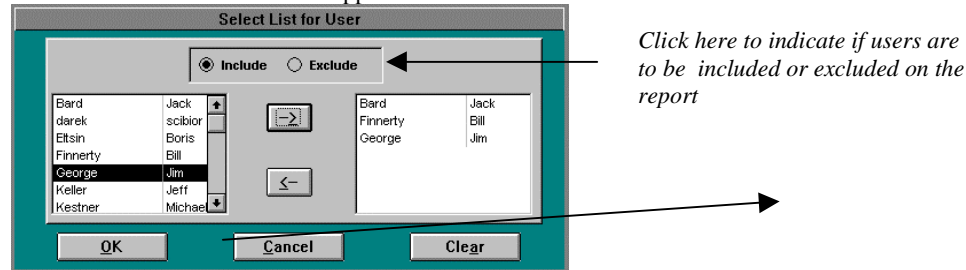
Click on the button next to the word **Department**, click on the **Clear** button and click on the **OK** button

7. User

To include all users on the report leave both fields empty.

To include or exclude users, click on the button next to the word **User**.

The **Select List for User** screen appears.



Click here to indicate if users are to be included or excluded on the report

Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over. Click on the button next to the word **User**, a + sign appears on the button next to the word **User** and a dotted line between the fields to indicate that it is a list of users. To remove the user from the list, click on the button next to the word **User**, click on the **Clear** button and click on the **OK** button.

To edit user selection

Click on the button next to the word **User**, make the modifications and click on the **OK** button.

To remove user selection

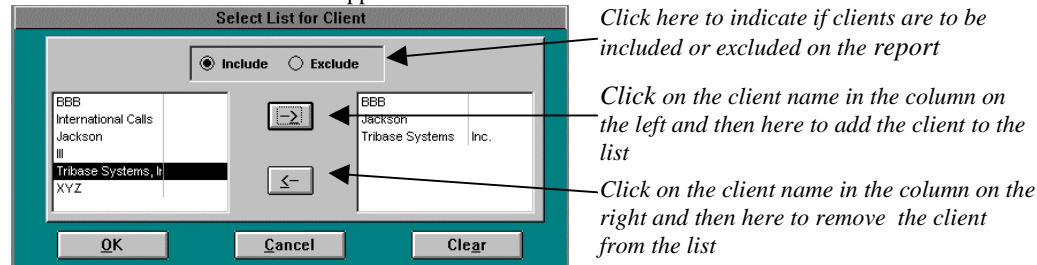
Click on the button next to the word **User**, click on the **Clear** button and click on the **OK** button

8. Client

To include all clients on the report leave both fields empty.

To include or exclude clients, click on the button next to the word **Client**.

The **Enter List for Client** screen appears.



Click here to indicate if clients are to be included or excluded on the report

Click on the client name in the column on the left and then here to add the client to the list

Click on the client name in the column on the right and then here to remove the client from the list

Depending on what you need to do check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Select client's name from the list on the left side of the screen and transfer it to the list on the right side by clicking on the right arrow.

Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over.

If any selection is entered, a + sign appears on the button next to the word **Client** and a dotted line between the fields to indicate that it is a list of clients.

To edit client selection

Click on the button next to the word **Client**, make the modifications and click on the **OK** button

To remove client selection

Click on the button next to the word **Client**, click on the **Clear** button and click on the **OK** button

9. Account Code

To include all account codes on the report leave both fields empty.

Otherwise, enter a range of account codes that would appear on the report or for more flexibility click on the button next to the word **Account Codes**.

The **Enter List for Account Code** screen appears.

This screen allows you to create the list of account codes to be included or excluded from the report.

Depending on what you need to do check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

In order to create account code listing enter account codes one at a time in a small text box on the left side of the screen and click on the right arrow to transfer it to the list on the right side of the screen.

Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over.

If any selection is entered, a + sign appears on the button next to the word **Account Code** and a dotted line between the fields to indicate that it is a list of account codes.

To edit account code selection

Click on the button next to the word account code, make the modifications and click on the **OK** button

To remove account code selection

Click on the button next to the word account code, click on the Clear button and click on the **OK** button

10. Trunk

To include all trunks on the report leave both fields empty.

Otherwise, enter a range of trunks that would appear on the report or for more flexibility click on the button next to the word **Trunk**.

The **Enter List for Trunk** screen appears.

This screen allows you to create the list of trunks to be included or excluded from the report.

Depending on what you need to do check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

In order to create trunk listing enter trunks, one at a time, in a small text box on the left side of the screen and click on the right arrow to transfer it to the list on the right side of the screen.

Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over.

If any selection is entered, a + sign appears on the button next to the word **Trunk** and a dotted line between the fields to indicate that it is a list of trunks.

Click here to indicate if trunks are to be included or excluded on the report

Click here to add trunks to the list

Type here trunks to be added to list

Click on the trunk in the list and then here to remove a trunk from the list

To edit trunk selection

Click on the button next to the word **Trunk**, make the modifications and click on the **OK** button.

To remove trunk selection

Click on the button next to the word **Trunk**, click on the **Clear** button and click on the **OK** button.

11. Phone Number

In order to include all telephone numbers in the report leave the **Phone Number** field empty.

Otherwise, enter a phone number that you would like to appear on the report (note that this field can accept partial numbers i.e. enter 800 in the area code to see only 800) or for more flexibility click on the button next to the word **Phone Number**.

The **Enter List for Phone Number** screen appears.



Click here to indicate if phone numbers are to be included or excluded on the report

Click here to add phone number to the list

Type here a full or partial phone number to be added to the list. Indicate if it is a 1 or 0 plus the number call.

Click on the phone number in the list and then here to remove a phone number from the list

This screen allows you to create the list of phone numbers to be included or excluded from the report.

Depending on what you need to check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

In order to create phone number listing enter phone numbers, one at a time, in a text box on the left side of the screen and click on the right arrow to transfer it to the list on the right side of the screen.

In order to generate global search for a particular exchange or a number use a space bar to move forward through the phone number field.

For example: you are looking for phone numbers with an exchange of 512. You need to type the following in the phone number field:

<space><space><space><space>512. When finished click on the right arrow button on the screen and the number will be automatically transferred to the phone number list window. This number should read ???512 in order to be processed correctly (? in place of each space).

Click on **OK** button to continue with the selection, **Cancel** to exit from this screen without any selection or **Clear** button to erase all changes and start over.

If any selection is entered, a + sign appears on the button next to the word **Phone Number** to indicate that it is a list of phone numbers.

To edit phone number selection

Click on the button next to the word phone number, make the modifications and click on the **OK** button

To remove phone number selection

Click on the button next to the word phone number, click on the **Clear** button and click on the **OK** button

12. Cost

Enter dollar amount values for call records to be included on the report

For example:

Enter .50 in the first field and 5.00 in the second field to display calls with cost over \$.50 and less then \$5.00.

Enter 1.00 in the first field and leave the second field blank to display all calls with cost over \$1.00.

To clear both fields click on the button next to the word **Cost**.

13. Show Only Local Calls - check the box to display only local calls in the report.

14. Do not Show Local Calls - check the box to exclude all local calls from the report

PLEASE NOTE THAT LOCAL AREA CODE AND EXCHANGES HAVE TO BE DEFINED IN THE DESTINATION TABLE. REFER TO THIS SECTION LATER IN THIS MANUAL.

There are four command buttons on the right side of the filter screen.



Continue – click on it to run the report.

Clear - click on this button to erase all filter criteria.

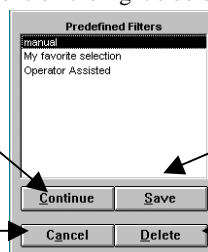
Cancel - click on it to exit filter screen

Click on **Predefined** button to save your selection for the future use (such filters come handy when setting **Report Scheduler**).

Enter the name of the filter in a **Save Filter** screen and click on **OK**

The **Predefined Filters** screen replaces the buttons on the right side of the screen.

Click on the filter name in the list to recall previously saved selection and then here to generate a report.



Click here to save current selection. You will be prompted to enter anew name.

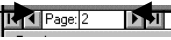
Click here to close this screen

Click on the filter name in the list and then here to delete previously saved selection.

Click on **Continue** to generate a report, **Cancel** if you do not want to run a report, **Delete** if you would like to delete a filter.

You can also make some changes to the filter criteria and click on **Save** to overwrite old filter or create a new one by giving it a different name.

Generated report is displayed in a preview mode. If it has more than one page you can navigate through them with arrows at the bottom of the report screen.

Click here to go to the previous page of the report  *Click here to go to the next page of the report*

Report window is equipped with a menu with the following options:

Print option will send report to the printer currently selected in the MS WINDOWS Print screen.

Print Setup will take you to the MS WINDOWS Page Setup screen where you can control printer options

Output To File option will invoke the **Save As Text** screen. It enables you to save report in a file.

Zoom will control the size of the displayed report.

Go To Page will allow you to type a page number you would like to go to.

Exit will close the report window.

Statistics

Statistics Concepts

Statistics function provides a graphical representation for your call records data.

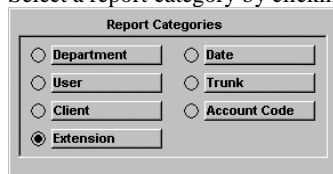
To access statistics click on the **Statistics** icon on the Main Menu

To generate statistical graph

For top 10 values



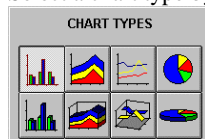
1. Click on **Top 20 Values** in the report group
2. Select a report category by clicking on its name on the **Report Categories** screen.



3. Select a report type by clicking on its name on the **Report Type** screen.



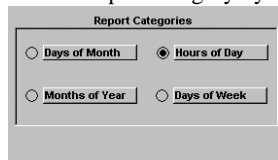
4. Select a chart type by clicking on its picture located on the **Chart Types** screen.



5. Click on **Continue**.
6. Enter criteria on the filter screen.
How to use filter screen(see pg.17 on how to use filter screen)
7. Click on **Continue**.
Chart will be displayed on your screen in a few moments.

For Date and Time

1. Click on **Date and Time** in the report group
2. Select a report category by making selection from the **Report Categories** option group.



3. Select a report type from the **Report Type** group.
4. Select a chart type by clicking on one of the icons in **Charts Type** selection group.
5. Click on **Continue**.
6. Enter criteria on the filter screen.
How to use filter screen(see pg.17 on how to use filter screen)

7. Click on **Continue**.
Chart will be displayed on your screen in a few moments
8. For Date and Time - Detail
9. Click on **Date and Time - Detail** in the report group
10. Select a report category by choosing from **Report Categories** group.



Report Categories

☐ Department ☐ Date

☐ User ☐ Trunk

☐ Client ☐ Account Code

☒ Extension

☐ Months of Year ☒ Hours of Day

☐ Days of Month ☐ Days of Work

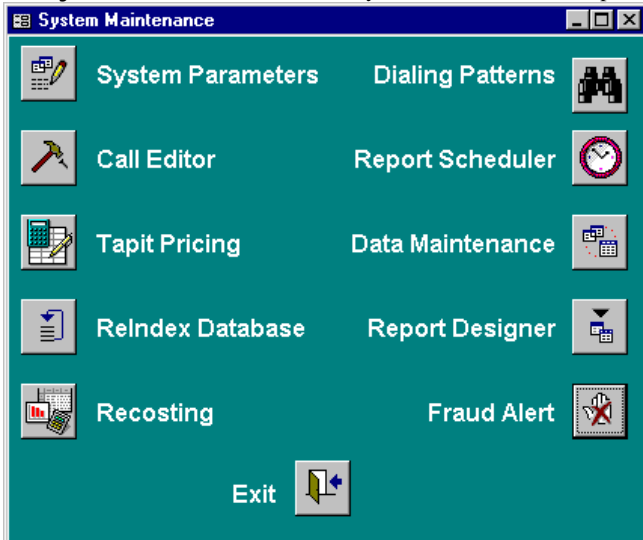
11. Note that in addition to the category, you may select time or days category.
12. Select a **report type** by clicking on its name.
13. Select a **chart type** by clicking on its picture.
14. Click on **Continue**.
15. Enter criteria on the filter screen.
How to use filter screen(see pg.17 on how to use filter screen)
16. Click on **Continue**.
Chart will be displayed on your screen in a few moments.

WE ENCOURAGE YOU TO RUN DIFFERENT STATISTICAL REPORTS TO SEE WHICH ONES SUIT YOUR NEEDS THE BEST.

System Maintenance

System Maintenance - Overview

The **System Maintenance** allows you to access different options by clicking on icons/buttons.



Clicking on the **Exit** button gets you back to the **Main Menu** screen.

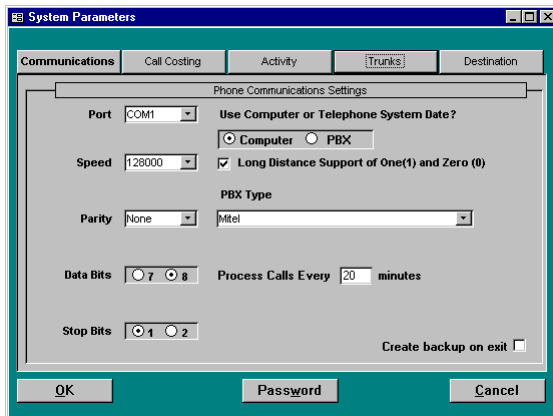
System Parameters

System Parameters Screen

System Parameters screen will allow you to configure various settings of TAPIT system.

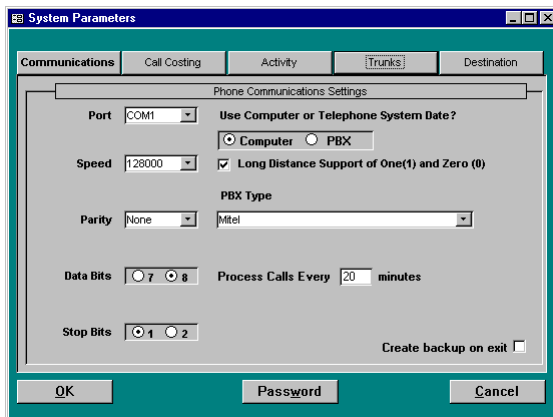
Click on the **Maintenance** icon on the Main Menu and then click on the **System Parameters** icon.

System Parameters screen will be displayed. It consists of five different screens: **Communications**, **Call Costing**, **Activity**, **Trunks**, and **Destination**.



Communications

The **Communications** screen is displayed first as default.



1. Click on the **down arrow** icon in the **Port** field to select a port on the computer the SMDR cable is connected to.
2. Click on the **down arrow** icon in the **Speed** field to select a transmission speed the phone system is set at.
3. Click on the **down arrow** icon in the **Parity** field to select a parity setting of the phone system.
4. Click on **7** or **8** in the **Data Bits** fields to select a data bits setting of the phone system.
5. Click on **1** or **2** in the **Stop Bits** fields to select a stop bits setting of the phone system.
6. Click on the **PBX** or **Computer** in the **Use Computer or Telephone System Date?** field to specify whether date information for the call records is going to be processed based on the computer or PBX date.
You must specify **Computer** date if your phone system is not generating the following date information: **day, month and year**. Otherwise we recommend that you use **PBX** date.
7. Click on the **down arrow** icon in the **PBX Type** field to select from the list a telephone system type the computer is receiving data from.
Data will not be processed correctly or not at all if incorrect selection is made.

MS Windows MUST be shut down and restarted when making any changes in the Communications Parameters Screen

8. **Process Calls Every __ Minutes**

Value entered in this box would determine how often Tapit would process data (convert raw information into TAPIT database format). 20 minutes is the default value for this field.

9. **Create Backup on exit**

When this box is checked TAPIT will create a backup copy of the main database every time you exit the software. When exiting TAPIT make sure that within the TAPIT application only **Main Menu** window is open.

We recommend that you leave this box checked to secure the integrity of the database.


Note that depending on the size of the database this process may take some time.

10. **Long Distance Support of One (1) and Zero** - uncheck this box if your phone system is not sending either digit 1 or 0 (zero) in the front of the long distance telephone number

11. Click on **OK** to save changes or **Cancel** to exit the screen without saving any changes

12. From **Communications** screen the **Password** function may be accessed

Click on **Password** button



Enter the system password here

Re-enter the system password here to confirm the system password's correct spelling

Call Costing

The screenshot shows the 'System Parameters' window with the 'Call Costing' tab selected. The 'Call Costing Settings' section includes the following fields and options:

- Your Telephone Number:** (305) 695-2300
- Tapit Default Carrier Call Costing in Increments:**
 - First minute: 6 sec. Next minute: 6 sec.
 - Would you like to surcharge calls which cost \$0.00?: ☒
- Default Surcharges:**
 - Per Call: \$0.00
 - Per Min: \$0.00
 - Multiplier %: 0
- Zero Plus Pricing @:** \$0.00
- Account Code Field Processed as:**
 - ☒ Client Code
 - ☐ User Authorization Code
- Matter Code Length:** 2

Buttons at the bottom: OK, Cancel.

1. Click on the **Telephone Number** field and enter your main telephone number (do not use an 800 number)
2. **Tapit Default Carrier Call Costing in Increments** will specify in how many seconds per increment Tapit will price calls if Tapit Carrier is used to price the calls. This option will not apply to V&H pricing table if you are using one.
Click on **First Minute** and enter a number of seconds Click on the **Next Minute** and enter a number of seconds for each additional minute

Only one form of increment can be specified for all calls being costed via TAPIT Carrier.

3. **Default surcharges** - numbers you will enter in these fields will appear automatically in surcharge and multiplier fields when adding a new user (see User setup)
Click on **Per Call** field and enter dollar amount to apply **per call** surcharge
Click on **Per Minute** field and enter dollar amount to apply **per minute** surcharge
Click on **Multiplier** and a percentage value to apply as a surcharge
4. **Zero Plus Pricing** – this field holds prices and surcharges for operator assisted calls.
5. **Account Code Processed As** - selection on this field will determine whether account codes generated by the phone system will be associated will user name or client name
Click on **Client Code** to associate this number with client name
Click on **User Authorization Code** to associate this number with user name
If **Client Code** is selected a **Matter Code** field is available (a sub-account code)
Click on the **Matter Code Length** field to enter a number of digits of the matter codes used (this number must be shorter that a length of the account code)
6. Click on **OK** to save changes or **Cancel** to exit the screen without saving any changes

Activity

This screen will allow you to specify what type of phone activity to include in or exclude from storing in TAPIT database

The screenshot shows the 'System Parameters' window with the 'Activity' tab selected. The 'Call Activity Settings' section includes the following fields and options:

- Include Activity for:**
 - Call Direction:**
 - ☒ Both
 - ☐ Outgoing
 - ☐ Incoming
 - ☒ Local Calls
 - Calls Longer Than:** 00:00:00
- Exclude Activity for:**
 - Extension:** 0001, 0002
 - Trunk:** 0003, 0024

Buttons at the bottom: OK, Cancel.

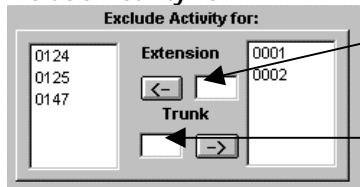
1. In the **Call Direction** field click on.
Both (default setting) to store outgoing and incoming calls.
Outgoing to store only outgoing calls.
Incoming to store only incoming calls.

2. Check the **Local Calls** (default) box if you want local calls to be stored.
Local is defined as a 7 digit or less dialed number.

Please note that **Local Area Code and Exchanges** have to be defined in the **Destination Table**. Refer to this section later in this manual.

3. **Calls Longer Than** - Click on this field and enter a time duration of calls (calls with the shorter time duration then specified will not be stored in TAPIT's database). The default value is 00:00:00.

4. **Exclude Activity For**



Enter here an extension you do **not** wish to store activity for, then click on the arrow pointing to the left

Enter here a trunk you do **not** wish to store activity for, then click on the arrow pointing to the right

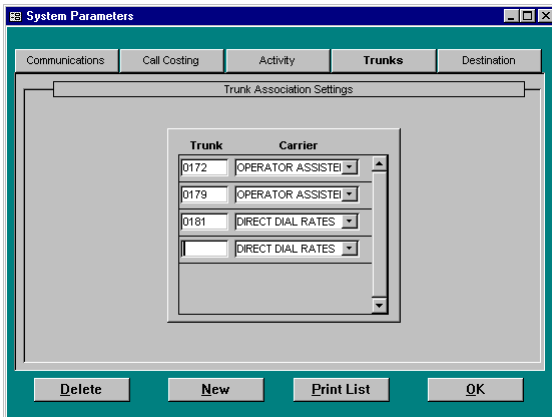
To remove an extension from the list double click on its number in the left hand column.

To remove a trunk from the list double click on it's number in the right-hand column.

5. Click on **OK** to save changes or **Cancel** to exit the screen without saving any changes.

Trunks

This screen will allow you to assign trunks numbers that are programmed on the phone system to different carriers - it is available only if you purchased and installed V&H pricing tables



Adding new trunks

1. Click on **New**.
2. Enter a trunk number in the **Trunk** field.
3. Click on the down arrow next to the carrier field to select an appropriate carrier from the list.

Deleting trunks

1. Click anywhere on the trunk field to select it for deletion.
2. Click on **Delete**.

Printing a list of the trunks

1. Click on the **Print List** button.
2. Click on **OK** to save changes or **Cancel** to exit the screen.

Destination

This screen will allow you to view, edit, add and delete records in the city and state destination table

Destination	City	State	Code
011240	EQUA GUINE	A	
011241	GABON		
011242	CONGO		
011243	ZAIRE		
011245	GUINEA-BIS	SA	
011246	DIEGO GARC	JA	

Adding new destination record

1. Click on **New**.
2. Enter area code and exchange of the new record in the **Destination** field, press **Enter**.
3. Enter destination description in the **City** field, press **Enter**.
4. Enter state description in the **State** field, press **Enter**.
5. Enter **L** in **Code** field if an area code and exchange being added is **Local**.

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

Deleting destination records

1. Place a cursor on a field you want to delete or click on **Find** button and enter area code and exchange to be deleted and click on **OK**
A record that you wish to delete should be highlighted
2. Click on **Delete** button

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

Editing destination records

1. Place a cursor on a field you want to edit or click on **Find** button and enter area code and exchange of record to be edited and click on **OK**
A record that you wish to edit should be highlighted.
2. Edit field value.

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

To clear **L** codes in the **Code** field.

If you purchased V&H pricing table, all local exchanges in your area code are going to be marked with an **L** code. You may not wish to process these calls as local therefore the **Code** button will allow you to remove this mark.



To remove ALL **L** codes click here

Click on **OK** to save changes and exit the screen

Call Editor

Working with Call Editor

This facility will allow you to change existing phone activity records as well as add new call records that were made outside of your environment.

1. Click on the **Maintenance** icon on the Main Menu and then click on the **Call Editor** icon.
2. A filter screen appears (see pg.17 on how to use filter screen), enter filter criteria information and click on **Continue**. **Call Editor** screen appears.

Date	Time	Duration	Trunk	Extn	Phone Number	Acct. Code	Cost	Dir
06/08/95	09:32	00:00:48	0003	0117		0	\$0.00	I
06/08/95	09:31	00:00:54	0001	0100		0	\$0.00	I
06/08/95	09:30	00:04:24	0016	0126	2014027400	0	\$0.66	O
06/08/95	09:33	00:01:18	0008	0128	15085802500	0	\$0.20	O
06/08/95	09:33	00:02:24	0001	0116		0	\$0.00	I
06/08/95	09:27	00:08:30	0009	0111	2017369100	0	\$1.28	O

New

Delete

Exit

Adding new call record

1. Click on **New** button - a new blank record appears
2. Start typing information: **Date**, **Time** of the call, **Duration**, **Trunk**, **Extension**, **Phone Number** for outgoing calls, **Account Code** if applicable, **Cost** and **Direction** = **O** for outgoing calls or **I** for incoming calls
3. Click on **Exit** (changes are saved automatically)

Editing call records

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

Deleting call records

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

TAPIT Pricing

Pricing Call Records

Tapit Pricing Table will allow you to enter pricing information to apply cost to outgoing calls.

Click on the **Maintenance** icon on the **Main Menu** and then click on the **Tapit Pricing** icon.

The **Tapit Pricing Table** allows you to enter prices for the first minute and next minute for three different time periods.

Number Dialed	From (h:h:mm)	Rate Per Minute First	Rate Per Minute Next	From (h:h:mm)	Rate Per Minute First	Rate Per Minute Next	From (h:h:mm)	Rate Per Minute First	Rate Per Minute Next
201	8:00	0.300	0.250	11:00	0.250	0.230	23:00	0.150	0.100
201593	8:00	0.250	0.200	11:00	0.200	0.150	23:00	0.110	0.080
NNN	0:00	0.550	0.550	0:00	0.000	0.000	0:00	0.000	0.000
800	0:00	0.000	0.000	0:00	0.000	0.000	0:00	0.000	0.000
	0:00	0.000	0.000	0:00	0.000	0.000	0:00	0.000	0.000

If same prices apply 24 hours a day use the first section of the pricing table only leaving the **From** column as 00:00.

Pricing special calls

1. To price 555 information calls, enter NNN555 in the **Number Dialed** field and desired pricing.
2. To price all international calls at the same rate, enter 011 in the **Number Dialed** field and desired pricing.
3. To price some international calls at the different rate, enter 011 followed by the country code in the **Number Dialed** field (i.e. 01149 for Germany) and desired pricing.
4. To price 411 information calls, enter 201411 (where 201 is **your** area code) in the **Number Dialed** field and desired pricing.

Adding new pricing record

1. Click on **New** button - cursor is inserted in a blank record line
2. Type phone number in the **Number Dialed** field as area code (NPA) or area code and exchange (NPA NXX).
3. Enter a start time for the first time period in the first **From** field. In case your time period is 24 hours long leave this field at 00:00 value.
4. Type rate for the first minute in the **Rate Per Minute / First** field. If **Rate Per Minute / Next** field is left empty then this rate is applied flatly to all the calls for the specified phone number. That means that no matter how long the call is or what kind of increment has been entered in **System Parameters** screen any call record is going to be priced exactly the rate of the first minute.
5. Type rate for each additional minute in the **Rate Per Minute / Next** field.
6. Enter time and rates for the next Time Period only if they are different. Otherwise, TAPIT will assume that calls are priced at the same rate all day long.
7. Click on **New** to create a new record or **Exit** to leave the screen, changes are saved automatically.

In our example:

- **201593** - Calls made to area code 201 and exchange 593 (**line two**) would be priced at .25 cents for the first minute and .20 cents for each additional minute between 8:00 AM and 11:00 AM; between 11:00 AM and 23:00 calls would be priced at .20 cents for the first minute and .15 cents for each additional minute; after 23:00 until 8:00 AM the rate would be .11 cents for the first minute and .08 cents for each additional minute.
- **201** - all other calls made to area code 201 (**line one**) would be priced at .30 cents for the first minute and .25 cents for each additional minute between 8:00 AM and 11:00 AM; between 11:00 AM and 23:00 calls would be priced at .25 cents for the first minute and .23 cents for each additional minute; after 23:00 until 8:00 AM the rate would be .15 cents for the first minute and .10 cents for each additional minute.
- **800** - All 800 calls would be free of charge (**line four**)
- **NNN** - all other calls would be priced at .55 cents a minute (**line three**)

Other Number Dialed entries:

- **L** - used to price all calls designated as Local in Destination Database
- **QQQ** - prices domestic long distance calls only
- **IN973360** - prices all incoming calls with 973 area code and 360 exchange
- **IN973** - prices all incoming calls with 973 area code (*user must have caller ID to price with INaaaxxx*)
- **INCID** - prices everything with caller ID
- **IN** -prices any incoming calls (like NNN)
- **011** - all international calls
- **01141** - international calls for the country code 41

To activate incoming pricing:

- Open **Tapit.ini** file (located in the folder where TAPIT database is stored)
 - Enter **InPricing=1** under the **[Phone_System]** section
 - Save and close **Tapit.ini** file
-

Deleting pricing records

1. Click anywhere on the record to be deleted and click on **Delete** button
2. Click on **Exit** to leave the screen, changes are saved automatically

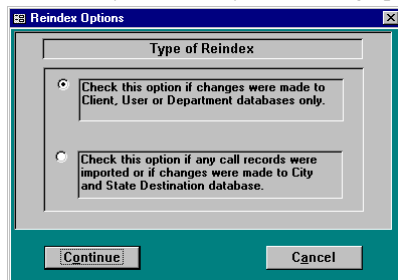
Finding specific record in the Number Dialed field

1. Click anywhere on **Number Dialed** field.
2. Click on **Find** button.
3. Enter the value to look for in **Look for** text box.
You can also select from the list of previous searches by clicking on a down arrow.
4. Click on **OK**.

Reindex Database

Reindexing

This facility will allow you to reassign pointers in TAPIT's Databases.



It is strongly recommended that you run this program after making any changes in User, Client, Department, Pricing or Destination Databases.

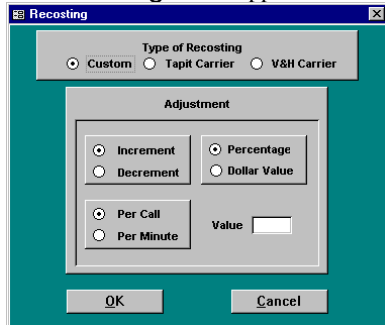
1. Click on the **Maintenance** icon on the **Main Menu** and then click on the **Reindex Database** icon. After clicking **Reindex Database** icon filter screen appears(see pg.17 on how to use filter screen). Enter filter criteria information and click on continue
2. While your Database is being Reindexed it is very important that you do not reboot or shut down your computer. The reindex process can sometimes take 20 to 30 minutes depending on your computer resources as well as the size of your database. If you interrupt this process your entire database will be corrupted.
3. When the reindexing is finished status screen appears with the appropriate message.
4. Click on **OK**, TAPIT's database has been reindexed.

Recosting

Recosting Call Records

Recosting function will allow you to recost existing phone activity based on your selection.

1. Click on the **Maintenance** icon on the Main Menu and then click on the **Recosting** icon.
2. A filter screen appears (see pg.17 on how to use filter screen), enter filter criteria information for calls to be recosted and click on continue.
3. The **Recosting** screen appears.



Using Custom option

1. Click on **Custom** selector in **Type of Recosting**
2. Click on either **Decrement** or **Increment**
3. Click on **Per Call** or **Per Minute**
4. Click on **Percentage** and enter percentage value in the **Value** field or click on **Dollar** value and enter dollar amount in the **Value** field
5. Click on **OK**
6. Filter screen appears(see pg.17 on how to use filter screen).Enter filter criteria and click on **Continue**. TAPIT will start recosting calls

Using Tapit Carrier option

1. Click on Tapit Carrier option in Type of Recosting.
2. Click on **OK**, TAPIT will start recosting calls according to the rates entered in TAPIT's pricing table.

Using V&H Carrier option

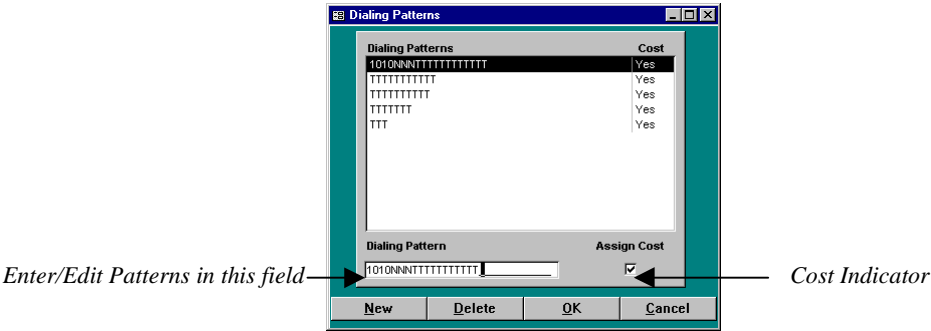
1. This option is available only if you have purchased TAPIT's V&H Pricing table.
2. Click on V&H Carrier selector in **Type of Recosting**.
3. A list of available carriers appears on the screen. Click on the carrier you want to use for recosting and click on **OK**, TAPIT will start recosting calls.

While your Data Base is being recosted it is very important that you do not reboot or shut down your computer. The recosting process can sometimes take 20 to 30 minutes depending on your computer resources as well as the size of your data base. If you interrupt this process your entire database will be corrupted.!!!

Dialing Patterns

Working with Dialing Patterns

Dialing Patterns function will allow you to separate the actual telephone number from complex dialing digit sequences.
Click on the **Maintenance** icon on the **Main Menu** and then click on the **Dialing Patterns** icon.



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 authorization or account code that directly proceeds or follows the telephone number dialed on the SMDR string.

When defining dialing patterns, please remember that it is important what digits are generated by your telephone system. Sometimes they do not match what you have dialed, i.e. dialing 1-202-593-8200 may generate 494-1-202-593-8200. Correct pattern would be NNNTTTTTTTTTTTT.

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	TTTTTTTTTTTT
593-8200	TTTTTTT
9-593-8200-123	9TTTTTTTNNN
1-593-8200	1TTTTTTT
10288-1-201-593-8200	10NNNTTTTTTTTTT
1800-593-82004333#1123	TTTTTTTTTTTTX
4994-1201-593-8200	4994TTTTTTTTTTTT
1234-1201-593-8200	CCCCTTTTTTTTTT
1202-593-82001234*	TTTTTTTTTCCCC

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

Adding new dialing pattern

1. Click on **New** button
2. Type in a new dialing pattern.
3. Click on **Cost Indicator** to associated cost with applicable pattern
4. Click on **New** button if you want to create a new dialing pattern or on **OK** button to save changes and exit.
Clicking on **Cancel** button will exit the screen without saving the changes.

Deleting dialing patterns

1. Click on existing dialing pattern on the list.
2. Click on **Delete** button.
3. Click on **OK** button to save changes and exit.

Editing dialing patterns

1. Click on existing dialing pattern on the list.
2. Add new characters or overwrite existing ones in the **Dialing Pattern** field.
3. Click on **OK** button to save changes and exit.

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 effect only the calls processed after PC has been rebooted.

Report Scheduler

Using Report Scheduler

Report Scheduler screen will allow you to schedule selected reports to be generated automatically.

TAPIT software has to be running in order for Report Scheduler to generate a report.

Click on the **Maintenance** icon on the **Main Menu** and then click on the **Report Scheduler** icon.

Scheduled Report	Applied Filter	Frequency	Time	Print	File Name
Detail Activity by User	Outgoing	Weekly - Friday	12:00	<input type="checkbox"/>	default.rpt
Longest Calls		Daily	3:45	<input checked="" type="checkbox"/>	

Report Frequency Delete New Exit

Adding new report

1. Click on **New** button.
The **Report Selection** screen is displayed.
2. Select the report name you want to add.
3. Click on **Continue**.
The filter screen is displayed. It is the same screen used to filter data in **Reports** module of TAPIT software however it works a little differently in this section. In order to apply filter criteria to reports generated by **Report Scheduler** you have to save a filter as **Predefined** or use an existing **Predefined** filter. Click the following link to obtain more information on how to accomplish this task (see pg.15 on how to use a filter screen).
4. Click on **Continue**.
Report Selection screen will close. The name of a selected report and filter (if used) will appear on the Report Scheduler screen in **Scheduled Report** and **Applied Filter** fields.
5. Enter time for the report to be generated in **Time** text box.
6. Check the **Print** box if you want the report to be output to printer. Otherwise the report will be sent to a file Default.rpt (you may click on **File Name** field and enter different file name).
7. Confirm that both **Scheduled Report** and **Applied Filter** fields have the correct values entered.
8. Click on **Frequency** button and select a frequency (how often) the report will be generated with.
Daily - a report is going to be generated every day at the specified time.
Weekly - a report is going to be generated once a week at the specified time and day of the week.
Monthly - a report is going to be generated once a month at the specified time and day of the month.
9. Click on **Exit** to leave the screen and save the changes

Editing report records

1. In order to edit **Time** and **File Name** fields click on them and enter new values.
2. If you would like to change the report name or the filter name click on the **Report** button and make adequate selection.
3. Click on **Frequency** button to change the setting of how frequently the report is going to be generated.
4. Check **Print** check box if required or leave it unchecked if you would like to print to file.
5. Click on **Exit** to leave the screen and save the changes.

Deleting report records

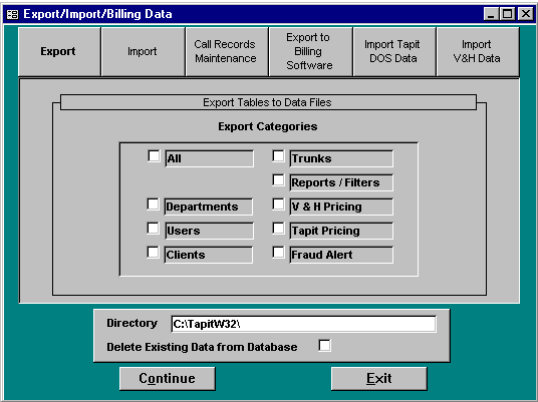
1. Click on **Time** or **File Name** field on the report record you wish to delete.
2. Click on the **Delete** button to delete a report record.
3. Click on **Exit** to leave the screen and save the changes.

Data Maintenance

Data Maintenance Concepts

Data Maintenance screen will allow you to maintain TAPIT’s data export and import functions.

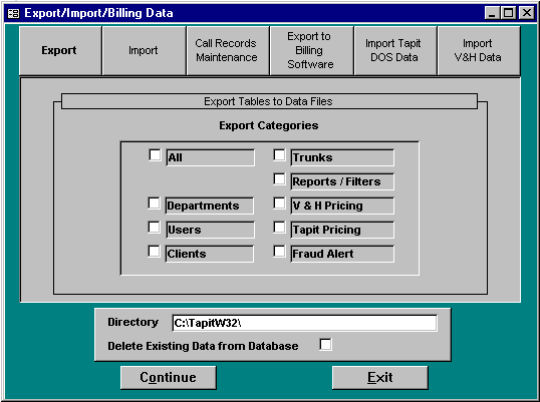
Click on the **Maintenance** icon on the **Main Menu** and then click on the **Data Maintenance** icon.



1. An **Export/Import/Billing Data** screen will be displayed. It consists of six different sections: **Export**, **Import**, **Call Records Maintenance**, **Export to Billing Software**, **Import Tapit DOS Data**, **Import V&H Data**
2. **Export** screen is displayed first as a default

Export

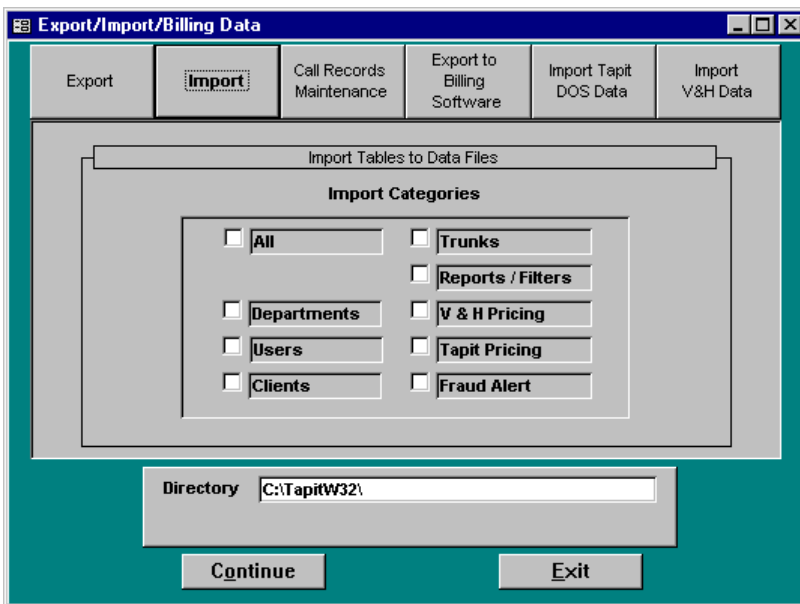
1. **Export** facility will allow you to export selected data for different categories to a file. Exported data can be used as a back-up or it can be imported by TAPIT installed at another location.



2. Select data category to be exported in the **Export Categories** box (select **All** if you wish to export all categories).
3. Click on **Directory** field and enter a destination path (do not enter anything if you wish to accept default destination).
4. Check the **Delete Existing Data from Database** box if you wish to remove data while exporting. Please be careful and make sure that you **do not export already empty files** , because they will overwrite already exported data (for example exporting twice in a row with Delete option on).
5. Click on **Continue** button.
6. TAPIT will create a number of files (depending on categories selected) in the destination directory with **TXT** extensions.

Import

Import feature allows you to import TAPIT’s data after it was exported as describe in **Export** section

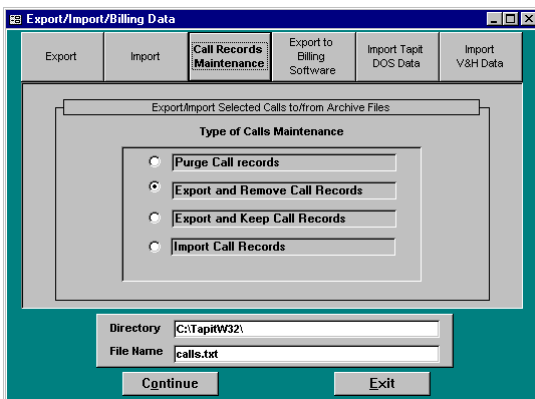


Select a category to be imported in the **Import Categories** box (select **All** if you wish to import all categories)

1. Click on **Directory** field and enter a source path (do not enter anything if data resides in C:\TAPITW32 directory)
2. Click on **Continue** button
3. TAPIT will start importing data. If appropriate files are not found in the specified directory TAPIT will notify you with a message. Those files will not be imported. The files were not found most likely because they were not exported from TAPIT or were exported to a different directory. When finished TAPIT will display "Data Import Completed" message.

Call Records Maintenance

Call Records Maintenance facility allows to export, purge, archive and import call records.



1. Select **Type of Calls Maintenance**
Available options are:
2. **Purge Call Records** - selected call records (a filter screen will be displayed in the next step) will be deleted permanently from TAPIT database.
3. **Export and Remove Call Records** - selected call records will be copied to the specified directory and deleted from TAPIT database. A file name for exported records must be entered in the **File Name** box (i.e. 0896.txt for exported records for August 1996). We recommend a .txt extension for this file.

Please keep track of all file names that are used when exporting since you will need to know them when importing records.

4. **Export and Keep Call Records** - selected call records will be copied to the specified directory. They will not be deleted from TAPIT database. A file name for exported records must be entered in the **File Name** box (i.e. 0896.txt for exported records for August 1996). This option can be used if you would like to have a copy of the call records on a different location where TAPIT is installed. **Note that when this option is used importing data from the newly created export file will create duplicate call records.**

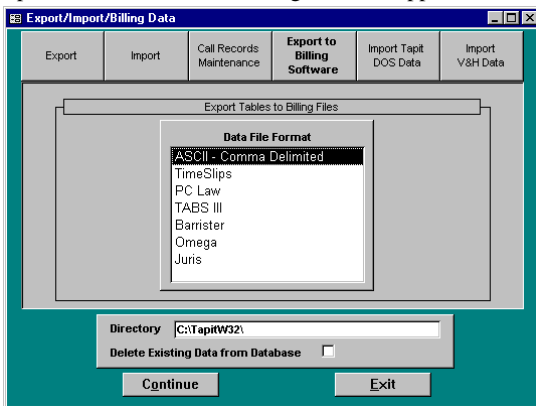
Please keep track of all file names that are used when exporting since you will need to know them when importing records.

5. **Import Call Records** - choose this option to import call records that have been exported using either **Export** or **Remove Call Records** or **Export and Keep Call Records** utility. Type in the directory name in the **Directory** box where file with call records are stored and the file name that was used when exporting call records in the **File Names** box.
6. After the selection has been made click on **Continue** button.
7. A filter screen will be displayed, enter criteria on the filter screen and click on **Continue**. (see pg.19-28 on how to use filter screen)

We do not recommend exporting call records directly to floppy diskettes. The possibility exists that there will be not enough room on the floppy disk when exporting and the results may be unpredictable. It is a better practice to export data to a hard drive and then copy it to an alternate location for extended storage (i.e. floppy disk, tape drive, file server, etc.)

Export to Billing Software

Export to Billing Software is an export facility that will allow you to export TAPIT's call data in various formats supported by major Database, Spreadsheet and Time&Billing software applications.



1. Select an application format in the **Data File Format** field.
2. Click on **Directory** field and enter a destination path (do not enter anything if you wish to accept **C:\TAPITW32** destination).
3. Check the **Delete Existing Data from Database** box if you wish to remove call records data while exporting.
4. Click on **Continue** button .
5. A filter screen may be displayed, enter criteria on the filter screen and click on **Continue**. (see pg.19-28 on how to use filter screen)
6. TAPIT will create a file with an appropriate extension for the output format (i.e. DBF for Dbase, XLS for Microsoft Excel) in the specified destination.

Import Tapit DOS Data

Use **Import Tapit DOS Data** function when upgrading from DOS Tapit to Windows version. Please follow instructions included with the upgrade.

Import V&H Data

Use **Import V&H Data** function to import V&H pricing file

1. Click on **Import V&H Data**.
2. Make sure that the area code and exchange of a telephone number entered in **System Parameters** screen matches area code and exchange imprinted on the **V&H** diskette.
3. Click on **Continue**.
Enter the name of a drive containing V&H disk if it is different from default option and click on **OK**.
4. Loading will take some time to complete. When finished program will display a following message: "V&H Data Load Completed"
Click on **OK**.

Report Designer

Creating Custom Reports

Report Designer screen will allow you to create your own custom detail or summary reports.

Click on the **System Maintenance** icon on the Main Menu and then click on the **Report Designer** icon.

The screenshot shows the 'Report Designer' window with the 'Detail' tab selected. The 'Name' field contains '[Untitled] - Report'. Under 'Primary Sort Sequence', 'Date' is selected. Under 'Order', 'Ascending' is selected. The 'Page Break' checkbox is unchecked. Under 'Secondary Sort Sequence', 'Extension' is selected. Under 'Order', 'Ascending' is selected. The 'SubTotal' checkbox is unchecked. The 'Available Fields' list includes User, Client, Trunk, Cost, Department, Extension, Call Length, Phone Number, Account Code, Matter Code, Area Code, and Time. The 'Chosen Fields' list contains 'Extension'. Buttons at the bottom include Open, New, Delete, Save, Save As, and Exit. A 'Test Run' button is on the right.

Creating a new detail report

1. Click on **New** button.
2. Select a primary sort sequence (Date is a default) by clicking on the appropriate field in the **Primary Sort Sequence** box.
3. Click in the **Order** box on either **Ascending** or **Descending** to choose whether sort is to be ascending or descending.
4. Check the **Page Break** box if you wish to have a page break inserted after each field that has been selected as a primary sort sequence.
5. Select a secondary sort sequence by clicking on the appropriate field in the **Secondary Sort Sequence** box.
6. Click in the **Order** box on either **Ascending** or **Descending** to select whether secondary sort is to be ascending or descending. Check **Subtotal** box if you want to see secondary field to be subtotaled.
7. **Available Fields** box lists all fields available for the reports. Click on the field name to be included on the report and click on the right arrow to move field to **Chosen Fields** box (you may also double click the field name to add it to the list). You can select as many fields as you wish (Page may print landscape in order to fit wide reports. Please note that the order of selection is reflected in the order of columns on the report). If you make a mistake click on the field name in the **Chosen Field** box and click on the left arrow to remove a field from the **Chosen Fields** list (you may also double click the field name to remove it from the list).
8. Click on **Save** button.
9. Enter report name and click on **OK**.
10. Click on the **Test Run** button to generate a report.
11. Click on **Exit** to leave the screen.

Creating a new summary report

The screenshot shows the 'Report Designer' window with the 'Summary' tab selected. The 'Name' field contains 'brwt'. Under 'Group By', 'Date' is selected. Under 'Order', 'Ascending' is selected. The 'Page Break' checkbox is unchecked. Under 'Sort By', 'Longest Average Call' is selected. Buttons at the bottom include Open, New, Delete, Save, Save As, and Exit. A 'Test Run' button is on the right.

1. Click on the **Summary** field .
2. Select a field the summary report is going to be grouped by (Date is a default) by clicking on the appropriate field in the **Group By** box.
3. Click in the **Order** box on either **Ascending** or **Descending** to choose whether sort is to be ascending or descending.
4. Check the **Page Break** box if you wish to have a page break inserted after each **Group By** field.
5. Select a sort sequence for the summary report by clicking on the appropriate field in the **Sort By** box.
6. Note that there is no fields selection on summary reports.
Fields that are included on summary reports are: Field you have selected in the **Group By** box, Number of calls, Time, Average time, Cost, and Average cost.
7. Click on **Save** button.
8. Enter report name and click on **OK**.
9. Click on the **Test Run** button to generate a report.
10. Click on **Exit** to leave the screen.

Creating reports from templates

1. Click on **Open**.
2. The **Report Selection** screen comes up.
3. Select a report you would like to base your new report on and click on **Continue**.
4. The **Report Selection** screen disappears and the **Report Designer** screen reflects the criteria of the open report.
5. You can edit the report's criteria in any way you need (refer to sections on creating detail and summary reports above) and save the report using **Save As** option.

Editing custom reports

1. Click on **Open**.
2. The **Report Selection** screen comes up.
3. Select a report that needs edited and click on **Continue**.
4. The **Report Selection** screen disappears and the **Report Designer** screen reflects the criteria of the open report.
5. You can edit report's criteria in any way you need (refer to the section on creating detail and summary reports above) and save the report using **Save** (if you want to preserve the same report name) or **Save As** option.
6. Saved reports can be found on the **Report Selection** screen in **Custom** section.

Note that Standard TAPIT Reports cannot be modified and saved with the same name. You can open and modify a Standard TAPIT Report, however, you have to use Save As option to save it under different name.

Deleting existing custom reports

1. Click on **Open** button.
Report Selection screen appears.
2. Click on the report you wish to delete and click on **OK** button.
3. Click on **Delete** button.

Note that Standard TAPIT Reports cannot be modified or deleted.

4. Click on **Exit** to leave the screen.

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Fraud Alert

Fraud Alert Features

Fraud Alert will notify you of unusual activity on the phone system according to the parameters specified.

TAPIT MUST BE RUNNING (EVEN MINIMIZED) IN ORDER FOR FRAUD ALERT TO WORK.

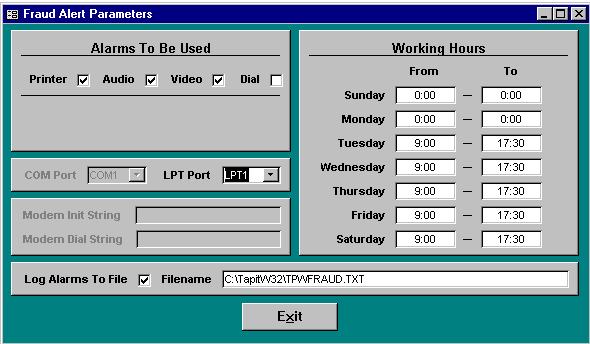
Click on the **Maintenance** icon on the Main Menu and then click on the **Fraud Alert** icon.

Fraud Alert will slow down your processing speed



Parameters

This facility allows you to define the parameters that will control Fraud Alert.
To access Parameters click on the **Parameters** icon.



Fraud Alert will not function if the parameters are NOT defined or are not properly defined!

The following is a description of fields that are available on this screen:

Working Hours - In order to distinguish between your work and off-work hours, you need to provide this information using these fields. Please be as accurate as possible. Work hours are the time period in which you normally conduct business (i.e. 8:00 AM - 5:00 PM would be 08:00 to 17:00). Note that the times are in military format. Anytime that is not specified as work is by default off-hours. Saturday would be 00:00 to 00:00, this means that there are NO work hours for that day and all the time will be off-hours.

Alarms

There are several alarms available to you. To specify which alarms will be utilized, click on the check box in the corresponding fields.

Printer - If selected, every time that an alarm condition is triggered, a message based on the condition will be sent to your printer.

Video - If selected, every time that an alarm condition is triggered, a warning message will flash in the center of your computer screen.

Audio - If selected, every time that an alarm condition is triggered, a siren will be activated on your computer. The sound quality is hardware dependent, so it may vary from computer to computer.

Dial - If selected and your computer is equipped with a Hayes compatible modem, every time that an alarm condition is triggered, a call will be initiated to a specified telephone number.

COM port - If you are planning to use a modem, you need to specify which COM port (serial port) you are going to use. REMEMBER that TAPIT is ALSO using a port. For example, if TAPIT is using COM1, you may use your modem on COM2 or COM4, etc.

LPT port - If using a printer, this field identifies LPT#.

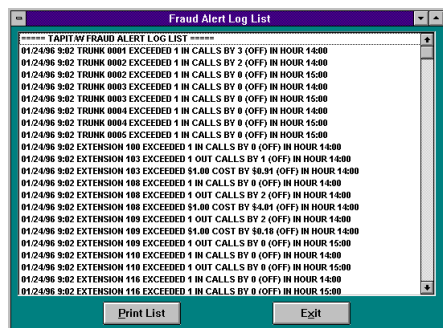
Modem init string - If you are planning to dial out to a pager, you are going to need a Hayes compatible modem. There are many varieties. Some of them may need to be initialized with special "AT" commands. Fraud Alert will use "AT" sequence if nothing is entered in this field. Please refer to your modem documentation.

Modem dial string - This field needs to be entered by the user. It should contain a telephone number for a pager or service, as well as characters to be transmitted in the event of an alarm condition. For example: "AT2125551234,,,,,25276" (this string interprets as dial # 212-555-1234; wait 10 seconds; dial "ALARM").

Log Alarm to File - If selected, every time that an alarm condition is triggered, a message based on the condition will be written to "TPWFRAUD.TXT" file in the TAPIT directory. This file may be stored somewhere else as configured by the user. This is a standard ASCII text file that you may print, view and edit.

To exit this screen click on the **Exit** button, changes will be saved automatically.

Print Log File - click on this icon to send output of the Log File ("TPWFRAUD.TXT") to the printer



Every time that an alarm condition is triggered, a message based on the condition will be written to "TPWFRAUD.TXT" file.

To Print "TPWFRAUD.TXT" file click on the **Print List** button

Example:

01/24/96 9:02 EXTENSION 116 EXCEEDED 1 IN CALLS BY 0 (OFF) IN HOUR 14:00

This record means that at 9:02 AM on January 24, 1996 extension 116 had exceeded it's check value of one (1) incoming call by 0 calls during off hours (OFF) in hour period 14:00 (2:00 PM). This alarm was to check for any calls from extension 116 during off-hours.

Delete Log File

Every time that an alarm condition is triggered, a message based on the condition will be written to "TPWFRAUD.TXT" file. This file is never overwritten, so there is a possibility that it may grow quite large (depending on your telephone activity). It is advisable to delete this file periodically.

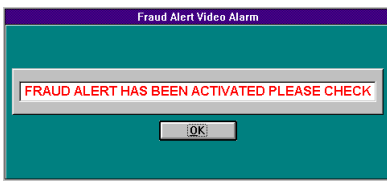
Click on the **Delete Log File** button to delete "TPWFRAUD.TXT"

Test Alarms

As we have mentioned earlier, there are several "alarms" available to you. They are defined on the Fraud Alert Parameters screen.

To get a good feel for what they are, you may want to try them out first before using them. Also, if you plan to use a modem to dial out to a pager in the event of Toll Fraud, you can test that process with this facility.

Click on the **Test Alarms** button to test alarms



Trunks

This facility allows you to specify a condition for a particular Trunk which, if met, will trigger an alarm (please see "Alarm" section). You can use TAPIT Call Accounting software to get a feel for your normal Trunk activity prior to setting up these conditions.

You may define several conditions for each trunk. Depending on the type of business you are in, there is an acceptable number of calls (incoming and outgoing) as well as the cost that occurs on a trunk during any particular hour (please remember the difference between work-hours and off-hours).

The following is a description of fields that are available to you:

Trunk - 4-character identification of a trunk (you should run TAPIT's Summary By Trunk report to see some valid Trunk IDs).

Trunk Type - up to 30 characters describing a trunk (i.e. CO, TIE, FX, WATS, etc.). This field is optional.

Incoming Calls - Alert Conditions

Hourly call volume exceeds - this number will set a number of calls that can be received on the trunk before an alarm is triggered, a different number can be used for **work** and **off** hours.

For Number of calls "0" value is valid. It will not trigger an alarm condition for that particular entry.

With call length Over/Under - this option will set duration for each call that is allowed to be received on the trunk before an alarm is triggered.

Outgoing Calls - Alert Conditions

Hourly call volume exceeds - this number will set a number of calls that can be made on the trunk before an alarm is triggered, a different number can be used for **work** and **off** hours.

For Number of calls "0" value is valid. It will not trigger an alarm condition for that particular entry.

With call length Over/Under - this option will set duration for each call that is allowed to be made on the trunk before an alarm is triggered.

Hourly call cost exceeds - alarm will be triggered if specified amount of cost is exceeded during the work and off hours regardless of number of calls made

Adding new trunk record

Click on **New** button and type in the desired information for a Trunk

Editing and retrieving existing trunk records

Click on the **arrow** pointing down and select a Trunk from the drop down list. Type new or overwrite existing settings.

Deleting trunk records

Retrieve an existing Trunk record and click on **Delete** button

Click on **Exit** to leave **Fraud Trunk Configuration** screen

Extensions

This facility allows you to specify a condition for a particular Extension which, if met, will trigger an alarm (please see "Alarm" section). You can use TAPIT Call Accounting software to get a feel for your normal Extension activity prior to setting up these conditions.

Following is the description of fields that are available to you:

From Extension - 4-digit identification of this extension (it may be helpful to run TAPIT's Summary by Extension report to see some valid Extensions).

To Extension - when creating or deleting a range of Extensions, this field will contain the "To" Extension.

Parameters may be entered for a range of extensions i.e. from 110 to 120 or just for one extension i.e. from 125 to 125

Incoming Calls - Alert Conditions

Hourly call volume exceeds - this number will set a number of calls that can be received by a single extension or each extension in the range before an alarm is triggered, a different number can be used for **work** and **off** hours

For Number of calls "0" value is valid. It will not trigger an alarm condition for that particular entry.

With call length Over/Under - this option will set duration for each call that is allowed to be received by a single extension or each extension in the range before an alarm is triggered.

Outgoing Calls - Alert Conditions

Hourly call volume exceeds - this number will set a number of calls that can be made by a single extension or each extension in the range before an alarm is triggered, a different number can be used for **work** and **off** hours.

For Number of calls "0" value is valid. It will not trigger an alarm condition for that particular entry.

With call length Over/Under - this option will set duration for each call that is allowed to be made by a single extension or each extension in the range before an alarm is triggered.

Hourly call cost exceeds - alarm will be triggered if specified amount of cost is exceeded during the work and off hours regardless of number of calls made.

Adding new extension record

Click on New button and type in the desired information for an Extension or an Extension Range.

Editing and retrieving existing extension records

Click on the **arrow** pointing down and select an Extension or Extension Range from the drop down list. Type new or overwrite existing settings.

Deleting extension records

Retrieve an existing Extension or Extension Range record and click on **Delete** button.

Click on **Exit** to leave **Fraud Alert Extension Configuration** screen.

Dialed Numbers

This facility allows you to specify which Outgoing calls will trigger an alarm (please see "Alarm" section).

Depending on your type of business, you may be concerned with excessive international or long distance calls, or you may be interested in monitoring calls to a particular Area Code, Country, or even a local exchange. Here you may set conditions for a particular telephone number. For example, if you specify "411", this entry will be processed EVERY time when someone dials Information. You can also specify an area code separately, such as "800" or "900" calls.

You may define several conditions for each number dialed. You should know the acceptable number of outgoing calls as well as the cost that occurs during any particular hour (please remember the difference between work-hours and off-hours).

Following is the description of fields that are available to you:

Area Code - 3-digit field in which you may enter specific area codes that you may be concerned with. You can also enter “NNN” and the system will populate your specified phone number with all available area codes (to cover 555-1212 calls for all area codes for example). Note that area code must be present if phone number is populated.

Number Dialed - 12-digit field in which you may enter telephone numbers that you may be concerned with.

Hourly call volume exceeds - this number will set an amount of calls that can be made to a particular number or area code before an alarm is triggered, a different number can be used for **work** and **off** hours.

For Number of calls "0" value is valid. It will not trigger an alarm condition for that particular entry.

With call length Over/Under - this option will set duration for each call that is allowed to be made to a particular number or area code before an alarm is triggered.

Hourly call cost exceeds - alarm will be triggered if specified amount of cost is exceeded during the work and off hours regardless of number of calls made.

Adding new Number Dialed record

Click on **New** button and type in the desired information for a telephone number.

Editing and retrieving existing Number Dialed records

Click on the **arrow** pointing down and select a Number Dialed record from the drop down list. Type new or overwrite existing settings.

Deleting Number Dialed records

Retrieve a Number Dialed record and click on **Delete** button.

Click on **Exit** to leave **Fraud Alert Extension** Configuration screen.

Note that making a change on any of the configuration screens will cause the system to reset all the counters for Fraud Alert.

Database Repair Utility

Using Repair Utility

Occasionally database may get damaged or corrupted. The most common reason for this type of situation is either a power outage or user action of shutting computer down when application is still open.

TAPIT ships with a utility that will try to repair databases that were not closed properly.

If you start getting error messages related to databases or if advised by our technical support staff:

1. Exit from TAPIT application.
2. Run Scandisk.
3. Go to Start\Tapit 2000\Tapit Repair.

Carefully read the message on your screen. If you are ready to run a repair utility click on **OK**.

Tapit 2000 Repair Utility Screen appears.

Tapit 2000 Repair
Designed for Windows 95/98/NT
Copyright (c) 1999-2000
Trisys, Inc.
215 Ridgedale Ave.
Florham Park, NJ 07932
Phone: (973) 360-2300
Fax: (973) 360-2222
Email: support@trisys.com
Web: www.trisys.com

SERIAL NUMBER:
Q37LS-9909-127

INSTALLATION TYPE:
SINGLE USER /w 10 REMOTE LOCATIONS

Tapit Folders
TAPIT: C:\TapitW32\ tapit.ini
DATABASE: C:\TapitW32\ mz.ini
WINDOWS: C:\WINDOWS\ mz.ini

Continue **Restore Files** **Exit**

Repair/Compact Options
☐ Repair only ☐ Compact only

DATABASE RELEASE **4**

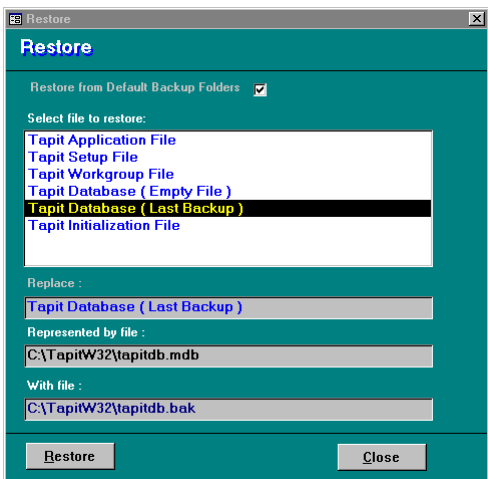
It displays your system's information.

Click on **Repair Database** button.

TAPIT will attempt to repair your database file. It will notify you with a message if the process has been successful.

Restore Files button allows you to replace damaged files with backup files.

When advised by Tech Support you can restore application files or database files using the above utility. To prevent data loss be very careful and follow all TAPIT messages guiding you through the process.



Restoring damaged file:

1. Check or uncheck the **Restore from Default Backup Folders** check box depending on what folder contains the backup file.
2. Select file you would like to restore from **Select file to restore:** list by clicking on it.
The correct path for both damaged and backup files will appear in text boxes below.
If **Repair Utility** cannot locate the file it will notify you with a message and you will have to enter the correct path manually.
3. Click on **Restore** button.

Try to recreate the problem when repairing is completed.

SMDR Monitor

Understanding SMDR Monitor

SMDR Monitor is a communication program that collects SMDR information generated by the PBX. It can also display the SMDR information on the screen of your computer in real time in the raw format.

SMDR Monitor command line is added to the Microsoft Windows WIN.INI file **Load** statement, so every time Microsoft Windows is started **SMDR Monitor** is loaded minimized and is ready to collect the call records data.

SMDR Monitor must be running in order for TAPIT to collect the call activity information.

By default **SMDR Monitor** loads the call data from COM Port. However, the program can be set up to process the data from the file. To load the call data from the file special settings need to be placed under the **[TAPIT]** entry in the **mz.ini** file (the **mz.ini** file can be found in the Windows folder on your computer. See the following example below.

Statements starting with a semicolon are comments and do not need to be entered to the mz.ini file.

;FileProc=1 - process the call data from the file, not from COM Port.

FileProc=1

;FileTimer=n - load the call data from the file every "n" seconds in 60 sec increments, for example: 180 = 3 minutes.

;The actual value depends on your requirements. The minimum value is 120 and the maximum value is 3600.

FileTimer=180

;FilePath= - the path to the file containing the call records data.

;You can use wild-card characters in a file name. For example: if your file name is changed daily to reflect the date of the data collection (smdr111201.log) you can substitute the "111201" string with the "?" wild-card character - "smdr?????.log". The file cannot have ".tmp" extension and a wild-card character "*" cannot be used in the file's extension as well.

FilePath=E:\tapitw32\Data\Main\telmsg.dat

;FileKill=1 - delete the temporary file after processing is done.

;FileKill=0 - keep the temporary file until the next load (recommended).

FileKill=0

To view the SMDR data in real time, double-click on **SMDR Monitor** minimized icon.

The **SMDR Monitor** screen is displayed.



SMDR Monitor Menu Options:

Action



Connect - will allow you to connect to a specified serial port (see Settings).

Disconnect - will allow you to disconnect from a specified serial port.

Flush - will dump any SMDR data that may be currently in SMDR Monitor buffer.

Print - will print a content of current screen.

Exit - will exit program. TAPIT will stop collecting data.

Settings



Tapit COM Port Options

1. **Port** - Click on the **down arrow** icon in the **Port** field to select a port on the computer the SMDR cable is connected to.
2. **Baud Rate** - Click on the **down arrow** icon in the **Baud Rate** field to select a transmission speed the phone system is set at.
3. **Data Bits** - Click on the **down arrow** icon in the **Data Bits** field to select a data bits setting of the phone system.
4. **Parity** - Click on the **down arrow** icon in the **Parity** field to select a parity setting of the phone system.
5. **Stop Bits** - Click on the **down arrow** icon in the **Stop Bits** field to select a stop bits setting of the phone system.
6. **Flow Ctrl.** - Check an appropriate box to select a flow control parameter that may be required by the PBX (refer to PBX's documentation).
7. **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 80).

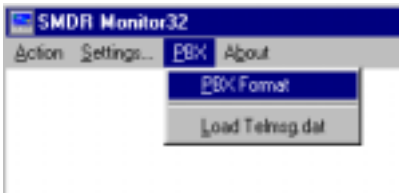
Control Options

1. **Write Log File TELMSG.DAT** - check this box if you wish TAPIT to save a raw SMDR information in the separate file (TELMSG.DAT in directory where TAPIT's database is stored).
2. **Display Errors** - Check this box if you wish TAPIT to display communication errors in the SMDR Monitor window.
3. **Always on top** - check this if you wish SMDR Monitor icon or window to be always on the foreground of the desktop.

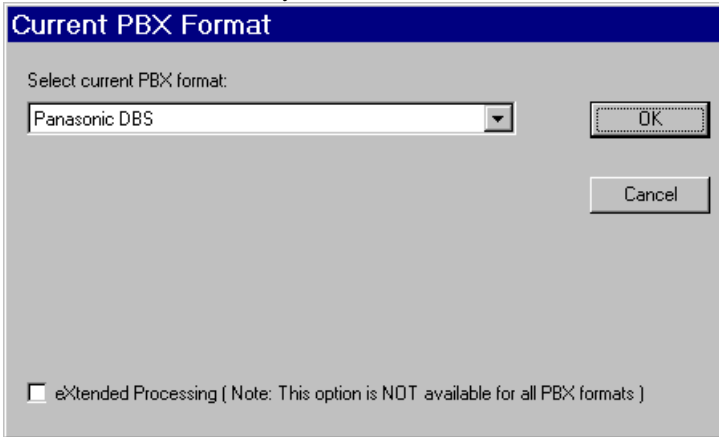
Display Options

1. **Autowrap** - some PBX SMDR string is 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.
2. **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).

PBX



PBX Format - Click on it if you would like to select a PBX Format.



1. Go to **Select current PBX format** list box and click on a down arrow to select appropriate PBX format from the list.
2. Go to **eXtended Processing** check box. For some PBX formats TAPIT supports extensions up to 7 digits and trunks up to 8 characters. Check this box if you are certain that TAPIT Monitor supports extended processing for your PBX format.
In case Monitor does not support this feature for your PBX format and eXtended Processing box is checked TAPIT will not process calls at all.

Load Telmsg.dat -

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.

You have to disconnect (Action/Disconnect) form the COM port before attempting loading.

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Contents

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Technical Support

Technical Support from Trisys, Inc.

Free Technical Support is available, by calling **973.360.2300** to all registered users of TAPIT for 30 days from the date of the first call. Extended Technical Support plan is available, please contact your dealer or Trisys, Inc. for details.

Trisys, Inc.
215 Ridgedale Avenue
Florham Park, NJ 07932

Visit also Trisys **Web site** <http://www.trisys.com> when looking for help in troubleshooting your software.
When calling Technical Support please have the following information ready in order to expedite your call.

- Serial number of the TAPIT software.
- Version number.
- Com Port Settings.
- Cable specifics for PBX Connection (start to finish cable type/any adapters?).
- PBX type (name and model).
- Computer specs - your processor type and speed.
- The amount of free disk space.
- The amount of RAM.

Troubleshooting

Unable to get the report to display on screen

TAPIT program gets all of its printing capabilities from the printer setup within windows. In order for the report to come up to the screen there must be a print driver installed and a default printer selected.

The monitor is not getting any SMDR Data

1. Configure HyperTerminal session using TAPIT settings. SMDR Monitor has to be turned off at that time.
2. Check the pin outs - DB-25 connector (3=receiving, 7=ground), DB-9 connector (2=receiving, 5=ground).
3. The cable may not be functioning.
4. The COM ports may be damaged.
5. The PBX is not actually outputting the SMDR.

Error 3040 - "Disk I/O error" or "Disk I/O error during read".

TAPIT is having difficulty putting data to the hard drive or getting data from it. This error is common to Windows and is most often caused by a misreporting of file size by the operating system. This can be corrected by running a Scandisk.

1. Run Scandisk with a surface scan when using Windows 3.1/3.11 or as a Thorough Scan in Win95.
2. Following Scandisk activate the TAPIT Repair Database utility which has two phases.
The first phase completes with a message "Repair Database Completed Successfully" and an "OK" box.
Clicking on the "OK" box begins the second phase, which compacts the database by removing any blank space found or created by the repair, thereby making the database more efficient.
3. Once completed restart TAPIT and repeat the operation that yielded the error message.

Error 3000 - "Reserved error - There is no message for this error".

This error occurs when there has been damage to the application files preventing TAPIT from operating properly, but not in an expected or predictable manner to which a dedicated message could be referenced. This error is common following an upgrade or reinstallation of the software when the proper sequence wasn't followed.

1. Close all applications and restart the computer.
2. Following restart run Scandisk including surface scan (Thorough Scandisk in Win95/98).
3. Run Repair Database utility located in the TAPIT program group.

"NPA Summary"

NPA stands for Numbering Plan Administration and this is an example of an Area Code being recognized by TAPIT but the Exchange is unknown. The Exchange was most likely created after this version of TAPIT was released. Contact your vendor about a City/State Update.

Error 3075 - Tapit 2000

It mentions an illegal function but the program still loads.

This error shows that some other program or your operating system has loaded newer common files than TAPIT 2000 was expecting. Please visit our web site www.trisys.com. Go to Tech Support and select Product Update Downloads. Click on TAPIT 2000 and download the Tapitapp.bak file for your installation (it is available as a single file or zipped in multidisk format). It will need to be installed on each machine running TAPIT 2000 in multi-user environments. If you have any further questions please contact Trisys Tech Support at 973 360 2300.

Error 3197 - "Data has changed - Operation Stopped"

This message appears following a failed upgrade, an upgrade by incorrect methods, or in limited cases - data corruption. The corrective action is completely dependent on the cause. Please contact our technical support at 973.360.2300.

Error Message "CONNECTION FAILED" when Monitor opens

The following message will appear when SMDR Monitor is opened, if there is a conflict with that comport (any other program or hardware device using that comport); or you have selected a comport that is not in your computer

Monitor shows gibberish for call records

Do you see gibberish (symbols, not clear readable records) across the screen when you receive a call record?

You need to double-check your parameters. Gibberish across the screen means that the **Parity**, **Stop Bits**, **Data Bits**, or **Baud Rate** are not matched with what the PBX is sending out. Again go to **Action** and select disconnect and then go to **Settings** and select the proper parameters.

DO NOT CHANGE THE COMPORT SETTING!!!

If you are still getting gibberish across the screen contact your PBX manufacturer for proper settings, or have the COM port checked for proper operation.

Error 2202 There is no default printer.

TAPIT cannot create reports or print to file without the use of your computers print drivers.

1. Go to Control Panel.
2. Select Printers.
3. Select a default printer or install one.

Note that you do not need a printer to be physically attached to the computer in order to install printer's driver. You can select a generic ink jet or laser jet to supply the necessary driver.

TAPIT End of the Month Procedures

In order to maintain adequate speed and data integrity, we recommend that the following procedures be attended to at the beginning of each month.

1. Enter Maintenance Menu from TAPIT Main Menu.
2. Select **Data Maintenance**.
3. Select **Call Records Maintenance**.
4. Select **Export and Remove Calls**.
5. Enter the correct archive drive (normally d: which is your zip drive) and directory (root directory is ok). Example: d:\.
6. Enter file name (april.txt).
7. Click on **Continue**.
8. Enter the correct dates in the filter screen (04/01/1998 – 04/30/1998).
9. Click on **Continue**.
10. After the process is complete, exit TAPIT program (only SMDR Monitor should be running).
11. Run scandisk utility on drive c:.
12. Run **Database Repair**.
13. Run defrag utility on drive c:.
14. Restart the computer.

To Prevent Data Loss

1. Consider installing an uninterrupted power supply (UPS) for the computer running TAPIT 2000.
2. Close TAPIT 2000 during non-business hours.
3. Backup all user/client data following initial input and periodically after changes/updates are done.
4. Close program and restart MS Windows on a periodic basis to refresh system resources and update operating system to current file statistics. Suggested every 1-2 weeks of operation.
5. "Export and Keep" call records on a regular basis to provide backup in the event of system failure.
6. "Export and Remove" call records that are not needed in the current, active database. These records can be imported back into the active database if reporting or research needs to be done.
7. Copy Exported calls files to floppy to allow for system rebuild in the event of a hard drive failure.
8. Run Repair Database after each "Export and Remove" session to compress database and return available space to the hard drive.

9. Run Thorough Scandisk on monthly, or more frequent, basis to advise on system storage integrity.
10. Run Defrag to improve system speed and efficiency.

SMDR ALARM

REQUIREMENTS

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

You must have administrative rights for the local computer in Windows NT/2000 environments in order to install the SMDR Alarm.

Tapit Multi-User or Tapit Remote Manager must be installed and set up. SMDR Alarm can work only with Multi-User and Remote Manager versions of TAPIT.

When installing SMDR Alarm on a machine different then your TAPIT Server make sure that you can point from it to the TAPIT database folder located on the TAPIT Server.

Hardware:

- CPU: Pentium II 166MHz or faster
- RAM: 32 MB (more recommended)
- Hard-disk Space: Minimum 20 MB
- Printer (to Print alarm messages - optional)
- COM Port and Modem (to dial on the Phone and send signal to the Beeper - optional)
- Sound Card and Speakers (to play Sound alarm message - optional)

Supported Operating Systems:

- MS Windows 95B/98SE/Me
- Windows NT4.0 Server Service Pack 5 or higher
Windows 2000 Server Service Pack 1 or higher recommended

Software Requirements:

- E-Mail client application MS Outlook 98/2000 (for E-mail Alarm signal option)
- Media Player capable to play WAV files.

INSTALLATION

Before installing SMDR Alarm

- You must have administrative access rights to the computer where the SMDR Alarm application will be installed.
- Tapit 2000 Multi-User version must be installed and set up.
- When installing SMDR Alarm on a computer different then your TAPIT server make sure that you can point from that machine to the TAPIT database folder located on the TAPIT Server. You must have read and write access rights to the TAPIT database folder.

Installation program may require rebooting of your PC.

Installing SMDR Alarm

1. Open **SMDR Alarm** folder located on the TAPIT CD.
2. Double click on **Setup.exe** file. **SMDR Alarm - Trisys, Inc. Setup** screen appears.
This screen is a reminder to close all running applications before installation begins.
Click on the **OK** button to continue.
3. Click on the computer icon/button to install in a default folder or click on **Change Directory** to install the application in a different folder. Click on **Continue**.
4. The next screen consists of the **Program Group** text box and the **Existing Group** list box. Accept default value or select of the program groups listed below. Click on **Continue**.
5. The program begins installation. When installation is completed **SMDR Alarm - Trisys, Inc Setup** was completed successfully. Click on **OK**.
6. To start SMDR Alarm select **Start/Programs/SMDR Alarm**.

USER INSTRUCTIONS

Setting up the SMDR Alarm

1. Click the **Start** menu and choose **Programs**. Select the program group **SMDR Alarm** and then **SMDR Alarm**. Application screen appears.

"Waiting..." indicates the SMDR Alarm application is running.

In this example each comma represents 1-second delay.

SMDR Alarm screen is not updated automatically to display the current day of the week settings. Instead the screen shows the settings for the last viewed/edited day of the week.

2. Check the **Report No SMDR Signal** box located in the lower left corner of the **SMDR Alarm** screen.
3. Click on the down arrow of the **Day of Week** list box and select the day of the week you want to setup the alarm first.
4. Enter the **Start Time** (military time format - hh:mm) and the **NO SMDR Timer** (minutes) values.
There are 3 **Start Time** and **NO SMDR Timer** settings. They divide a 24-hour day into three time periods.

The SMDR Alarm will not function if the 3 time periods are not set for each day of the week.

Start Time indicates the beginning of each SMDR Alarm period. **NO SMDR Timer** shows how long (minutes) an interruption in a call data flow has to be prior to sounding an alarm during the corresponding time period.

There is an approximately 60 second delay during the NO SMDR failure reporting process.

Start Time	NO SMDR Timer
08:00	15 minutes
17:00	60 minutes
21:00	0 minutes

The example above should be interpreted as follows:

1st setting - Starting 8 AM SMDR Alarm is going to trigger if the call data flow is interrupted for more than 15 minutes.

2nd setting - Starting 5 PM (17:00 military time) SMDR Alarm is going to trigger if the call data flow is interrupted for more than 60 minutes.

3rd setting - Starting 9 PM (21:00 military time) SMDR Alarm is not going to trigger until the next **Start Time** (8:00 AM).

When the NO SMDR Timer is set to "0" the program will disregard any call data flow interruptions.

1. Click on the down arrow of the **Alarm Signal** list box. Select one of the four alarm signal options.

Alarm Signal:	Send Alarm Signal using:	Test Now
E-mail	peterl@trisys.com	
Visual		
Phone	19733602223,,,,,25276	
Print		
Visual		
Visual		

In this example each comma represents 1-second delay.

Each option indicates how a user is notified about the SMDR failure.

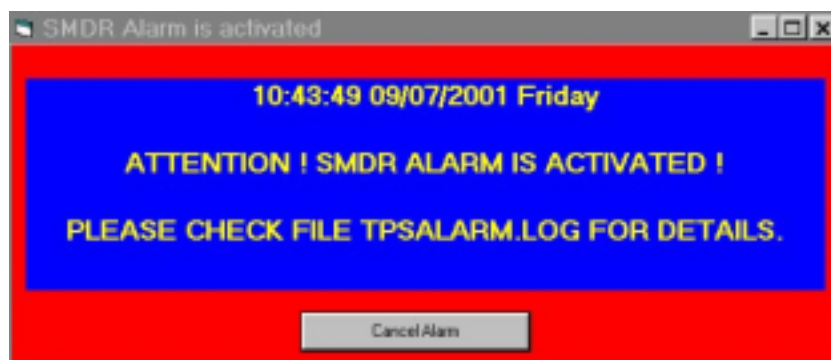
Phone option -system pages a user (modem connection required).

Email option - notification message is sent to a user's mailbox (email client required).

Print option - notification is printed (printer connection required).

Visual option - SMDR Alarm flashes the notification message on the screen and plays an alarm voice recording (sound card required).

Note: By default all options are accompanied with the screen notification and voice-recorded message.



The alarm on-screen message has the **Cancel Alarm** button. Click on it to close the message screen.

You can assign 2 types of alarm signals to one time period.

7. If you selected Phone or E-mail **Alarm Signal** option, enter the phone number or email address that corresponds to your choice in the **Send Alarm Signal using:** text box.
8. Repeat pt 4 through 6 for all time periods.

Note: The SMDR Alarm will not function if the 3 time periods are not set for each day of the week.

9. Click on the **Apply** button.
10. Click on the **Test Now** button. It allows you to test alarm signals.

Note: You can only test alarm signals assigned to a current day and time period.

Example:

You have clicked on the **Test Now** button at 9 AM on Friday.

Let us assume that Friday's SMDR Alarm is set to the email and printer options for the time period starting at 8:AM.

We have to remember that screen and voice alarm by default accompanies all other types of alarm.

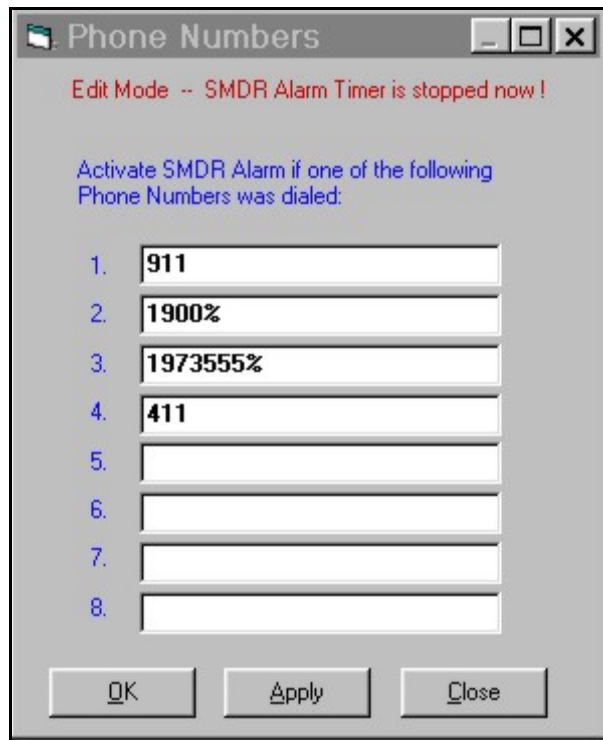
In this case, clicking **Test Now** prompts the system to send an email notification, print the message, display the screen alarm message and play the voice-recorded message.

11. If you want to apply the same settings to all the days of the week, click on the **Apply to all Days** button. Otherwise, click on the down arrow of the **Day of the Week** list box, select the desired day and repeat pt.4 through 8. Continue this process for the remaining days of the week (you can set different options for each day but all days of the week **must** be set).
12. If you want to clear all settings for a given day, select the day from the **Day of Week** list box and click on the **Clear Day Alarms** button. Click on **YES** for the confirmation message. All values for the day are discarded. Enter the new settings and click on **Apply**.

Setting up Phone Number tracking

The SMDR alarm can be triggered when a specific phone number is dialed.

1. Check the **Report Phone Numbers** check box located in the lower left corner of the **SMDR Alarm** screen.
2. Click on the **Phone Numbers** button.
The **Phone Numbers** screen appears.

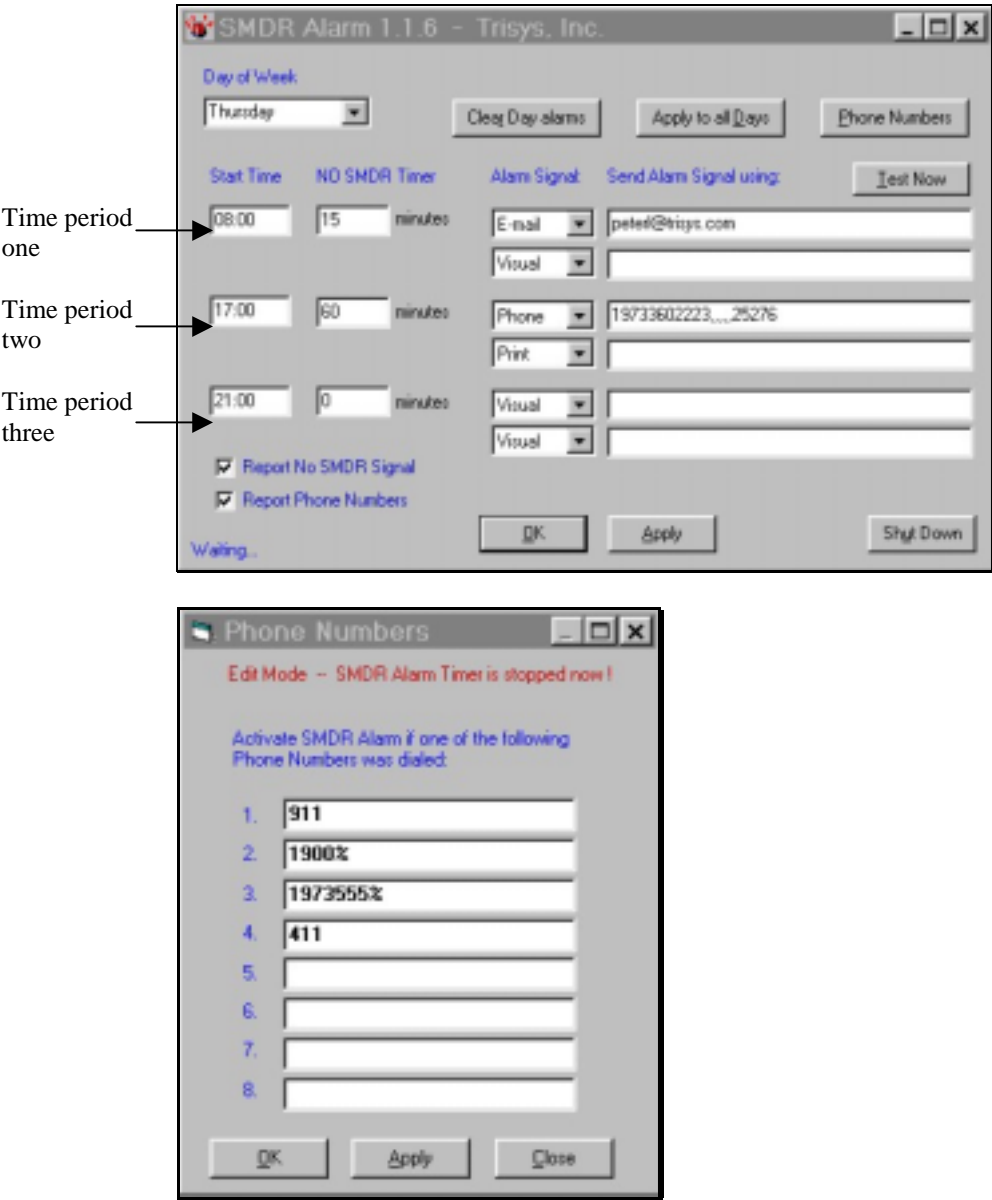


3. Enter phone numbers in the provided spaces. You can enter up to 8 numbers.
4. Click on **Apply**.
5. Click on **OK**. The **Phone Numbers** screen closes.

After the SMDR Alarm has been set up click on OK. This minimizes the SMDR Alarm screen and leaves it running.

If the TAPIT Monitor is running, restart it. Otherwise start the TAPIT Monitor application by clicking on the Start menu, selecting Programs and then TAPIT 2000/TAPIT Monitor.

Example of the Phone Number tracking



Phone Number tracking works in conjunction with SMDR Alarm settings. The two examples above can be explained as follows:
According to the Phone Numbers screen above, the following numbers are being tracked: 411, 911 or any numbers starting with 1900 or 1973555 ("% is a wild character used to indicate that any digits can follow the preceding number).
In our SMDR Alarm screen example, the following alarm signals are triggered if any of the above numbers are dialed:
time period one - between 8 AM and 5 PM a user is emailed, presented with a screen message and a voice-recording.
time period two - between 5 PM and 9 PM a notification message is printed, a user is paged, a screen message is displayed and a voice recording is played.
time period three - between 9 PM and 8:AM a screen message is displayed and a voice recording is played.

The NO SMDR Timer setting is disregarded by the Phone Number tracking. When it is set to "0" the SMDR Alarm is not activated but the alarm for the phone numbers is still triggered.

Understanding the TPSALARM.LOG file

The TPSALARM.LOG file contains time and date log of the SMDR alarm and the tracked phone numbers.
The above file is located in the same folder the TAPIT database is stored.

```
Tpsalarm.log - Notepad
File Edit Search Help

=====
08/06/01 17:01 File TPSALARM.LOG
Old LOG File is saved as TPSALOLD.LOG
=====

08/06/01 18:02 - SMDR Alarm Application
Started

08/06/01 18:49 -
Detected Phone: 1900555555 Date: 8/6/01 Time: 6:50:00 PM Extn: 0139
Message: Specified number was dialed

09/06/01 18:49 -
SMDR Visual Alarm is activated !

09/06/01 18:49 -
SMDR Alarm is activated !

09/06/01 09:53 -
Interval: 15 min - No incoming SMDR data detected whithin specified time interval

09/06/01 09:53 -
SMDR Visual Alarm is activated !
```

When the TPSALARM.LOG file becomes too large to maintain it is saved into TPSALOLD.LOG and the new empty TPSALARM.LOG file is created.

The tracked phone number has been detected. The call originated from ext. 139. The alarm has been triggered.

The SMDR flow has been interrupted for more than 15 min. The alarm has been triggered.

WEB REPORTS

REQUIREMENTS

You must have administrative rights for the local computer in Windows NT/2000 environments in order to Install the Tapit Web Reports.

Tapit Multi-User must be installed and set up. Tapit Web Reports can work only with Multi-User versions of TAPIT. When installing Tapit Web Reports on a machine other than your TAPIT Server make sure you can point from it to the TAPIT database located on the TAPIT Server.

Hardware:

CPU: Pentium II 200MHz or faster
RAM: 64 MB (more recommended)
Hard-disk Space: Minimum 20 MB

Windows NT and Windows 2000 software requirements:

OS: Windows NT4.0 Server Service Pack 5 or higher with IIS 4.0 or higher
Windows 2000 Server Service Pack 1 or higher recommended
Browser: Internet Explorer 5.01 Service Pack 1 or higher
Data Access Drivers: MDAC 2.5 or higher

Windows 98 software requirements:

OS: Windows 98 SE
Personal Web Server installed (can be found on Windows 98 Second Edition CD)
Browser: Internet Explorer 5.01 Service Pack 1 or higher
Data Access Drivers: MDAC 2.5 or higher

INSTALLATION

Before installing Tapit Web Reports

- You must have administrative access rights to the computer where the Tapit Web Reports application will be installed.
- Tapit 2000 Multi-User version must be installed and set up.
- When installing Tapit Web Reports on a computer other than your TAPIT Server make sure you can point from that machine to the TAPIT database folder located on the TAPIT Server. You must have read and write access rights to the TAPIT database folder.

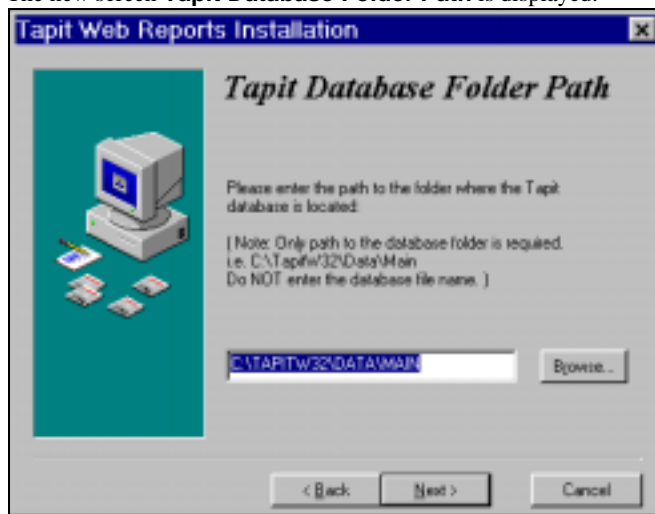
Installation program may require to reboot your PC.

Installing Tapit Web Reports

In order to view Tapit Web Reports on the Internet the application needs to be installed on the computer hosting a web site accessible on the Internet (i.e. www.trisys.com). Make sure you can point from that Web Server to the TAPIT database folder located on the TAPIT Server.

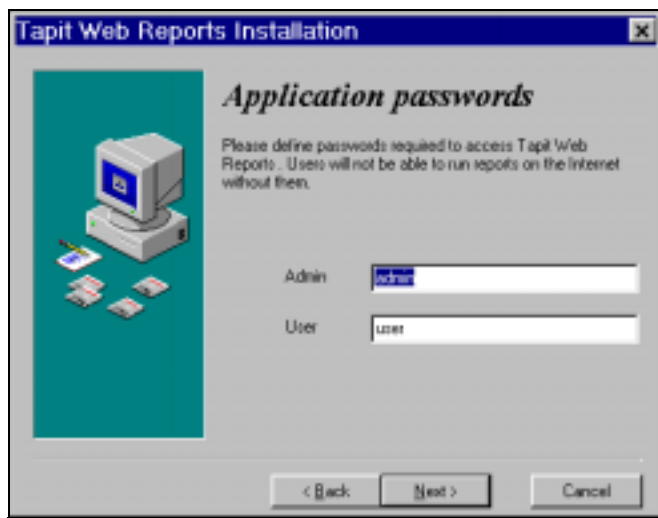
If you are installing Tapit Web Reports on a Windows 2000/WindowsNT computer other than TAPIT Server refer to the Installing Tapit Web Reports on a Windows NT or Windows 2000 computer other than the TAPIT Server machine section below (page 82).

1. Download **TapitWeb.exe** file from <http://www.trisys.com/support/WebRepDown.asp>.
2. Double click on it to extract the application files. Open the directory that contains extracted files.
3. Double click on **TapitReps.EXE** file. **Tapit Reports Installation** screen appears.
Click on the **Next** button to continue.
4. The new screen **Tapit Database Folder Path** is displayed.



Enter the path to the folder where the Tapit database is located or click on a **Browse** button to locate the database folder. Only the path to the database folder (without ending backslash) is required i.e. C:\TapitW32\Data\Main.
Do NOT enter the Tapit database file name.
Click on **Next**.

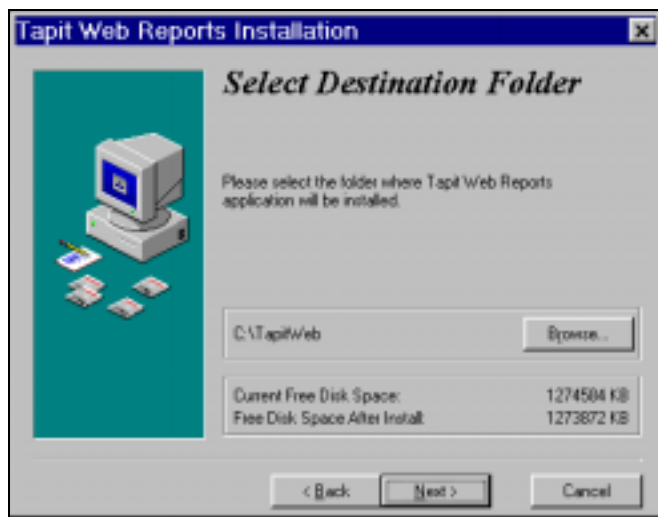
5. Password screen follows.



Define two passwords or accept default values. These passwords are required to log in to the Tapit Web Reports application. Users will not be able to view reports without a password.

Note: Both passwords have the same scope of operation. The second one is provided for future implementations.

6. Click on **Next**.
7. This screen prompts you to select the path to the folder where the Tapit Web Reports application will be installed.



Accept the default value or click on the **Browse** button to locate a different folder.

Click on **Next**.

8. **Ready to Install!** screen appears. Click on **Next**. Setup program will start installing files.
9. **Installation Completed** screen is displayed. Check the **View ReadMe.txt** check box if you would like to print/read user instructions document. Click on **Finish**.

Installing Tapit Web Reports on a Windows NT or Windows 2000 computer other than the TAPIT Server machine.

In order to view Tapit Web Reports on the Internet the application needs to be installed on the computer hosting a web site accessible on the Internet (i.e. www.trisys.com). Make sure you can point from that Web Server to the TAPIT database folder located on the TAPIT Server.

Before you can proceed with the installation follow the steps below:

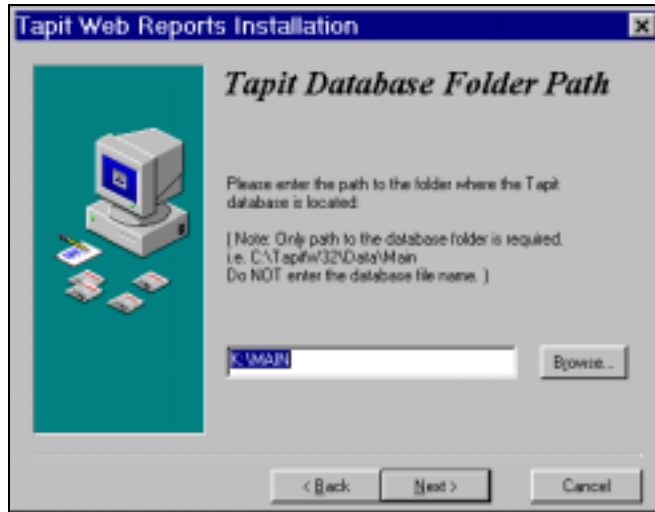
- On the computer where the TAPIT database is residing check if the database folder is shared. In this case, we are going to use the following database folder path: i.e. C:\TAPITW32\Data\Main. For this example **Data** is a shared folder.
 - Confirm that Tapit.ini file is located in the TAPIT database folder.
 - Map the shared directory onto the Tapit Web Reports computer (where the Tapit Web Reports application is going to be installed) i.e. in this case the mapped path to the database folder is K:\Main.
1. Download **TapitWeb.exe** file from <http://www.trisys.com/support/WebRepDown.asp>.
 2. Double click on it to extract the application files. Open the directory that contains extracted files.
 3. Double click on **TapitReps.EXE** file. **Tapit Reports Installation** screen appears.
Click on the **Next** button to continue.

4. The new screen **Tapit Database Folder Path** is displayed. Enter the path to the folder where the Tapit database is located or click on the **Browse** button to locate the database folder.

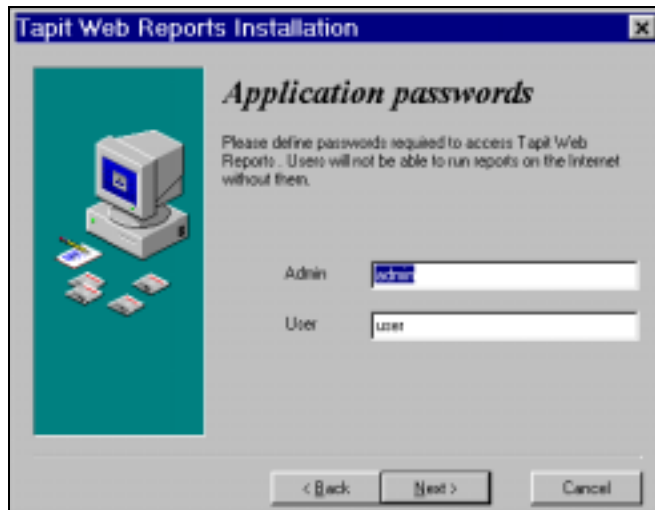
Note: Only the path to the database folder (without ending backslash) is required i.e. K:\Main.

Do NOT enter the Tapit database file name.

Click on **Next**.



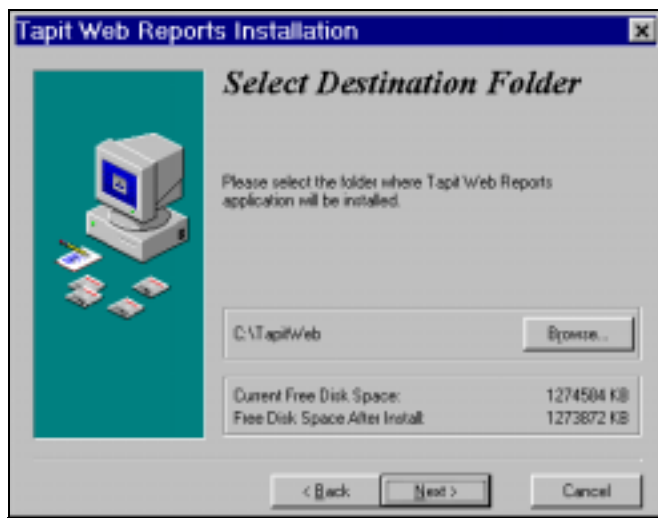
5. Password screen follows.



Define two passwords or accept default values. These passwords are required to log in to the Tapit Web Reports application. Users will not be able to view reports without a password.

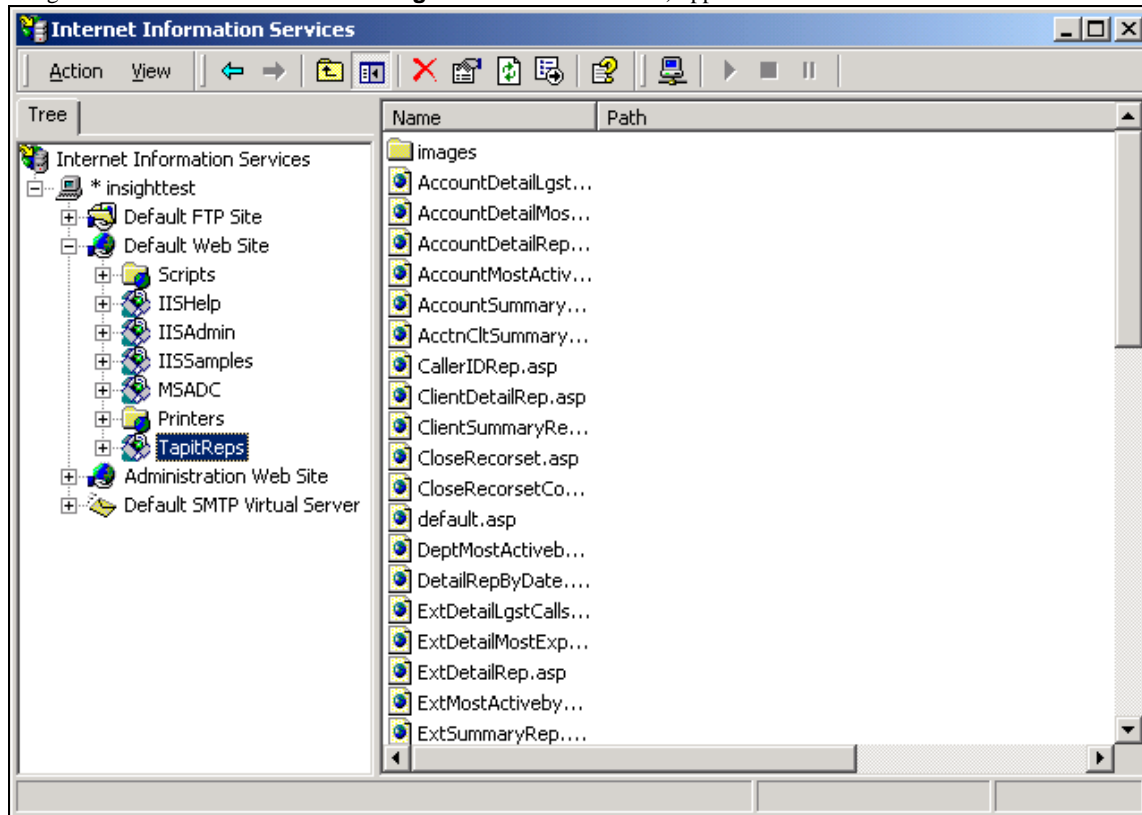
Note: Both passwords have the same scope of operation. The second one is provided for future implementations.

6. Click on **Next**.
7. This screen prompts you to select the path to the folder where the Tapit Web Reports application will be installed. Accept the default value or click on the **Browse** button to locate a different folder.



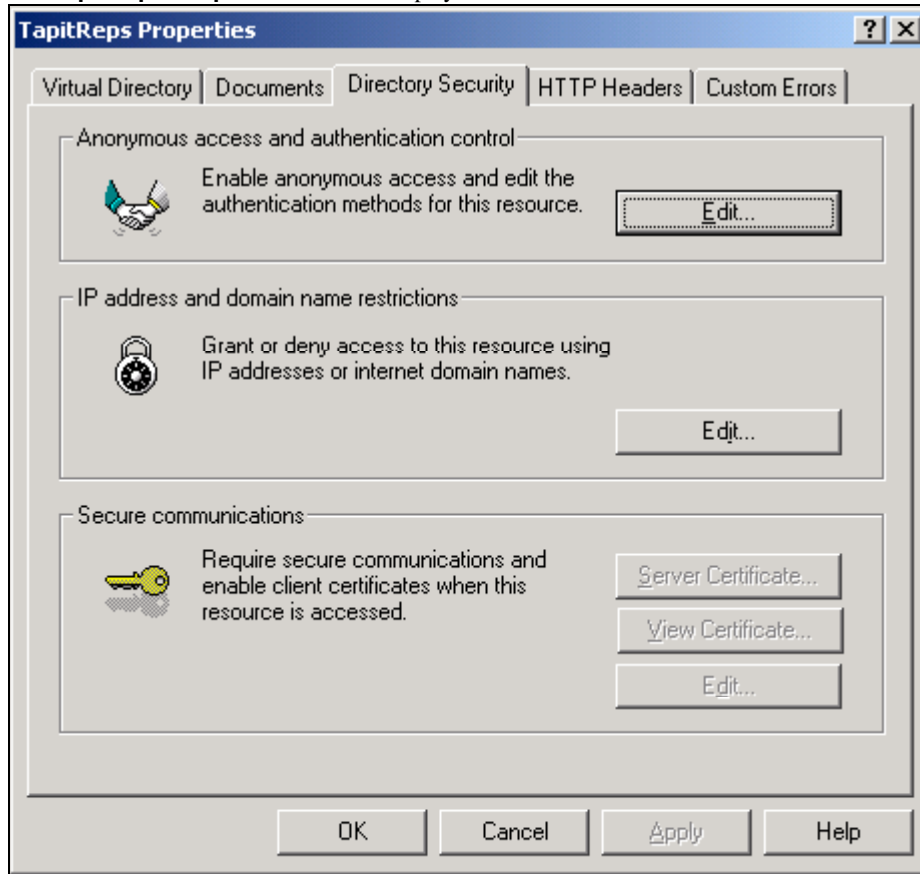
Click on **Next**.

8. **Ready to Install!** screen appears. Click on **Next**. The setup program will start installing files.
9. **Installation Completed** screen is displayed. Check the **View ReadMe.txt** check box if you would like to print/read the user instructions document.
Click on **Finish**.
10. When the installation is completed, click on **Start** menu and select **Programs/Administrative Tools/Internet Services Manager** (when working with Windows NT click on the **Internet Services Manager** icon on your desktop). The **Internet Information Services** screen (or if using Windows NT the **Microsoft Management Console** screen) appears.

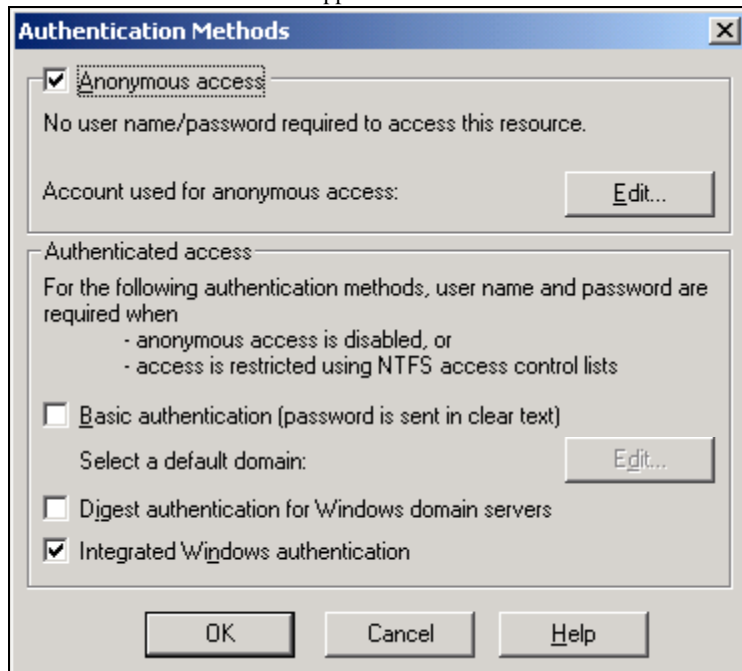


11. Click on the **Default Web Site** folder and select **TapitReps** folder below. Right-click on the folder and select the **Properties** option from the drop-down menu.

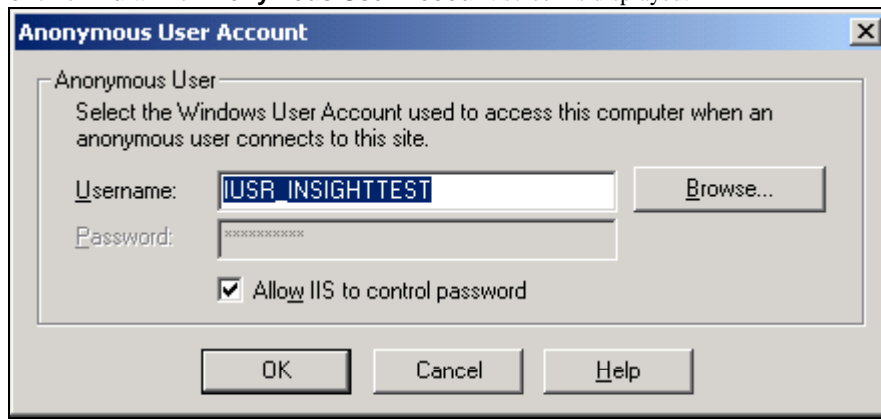
12. The **TapitReps Properties** screen is displayed.



13. Click on the Directory Security tab.
14. Click on the Edit button located in the Anonymous access and authentication control group. Authentication Methods screen appears.



15. Click on **Edit**. The **Anonymous User Account** screen is displayed.

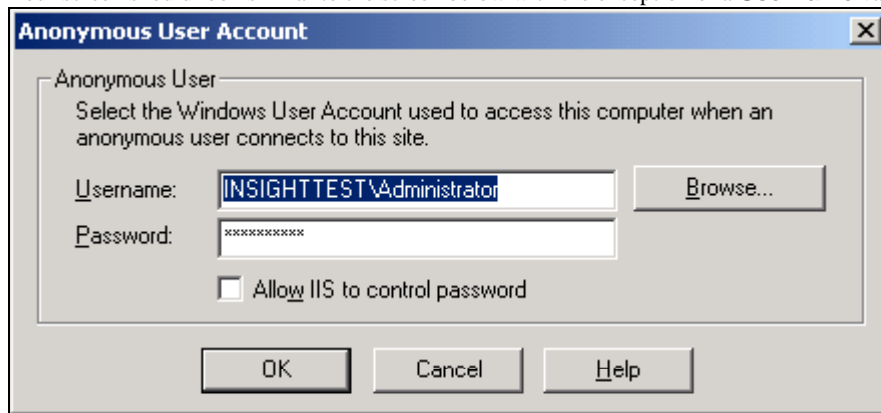


The screenshot shows a Windows-style dialog box titled "Anonymous User Account". Inside, there's a section labeled "Anonymous User" with the instruction: "Select the Windows User Account used to access this computer when an anonymous user connects to this site." Below this, there are two input fields: "Username:" containing "IUSR_INSIGHTTEST" and "Password:" containing "XXXXXXXXXX". To the right of the Username field is a "Browse..." button. Below the password field is a checked checkbox labeled "Allow IIS to control password". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

It contains the default account user name for the Tapit Web Reports application used to access the TAPIT database and other files located on a TAPIT Server computer.

This default account does not have any read or write permissions to the TAPIT Server machine.

16. Click on the Allow IIS to control password (if using Windows NT - Enable Automatic Password Synchronization) box to uncheck it.
17. Enter your account name into the **Username** text box or click on the **Browse** button and select the appropriate name from the list. It is required you have read/write access rights to the TAPIT Server machine. We suggest using your account name.
18. Enter the new password. Press enter. Enter it again in the confirmation screen.
19. Your screen should look similar to the screen below with the exception of a **Username** value which of course is different in your case.



This screenshot shows the same "Anonymous User Account" dialog box, but with changes. The "Username:" field now contains "INSIGHTTEST\Administrator". The "Password:" field still shows "XXXXXXXXXX". The "Allow IIS to control password" checkbox is now unchecked. The "Browse..." button is still present to the right of the username field. The "OK", "Cancel", and "Help" buttons remain at the bottom.

20. Click on **OK**.

- To start the Tapit Web Reports application on the same computer:
Go to **Start/Programs/Tapit Web Reports/Tapit Reports**.
- To view Tapit Web Reports via Network from a different computer:
Note: The computer where the Tapit Web Reports application has been installed must be up and its Web Server must be running.
Open the Internet Explorer and type in the following link:
http://web server name/TapitReps (i.e. **http://myserver/TapitReps**).
- To access Tapit Web Reports via Internet from any computer.
Open the Internet Explorer and type in the following link:
www.your domain name/TapitReps (i.e. **www.trisys.com/TapitReps**).

USER INSTRUCTIONS

1. Start the Tapit Web Reports application by clicking on **Start/Programs/Tapit Web Reports/Tapit Reports**.
2. Password screen appears. Enter one of the passwords defined during the installation and click on the **Log In** button.
3. The report menu is displayed. Each option on the menu is a report category. Each category contains several reports. For example click on **User**. Your screen displays the list of reports in a **User** category.
4. Click on the name of a required report. The filter screen appears. Enter the appropriate criteria.

Date

enter the time frame in the following format: mm/dd/yyyy-mm/dd/yyyy.

Direction

select the direction of phone activity.

Extension

enter the extension bracket or if you want to run a report for a particular extension enter the same value in both text boxes.

Trunk

enter the trunk bracket or if you want to run a report for a particular trunk enter the same value in both text boxes.

Time Window

enter the time window in the following format: hh:mm-hh:mm. The report will be run only for calls taking place in that time bracket.

Telephone #

enter the telephone number you would like to run the report for. You can enter partial numbers. I.e. only area code or area code and exchange.

Length

click on a down arrow to open the logical operators list. Select the appropriate operator and enter the call length value in the following format:

hh:mm:ss

Cost

click on a down arrow to open the logical operators list. Select the appropriate operator and enter the call cost value (i.e. enter 1.0 for \$1 and .5 for 50 cents)

Account Code

enter the account code bracket or if you want to run a report for a particular account code enter the same value in both text boxes.

Only Local Calls/Exclude Local Calls

check one of the boxes if you want to run a report only for local calls or all calls except local respectively

Department, User, Client

If your Tapit database does not contain any Department, Client or User records the list boxes will be empty.

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.

5. If you want to start from scratch clean the filter screen by clicking on **Clear**.

When you have entered all filter criteria click on the **Create Report** button.

Report screen appears. Depending on the size of your database, the scope of the report and the speed of your Internet connection it may take a few minutes.

If the report has more than one page, links to the next pages (up to 10) appear on the top and the bottom of the screen. Ten page numbers are displayed at the same time. You can move to each page by clicking on its number.

To advance to the next 10 pages, click the single arrow pointing to the right.

To go back to the previous 10 pages, click on the single arrow pointing to the left.

Click the right double arrow to go to the last page of the report.

If you want to go to the first page of the report, click the left double arrow

TROUBLESHOOTING WEB REPORTS

Error Message: "Could not create ...the path to the TAPIT database folder\Tapit.ini object on the server" or "Could not open ...the path to the TAPIT database folder\Tapit.ini file".

This message appears when Tapit.ini file is not accessible to the Tapit Web Reports application.

If the Tapit Web Reports application was installed on the TAPIT Server computer:

1. Check if Tapit.ini is located in the folder where the TAPIT database is residing.
2. Check if the folder path, displayed in the error message, matches the existing folder path to the TAPIT database.
If the folder paths are different this means the Tapit Web Reports program was not installed properly and needs to be reinstalled.

Refer to the installation part of this document starting on page 80. It is recommended to download the newest version of Tapit Web Reports and install it over the old CD version.

Go to the download page located on Trisys, Inc. website - <http://www.trisys.com/support/WebRepDown.html>.

Follow instructions. When prompted to enter the path to the TAPIT database folder

(pt.4 on page 80) make sure you enter the correct path.

If the Tapit Web Reports application was installed on a Windows2000/Windows NT machine other than your TAPIT Server:

1. Check if the Tapit.ini file is located in the folder where the TAPIT database is residing.
2. Check if the folder path, displayed in the error message, matches the existing folder path to the TAPIT database.
If the folder paths are different this means the Tapit Web Reports program was not installed properly and needs to be reinstalled.

Refer to the installation part of this document starting on page 80. It is recommended to download the newest version of Tapit Web Reports and install it over the old CD version.

Go to the download page located on Trisys, Inc. website - <http://www.trisys.com/support/WebRepDown.html>.

Follow instructions. When prompted to enter the path to the TAPIT database folder

(pt.4 on page 80) make sure you enter the correct path.

Index

B

Before installing your software 2

C

Call Editor 34

Clients 18

 Add a new client 18

 Edit or delete a client 18

 Print Clients List 19

Custom Reports 47

D

Data Maintenance 43

 Call Records Maintenance 44

 Export 43

 Export to Billing Software 45

 Import 43

 Import Tapit DOS Data 45

 Import V&H Data 45

Database Repair Utility 54

Departments 14

 Add a new department 15

 Edit or delete a department 15

 Print departments list 15

Dialing patterns 40

 Add a dialing pattern 41

 Delete a dialing pattern 41

 Edit a dialing pattern 41

DOS Data 45

F

Filter - reports 20

Fraud Alert 49

 Delete Log File 50

 Dialed numbers 52

 Extensions 51

 Parameters 49

 Test Alarms 50

 Trunks 51

H

Hierarchy Tree 17

I

Installing Tapit Multi-User 6

Installing Tapit Single User 3

Introduction 1

M

Main Menu 12

Monitor 56

 Action 57

 PBX 58

 Settings 57

O

Overview 13

P

Pricing

 Add new pricing record 35

 Delete pricing record 37

 Find a specific record 37

 Special calls 35

Pricing Call Records 35

R

Recosting 39

 Using Custom option 39

 Using Tapit Carrier option 39

 Using V&H Carrier option 39

Reindexing 38

Reinstalling TAPIT 2000 8

Report Designer 47

 Custom Reports

 Creating reports from templates 48

 Delete an existing custom report 48

 Detail report 47

 Editing custom reports 48

 Summary report 48

Report Scheduler 42

 Add a new report 42

 Delete a report record 42

 Edit a report record 42

Reports 20

 Filter options 20, 21

 Web Reports 70

S

Setting up TAPIT Single User 3

SMDR Alarm 63

 Installation 64

 Requirements 63

 User Instructions 65

SMDR Monitor 56

Software License Agreement 59

Statistics 26

 Graphs 26

 For Date and Time 26

 For Date and Time - Detail 27

 For top 10 values 26

System Maintenance 28

System Parameters 4, 29

 Activity 31

- Call Costing 31
- Communications 29
- Destination 32
- Trunks 32

System Requirements 1

T

- Technical Support 61
- Troubleshooting 61

U

- Upgrading TAPIT 2000 – different serial number 7
- Upgrading TAPIT 2000 – same serial number 7
- Upgrading TAPIT for DOS 9
- Upgrading TAPIT for Windows 8
- Users 13
 - Add a new user 13
 - Edit or delete a user 14
 - Print Hierarchy Tree 17
 - Printing users list 14

V

- V&H Data - Import 45

W

- Web Reports 70
 - Installation 71
 - Requirements 70
 - Troubleshooting 78
 - User Instructions 77