

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>	

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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

System Requirements

- Pentium™ II Based PC
- 128 MB RAM
- Microsoft™ Windows 98/NT/2000/XP Professional
- 250 MB free disk space
- One RS232 port connection to the PBX® SMDR port
- Printer driver must be installed on your system
- 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

Getting Started

Before Installation

If your PBX system sends data to the RS232 port, test the SMDR link by following instructions from page 2 (“Before installing your software”).

Plain TAPIT Installation

Install and setup TAPIT following the instructions on page 4 (“Installing Tapit Single-User”) or page 8 (“Installing Tapit Multi-User”).

TAPIT Remote Manager Installation

Install and setup TAPIT (see “Plain TAPIT Installation above”).

Install TAPIT Remote Manager (refer to the TAPIT Remote Manager manual located on the CD in Docs folder).

If your system is collecting data from CDR systems like Altigen, 3COM, AVAYA IP Office, Cisco CCM etc.:

Open and print readme and an appropriate startup file located on the Trisys Software CD in Tapit CDR Loader folder.

Follow installation instructions for your telephone system.

Note: the installation includes TAPIT Multi-User setup, TAPIT Remote Manager setup (if you purchased this option) and TAPIT CDR Loader setup.

If you want to use Web based reports with your TAPIT software:

Install and setup TAPIT Multi-User (page 8 - “Installing Tapit Multi-User”).

If you purchased this option, install and setup TAPIT Remote Manager (refer to the TAPIT Remote Manager manual on the CD in Docs folder). Install TAPIT Web Reports following the instructions on page 110.

Before installing your software

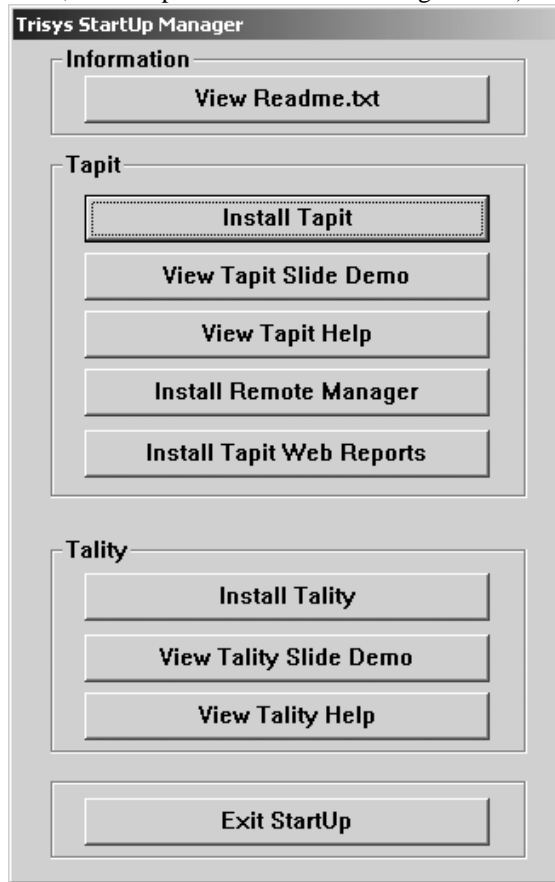
In an effort to separate possible hardware and software issues we need to confirm the presence of clear SMDR data (this will tell us if the connection between PBX and computer is intact). To do that we’ll use a communications software called HyperTerminal®, which comes bundled with Microsoft® Windows.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

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.

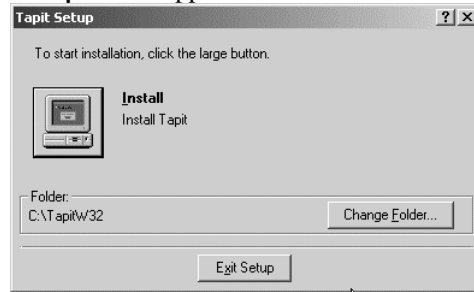
Installing Tapit Single User

1. Insert TAPIT CD into the CD ROM drive. **Trisys StartUp Manager** screen is displayed.
(If this screen is not displayed automatically then use the Run command on the Start (Windows) menu by typing D:\Startup.exe, where D is represents your CD ROM drive, in the Open text box and clicking on OK.)



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

Setup screen appears.



4. Click on the **Install** button/icon to continue (or click on the **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 the **Enter Serial Number** screen. Enter your TAPIT software serial number. Click on **OK**.
7. TAPIT 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 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 19 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 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** 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/Tapit Setup**.
A message with product information is displayed. This message contains the TAPIT Serial Number. Verify the number is correct and click on **Yes**.

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



3. Click on the **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 application on Maintenance/System Parameters screen.

6. Click on the **Your Telephone Number** field and enter your main telephone number (do not use an 800 number).
7. **Load Calls from Text File:**
check this check box only if you want the call records to be loaded from a text file instead of a Com Port.
When **Load Calls from Text File:** is checked the adjacent text box with the path to a call records file is enabled. Accept the default value or enter a new path.
8. **Process Text File Every _____seconds**
This option becomes available when the **Load Calls from Text File** box is checked.
The value entered in this box determines how often TAPIT loads data from the text file.
9. **Load Calls into Database Every __ minutes**
The value entered in this box determines how often TAPIT processes data (converts raw information into TAPIT database format). Twenty minutes is the default value for this field.
10. Click on the **down arrow** icon in the **PBX Type/SMDR Format** field to select a telephone system type the computer is receiving data from.
Data will not be processed accurately if incorrect selection is made.

11. **eXtended Processing (not available for ALL PBX formats)**
Check this box only when you are certain TAPIT supports extended processing format or when suggested by Trisys Technical Support.
12. Click on the **PBX** or **Computer** options 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 check the Computer date option if your phone system is not generating the following date information: day, month and year.
Otherwise we recommend you use the PBX date.

Note: The Port, Speed, Parity, Data Bits and Stop Bits options are enabled only when the Load Calls From Text File: box is unchecked.

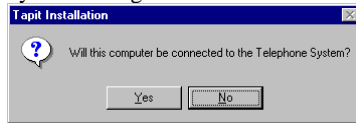
13. Click on the **down arrow** in the **Port** field to select a port the SMDR cable is connected to.
14. Click on the **down arrow** icon in the **Speed** field to select the phone system transmission speed/ baud rate.
15. Click on the **down arrow** icon in the **Parity** field to select the phone system parity setting.
16. Click on **7** or **8** in the **Data Bits** fields to select the phone system data bits setting.
17. Click on **1** or **2** in the **Stop Bits** fields to select the phone system stop bits setting.
18. 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.
19. 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**.
20. 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.
21. If everything is complete **reboot** your computer.
22. Verify the TAPIT Monitor is running and start your TAPIT application by clicking on **Start/Programs/Tapit/Tapit**.
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. Follow the instructions from the **Installing Tapit Single User** section above (page 4) pt. 1 through 7.
3. TAPIT processes the serial number. The product information message is displayed followed by the message:



Click on **Yes**.

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

Setting up TAPIT Server

When the program installation is completed you can proceed with the configuration of TAPIT so it will communicate with the phone system properly.

1. Open the **Setup** program by clicking on **Start/Programs/Tapit/Tapit Setup**. A message with product information is displayed. This message contains the TAPIT Serial Number. Verify the number and click on **Yes**.
TAPIT Setup screen appears. This screen displays your software serial number and product description.
2. Click on the **START SETUP** button.
3. Product information message is displayed followed by the message: "Will this computer be connected to the Telephone System?". Click on **YES**.
4. The Setup program displays a message indicating the initial database location and asks you if you want to keep the current location settings. Click on **No** to reject the current location.
5. The message "..Store Tapit in the default folder for Tapit/w Multi-user Access?" appears. Click on **Yes**.
6. Follow instructions on page 5 - Setting up TAPIT Single User - pt.5 - pt.22

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.

7. Open your Windows Explorer and go to TapitW32 folder. Find the **DATA** folder. Make sure this folder is shared with read/write access on the network.

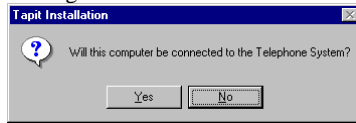
Note: Wherever you decide to store your data the basic rule for the TAPIT Server setup is: Tapit Database must be stored in the subfolder of the shared folder.

TAPIT Client Installation

Client installation must be performed on every workstation that is 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 4) pt. 1 through 7.
2. TAPIT 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 Setup was completed successfully". Click on **OK**. It is recommended to restart the computer.

Setting up TAPIT Client

Before running TAPIT Setup, it is recommended to map a network drive at the client computer to the folder DATA 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. However, you can also find the shared DATA folder via Network Neighborhood during setup and create the database path then.

The next step is to configure TAPIT on the client station, so it will properly communicate with the database.

1. Open setup by clicking on **Start/Programs/TAPIT/TAPIT Setup**.
A message with product information is displayed. This message contains the TAPIT Serial Number. Verify the number and click on **Yes**.
TAPIT Setup screen appears. This screen displays your software serial number and product description.
2. Click on the **START SETUP** button.
3. Product information message is displayed followed by the message: "Will this computer be connected to the Telephone System?".
Click on **NO**.
4. The message "Do you want to locate Tapit Database Now? (Recommended)" appears.
Click on **Yes**.
5. The file browser window is displayed. Locate the previously mapped network drive and the database in the MAIN folder, or go to Network Neighborhood and find shared **DATA** folder.
Click on **Open**.
6. 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.
7. If everything is completed **reboot** your computer.
8. 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 TAPIT applications on all Client computers are closed. To avoid any inappropriate changes to system configuration, delete the shortcut to the TAPIT Monitor from Tapit program group on Client computer.

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 EX using different serial

number

This section of the manual pertains to a registered version of TAPIT EX that is upgraded to a different type of TAPIT call accounting software (i.e. upgrading TAPIT EX Single-User to TAPIT EX Multi-User). In such cases, please call Technical Support at 973 360 2300 for instructions.

Moving TAPIT EX to another computer

Follow the instructions in this section if your TAPIT EX software is registered and you need to move it to another computer.

1. At the new computer install and configure TAPIT EX by following the upgrade instructions from the **Upgrading TAPIT EX To TAPIT EX** section below.
2. **Note: Make sure that you have access to the old computer.** Call Technical Support to deactivate previous registration and obtain a new registration number.

Reinstalling TAPIT EX

Follow the instructions in this section if you need to reinstall your TAPIT EX software on the same computer with the same serial number.

Open your Windows Explorer.

Go to **TAPITW32** folder.

Select **Setup** folder and delete it.

Now you can proceed with installing TAPIT - refer to the Installing TAPIT Single User (page 4). 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 EX to TAPIT EX

Follow instructions from the **Upgrading TAPIT 2000 to TAPIT EX** section below.

Upgrading TAPIT 2000 to TAPIT EX

1. Click on the **Maintenance** icon on the TAPIT Main Menu of a current version of your software.
2. Click on **Data Maintenance**. **Data Maintenance** screen opens on the **Export** tab by default.
Click **All** in the **Export** field for all data to be exported. The default folder is your current TAPIT folder. You may choose another folder if you want. **DO NOT Check "Delete Existing Data from Database"**. Click **Continue**. You will receive "Data Export Completed" message.

Note: If you are using account codes with matter codes you need to follow the steps below before you export your call records. Otherwise proceed with step 3.

1. Go to the Systems Parameters screen and select the Call Costing tab.
 2. Write down the Matter Code Length setting for later use.
 3. Change the Matter Code Length setting to 0.
 4. Click on OK.
 5. Click on Reindex Database.
 6. Select second option.
 7. Click on Continue.
 8. Filter screen appears. Enter the date range criteria for the call records you intend to export.
 9. Click on Continue.
 10. Tapit reindexes the data. The confirmation message appears when done. Click on OK.
-

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 backup.
6. Proceed with the new installation of TAPIT EX.
7. Insert TAPIT CD into the CD ROM drive. The **Trisys StartUp Manager** screen is displayed.
8. Click on **Install TAPIT . TAPIT Setup** screen appears.
9. Click on **Continue** button. TAPIT is searching for the installed components.
10. Click on **OK** button to install TAPIT in TAPITW32 folder on drive C. **TAPIT Setup** screen appears.
11. Click on **Install** button to continue (Note: Change Folder button allows a different TAPIT destination path than default).
12. Program installs TAPIT files and updates your system.
13. Program displays a following message: "Setup has found Serial Number (*your current serial number*). Is it your current valid Serial Number?" Click on **NO**.
14. TAPIT displays **Enter Serial Number** screen. Enter your TAPIT software serial number. Click on **OK**.
15. TAPIT processes the serial number. Product information message is displayed. Click on **OK**.

16. Setup program displays a registration message as a reminder to register TAPIT software.
17. It is very important to register your TAPIT promptly. TAPIT will stop functioning if you do not register it 30 days from the date of installation.
You can find registration instructions on page 19 of this manual, "Getting Started" booklet included with your package or TAPIT CD in register.txt file.
Setup program displays a message "TAPIT Setup was completed successfully".
Click on **OK** (If prompted by system, restart the computer).
18. Copy TAPIT.INI file from TAPITOLD folder into new TAPITW32 folder (where your TAPIT database files reside). Let it overwrite the existing file.
19. Go to **START/Programs/TAPIT** and run **TAPIT Setup**. Note: 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 5 of this manual.)
20. After completing Setup go to **START/Programs/TAPIT/TAPIT**.
TAPIT provides the following message: "TAPIT will be connected to the database...". Click **OK**.
21. From the **Main Menu**, click on **Maintenance**, click on **Data Maintenance**, click on **Import** tab.
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.
22. 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.

Note: If you are using account codes with matter codes you need to follow the steps below after you import your call records. Otherwise proceed with step 12.

1. Go to the Systems Parameters screen and select the Call Costing tab.
 2. Change the Matter Code Length setting to the previously recorded setting.
 3. Click on **OK**.
-

23. Click on **Reindex Database**. Select second option. Click on **Continue**. Filter screen appears. Enter the date range criteria for the call records you intend to export. Click on **Continue**. Tapit reindexes the data. The confirmation message appears when done. Click on **OK**.
24. To confirm successful import of data, run a **Detail Activity by Date** report from the **Report Menu**.
25. If everything is running after you completed the above, you may go back to Windows Explorer and delete the TAPITOLD folder. **Note:** The old TAPIT 2000

program group is not automatically removed from the MS Windows START/Programs menu. You have to delete it manually (see MS Windows help).

Upgrading TAPIT for Windows to TAPIT EX

Upgrading TAPIT on the SAME computer:

1. Click on the **Maintenance** icon on the TAPIT Main Menu of a current version of your software.
2. 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 want. DO NOT Check "Delete Existing Data from Database". Click on **Continue**. You will receive "Data Export Completed" message.

Note: If you are using account codes with matter codes you need to follow the steps below before you export your call records. Otherwise proceed with step 3.

1. Go to the Systems Parameters screen and select the Call Costing tab.
2. Write down the Matter Code Length setting for later use.
3. Change the Matter Code Length setting to 0.
4. Click on OK.
5. Click on Reindex Database.
6. Select second option.
7. Click on Continue.
8. Filter screen appears. Enter the date range criteria for the call records you intend to export.
9. Click on Continue.
10. Tapit reindexes the data. The confirmation message appears when done. Click on OK.

-
3. Click on the **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) and click on **Continue**. You will receive "Call Records Export Completed" message. Exit the **Data Maintenance** screen.
 4. Click on the **System Parameters** icon. **System Parameters** screens opens up on the default **Communications** tab. You need to write down this screen's settings to save them for entry during new installation.
 5. Exit the **System Parameters** screen.
 6. Close TAPIT for Windows and TAPIT SMDR Monitor.
 7. Go to Windows Explorer and locate the TAPITW folder. Rename the folder as TAPITOLD.
 8. Proceed with TAPIT EX installation.(see Installing TAPIT Single User on page.4)

9. Go to START/Programs/TAPIT and run TAPIT Setup. NOTE: While running TAPIT Setup, **System Parameters** screen appears. Enter settings copied previously from your old version of TAPIT. Do not change anything unless required. (For setup instructions see Setting up TAPIT on page 5 of this manual.)
10. After completing Setup, go to START/Programs/TAPIT/TAPIT. TAPIT provides the following message: "TAPIT will be connected to the database...". Click **OK**.
11. From Main Menu, click on **Maintenance**, click on **Data Maintenance**, click on the 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.
12. 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.

Note: If you are using account codes with matter codes you need to follow the steps below after you import your call records. Otherwise proceed with step 12.

1. Go to the Systems Parameters screen and select the Call Costing tab.
 2. Change the Matter Code Length setting to the previously recorded setting.
 3. Click on OK.
-

12. Click on **Reindex Database**. Select second option. Click on **Continue**. Filter screen appears. Enter the date range criteria for the call records you intend to export. Click on **Continue**. Tapit reindexes the data. The confirmation message appears when done. Click on **OK**.

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

If you have completed the above and everything is running, you may go back to Windows Explorer and 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).

Upgrading TAPIT on the DIFFERENT computer:

1. Click on the **Maintenance** icon on the TAPIT Main Menu.
2. 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.

Note: If you are using account codes with matter codes you need to follow the steps below before you export your call records. Otherwise proceed with step 3.

1. Go to the **Systems Parameters** screen and select the **Call Costing** tab.
 2. Write down the **Matter Code Length** setting for later use.
 3. Change the **Matter Code Length** setting to 0.
 4. Click on **OK**.
 5. Click on **Reindex Database**.
 6. Select second option.
 7. Click on **Continue**.
 8. Filter screen appears. Enter the date range criteria for the call records you intend to export.
 9. Click on **Continue**.
 10. Tapit reindexes the data. The confirmation message appears when done. Click on **OK**.
-

3. 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) and click on **Continue**. You will receive “Call Records Export Completed” message. Exit **Data Maintenance** screen.
4. Click on the **System Parameters** icon. **System Parameters** screens opens up on the default **Communications** tab. You need to write down this screen’s settings to save them for entry during new installation.
5. Exit the **System Parameters** screen.
6. Close TAPIT for Windows and TAPIT SMDR Monitor.
7. Copy all the exported data files to an external storage.
8. Proceed with TAPIT EX installation on a new computer. See **Installing TAPIT Single User** on page 4.
9. Copy all the exported data files from the external storage into new TAPITW32 folder.
10. Run TAPIT Setup Program – **START/Programs/TAPIT/TAPIT Setup**.
NOTE: While running TAPIT Setup, **System Parameters** screen appears. Enter settings copied previously from your old version of TAPIT. Do not change anything unless required. (For setup instructions see **Setting up TAPIT** on page 5 of this manual).
11. After completing Setup program, go to **START/Programs/TAPIT/TAPIT**. TAPIT provides the following message: “TAPIT will be connected to the database...”. Click **OK**.
12. 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.

13. 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.

Note: If you are using account codes with matter codes you need to follow the steps below after you import your call records. Otherwise proceed with step 12.

1. Go to the **Systems Parameters** screen and select the **Call Costing** tab.
 2. Change the **Matter Code Length** setting to the previously recorded setting.
 3. Click on **OK**.
-

12. Click on **Reindex Database**. Select second option. Click on **Continue**. Filter screen appears. Enter the date range criteria for the call records you intend to export. Click on **Continue**. Tapit reindexes the data. The confirmation message appears when done. Click on **OK**.

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

Upgrading TAPIT for DOS to TAPIT EX

Note: you need to have TAPIT for DOS version 2.9.8 in order to upgrade it to TAPIT EX.

1. Go to **C:\Tapit>** prompt and type **TPDBEXP** then press **ENTER**
2. Start TAPIT for DOS
3. Select **6** (System Maintenance)
4. Select **A** (Export for Billing)
5. Enter criteria for call records that you would like to be imported into TAPIT for Windows
6. Enter **0** (Zero) in **Select Billing Interface** field and press **F3**
7. 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
8. Install **TAPIT EX** – complete the instructions on page 4 of this manual.
9. Run **TAPIT Setup** – see the instructions on page 5.

10. Copy exported files from the floppy disk to TAPITW32 directory.
11. Start TAPIT EX – Start/Programs/TAPIT/TAPIT
12. Click on **Maintenance** icon located on the Main Menu screen.
13. Click on Data Maintenance icon.
14. Click on **Import DOS** data (Assumes .txt files are in TAPITW32 host folder)
15. Click on **OK** when a message confirming the Import process is completed appears on the screen
16. Click on **Exit** to leave **Data Maintenance** screen
17. Run a **Detail Activity by Date** report to confirm import of call records.
18. Close any running program, and exit out of Windows and reboot the computer.

Registration

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

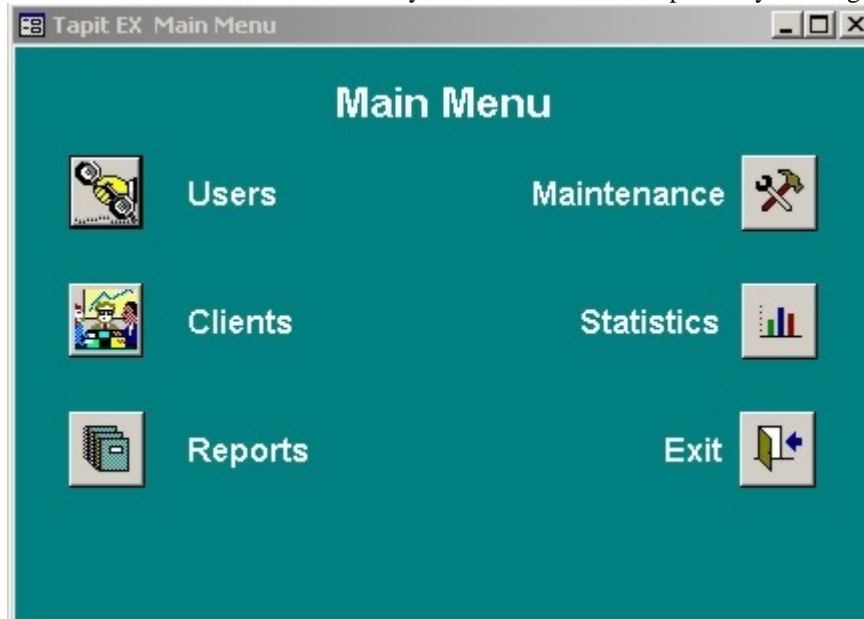
For registration instructions refer to the Registration.txt file on the CD or the company website - www.trisys.com (option Registration).

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	352
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	349
Egidio Donn	Tech Support	10113	3702
Gaeta Frank	Sales	10111	341
Gaeta Frank	Sales	10111	3703
Gaeta Frank	Sales	10111	321
Gaeta Frank	Sales	10111	111
George Donna	Sales	10180	180
George Donna	Sales	10180	343
Group Company	General		183
Group Sales	Sales		181
Group Tech Support	Tech Support		182
Hill Rnh	Sales	10185	324

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.

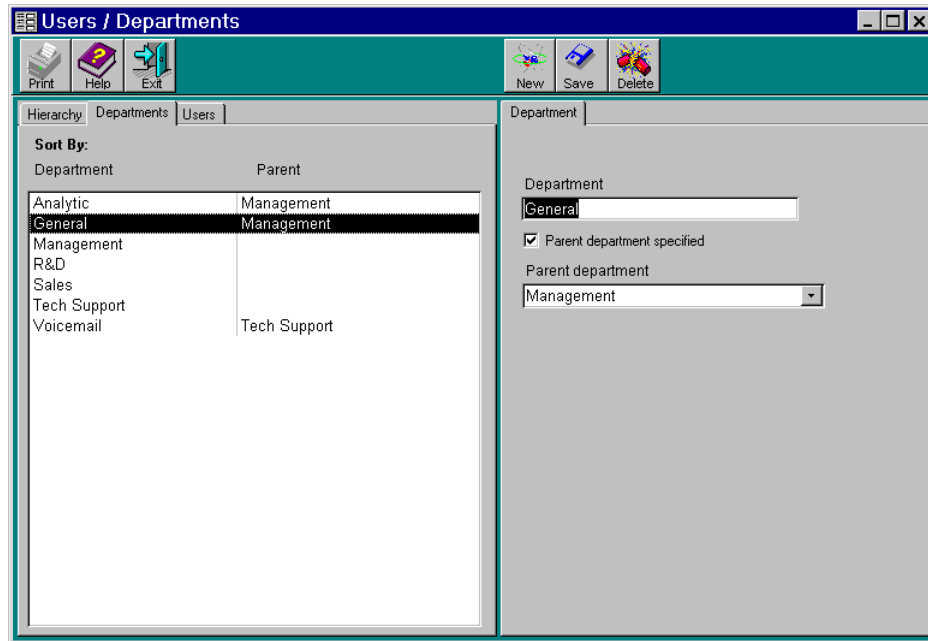
Printing users list

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**.

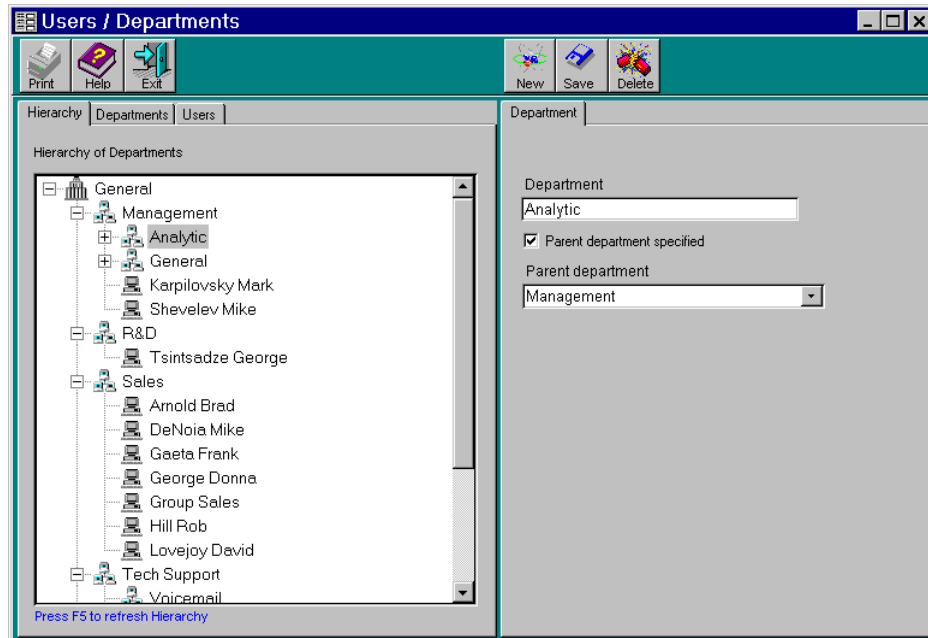
It is a good practice to run Reindex Database (Main Menu/Maintenance/Reindex Database) after adding, changing or deleting user records.

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 two sets of icons: "New", "Save", and "Delete" on the right, and "Print", "Help", and "Exit" on the left. The main area is divided into two panes. The left pane, titled "Clients", contains a table with columns "Client", "Acc. Code", and "Phone". The right pane, titled "Client", contains form fields for "Client Last Name / Company", "Client First Name", "Account Code", "Address 1", "Address 2", "City", "State", "ZIP code", and "Phone Numbers(s)".

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
Shelhw Corn	126	7138950600

Client Last Name / Company: Gray Suit

Client First Name:

Account Code: 43900

Address 1:

Address 2:

City: State: ZIP code:

Phone Numbers(s): 4132723900

Buttons: Add >>, 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**.

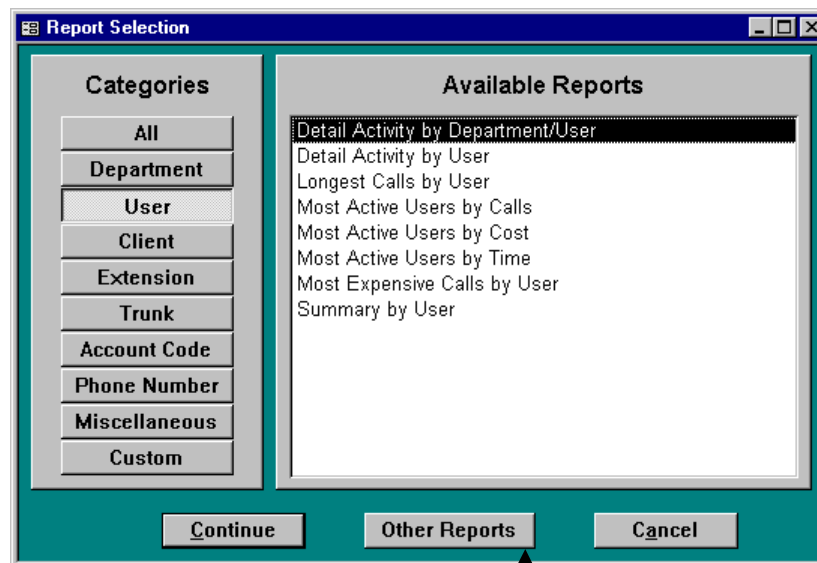
Reports

Generating Reports

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

Note: **Other Reports** button located at the bottom of the **Report Selection** screen.

Click on it to invoke the **Special Reports** screen. These additional reports cannot be modified. They can be scheduled using **Report Scheduler**.



Click here to view the additional set of custom reports. Custom CallerID Deluxe report is one of them.

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 – HOW TO USE FILTER SCREEN

Select a report (by clicking on its name) and click on **Continue**.

The 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) in military time format “hh:mm”.

3. **Call 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 **Call Duration**.

4. **Ring Duration**

- indicates the length of the ring time before the call is picked up. The report will display all records with a ring time equal to or more than the entered value.

5. **On Hold Duration**

- indicates the length of the time the call stayed on hold. The report will display all records with a hold time equal to or more than the entered value.

6. **Call Direction**

Click on the button next to the word **Call Direction** and select one or the combination of **Incoming**, **Outgoing** and **Internal** options. When finished the button displays a “+” sign.

7. **Call Type**

Click on the button next to **Call Type** and select **Transfer** – TAPIT will report now **only** on transferred calls.

8. **Call Status**

Click on the button next to **Call Status** – select one or the combination of the following options: **Normal**, **Continued**, **Abandoned**.

Normal – calls that are neither transferred or terminated.

Continued – transferred calls.

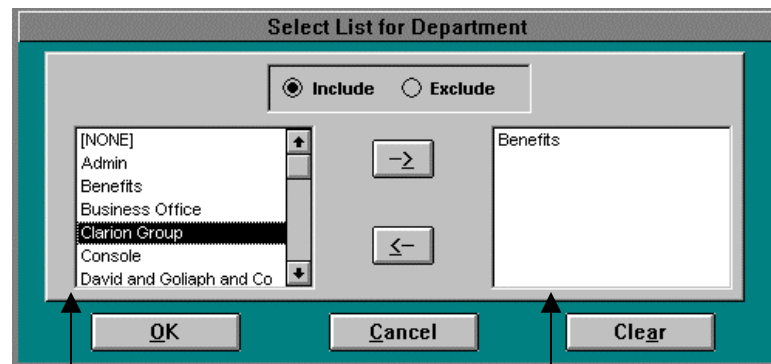
Abandoned – terminated calls.

9. **Department**

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

To specify a range of departments, click on the square button to the right of the **Department** label.

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



Left-side list contains all available departments.

Right-side list contains selected departments.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected departments.

Exclude – the selected departments are excluded from the report.

To add a department

Click on the item in the left-side list to highlight it.

Transfer the selection to the right-side list by clicking on the right arrow.

To remove a department

Click on the item in the right-side list to highlight it.

Transfer the selection to the left-side list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

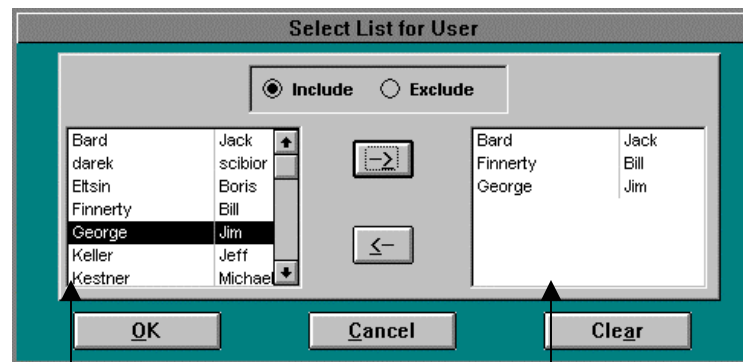
At the filter screen note a “+” sign next to the **Department** label and a dotted line between the department fields. This indicates the range of departments that has been selected.

10. User

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

To specify a range of users, click on the square button to the right of the **User** label.

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



Left-side list contains all available users.

Right-side list contains selected users.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected users.

Exclude – the selected users are excluded from the report.

To add a user

Click on the item in the left-side list to highlight it.
Transfer the selection to the right-side list by clicking on the right arrow.

To remove a user

Click on the item in the right-side list to highlight it.
Transfer the selection to the left-side list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

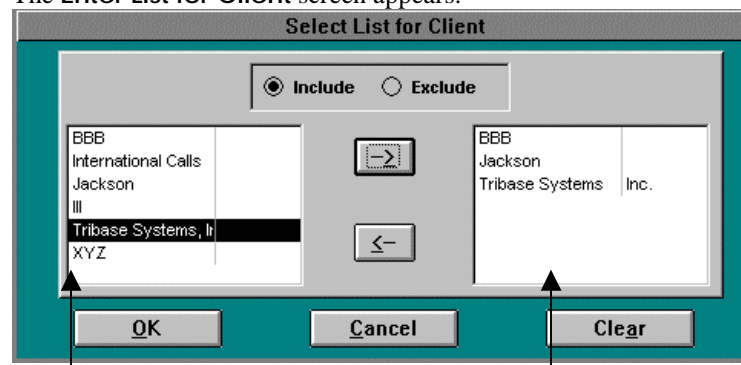
At the filter screen note a “+” sign next to the **User** label and a dotted line between the user fields. This indicates the range of users that has been selected.

11. Client

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

To specify a range of clients, click on the square button to the right of the **Client** label.

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



Left-side list contains all
available clients.

Right-side list contains
selected clients.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected clients.

Exclude – the selected clients are excluded from the report.

To add a client

Click on the item in the left-side list to highlight it.

Transfer the selection to the right-side list by clicking on the right arrow.

To remove a client

Click on the item in the right-side list to highlight it.

Transfer the selection to the left-side list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

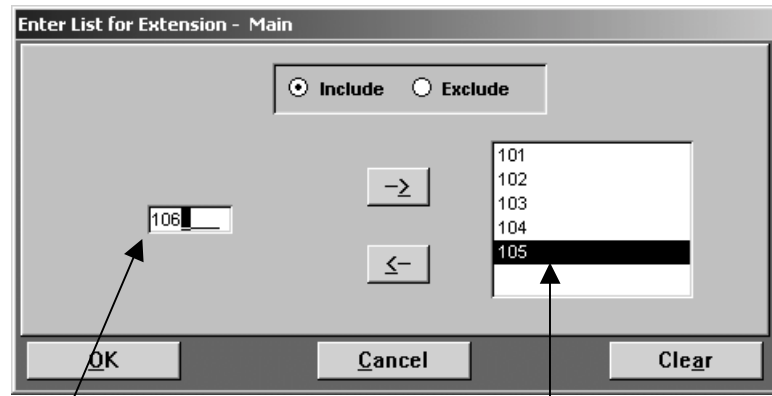
At the filter screen note a “+” sign next to the **Client** label and a dotted line between the client fields. This indicates the range of clients that has been selected.

12. **Extension** – source extension.

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

Otherwise, enter a range of extensions or click on the square button to the right of the **Extension** label.

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



Enter the extension you want to add to the right-side list.

Right-side list contains selected extensions.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected extensions.

Exclude – the selected extensions are excluded from the report.

To add an extension

Enter the extension in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

To remove an extension

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

At the filter screen note a “+” sign next to the **Extension** label and a dotted line

between the extension fields. This indicates the range of extensions that has been selected.

13. **2nd Extension** - destination extension.

To include all destination extensions in the report leave both fields empty. Otherwise, enter a range of extensions or click on the square button to the right of the **2nd Extension** label.

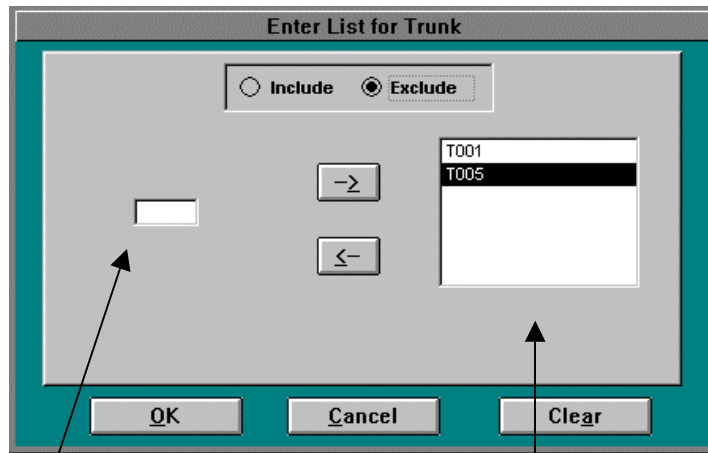
The **Enter List for 2nd Extension** screen appears. This screen works exactly the way **Enter List for Extension** screen does. Refer to pt.12 for instructions.

14. **Trunk**

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

Otherwise, enter a range of trunks or click on the square button to the right of the **Trunk** label.

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



Enter the trunk you want to add to the right-side list.

Right-side list contains selected trunks.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected trunks.

Exclude – the selected trunks are excluded from the report.

To add an trunk

Enter the **trunk** in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

To remove an trunk

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the

Cancel button.

At the filter screen note a “+” sign next to the **Trunk** label and a dotted line between the trunk fields. This indicates the range of trunks that has been selected.

15. **2nd Trunk** - destination trunk.

To include all destination trunks in the report leave both fields empty.

Otherwise, enter a range of trunks or click on the square button to the right of the **2nd Trunk** label.

The **Enter List for 2nd Trunk** screen appears. This screen works exactly the way **Enter List for Trunk** screen does. Refer to pt.14 for instructions.

16. **Area Code**

To include all area codes in the report leave both fields empty.

Otherwise, enter a range of area codes or click on the square button to the right of the **Area Code** label.

Enter List for Area Code

☒ Include ☐ Exclude

→

←

732
908
973

OK Cancel Clear

Enter the area code you want to add to the right-side list.

Right-side list contains selected area codes.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected area codes.

Exclude – the selected area codes are excluded from the report.

To add an area code

Enter the area code in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

To remove an area code

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

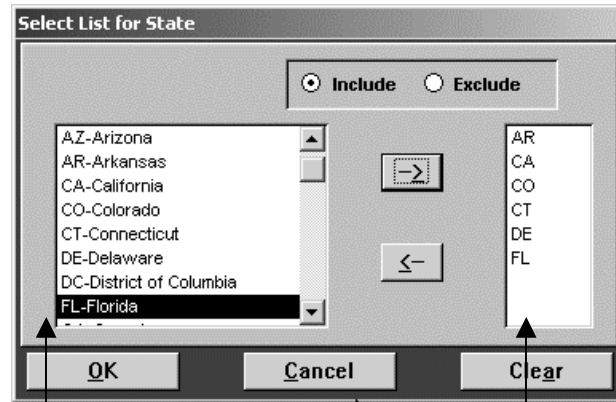
At the filter screen note a “+” sign next to the **Area code** label and a dotted line between the area code fields. This indicates the range of area codes that has been selected.

17. **State**

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

To include or exclude states, click on the button next to the word **State**.

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



Left-side list contains all available states.

Right-side list contains selected states.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected states.

Exclude – the selected states are excluded from the report.

To add a state

Click on the item in the left-side list to highlight it.

Transfer the selection to the right-side list by clicking on the right arrow.

To remove a state

Click on the item in the right-side list to highlight it.

Transfer the selection to the left-side list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

At the filter screen note a “+” sign next to the **State** label and a dotted line between the state fields. This indicates the range of states that has been selected.

18. Phone Number

To include all phone numbers in the report leave both fields empty.

Otherwise, enter a range of phone numbers or click on the square button to the right of the **Phone** label (note: this field can accept partial numbers i.e. enter 800 in the area code to run report only for 800 numbers).

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

Enter the phone number you want to add to the right-side list.

Right-side list contains selected phone numbers.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected phone numbers.

Exclude – the selected phone numbers are excluded from the report.

To add a phone number

Enter the phone number in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

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

I.e. if you are looking for the phone numbers with an exchange of 512, 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 right-side list. This number should read ???512 in order to be processed correctly (“?” in place of each space).

To remove a phone number

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

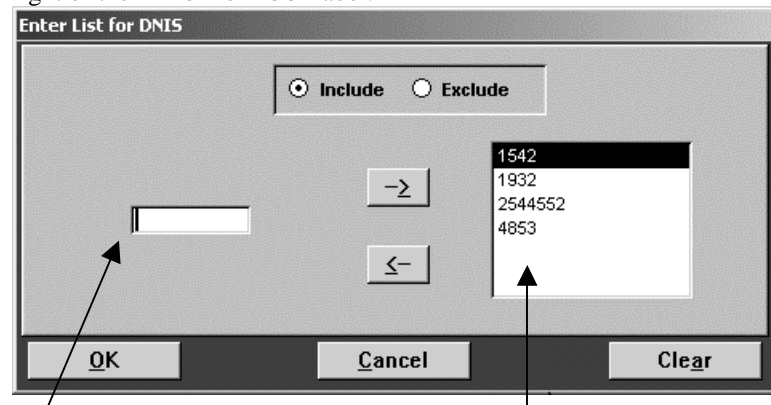
When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

At the filter screen note a “+” sign next to the **Phone** label and a dotted line between the phone number fields. This indicates the range of phone numbers that has been selected.

19. DNIS Number

To include all **DNIS** numbers in the report leave both fields empty.

Otherwise, enter a range of **DNIS** numbers or click on the square button to the right of the **DNIS Number** label.



Enter DNIS number you want to add to the right-side list.

Right-side list contains selected DNIS numbers.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected DNIS numbers.

Exclude – the selected DNIS numbers are excluded from the report.

To add a DNIS number

Enter the DNIS number in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

To remove a DNIS number

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

At the filter screen note a “+” sign next to the **DNIS number** label and a dotted

line between the DNIS number fields. This indicates the range of DNIS numbers that has been selected.

20. **Account Code, Matter Code, Author. Code**

To include all account/matter/author codes on the report leave both fields empty for all options.

To select a range click on the square button to the right of **Account Code**, **Matter Code** or **Author.Code** label.

Since all three screens work in the same way we will use the “Enter List for Account Code” screen as an example.

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

Enter the account code you want to add to the right-side list.

Right-side list contains selected account codes.

Check one of the option buttons, **Include** or **Exclude**, located on the top of the selection screen.

Include – the report is run only for the selected account codes.

Exclude – the selected account codes are excluded from the report.

To add an account code

Enter the account code in a text box on the left side of the screen.

Transfer the entry to the right-side list by clicking on the right arrow.

To remove an account code

Click on the item in the right-side list to highlight it.

Remove it from the list by clicking on the left arrow.

If you want to start over click on the **Clear** button.

When finished click on **OK** to accept the selection and go back to the filter screen. To cancel the selection and go back to the filter screen click on the **Cancel** button.

At the filter screen note a “+” sign next to the **Account code** label and a dotted line between the account code fields. This indicates the range of account codes that has been selected.

21. **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**.

22. **IP Addr. Out**

Enter the source IP address. A wild character “*” at the end of a partial IP address runs a report for all IP addresses containing the entered string.

23. **IP Addr In**

Type in the destination IP address. A wild character “*” at the end of a partial IP address runs a report for all IP addresses containing the entered string.

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

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

PLEASE NOTE: 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.

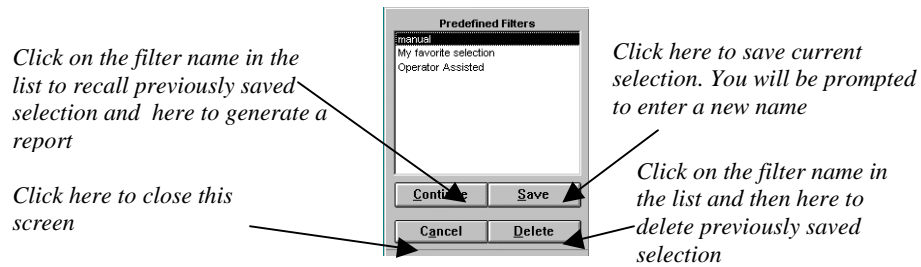
Clear - click on this button to erase all filter criteria.

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**

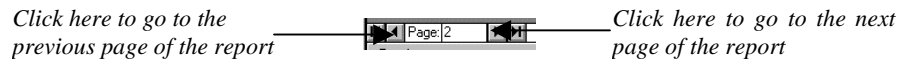
The **Predefined Filters** screen replaces the buttons on the right side of the screen.



Click on **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.



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

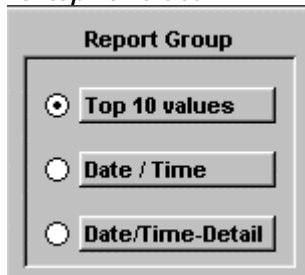
Statistics Concepts

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

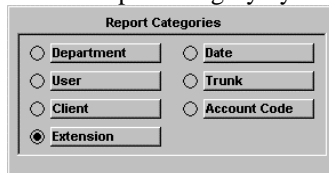
To access statistics click on the Statistics icon on the Main Menu

To generate statistical graph

For top 10 values

A dialog box titled "Report Group" with three radio button options: "Top 10 values" (selected), "Date / Time", and "Date/Time-Detail".

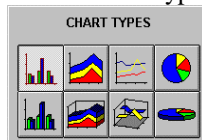
1. Click on **Top 10 Values** in the report group
2. Select a report category by clicking on its name in the **Report Categories** section.

A dialog box titled "Report Categories" with two columns of radio button options. The first column contains "Department", "User", "Client", and "Extension" (selected). The second column contains "Date", "Trunk", and "Account Code".

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

A dialog box titled "Report Type" with three radio button options: "Most Active" (selected), "Longest Calls", and "Most Expensive".

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

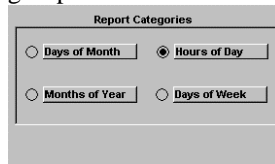
A dialog box titled "CHART TYPES" showing a grid of eight different chart icons: bar chart, area chart, line chart, pie chart, 3D bar chart, 3D area chart, 3D line chart, and 3D pie chart.

5. Click on **Continue**.
6. Enter criteria on the filter screen.
See page 30 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 page 30 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.



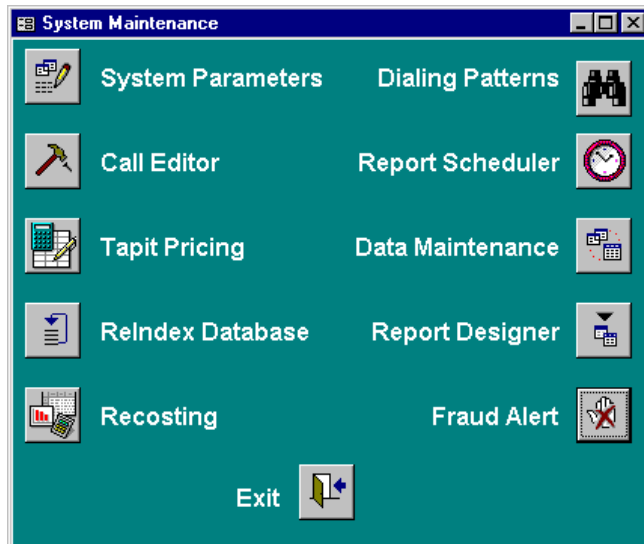
11. Note that in addition to the category, you may select time or days category.
12. Select a **report type** by clicking on its name.
13. Select a **chart type** by clicking on its picture.
14. Click on **Continue**.
15. Enter criteria on the filter screen.
How to use filter screen (see page 30 on how 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.



Click on the **Exit** button to go back to the **Main Menu** screen.

System Parameters

System Parameters Screen

The **System Parameters** screen allows you to configure various settings of the TAPIT system.

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

The **System Parameters** screen is displayed. It consists of six different screens: **Communications**, **Call Costing**, **Activity**, **Trunks**, **Destination**, and **Data**.

The screenshot shows the 'System Parameters' window with the 'Communications' tab selected. The window has a title bar with standard Windows controls. Below the tabs, there is a section titled 'Phone Communications Settings' with an important note: 'IMPORTANT: RESTART the SMDR Monitor if you made ANY CHANGES on this screen'. The 'Your Telephone Number' field is set to '(873) 360-2300'. There is a checkbox for 'Load Calls from Text File' with a file path 'C:\TAPITW32\DATA\MAIN\telmsg.dat'. Below this, there are two frequency settings: 'Process Text File Every 180 seconds' and 'Load Calls into Database Every 20 minutes'. On the left, there are dropdown menus for 'Port' (COM1), 'Speed' (1200), and 'Parity' (Even). Below these are radio buttons for 'Data Bits' (7 and 8) and 'Stop Bits' (1 and 2). On the right, there is a 'PBX Type' dropdown set to 'Panasonic DBS', a checkbox for 'eXtended Processing (not available for ALL PBX formats)', and a section 'Use Computer or Telephone System Date?' with radio buttons for 'Computer' (selected) and 'PBX'. At the bottom, there are three buttons: 'OK', 'Password', and 'Cancel'.

Communications

The Communications screen is displayed as a default.

The screenshot shows the 'System Parameters' dialog box with the 'Communications' tab selected. The title bar reads 'System Parameters'. Below the tabs, the text 'Phone Communications Settings' is displayed, followed by an important note: 'IMPORTANT: RESTART the SMDR Monitor if you made ANY CHANGES on this screen'. The 'Your Telephone Number' field contains '(973) 360-2300'. The 'Load Calls from Text File:' checkbox is unchecked, and the adjacent text box shows the path 'C:\TAPITW32\DATA\MAIN\telmsg.dat'. Below this, 'Process Text File Every' is set to '180' seconds and 'Load Calls into Database Every' is set to '20' minutes. On the left, 'Port' is 'COM1', 'Speed' is '1200', 'Parity' is 'Even', 'Data Bits' are set to '7', and 'Stop Bits' are set to '1'. On the right, 'PBX Type' is set to 'Panasonic DBS', and 'eXtended Processing (not available for ALL PBX formats)' is unchecked. At the bottom, 'Use Computer or Telephone System Date?' has 'Computer' selected. The dialog has 'OK', 'Password', and 'Cancel' buttons at the bottom.

1. Click on the **Your Telephone Number** field and enter your main telephone number (do not use an 800 number).
2. **Load Calls from Text File:**
check this box only if you want the call records to be loaded from a text file instead of a Com Port.
When **Load Calls from Text File:** is checked the adjacent text box with the path to a call records file is enabled. Accept the default value or enter a new path.
3. **Process Text File Every _____ seconds**
This option becomes available when the **Load Calls from Text File** box is checked.
The value entered in this box determines how often TAPIT loads data from the text file.
4. **Process Calls Every __ Minutes**
The value entered in this box determines how often TAPIT processes data (converts raw information into TAPIT database format). Twenty minutes is the default value for this field.
5. Click on the **down arrow** icon in the **PBX Type** field to select a telephone system type the computer is receiving data from.
Data will not be processed accurately if an incorrect selection is made.

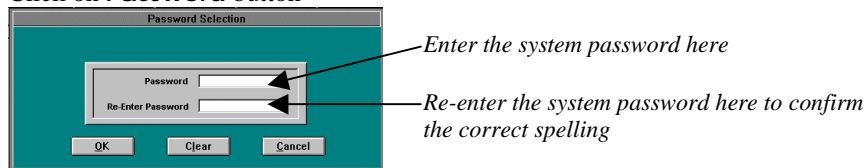
6. **eXtended Processing (not available for ALL PBX formats)**
Check this box only if you are certain TAPIT supports extended processing format or when suggested by Trisys Technical Support.
7. Click on the **PBX** or **Computer** options in the **Use Computer or Telephone System Date?** field to specify 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 using the PBX date.

Note: The Port, Speed, Parity, Data Bits and Stop Bits options are enabled only when the Load Calls From Text File: check box is unchecked.

8. Click on the **down arrow** icon in the **Port** field to select a port on the computer the SMDR cable is connected to.
9. Click on the **down arrow** icon in the **Speed** field to select a transmission speed the phone system is set at.
10. Click on the **down arrow** icon in the **Parity** field to select a parity setting of the phone system.
11. Click on **7** or **8** in the **Data Bits** fields to select a data bits setting of the phone system.

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

8. Click on **OK** to save changes or **Cancel** to exit the screen without saving any changes.
9. From the **Communications** screen the **Password** function may be accessed.
Click on **Password** button



Call Costing

System Parameters

Communications | **Call Costing** | Activity | Trunks | Destination | Data

Call Costing Settings

Call Costing settings for Tapit Pricing table

First Interval sec. Next Interval sec.
First Increment sec. Next Increment sec.

Would you like to price incoming calls? ☐

Would you like to surcharge calls which cost \$0.00? ☐

	Per Call	Per Min	Multiplier %
Default Surcharges	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0"/>
Zero Plus Pricing @	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="0"/>

Account / Authorization Code Processing Options:

☒ Client Code Matter Code Length ☐ User Authorization Code Only
☐ Separate Account & Authorization Codes (when both are supplied by System)

OK Cancel

1. The **Call Costing settings for Tapit Pricing table** section is used to specify pricing intervals and increments. Click on **First Interval** and enter the number of seconds for the first interval. Click on **Next Interval** and enter the number of seconds for each additional interval. By default these fields are set to 60 seconds and the calls are priced per minute.
2. Click on the **First Increment** field and enter the number of seconds for the first increment within an interval. Click on the **Next Increment** field and enter the number of seconds for each additional increment within an interval. If **Tapit Carrier** is used to price the calls, the values of increment fields indicate in how many seconds per increment TAPIT prices calls.
For example: let's assume a price for the first minute is 10 cents, **First Interval** equals 60 and **First Increment** equals 6. In such case the call record with a call duration equal to 6 seconds is priced at 1 cent.
This option does not apply to V&H pricing table.
3. **Would you like to price incoming calls?** – check this box if you would like to price incoming calls.
This requires special settings in the pricing table (see page 59 for detail information - TAPIT Pricing).
3. **Would you like to surcharge calls which cost \$0.00?**
Check this option if you would like to surcharge calls that cost \$0.00.

4. **Default surcharges** - numbers you enter in these fields 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.
5. **Zero Plus Pricing @** – this field holds prices and surcharges for operator assisted calls.
6. **Account/Authorization Code Processing Options:** - selection in this option group determines whether account codes generated by the phone system will be associated with user name or client name.
Click on **Client Code** to associate this number with client name (if your system supplies only account code).
Click on **User Authorization Code** to associate this number with user name (if your system supplies only authorization code).
If **Client Code** is selected a **Matter Code** field becomes available (a sub-account code).
Click on the **Matter Code Length** field to enter the number of digits of used by the matter codes (this number must be shorter than a length of the account code).
Click on the **Separate Account & Authorization Codes** to associate **Account Code** with the client and **Authorization Code** with the user (if your system supplies both Account and Authorization Codes).
7. Click on **OK** to save changes or **Cancel** to exit the screen without saving any changes.

Activity

This screen allows you to specify what type of the phone activity to store in the TAPIT database.

The screenshot shows the 'System Parameters' dialog box with the 'Activity' tab selected. The 'Call Activity Settings' section is visible. Under 'Include Activity for:', the 'Call Direction' field has checkboxes for 'All', 'Outgoing', 'Incoming', and 'iNternal', all of which are checked. The 'Call Type and Status' field has a checkbox for 'Local Calls', which is also checked. Below these, the 'Calls Longer Than' field is set to '00:00:00'. Under 'Exclude Activity for:', there are two lists: 'Extension' and 'Trunk'. The 'Extension' list contains the numbers 3, 114, and 201. The 'Trunk' list contains the numbers 0009 and 0024. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

1. In the **Call Direction** field click on:
ALL (default setting) to store outgoing , incoming and internal calls.
Outgoing to store only outgoing calls.
Incoming to store only incoming calls.
iNternal to store only internal calls. This option works if TAPIT allows for internal 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: Local Area Code and Exchanges must be defined in the Destination Table. Refer to this section later in this manual.

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

4. Exclude Activity For

Exclude Activity for:

Extension	Trunk
3	0003
114	0024
201	

Annotations:
- Enter an extension you do **not** want to store activity for, then click on the arrow pointing to the left.
- Enter a trunk you do **not** want 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 its 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 trunk numbers that are programmed on the phone system to different carriers.

This option is available only if you purchased and installed V&H pricing tables

System Parameters

Communications | Call Costing | Activity | **Trunks** | Destination | Data

Trunk Association Settings

Trunk	Carrier
0172	AT&T DIRECT DIAL RATE:
0179	AT&T DIRECT DIAL RATE:
0181	AT&T DIRECT DIAL RATE:
	AT&T DIRECT DIAL RATE:

Buttons: Delete, New, Print List, OK

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 any place 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 allows you to view, edit, add and delete records in the city and state destination table.

Area/Exch.	City	State	Code
219814	MICHIGANCY	IN	
219817	KEWANNA	IN	
219818	HUNTERTOWN	IN	
219819	RENSSELAER	IN	
219820	BLUFFTON	IN	
219821	MIDDLEBURY	IN	
219822	MIDDLEBURY	IN	
219823	BLUFFTON	IN	

Buttons: Find, New, Delete, OK

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 the cursor on the field you want to delete or click on **Find** button and enter area code and exchange to be deleted and click on **OK**.
The record you want 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 the cursor on the field you want to edit and click on the **Find** button.
Enter the value of the field to be edited and click on **OK**.
For example: place the cursor on any **Area/Exch.** field and click on **Find**. Enter the value of the desired area code and/or exchange. Click on **OK**. The record you want to edit is highlighted.
2. Edit field value.

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

To clear all “L” codes in the Code field:

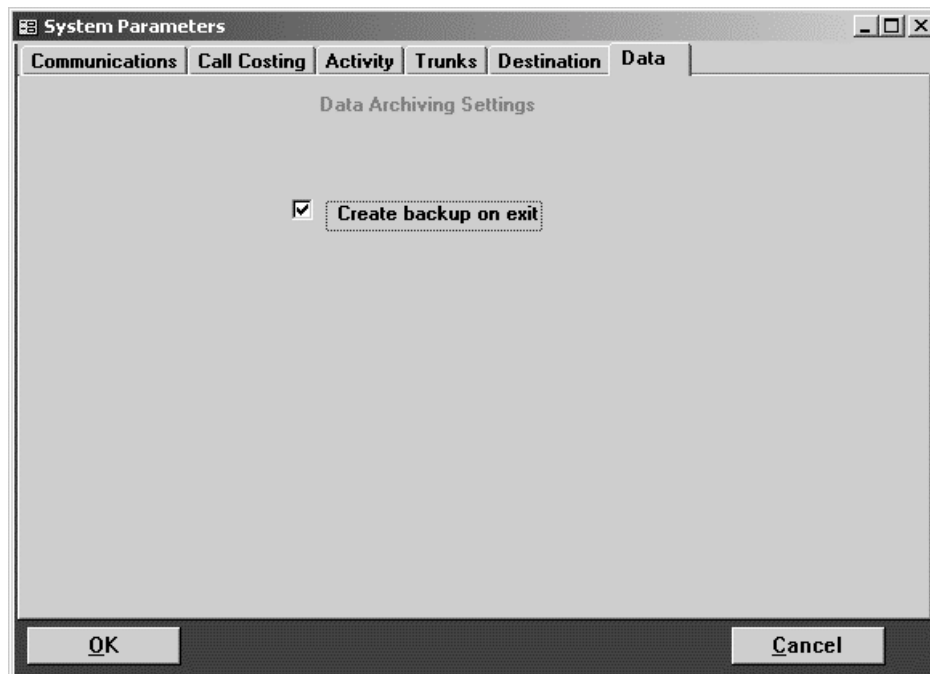
If you purchased a V&H pricing table, all local exchanges in your area code are marked with an L code. If you do not want to process these calls as local, then click on the Code button. This removes all L settings from the destination table.



← To remove ALL L codes click here

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

DATA



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 within the TAPIT application only Main Menu window is open.

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

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

Call Editor

Working with Call Editor

This facility allows you to change existing phone activity records and 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 page 30 how to use filter screen), enter filter criteria information and click on **Continue**. **Call Editor** screen appears.

Call Editor													
Date	Time	Call Length	Ring Time	Hold Time	Dir & Status	X-fer From Ext	Current Ext	X-fer To Ext	Trunk	Re-Direct. Trunk	Phone Number	DNIS Number	Cost
06/04/2002	11:55	0:00:51	0:00:00	0:00:00	IXC		0000	1168	008				\$0.00
06/04/2002	11:55	0:00:28	0:00:06	0:00:00	IXC		1000	0292	002				\$0.00
06/05/2002	11:55	0:04:41	0:00:00	0:00:00	IXC		0000	2163	017				\$0.00
06/05/2002	11:55	0:02:27	0:00:00	0:00:00	IXC		0000	2166	003				\$0.00
06/05/2002	11:55	0:00:51	0:00:00	0:00:00	IXC		0000	1168	008				\$0.00
06/04/2002	11:56	0:00:00	0:00:00	0:02:27	IXA	0291	0295		016				\$0.00
06/04/2002	11:56	0:01:31	0:00:00	0:00:00	IX	1000	1089		009				\$0.00
06/04/2002	11:56	0:02:00	0:00:00	0:00:00	IX	1001	2160		001				\$0.00
06/03/2002	8:46	0:02:47	0:00:00	0:00:00	O		0106		001		9735156666		\$0.28
06/03/2002	8:51	0:01:24	0:00:04	0:00:00	I		0114		999				\$0.01
06/03/2002	8:54	0:01:27	0:00:00	0:00:00	O		0114		003		_7139958337		\$0.15
06/03/2002	8:55	0:00:40	0:00:00	0:00:00	O		0114		005		_2817044490		\$0.07
06/04/2002	11:56	0:01:29	0:00:00	0:00:00	IX	0000	1168		008				\$0.00
06/04/2002	11:57	0:00:00	0:00:00	0:01:53	IXA	1001	0300		010				\$0.00
06/04/2002	9:01	0:01:24	0:00:04	0:00:00	I		0000		001				\$0.00
06/04/2002	11:57	0:01:50	0:00:00	0:00:00	IX	1001	0291		012				\$0.00

New

Delete

Exit

TAPIT Pricing

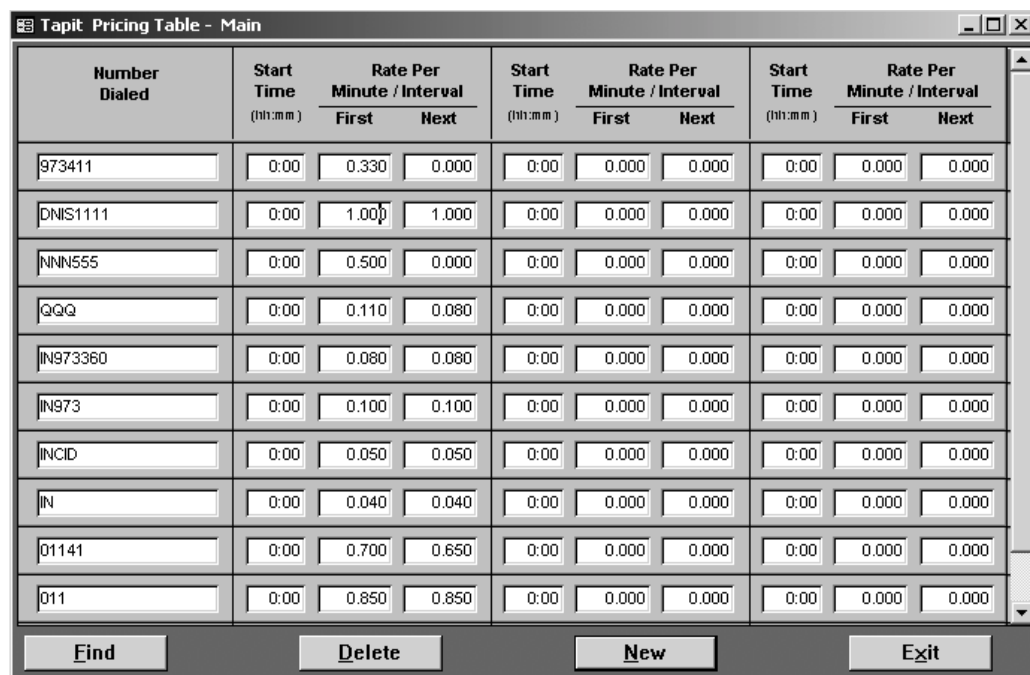
Pricing Call Records

The **Tapit Pricing Table** screen is used to enter pricing information to apply cost to the call records.

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

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

SCREEN 1



Number Dialed	Start Time (hh:mm)	Rate Per Minute / Interval		Start Time (hh:mm)	Rate Per Minute / Interval		Start Time (hh:mm)	Rate Per Minute / Interval	
		First	Next		First	Next		First	Next
973411	0:00	0.330	0.000	0:00	0.000	0.000	0:00	0.000	0.000
DNIS1111	0:00	1.000	1.000	0:00	0.000	0.000	0:00	0.000	0.000
NNN555	0:00	0.500	0.000	0:00	0.000	0.000	0:00	0.000	0.000
QQQ	0:00	0.110	0.080	0:00	0.000	0.000	0:00	0.000	0.000
IN973360	0:00	0.080	0.080	0:00	0.000	0.000	0:00	0.000	0.000
IN973	0:00	0.100	0.100	0:00	0.000	0.000	0:00	0.000	0.000
INCID	0:00	0.050	0.050	0:00	0.000	0.000	0:00	0.000	0.000
IN	0:00	0.040	0.040	0:00	0.000	0.000	0:00	0.000	0.000
01141	0:00	0.700	0.650	0:00	0.000	0.000	0:00	0.000	0.000
011	0:00	0.850	0.850	0:00	0.000	0.000	0:00	0.000	0.000

Find Delete New Exit

SCREEN 2

Number Dialed	Start Time (hh:mm)	Rate Per Minute / Interval		Start Time (hh:mm)	Rate Per Minute / Interval		Start Time (hh:mm)	Rate Per Minute / Interval	
		First	Next		First	Next		First	Next
IP1234.123.12.*	0:00	0.800	0.400	0:00	0.000	0.000	0:00	0.000	0.000
IP0123.234.12.34	0:00	0.500	0.500	0:00	0.000	0.000	0:00	0.000	0.000
IP0234.123.12.*	0:00	0.800	0.400	0:00	0.000	0.000	0:00	0.000	0.000
L	0:00	0.100	0.050	0:00	0.000	0.000	0:00	0.000	0.000
TLC001	0:00	0.100	0.100	0:00	0.000	0.000	0:00	0.000	0.000
TLD001	0:00	0.100	0.100	0:00	0.000	0.000	0:00	0.000	0.000
201593	8:00	0.250	0.200	11:00	0.200	0.150	23:00	0.110	0.080
201	8:00	0.300	0.250	11:00	0.250	0.230	23:00	0.150	0.100
800	0:00	0.000	0.000	0:00	0.000	0.000	0:00	0.000	0.000
NNNN	0:00	0.550	0.550	0:00	0.000	0.000	0:00	0.000	0.000

Find Delete New Exit

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

Note: When pricing local calls an exchange must be prefixed by the local area code. I.e. 411 calls must be entered with the local area code – i.e. “973411”.

TINxxxx – entry in the pricing table allows for pricing incoming calls for trunk xxxx. The entry is composed of the prefix TIN and the trunk number (xxxx). In other words the entry TIN00123 would price incoming calls for trunk 00123.

Note: this setting does not affect incoming calls that are already priced via Caller ID or DNIS. Incoming trunk pricing has lower priority than Caller ID and DNIS.

In our example:

SCREEN 1:

- **973411**
All 411 calls for 973 area code are priced at a flat rate of 33 cents per call.
- **DNIS1111 - DNISxxxx**
Incoming calls with the DNIS number equal to “1111” are priced at one dollar per each minute/interval.

- **NNN555**
All 555 information calls are priced at a flat rate of 50 cents per call.
- **QQQ**
The domestic long distance calls are priced 11 cents per first minute/interval and 8 cents per each additional minute/interval.
- **IN973360 - INaaaxxx**
Incoming calls with “973” area code and “360” exchange are priced 8 cents per each minute/interval.
- **IN973 - INaaa**
The remaining incoming calls with “973” area code are priced at 10 cents per each minute/interval.
- **INCID**
Call records with Caller ID are priced at 5 cents for each minute/interval.
- **IN**
All other incoming calls are priced at 4 cents per each minute/interval.
- **01141 – 011xxxxxx**
International calls with the 41 country code are priced 70 cents per first minute/interval and 65 cents per each additional minute/interval.
- **011**
All other international calls are priced at 85 cents per each minute/interval

SCREEN 2:

- **IPI234.123.12.* - IPIxxx.xxx.xxx.***
All calls incoming to IP Addresses containing “234.123.12.” are priced 80 cents per the first minute/interval and 40 cents per each additional minute/interval.
- **IPO123.234.12.34 - IPOxxx.xxx.xxx.xxx**
All calls outgoing to “123.234.12.34” IP Address are priced 50 per each minute/interval.
- **IPO234.123.12.* - IPOxxx.xxx.xxx.***
All calls outgoing to IP Addresses containing “234.123.12.” are priced 80 cents per the first minute/interval and 40 cents per each additional minute/interval.
- **L**
All local calls are priced 10 cents per first minute/interval and 5 cents per each additional minute/interval.
- **TLC001- TLCxxxx**
Local calls originating from trunk “001” are priced the rate of 10 cents per each minute/interval.
- **TLD001 – TLDxxxx**
Long distance calls originating from trunk “001” are priced the rate of 10 cents per each minute/interval.
- **201593 -aaaxxx**
Calls made to the area code “201” and the exchange “593” are priced at 25 cents for the first minute/interval and 20 cents for each additional minute/interval between 8:00 AM and 11:00 AM.
Between 11:00 AM and 23:00 calls are priced at 20 cents for the first minute/interval and 15 cents for each additional minute/interval.

After 23:00 until 8:00 AM the rate is 11 cents for the first minute/interval and 8 cents for each additional minute/interval.

- **201 - aaa** all other calls made to the area code “201” are priced at 30 cents for the first minute/interval and 25 cents for each additional minute/interval between 8:00 AM and 11:00 AM.

Between 11:00 AM and 23:00 calls are priced at 25 cents for the first minute/interval and 23 cents for each additional minute/interval.

After 23:00 until 8:00 AM the rate is 15 cents for the first minute/interval and 10 cents for each additional minute/interval.

- **800** - all 800 calls would be free of charge.
- **NNN** - all other calls would be priced at 55 cents per each minute/interval.

To activate incoming pricing:

- set the **Would you like to price incoming calls?** option on the Call Costing screen (see page 50 for detailed instructions).

Adding new pricing record

1. Click on the **New** button - cursor is inserted in a blank record line.
2. Enter the phone number code in the **Number Dialed** field (follow the guidelines from “The Number Dialed entries” section below).
3. Enter a start time for the first time period in the first **Start Time** field. If your time period is 24 hours long, leave this field at 00:00 value.
4. Enter the rate for the first minute/interval in the **First** field under the **Rate Per Minute/Interval** section. If the **Next** field is left empty then this rate is applied flatly to all the calls for the specified phone number code. This means regardless of call duration or the **System Parameters/Communications** price increment setting all call records for the specified phone number code are going to be priced at the rate of the first minute/interval.
5. If you want to price additional minutes/intervals enter the desired rate in the **Next** field under the **Rate Per Minute/Interval** section. Each additional minute/interval will be priced according to this setting.
6. If the time and rate settings are different for the remaining time periods fill in appropriate values, otherwise, leave them blank and TAPIT will assume that call records are priced at the same rate all day.
7. Click on the **New** button to create another record or **Exit** to leave the screen. Changes are saved automatically.

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

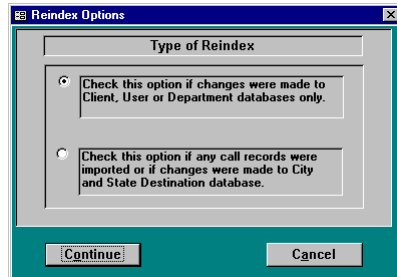
1. Click anywhere on the **Number Dialed** field.
2. Click on the **Find** button.

3. Enter the value to look for in the **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.

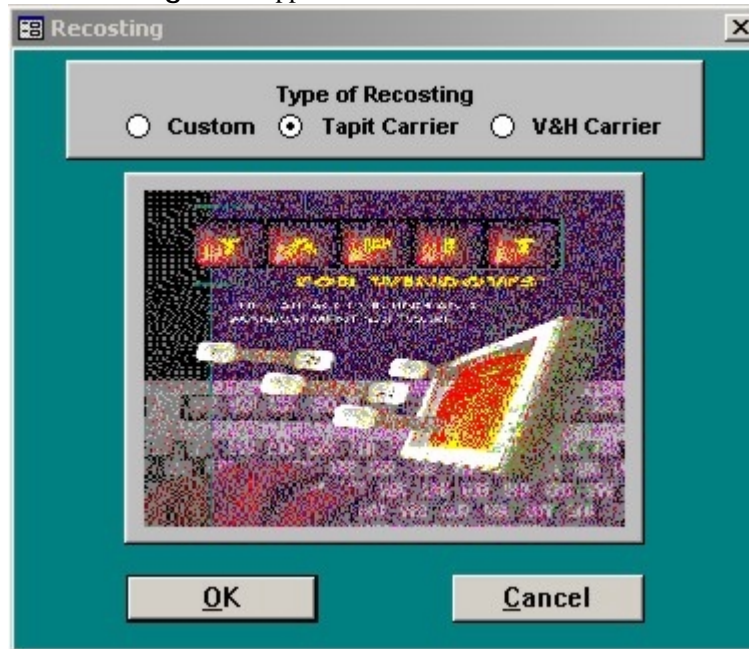
1. Click on the **Maintenance** icon on the **Main Menu** and then click on the **Reindex Database** icon. After clicking **Reindex Database** icon filter screen appears(see page 30 on how to use filter screen). Enter filter criteria information and click on continue.
2. While your Database is being 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

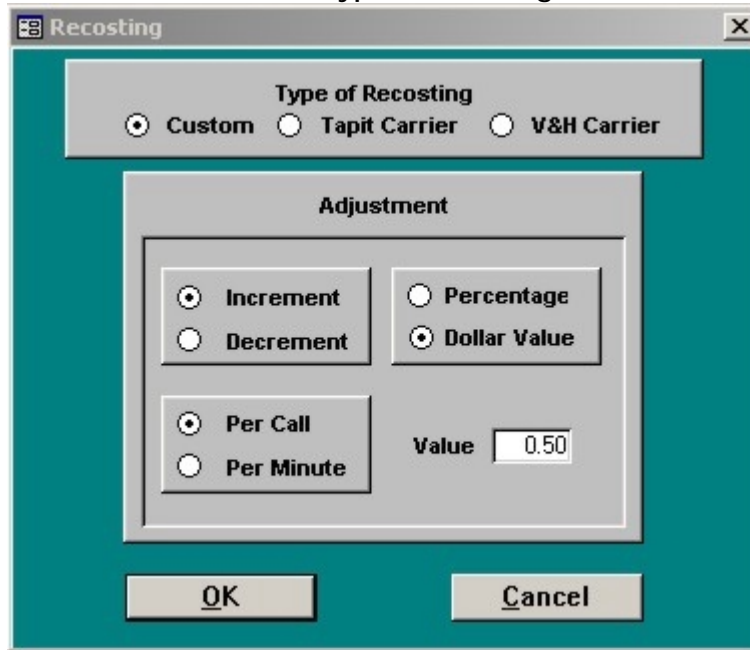
Recosting function will allow you to recost existing phone activity based on your selection.

1. Click on the **Maintenance** icon on the Main Menu and then click on the **Recosting** icon.
2. The **Recosting** screen appears.



Using Custom option

1. Click on **Custom** selector in **Type of Recosting**.



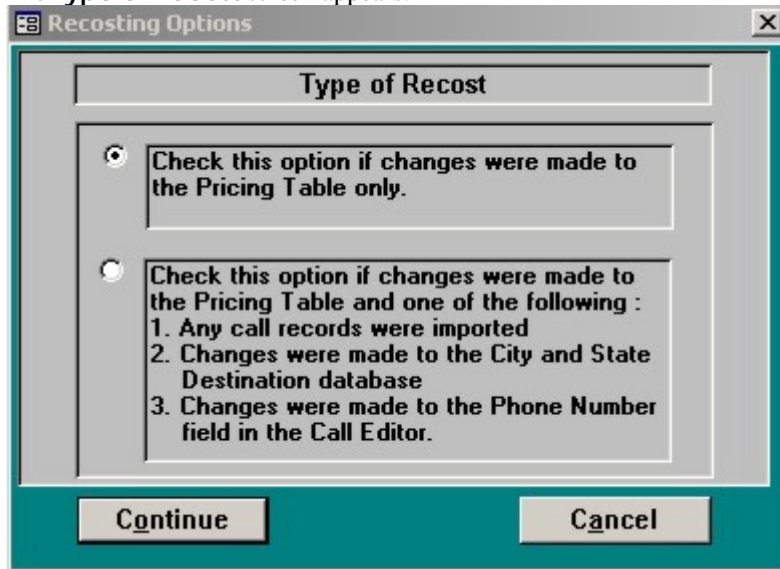
The image shows a 'Recosting' dialog box with a teal background. At the top, there's a title bar with a small icon and the text 'Recosting'. Below the title bar, there's a section titled 'Type of Recosting' with three radio buttons: 'Custom' (selected), 'Tapit Carrier', and 'V&H Carrier'. Below this is a section titled 'Adjustment' which contains two columns of radio buttons. The left column has 'Increment' (selected) and 'Decrement'. The right column has 'Percentage' and 'Dollar Value' (selected). Below these columns are two more radio buttons: 'Per Call' (selected) and 'Per Minute'. To the right of these is a 'Value' field with a text box containing '0.50'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

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 page 30 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**.

The **Type of Recost** screen appears.



3. Check one of the option buttons according to the instructions on the screen.
4. Click on **Continue**.
5. Filter screen appears (see page 30 on how to use filter screen). Enter filter criteria and click on **Continue**.
TAPIT will start recosting calls.

Using V&H Carrier option

1. This option is available only if you have purchased TAPIT's V&H Pricing table.
2. Click on the **V&H Carrier** option 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**.
Filter screen appears (see page 30 on how to use filter screen). Enter filter criteria and click on **Continue**.
TAPIT will start recosting calls.

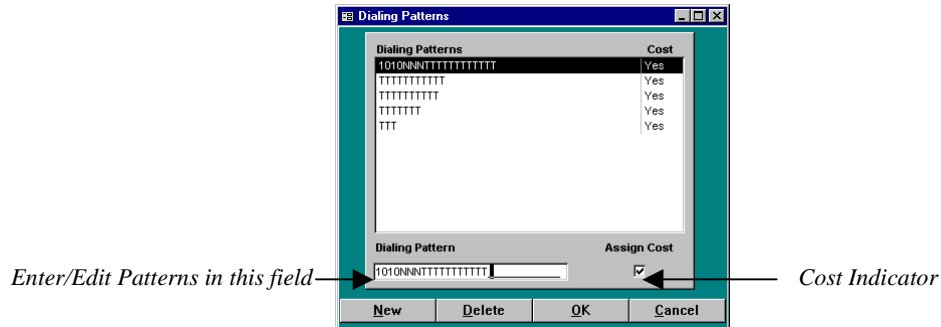
While your Data Base is being recosted it is very important that you do not reboot or shut down your computer. The recosting process can sometimes take 20 to 30 minutes depending on your computer resources as well as the size of your data base. If you interrupt this process your entire database will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

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

DIALED COMBINATION

PATTERN

1-201-593-8200

TTTTTTTTTTT

593-8200	TTTTTTT
9-593-8200-123	9TTTTTTTNNN
1-593-8200	1TTTTTTT
10288-1-201-593-8200	10NNNTTTTTTTTTTT
1800-593-82004333#1123	TTTTTTTTTTTX
4994-1201-593-8200	4994TTTTTTTTTTTT
1234-1201-593-8200*	CCCCTTTTTTTTTTTT
1202-593-82001234*	TTTTTTTTTTCCCC

*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.

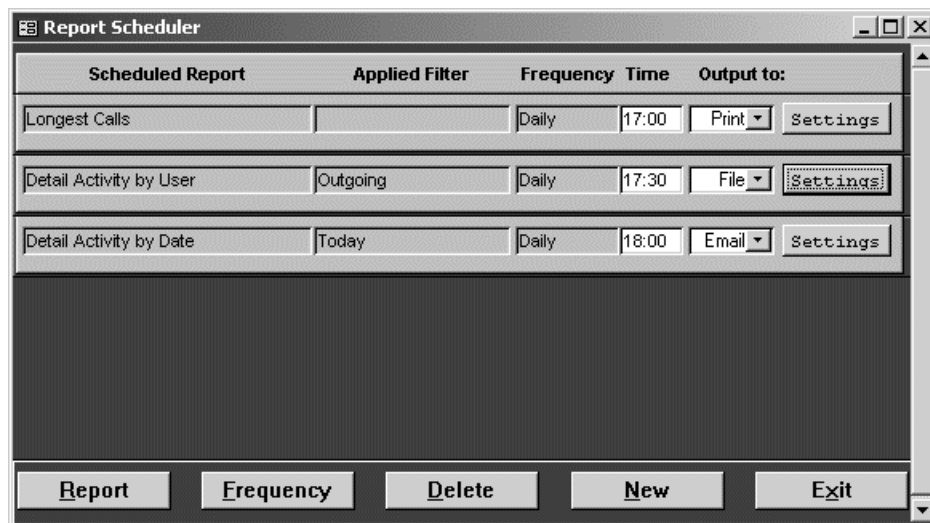
Report Scheduler

Using Report Scheduler

Report Scheduler screen will allow you to generate selected reports automatically.

TAPIT software must 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.



Adding a new report

1. Click on the **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. To apply filter criteria to reports generated by **Report Scheduler** you must save a filter as **Predefined** or use an existing **Predefined** filter (see page 30 on using a filter screen).
Click on **Continue**.
Report Selection screen will close. The name of the selected report and filter (if

used) will appear on the Report Scheduler screen in **Scheduled Report** and **Applied Filter** fields.

4. Enter the time for the report to be generated in **Time** text box.
5. Select one of the options from the **Output to** listbox.
 - Print** - the report will be sent to a printer
 - File** - the report will be saved as a file. Click on the **Settings** button located next to the **Output to** list. Accept the default file name and path or enter a new one. Select an appropriate file format from the **File format** list box. Click on **OK** to save changes or **Cancel** to leave the screen without saving.
 - Email** - the report will be sent to the provided email address. Click on the **Settings** button located next to the **Output to** list. Choose a name for the **To** and **CC** fields. Go to **File format** and choose from **Rich Text**, **HTML** and **Text** formats. Enter the title of your email message in a **Subject** field and a short description in the **Description** field. Click on **OK** to save changes or **Cancel** to leave the screen without saving.
6. Confirm both **Scheduled Report** and **Applied Filter** fields have the correct values entered.
7. Click on **Frequency** button and select a frequency (how often) the report will be generated with.
 - Daily** - a report is generated every day at the specified time.
 - Weekly** - a report is generated once a week at the specified time and day of the week.
 - Monthly** - a report is generated once a month at the specified time and day of the month.
8. Click on **Exit** to leave the screen and save changes.

Editing report records

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

Deleting report records

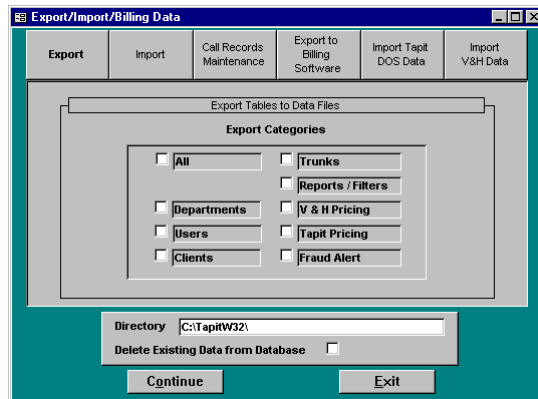
1. Click on **Time** or **File Name** field on the report record you want to delete.
2. Click on the **Delete** button to delete a report record.
3. Click on **Exit** to leave the screen and save the changes.

Data Maintenance

Data Maintenance Concepts

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

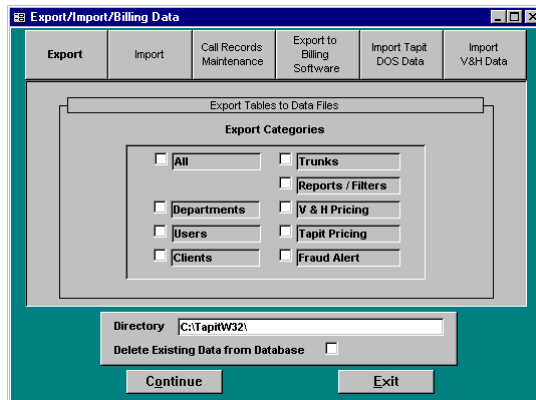
Click on the **Maintenance** icon on the **Main Menu** and then click on the **Data Maintenance** icon.



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

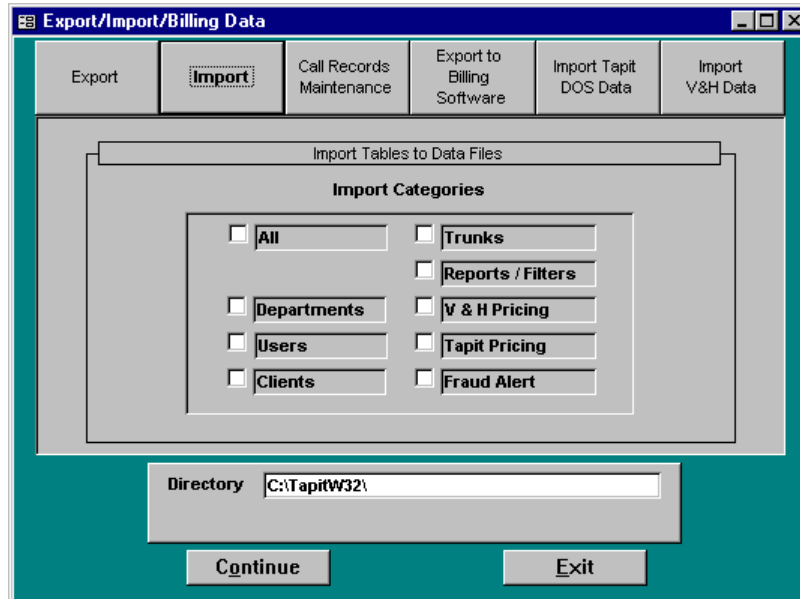
1. **Export** facility will allow you to export selected data for different categories to a file. Exported data can be used as a back-up or it can be imported by TAPIT installed at another location.



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

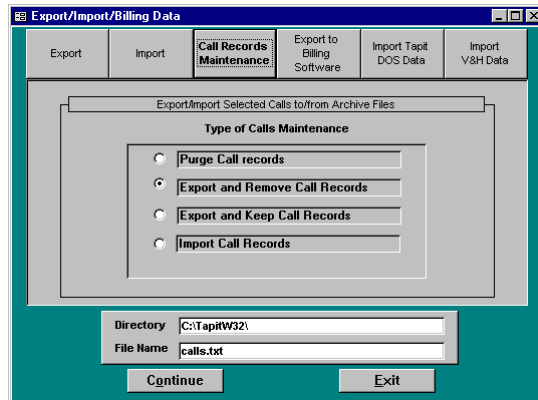


Select a category to be imported in the **Import Categories** box (select **All** if you wish to import all categories)

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

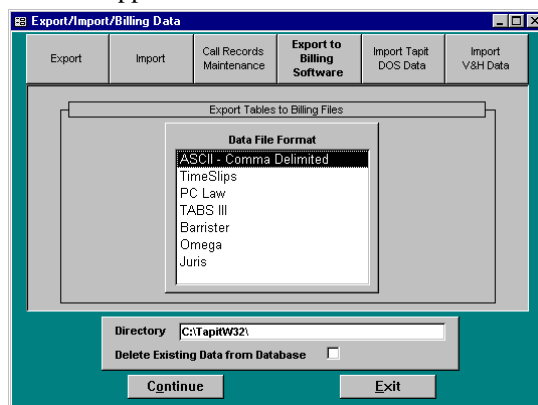
with call records are stored and the file name that was used when exporting call records in the **File Names** box.

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 page 30 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 page 30 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 to current TAPIT version.
Please follow instructions from **Upgrading TAPIT for DOS to TAPIT EX** on page 18.

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 allows 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. At the top, there are radio buttons for 'Detail' (selected) and 'Summary'. To the right is a text box labeled 'Name:' containing '[Untitled] - Report'. Below this are two sections for sort sequences. The 'Primary Sort Sequence' section has radio buttons for User, Department, Call Length, Matter Code, Client, Extension, Phone Number, Area Code, Trunk, Date, Account Code, and Time. To its right is an 'Order' box with 'Ascending' (selected) and 'Descending' options, and a checked 'Page Break' checkbox. The 'Secondary Sort Sequence' section has similar radio buttons. To its right is an 'Order' box with 'Ascending' (selected) and 'Descending' options, and a checked 'SubTotal' checkbox. A 'Test Run' button is on the right side. At the bottom, there are two lists: 'Available Fields' (Department, User, Client, Area Code, Trunk, Account Code) and 'Chosen Fields' (Extension, Direction, Cost, Phone Number, Time, Call Length). Between these lists are two buttons: '-->' and '<--'. At the very bottom are buttons for 'Open', 'New', 'Delete', 'Save', 'Save As', and 'Exit'.

Creating a new detail report

1. Click on the **New** button.
2. **Primary Sort Sequence**
Select the field name for the primary sort sequence by clicking on the appropriate option button.
Click on the **Ascending** or **Descending** button to indicate the sort order.
Check the **Page Break** box if you want the information for different values of the selected field to always start on a new pages. e.i. If Date is selected as a primary sort sequence field and the **Page Break** is checked the data for each date will start on a new page.

3. **Secondary Sort Sequence**

Select the field name for the secondary sort sequence by clicking on one of the option buttons.

Click on the **Ascending** or **Descending** button to indicate the sort order.

Check **Subtotal** box if you want to see totals for the secondary sort field.

4. **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 the field to the **Chosen Fields** list box (you may also double click the field name to add it to the list). The number of fields you can select is limited by the page size. Page may print landscape in order to fit wide reports. Note: The order of the columns on the report is the same as the order of the selected fields.

To remove a field from the report, click on the field name in the **Chosen Fields** box and click on the left arrow or double click the field name.

5. Click on the **Save** button.

6. Enter the report name and click on **OK**.

The example screen above:

The detail report is grouped first by Date and then by Extension. Each date will start on the new page. Totals for each extension are going to be displayed. The report sort order is ascending.

7. Click on the **Test Run** button to generate a report.

8. The report filter screen appears. Enter the report criteria.

If you want to run this report always based on the same criteria:

Click on the **Predefined Filter** button.

"Do you want to save the current filter selection as a predefined filter?" message appears.

Click on **Yes**.

Save Filter screen appears. Fill in the filter name and click on **OK**.

Click on **Continue**. The message "Do you want to associate the selected predefined filter with this report for future use?".

Click on **Yes**.

You can also choose from the list of existing predefined filters and associate your report with one of them.

To change the predefined filter to another predefined filter open the Report Filter screen (either via MainMenu/Reports or Test Run) and select another existing filter name or create a new one. Run the report. When the "Do you want to associate the selected predefined filter with this report for future use" message. Click on **Yes**.

If you do not want to run this report always based on the same criteria:

Click on **Continue**.

9. Verify the report and close the report screen.

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

Creating a new summary report

The screenshot shows the 'Report Designer' window. At the top, there are two tabs: 'Detail' and 'Summary', with 'Summary' selected. To the right of the tabs is a 'Name:' field containing 'brvt'. Below the tabs, there are three main sections: 'Group By', 'Order', and 'Sort By'. The 'Group By' section has radio buttons for User, Department, Call Length, Client, Extension, Phone Number, Trunk, Date, and Account Code, with 'Date' selected. The 'Order' section has radio buttons for Ascending and Descending, with 'Ascending' selected. There is a 'Page Break' checkbox which is unchecked. The 'Sort By' section has radio buttons for Date, Longest Average Call, Most Active, Most Expensive, Longest Call, and Most Expensive Avg., with 'Date' selected. A 'Test Run' button is located to the right of the 'Order' section. At the bottom of the window, there is a toolbar with buttons for Open, New, Delete, Save, Save As, and Exit.

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 option button in the **Group By** section.
3. Click on the **Ascending** or **Descending** button to indicate the sort order.
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: There are no **Available Fields** and **Chosen Fields** list boxes on the summary report screen.
Fields that are included on summary reports are:
the selected field from the **Group By** section, number of calls, Time, Average Time, Cost, and Average Cost.
7. Click on the **Save** button.
8. Enter the report name and click on **OK**.
9. Click on the **Test Run** button to generate a report. Follow instructions.
10. The report filter screen appears. Enter the report criteria.
If you want to run this report always based on the same criteria follow the instructions below.

Click on the **Predefined Filter** button.

"Do you want to save the current filter selection as a predefined filter?" message appears.

Click on **Yes**.

Save Filter screen appears. Fill in the filter name and click on **OK**.

Click on **Continue**. The message "Do you want to associate the selected predefined filter with this report for future use?".

Click on **Yes**.

You can also select from the list of existing predefined filters and associate your report with one of them.

To change the predefined filter to another predefined filter open the report filter screen (either via MainMenu/Reports or Test Run located on the Report

Designer screen) and select another existing filter name or create a new one. Run the report. When the “Do you want to associate the selected predefined filter with this report for future use” message appears click on **Yes**.

If you do not want to run this report always based on the same criteria click on **Continue**.

11. Verify the report and close the report screen.
12. Click on **Exit** to leave the screen.

Creating reports from templates

1. Click on **Open**.
2. The **Report Selection** screen comes up.
3. Select the report you want 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 reports criteria in any way you need (refer to sections on creating detail and summary reports above) and save the report using **Save As** option. If you want to associate this report with the predefined filter, follow instructions from pt. 8 to pt. 12 from the section **Creating a new summary report** above.

Editing custom reports

1. Click on **Open**.
2. The **Report Selection** screen comes up.
3. Select the report that needs editing 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 reports 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 overwrite the same report name) or **Save As** option (if you want to save it as a new report).
6. To run the custom reports from the **Main Menu** click on the **Reports** icon. On the **Report Selection** screen click on the **Custom** tab. Select the name of the report and click on **Continue**. For help with running reports refer to the Reports chapter (page 30).

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

Fraud Alert

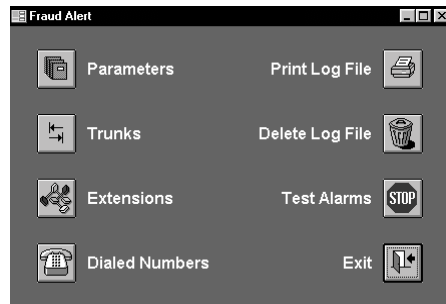
Fraud Alert Features

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.

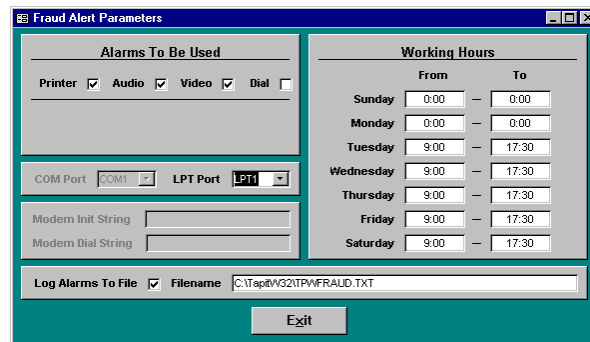
Click on the **Maintenance** icon on the **Main Menu** and then click on the **Fraud Alert** icon.

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.

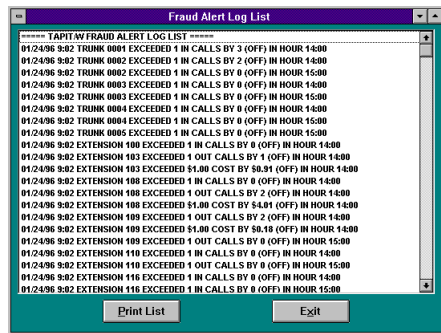
Please refer to your modem documentation.

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.

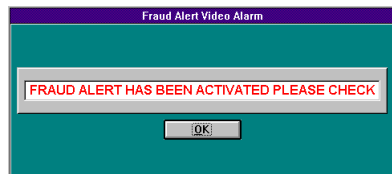
Click on the **Delete Log File** button to delete "TPWFRAUD.TXT"

Test Alarms

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

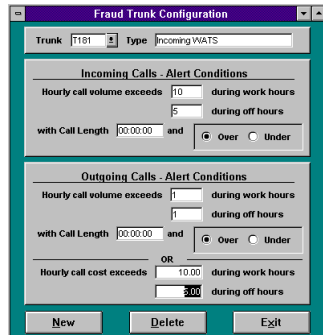
To get a good feel for what they are, you may want to try them out first before using them. Also, if you plan to use a modem to dial out to a pager in the event of Toll Fraud, you can test that process with this facility.

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).

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 screen 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.

The screenshot shows the 'Fraud Alert Extension Configuration' window. It features a title bar and an 'Extension' field with a range from 0100 to 0200. The main configuration area is split into two sections: 'Incoming Calls - Alert Conditions' and 'Outgoing Calls - Alert Conditions'. The 'Incoming Calls' section includes fields for 'Hourly call volume exceeds' (10 during work hours, 2 during off hours) and 'with Call Length' (00:00:00) with radio buttons for 'Over' (selected) and 'Under'. The 'Outgoing Calls' section has similar fields for volume and cost. Below these is an 'OR' section with 'Hourly call cost exceeds' (\$50.00 during work hours, \$5.00 during off hours). At the bottom are 'New', 'Delete', and 'Exit' buttons.

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.

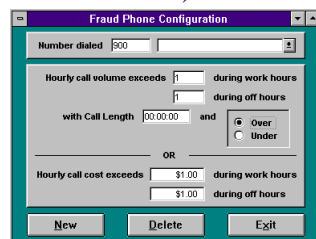
Deleting extension records

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\Tapit Repair.

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

TAPIT Repair Utility screen appears.



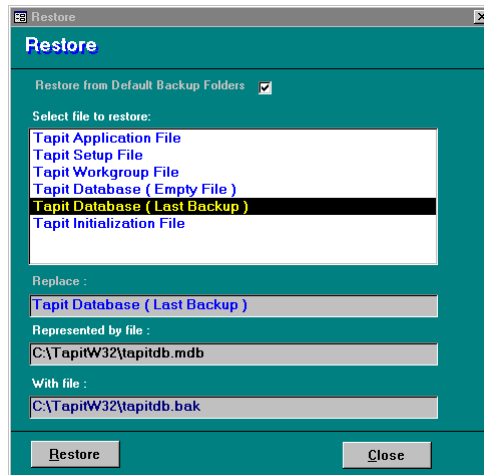
It displays your system's information.

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).

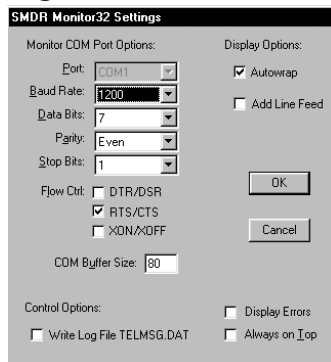
Disconnect - will allow you to disconnect from a specified serial port.

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).

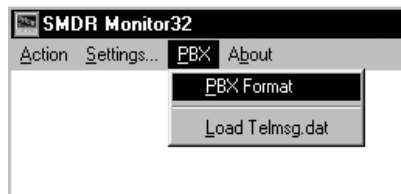
Control Options

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.

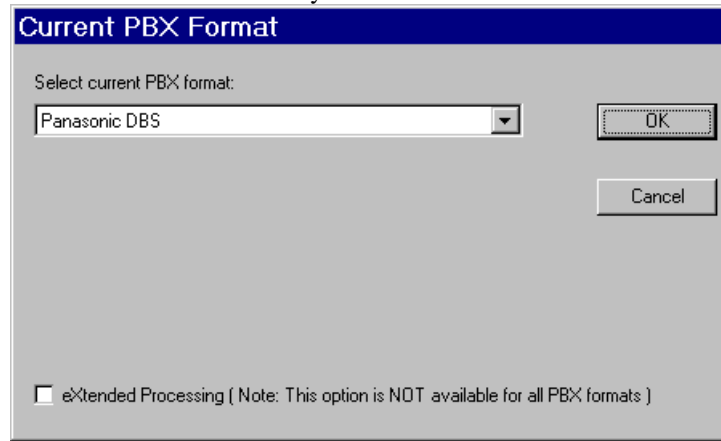
Display Options

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.

Software License Agreement

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

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 was expecting. Please visit our web site www.trisys.com. Go to Tech Support and select Product Update Downloads. Click on TAPIT 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 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.
2. Close TAPIT 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 other than 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: 64 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:

- Microsoft™ Windows 98/NT/2000/XP
- 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 Multi-User version must be installed and set up.
- When installing SMDR Alarm on a computer other than 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.

The screenshot shows the SMDR Alarm 1.1.6 application window. The title bar reads "SMDR Alarm 1.1.6 - Trisys, Inc.". The window contains several sections: "Day of Week" with a dropdown menu set to "Thursday", "Clear Day alarms", "Apply to all Days", and "Phone Numbers" buttons; "Start Time" with a dropdown set to "08:00"; "NO SMDR Timer" with a dropdown set to "15 minutes"; "Alarm Signal" with a dropdown set to "E-mail"; "Send Alarm Signal using:" with a text field containing "peterl@trisys.com"; "Visual" with a dropdown set to "Visual"; "Phone" with a dropdown set to "19733602223... 25276"; "Print" with a dropdown set to "Print"; "Visual" with a dropdown set to "Visual"; "Visual" with a dropdown set to "Visual"; "Report No SMDR Signal" and "Report Phone Numbers" checkboxes, both checked; "Waiting..." label in the bottom left; "OK", "Apply", and "Shut Down" buttons at the bottom.

"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
<input type="text" value="08:00"/>	<input type="text" value="15"/> minutes
<input type="text" value="17:00"/>	<input type="text" value="60"/> minutes
<input type="text" value="21:00"/>	<input type="text" value="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:

 peterl@trisys.com

 19733602223,,,,,25276

Each comma
represents
1-second delay.

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

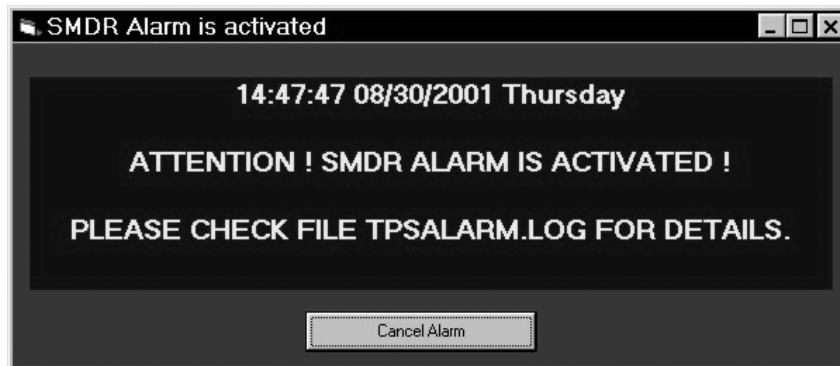
Phone option -system pages a user (modem connection required).

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.

6. 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.
7. 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.

8. Click on the **Apply** button.
9. 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.

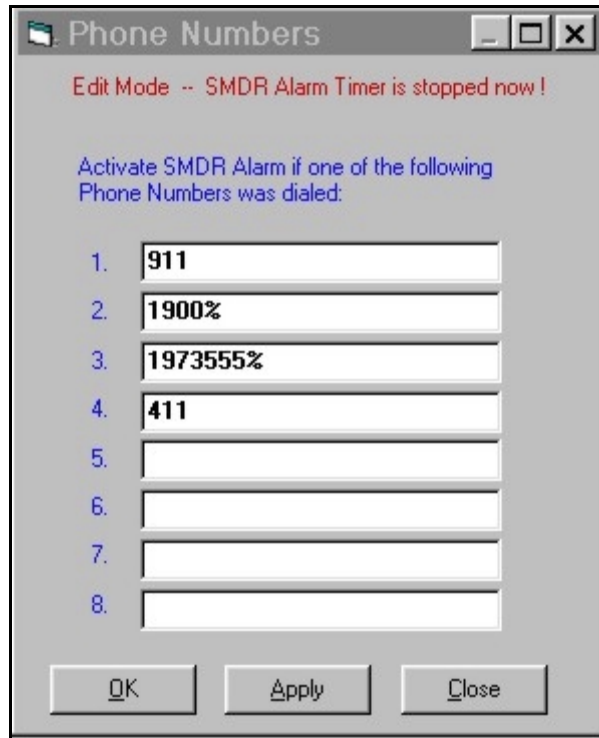
In this case, clicking **Test Now** prompts the system to send an email notification, print the message, display the screen alarm message and play the voice-recorded message.

10. 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).
11. 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.



Phone Numbers

Edit Mode -- SMDR Alarm Timer is stopped now !

Activate SMDR Alarm if one of the following Phone Numbers was dialed:

1. 911
2. 1900%
3. 1973555%
4. 411
- 5.
- 6.
- 7.
- 8.

OK Apply Close

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/TAPIT Monitor.

Example of the Phone Number tracking

SMDR Alarm 1.1.6 - Trisys, Inc.

Day of Week: Thursday

Clear Day alarms Apply to all Days Phone Numbers

Start Time NO SMDR Timer Alarm Signal: Send Alarm Signal using: Test Now

Time period one: 08:00 15 minutes E-mail peterk@trisys.com

Time period two: 17:00 60 minutes Phone 19733602223,25276

Time period three: 21:00 0 minutes Visual

☒ Report No SMDR Signal
☒ Report Phone Numbers

Waiting... OK Apply Shut Down

Phone Numbers

Edit Mode -- SMDR Alarm Timer is stopped now !

Activate SMDR Alarm if one of the following Phone Numbers was dialed:

1. 911
2. 1900%
3. 1973555%
4. 411
- 5.
- 6.
- 7.
- 8.

OK Apply Close

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 within 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 EX 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, Windows 2000 and Windows XP Professional 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 5.5 Service Pack 2 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 EX Multi-User version must be installed and set up.
To verify the correct version of the TAPIT EX database, go to Start/Tapit/Tapit Repair. The initial TAPIT Repair screen displays the database release number in the lower right corner. If you have the Remote Manager software installed click on Continue. To verify the release number for each location database select the location name and check the lower right corner. The correct release number for the TAPIT EX database is 5.
- When installing Tapit Web Reports on a computer other than your TAPIT Server, you must be able to 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.

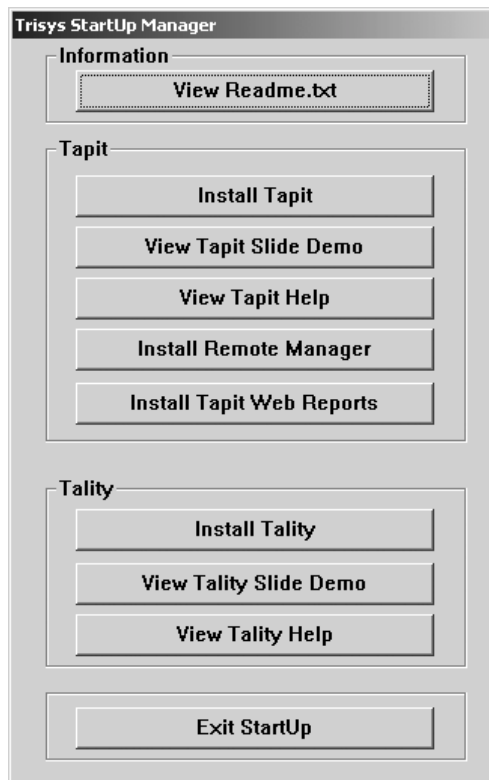
Installation program may require you to reboot your PC.

Installing Tapit Web Reports

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). You must be able to point from that Web Server to the TAPIT database folder located on the TAPIT Server.

If you are installing Tapit Web Reports on a computer other than TAPIT Server machine follow the instructions below before you proceed with installation.

- 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 the 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. the mapped path to the database folder is K:\Main.
1. Insert TAPIT CD into the CD ROM drive. **Trisys StartUp Manager** screen is displayed. (If this screen is not displayed automatically, then use the Run command on the Start (Windows) menu by typing D:\Startup.exe, where D is represents your CD ROM drive, in the Open text box and clicking on OK.).



2. Click on **Install Tapit Web Reports**.
3. **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**.

Note: If TAPIT is not properly installed or you have entered an incorrect path to the database or the TAPIT database release number is not "5" then the message "Cannot access the Tapit database at : *your database path*" appears. You cannot continue with Tapit Web Reports installation.

5. **User Account** screen appears.

User Name field - enter a user account to be used by IIS to run the Tapit Web Reports application. This account needs **Full Control** permissions for all Tapit Web Report application folders (**TapitWeb** folder where Tapit Web Reports are installed and its subfolders - especially **TapitWeb\TapitReps\Data** folder) and TAPIT database folder (where TAPIT database resides).

When entering Domain User Name use the following format: DOMAIN\User

Enter this users' password in the **Password** field and confirm the password by reentering it in the **Confirm Password** field.



6. Application Passwords screen follows.



Create two passwords. These passwords are required to log into the Tapit Web Reports application. Users will not be able to view reports without a password. The passwords are required entries.

Note: User password allows for running all reports except the Authorization Code and Trunk Analysis categories. Administrator password enables a person to change passwords and generate all available reports.

7. Click on **Next**.
8. 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**.

9. The **Ready to Install!** screen appears. Click on **Next**. Setup program starts installing files.
10. **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**.

Changing IIS permissions

During installation entries from the **User Account** screen are used to set up IIS to use an appropriate user account when running the Tapit Web Reports application. However, you can change user account settings using provided ***Tapit Web Config*** utility or manually.

Changing IIS permissions with Tapit Web Config utility

1. Click on **Start** menu and select **Start/Programs/Tapit Web Reports/ Tapit Web Config**.

Tapit Web Reports Configuration screen opens in your Internet browser.

Tapit Web Reports Configuration

Please enter a user account to be used by IIS to run the Tapit Web Reports application. This account needs Full Control permissions for all Tapit Web Report application and TAPIT database folders. When entering Domain User Name please use the following format: DOMAIN\User

[Domain\]User:

Password:

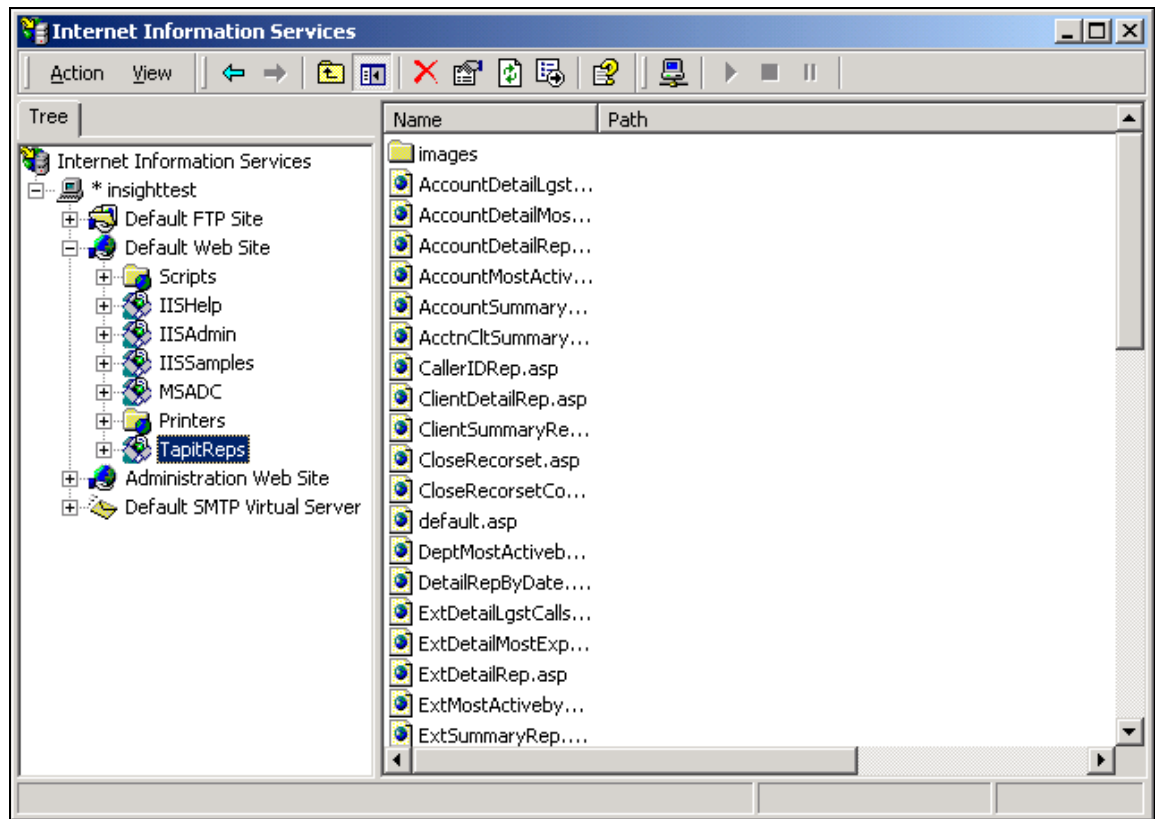
Confirm Password:

Path to the DB files: C:\TAPITW32\DATA\MAIN
TapitReps Web Site: Default Web Site
(IIS://LocalHost/w3svc/1/ROOT/TapitReps)

2. **User** field contains the currently used (by IIS) User Name. You can type a new user name if required.
Note: this user account is used by IIS to run the Tapit Web Reports and it needs **Full Control** permissions for all Tapit Web Report application folders (TapitWeb folder where Tapit Web Reports are installed and its subfolders - especially TapitWeb\TapitReps\Data folder) and TAPIT database folder (where TAPIT database resides).
When entering Domain User Name use the following format: DOMAIN\User
3. Enter this users' password in a **Password** field and confirm the password by reentering it in the **Confirm Password** field.
4. Click on **Change**.
If the IIS settings are changed successfully you will receive a confirmation message.

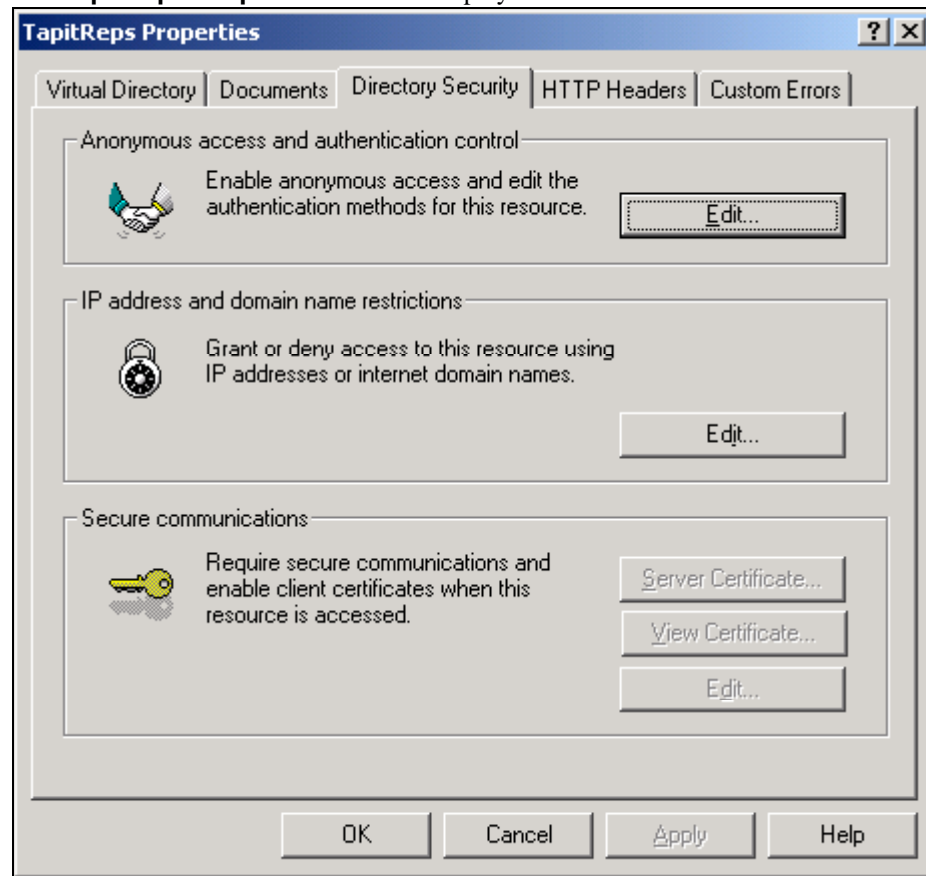
Changing IIS permissions manually.

1. 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.



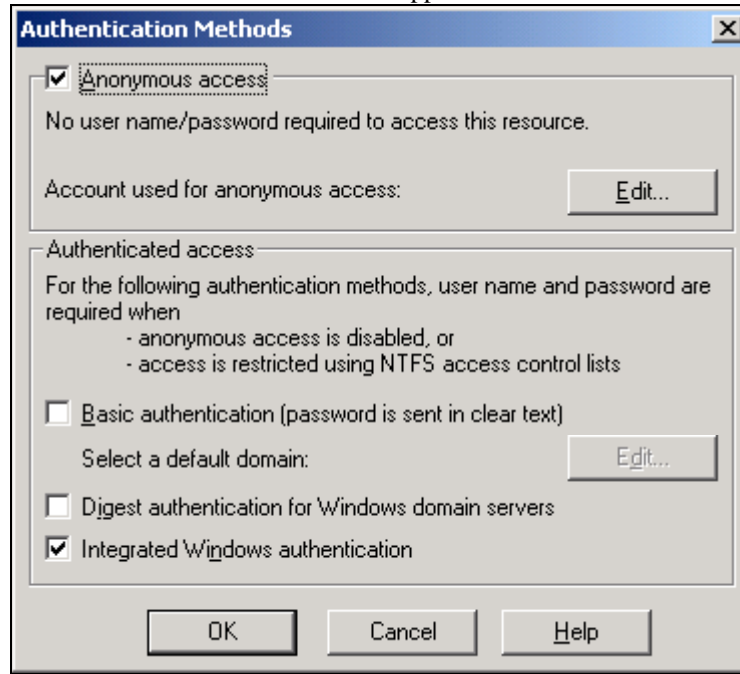
2. Click on the **Default Web Site** folder and select **TapitReps** folder below. Right-click on the folder and select the **Properties** option from the drop-down menu.

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



4. Click on the **Directory Security** tab.
5. Click on the **Edit** button located in the Anonymous access and authentication control group.

Authentication Methods screen appears.



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

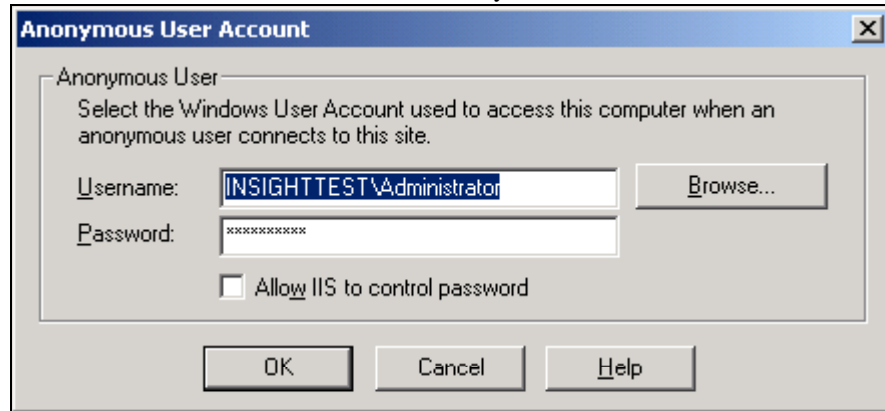


The screen contains the default account user name for the Tapit Web Reports application used to access the TAPIT database and other files located on a TAPIT Server computer.

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

7. Click on the **Allow IIS to control password** (if using Windows NT - **Enable Automatic Password Synchronization**) box to uncheck it.

8. Enter the account name into the **Username** text box or click on the **Browse** button and select the appropriate name from the list. This account needs Full Control permissions for all Tapit Web Report application folders (**TapitWeb** folder where Tapit Web Reports are installed and its subfolders - especially **TapitWeb\TapitReps\Data** folder) and TAPIT database folder (where TAPIT database resides).
9. Enter the new password. Press enter.
Type in the password again in the confirmation screen. Click on **OK**.
10. Your screen should look similar to the screen below with the exception of the **Username** value, which will be different in your case.



11. 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 turned on 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).

UPGRADING TAPIT WEB REPORTS

Note: TAPIT Web Reports version 4.1.1.5 and higher works **ONLY** with the Multi-User versions of TAPIT EX.
TAPIT EX must be installed and set up before upgrading TAPIT Web Reports.

When upgrading TAPIT Web Reports passwords are not carried from the old version to the new version.

You have to re-enter passwords while installing the software.

Upgrading TAPIT Web Reports ver. 4.1.5.0 and higher (versions distributed with TAPIT EX 4.1.5 and higher)

The location/department level permission module has been added to the Tapit Web Reports ver. 4.1.5.0

The permission information is stored in TapitWeb/Bin/ Security.mdb database.

When performing uninstall this database is deleted.

If you are using permission module (you have created users and permissions for Tapit Web Reports) do not uninstall Tapit Web Reports. Simply run the installation of the upgrade version. The upgrade installation will update your files without deleting Security.mdb.

However, if you need to uninstall the program and want to preserve your security data, make a backup of the Security.mdb first. Store the backup file in a folder outside the TapitWeb folder. Once the upgrade installation is finished you can overwrite the new Security.mdb file with the backed up file.

For upgrade installation follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports ver. 4.1.1.5 and higher (versions distributed with TAPIT EX 4.1.0 and higher)

1. Go to **Start/TapitWeb/Uninstall Web Reports** and run the uninstall program.
2. Follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports ver. 1.1.1.4 (version distributed with TAPIT 2000 3.1.9)

Note: When upgrading to version 4.1.1.5 and higher you must upgrade your TAPIT 2000 to TAPIT EX first.

3. Go to **Start/TapitWeb/Uninstall Web Reports** and run the uninstall program.
4. Follow directions from **Installing Web Reports** section of this document.

Upgrading TAPIT Web Reports version 1.1.1.3

(TAPIT Web Reports version 1.1.1.3 has been distributed with the TAPIT 2000 3.1.8 version)

Note: When upgrading to version 4.1.1.5 and higher you must upgrade your TAPIT 2000 to TAPIT EX first.

This version has a problem with the uninstall program.

Do not use the uninstall utility. It can impair your TAPIT software. Remove

TapitWebReports folder as well as TapitWeb entries in Start/Programs menu manually.

Proceed with the installation of the new product – see Installing Web Reports section of this document.

USER INSTRUCTIONS

Logging in to the Tapit Web Reports

There are two ways to use Tapit Web Reports.

A = if required, you can set up **location/department level** permissions and only users with assigned permissions will be able to view reports.

B = you can use Tapit Web Reports “as is” – using the two passwords created during installation.

1. Open Tapit Web Reports.

Login screen appears.

2. **A If you are not using location/department permissions or no permissions have yet been created,**

login screen has only one entry field - **Password**.

(If permissions have already been set up, skip this point and go to point 3.)

Enter your password.

If the administrative password has been entered, the main menu is displayed.

This screen contains the following options: **View Reports, Passwords, and Set up Permissions**.

To view reports, click on the **View Reports** option.

Reports menu screen appears.

For more information on how to generate reports see the **Creating /Printing Reports** section below.

If you decide to set up permissions click on the **Set up Permissions** option. Refer to the **Permissions** section for further instructions.



If the users password has been entered, the report menu is displayed.
For more information on how to generate reports see **Creating /Printing Reports** section below.

TAPIT REPORTS								
USER	DEPARTMENT	CLIENT	EXTENSION	TRUNK	ACCOUNT CODE	PHONE NUMBER	MOST ACTIVE	MISC

3. **B** If you are already using location/department level permissions, login screen displays two entry fields – **Login User Id** and **Password**.
Note: if you want to use location/department level permissions and but no permissions have yet been set up, refer to point 2.
Enter your user id and password.
If the full control user id and password have been entered, the main menu is displayed.
This screen contains the following options: **View Reports, Permissions**.
To view reports, click on the **View Reports** option.
Reports menu screen appears.
For more information on how to generate reports see the **Creating /Printing Reports** section below.
To add/edit users/permissions click on the **Permissions** option. Refer to the **Permissions** section for further instructions.



If the users password has been entered, the report menu is displayed.
For more information on how to generate reports see **Creating /Printing Reports** section below.

TAPIT REPORTS										
USER	DEPARTMENT	CLIENT	EXTENSION	TRUNK	TRUNK ANALYSIS	ACCOUNT CODE	AUTH. CODE	PHONE NUMBER	MOST ACTIVE	MISC

Depending on users permissions, the report menu may not have all the options shown above.

CREATING/PRINTING REPORTS

1. Open the report menu (see Logging in to the Tapit Web Reports for instructions on how to open report menu).

TAPIT REPORTS									
USER	DEPARTMENT	CLIENT	EXTENSION	TRUNK	ACCOUNT CODE	PHONE NUMBER	MOST ACTIVE	MISC	

2. Each option on the menu is a report category. Each category contains several reports. For example click on **Phone Number**. Your screen displays the list of reports in a **Phone Number** category.

PHONE NUMBER REPORTS

- **Detail Activity by Phone Number/Call Duration**
- **Detail Activity by Phone Number/Cost**
- **Detail Activity by Phone Number/Date**
- **Summary by Phone Number**
- **Summary Phone Number by Call Duration**
- **Summary Phone Number by Call Volume**
- **Summary Phone Number by Cost**
- **Summary Top 100 Phone Numbers Graph**

3. Click on the name of a required report.

4. The filter screen appears. Enter the appropriate criteria.

DETAIL ACTIVITY BY PHONE NUMBER/DATE FOR "MAIN" LOCATION			
Location: MAIN			
enter the Date: 3/4/2003 - 3/4/2003		Time Window: - hh:mm	
or select the today date range			
Extension: 100 - 290	Duration: > 00:01:00 hh:mm:ss		
Trunk: 1000 - 1010	Ring Duration: < 00:01:30 hh:mm:ss		
Account Code: - 	Hold Duration: > 00:00:30 hh:mm:ss		
Matter Code: - 	Cost: > .10		
Author. Code: - 	Telephone#: 973		
Area Code: - 	DNIS #: 		
Source IP Addr: 123.090*	Dest. IP Addr: 		
<input type="checkbox"/> Only Transfer Calls		Direction: ALL Incoming Outgoing Internal	Call Status: ALL Normal Continued Abandoned
State: ALL AL-Alabama AK-Alaska AZ-Arizona AR-Arkansas			
Department: ALL Analytic General Management R&D	User: ALL Apple Brad Brown Dianne Corleone Mike Eggpan Donn	Client: ALL Abel Miriam BATI John Berrah Lue Central Offices	
<input type="checkbox"/> Only Local Calls <input type="checkbox"/> Exclude Local Calls			
Create Report Print To File Clear			

Location

If the Remote Manager is not installed this list contains only one item – Main. Otherwise Location list box enables you to switch locations and run reports for any of your remote sites.

Date

enter the time frame in the following format: “mm/dd/yyyy-mm/dd/yyyy” or select data range from the list box below

Time Window

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

Extension

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

Trunk

enter the trunk bracket or if you want to run a report for a specific trunk, enter the same value

in both text boxes.

Account Code

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

Matter Code

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

Author. Code

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

Area Code

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

Source IP Addr

enter the source IP address. Use "*" wild character at the end of the entry if you want to search for all source IP addresses containing the entered string.

Dest. IP Addr

enter the destination IP address. Use "*" wild character at the end of the entry if you want to search for all destination IP addresses containing the entered string.

Duration

click on the down arrow to open the operator list. Select the appropriate operator and enter the call duration value in the following format: "hh:mm:ss".

Ring Duration

click on the down arrow to open the operator list. Select the appropriate operator and enter the ring duration value in the following format: "hh:mm:ss". **Ring Duration** indicates the length of the ring time before the call was picked up.

Hold Duration

click on a down arrow to open the operator list. Select the appropriate operator and enter the call duration value in the following format: "hh:mm:ss". **Hold Duration** indicates how long the call stayed on hold.

Cost

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

Telephone #

enter the telephone number. You can enter partial numbers. i.e. only area code or area code and exchange (973 or 973 360).

DNIS #

enter the DNIS number.

Direction

select the direction of phone activity.

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.

Call Status

select the desired call status option.

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.

Department, User, Client, States

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. **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.

5. To start over 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
6. **Print To File** opens the **Print To File** screen.
Use it if you need to save a copy of a report for printing or emailing.

PRINT TO FILE - DETAIL ACTIVITY BY PHONE NUMBER/DATE

1 Select File Type: ☒ HTML ☐ EXCEL

- Click on the 'Continue' button to save the report in the appropriate file format.

NOTE: new file OVERWRITES by default previously generated file. To KEEP the copy of the report, open the file for viewing and save it to your disk using Internet Explorer menu options.

Continue

BACK TO FILTER SCREEN

Select appropriate file type: HTML or EXCEL (to view EXCEL files MS EXCEL must be installed) and click on **Continue**.

The Print to File screen expands to display View File button and specs for the newly generated file.

PRINT TO FILE – DETAIL ACTIVITY BY PHONE NUMBER/DATE

1

Select File Type:
☒ HTML
 ☐ EXCEL

- Click on the 'Continue' button to save the report in the appropriate file format.

NOTE: new file **OVERWRITES** by default previously generated file. To **KEEP** the copy of the report, open the file for viewing and save it to your disk using Internet Explorer menu options.

Continue

2

HTML File specs:

- file size: 162K
- number of pages: 7
- created: Tuesday, March 04, 2003

Click on the 'View File' button to view the file.
 To **PRINT**, **SAVE** or **EMAIL** the file, use **Internet Explorer** menu options.
NOTE: depending on the size of the file and the speed of the Internet connection this may take some time.

View File

3

To **QUIT** printing , click on 'BACK TO FILTER SCREEN' button. This will **CLEAN** the 'left over' print files on the server.

BACK TO FILTER SCREEN

Click on the **View File** button to open the report. Some files may take few minutes to load – depending on their size.

The report file opens in a new window. You can save this file to your disk, print or email it using Internet Explorer menu options.

Note: once you leave the Print To File screen or generate a new file, the previously created file is erased.

DRILL DOWN REPORTS

Summary reports contain links to the detail reports for the each record. For example clicking on a specific user name in the Summary by User report invokes a detail report for this user. Clicking on the name of state in the Summary by State – Map report displays the detail report for this state.

Most Active reports are summary reports. They display top 30 (for your filter selection) most active extensions/account codes/phone numbers. If you purchased TAPIT with Remote Manager you can run **Most Active** reports for all or selected locations.

GRAPH REPORTS

There are several graph reports available. They display the top 100 records for your filter selection and can be sorted by call volume or by cost.

TRUNK ANALYSIS REPORTS

TAPIT REPORTS									
USER	DEPARTMENT	CLIENT	EXTENSION	TRUNK	TRUNK ANALYSIS	ACCOUNT CODE	PHONE NUMBER	MOST ACTIVE	MISC

1. To run one of the trunk analysis reports click on the **Trunk Analysis** group.
The list of available reports appears.
2. Click on the required report. The filter screen appears.
Note: It is important to set your trunks and your trunk groups before running reports.
Refer to the sections below on “how to maintain trunks and trunk groups”.
3. When your trunks and trunk groups are set up, correctly enter the required criteria on the filter screen and click on **Create Report**.

HOURLY ALL TRUNKS BUSY BY TRUNK GROUP FOR "MAIN" LOCATION	
Location:	MAIN
enter the Date:	01/01/2003 - 01/01/2003
or select the	today
Time Window:	- hh:mm
Trunk Group:	-
Trunk :	-
<div> <div>Create Report</div> <div>Print To File</div> <div>Clear</div> <div>Setup Trunks</div> <div>Setup Trunk Groups</div> </div>	

The report screen appears.

To ensure the integrity of the Web Reports, navigate using the buttons provided in the application.

HOURLY ALL TRUNKS BUSY BY TRUNK GROUP

Location: MAIN

from 01/01/2003 through 01/01/2003

FILTER SCREEN

Trunk Group	ATB Time	ATB CCS Time	ATB %	Calls		
				In	Out	All
DATE: 1/1/2003						
● Hour: 10:00						
TR001	00:05:00	3	8.33%	17	2	19
TR002	00:04:00	2.4	6.67%	4	31	35
Wednesday, July 16, 2003 09:59						

To see field descriptions point to each columns header.

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

Hourly All Trunks Busy By Trunk Group accounts only for the time when all trunks are unavailable for use.

Setting Up Trunk Groups:

- 1. From the main menu click on the **Trunk Analysis** report group to display the list of available reports.
- 2. Select one of the **Trunk Analysis** reports.
- 3. The report filter screen appears.

HOURLY ALL TRUNKS BUSY BY TRUNK GROUP FOR "MAIN" LOCATION

Location:

MAIN

enter the Date:

01/01/2003

-

01/01/2003

or select the

today

▼

date range

Time Window:

-

hh:mm

Trunk Group:

-

Trunk :

-

Create Report

Print To File

Clear

Setup Trunks

Setup Trunk Groups

- 4. Click on the **Setup Trunk Groups** button located on the bottom of the screen.
The **Trunk Group Setup Screen** appears.

TRUNK GROUP SETUP SCREEN -
"MAIN" LOCATION

New Group:

0005

Available Trunks:

0001
0002
0003
0008
0009
001
0010
0011
0012
0013
0014
0015
0016
002
0022

Add

+

Remove

-

Assigned Trunks:

0004
0005
0006
0007

Save

New

Delete

Cancel

Filter

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Tapit

5. **To add a new group:**
Click on the **New** button. Enter group's name/id in the **New Group** text box.
Note: When opened for the first time this screen displays the New Group text field by default.
Select trunk/trunks from the **Available Trunks** list.
Click on the **Add** button to add selected trunks to the **Assigned Trunks** list.
If you need to remove any trunks from **Assigned Trunks** list, select trunk/trunks from the **Assigned Trunks** list and click on the **Remove** button.
Click on the **Save** button to save the new group.
The **New Group** field changes into **Available Trunks** list.
6. **To edit a trunk group:**
Select a trunk group from the **Available Groups** list.

TRUNK GROUP SETUP SCREEN -
"MAIN" LOCATION

Available Groups:
0005

Available Trunks:

- 0001
- 0002
- 0003
- 0008
- 0009
- 001
- 0010
- 0011
- 0012
- 0013
- 0014
- 0015
- 0016
- 002
- 0022

Assigned Trunks:

- 0004
- 0005
- 0006
- 0007

Add +

Remove -

Save New Delete Cancel Filter

- Select trunk/trunks from the **Assigned Trunks** list and click on the **Remove** button to remove them from a trunk group. Select trunk/trunks from the **Assigned Trunks** list and click on the **Add** button to add them to a trunk group.
Click on the **Save** button to save the changes.
7. To delete an unwanted trunk group:
Select a trunk group from the **Available Groups** list and click on the **Delete** button.
Click **OK** on the confirmation message. A trunk group has been deleted.
 8. Click on **Filter** to go back to the filter screen.

Setting Up Trunks:

1. Click on the **Trunk Analysis** report group to display the list of available reports.
2. Select one of the **Trunk Analysis** reports.
3. The report filter screen appears.

The screenshot shows a web-based report filter interface. At the top, the title is "HOURLY ALL TRUNKS BUSY BY TRUNK GROUP FOR 'MAIN' LOCATION". Below the title, there is a "Location:" dropdown menu set to "MAIN". Underneath, there are date selection options: "enter the Date:" with two date pickers (01/01/2003 - 01/01/2003) and "or select the" with a "today" button and a "date range" dropdown. Below these are fields for "Time Window:" (two empty boxes followed by "hh:mm"), "Trunk Group:" (two empty boxes), and "Trunk:" (two empty boxes). At the bottom, there are five buttons: "Create Report", "Print To File", "Clear", "Setup Trunks", and "Setup Trunk Groups".

9. Click on the **Setup Trunks** button located on the bottom of the screen.
10. The **Trunk Setup Screen** appears.

The screenshot shows the "TRUNK SETUP SCREEN - 'MAIN' LOCATION". It has a dark blue header with the title. The main area is yellow. On the left, there are two buttons: "Add" with a "+" icon and "Remove" with a "-" icon. Between them is a text input field containing "0001". On the right, there is a list box titled "Trunks:" containing the numbers 0001, 0002, 0003, 0004, 0005, and 0006. At the bottom, there are two buttons: "Save" and "Filter".

11. **To add a new trunk:**
Enter trunk's name/id in the text box provided and click on the **Add** button.
The entry is added to the Trunks list. You may have to scroll to the bottom to see it.
Click on **Save**.
12. **To remove unwanted trunks:**
Select trunk/trunks from the Trunks list and click on the **Remove** button.

Click on the **Save** button to save the changes.

Click on **Filter** to go back to the filter screen.

PASSWORDS

Password screen is available to a user with the administrator password ONLY if the location/department level permissions have not been set up.

Tapit Web reports has two levels of passwords:

- administrator is able to set/change passwords, view **Authorization Code** and **Trunk Analysis** reports
- user is able to view all reports but authorization code group and does not have access to password setup screen.

Initially passwords are set during the installation, however they can be changed later using the password screen.

1. Open **Tapit Web Reports** application with your administrator password.
2. The **Main Menu** screen appears.



3. Click on **Passwords**.
4. The **Password** screen is displayed.

5. To verify your privileges enter your password in the **Enter your current password** text box.
 Password screen is divided into **Administrator Password** and **User Password** sections.
 Each section has the **New password** and **Confirm new password** text boxes.
 Enter the new password in the **New password** field and confirm it by reentering the same password in **Confirm new password** box.
6. Click on **Save**.
 You will obtain a confirmation message on your screen.

If you receive the following message: "The administrator password has not been changed. This problem may be related to your Tapit Web Reports virtual web folder security settings. Please refer to the readme.doc file or the Tapit manual for further instructions. Follow instructions from section "Changing IIS permissions" on page 7.

PERMISSIONS

IMPORTANT NOTE:

Once permissions are created, the Tapit Web Reports login process changes.

Only users with permissions are able to access Tapit Web Reports.

If a **Full Control** password or user id is lost, an administrator can use the generic password (old Administrator Password) to open Tapit Web Reports with full control. The generic password needs to be entered in both **Login User Id** and **Password** fields on the **login** screen.

The generic administrator password should be available only to Tapit Web Reports administrator/s. If users other than administrator/s know it, the Administrator Password should be changed using the Passwords option from the Main Menu before permissions are set up.

The Passwords option is not available once permissions are set up.

BEFORE SETTING UP PERMISSIONS: Tapit EX must be installed and set up. Remote Manager, if you have purchased this option, must be installed and set up. Each remote site and the main location must have at least one department assigned to it.

1. Open Tapit Web Reports.
Login screen appears.
2. If no permissions have yet been created, login screen has only one entry field - **Password**.
Enter your administrative password.

If permissions have already been set up, login screen displays two entry fields – **Login User Id** and **Password**.

Enter your **Full Control** user id and password.

You must be a Tapit Web Reports administrator to access Permissions.

3. The main menu screen appears.
If no permissions have yet been created, this screen displays the following options: **View Reports, Passwords, and Set up Permissions**.
If permissions have already been set up, this screen displays the following options: **View Reports, Permissions**.

Setting up Permissions for the first time.

1. Click on **Set Up Permissions** on the **Main Menu** screen.
The **User List** screen appears.
Since no permissions are set up yet, this screen displays instructions.
2. Click on the **Add User** button.
The **User Profile** screen appears.



USER PROFILE

Login User Id: Password: Confirm Password:

Full Name: Default Location:

Description:

Main Menu Back To User List Continue

3. Enter the following user information:

Login User Id - enter the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. The entry must be a unique value and must be different from the generic password (old Administrator password). If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

Password - enter the password that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. This field is required.

Confirm Password – re-enter your password here. This field is required.

Full Name - enter a name identifying a user. This name appears on the **User List** screen. It may be a first and a last name, or a name of a user group. This field is required.

Default Location – select a value from a list of available locations.

TAPIT EX Multi-User WITHOUT Remote Manager option - only one location is available - MAIN.

TAPIT EX WITH Remote Manager option - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.

For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen. This field is required.

Description - enter a short description of a user/user group. This field is optional.

4. If all required information has been entered, click on **Continue**.

- | USER PROFILE | | | |
|---|---|--|---|
| Login User Id: | <input type="text" value="D5234"/> | Password: | <input type="password" value="..."/> |
| | | Confirm Password: | <input type="password" value="..."/> |
| Full Name: | <input type="text" value="Debra Brown"/> | | Default Location: |
| | | | <input type="text" value="CHESTERFIELD"/> |
| Description: | <input type="text" value="Accounting"/> | | |
| Location/Department Security Setup for Debra Brown | | | |
| <input checked="" type="checkbox"/> Full Control | <input checked="" type="checkbox"/> View ALL Reports | <input checked="" type="checkbox"/> View All EXCEPT Trunk Analysis | <input checked="" type="checkbox"/> Deny All |
| Assign FULL CONTROL over all locations. | Allow viewing AUTHORIZATION CODE reports and reports for ALL DEPARTMENTS for all locations. | Allow viewing reports for ALL DEPARTMENTS , but NO TRUNK ANALYSIS reports for all locations. | DENY ALL access to all locations. |
| <input checked="" type="checkbox"/> - access denied <input checked="" type="checkbox"/> - loc. options open <input checked="" type="checkbox"/> - unavailable | | ! INSTRUCTIONS | |
| <input type="checkbox"/> RESTRICT Debra Brown to view reports for ONLY ONE TAPIT USER , or set permission options below. | | Open printable version of Instructions.

Permissions Overview

Setting up Permissions for the first time

Using User List Screen

Using User Profile Screen

Using Location/Department Security Preset Options | |
| <input type="checkbox"/> ALLOW Debra Brown FULL CONTROL over all locations, or set permissions for locations below. | | | |
| <input checked="" type="checkbox"/> MAIN (location) | | | |
| <input checked="" type="checkbox"/> ATLANTA (location) | | | |
| <input checked="" type="checkbox"/> CHESTERFIELD (location) | | | |
| <input checked="" type="checkbox"/> CINCINNATI (location) | | | |
| <input checked="" type="checkbox"/> GLENDALE (location) | | | |
| <input checked="" type="checkbox"/> GRAND RAPIDS (location) | | | |
| <input checked="" type="checkbox"/> GREENVILLE (location) | | | |
| <input checked="" type="checkbox"/> KANSAS CITY (location) | | | |
| <input type="button" value="Main Menu"/> <input type="button" value="Back To User List"/> <input type="button" value="Save"/> | | | |

To set custom permissions for each location use the location/department tree located in the left pane of the screen (see **Using Location/Department Tree** section below).

- WEB REPORTS • 141

If the record is SAVED the Record has been SAVED message is displayed.

USER PROFILE

Login User Id: Password: Confirm Password:

Full Name: Default Location:

Description:

Record has been SAVED

Location/Department Security Setup for Agnes Litak

<input checked="" type="checkbox"/> Full Control Assign FULL CONTROL over all locations.	<input checked="" type="checkbox"/> View ALL Reports Allow viewing AUTHORIZATION CODE reports and reports for ALL DEPARTMENTS for all locations.	<input checked="" type="checkbox"/> View All EXCEPT Trunk Analysis Allow viewing reports for ALL DEPARTMENTS , but NO TRUNK ANALYSIS reports for all locations.	<input checked="" type="checkbox"/> Deny All DENY ALL access to all locations.
---	--	---	---

✕ - access denied ✓ - loc. options open ○ - unavailable

☒ **Agnes Litak is ALLOWED** to view reports for the **selected TAPIT User ONLY**.

TAPIT Users for the 'Default Location' - **MAIN**:

Tapit User name must be selected.
To select TAPIT User from a **different remote site**, switch to a desired location using 'Default Location' field above.

! NSTRUCTIONS

[Open printable version of Instructions.](#)

[Permissions Overview](#)

[Setting up Permissions for the first time](#)

[Using User List Screen](#)

[Using User Profile Screen](#)

[Using Location/Department Security Preset Options](#)

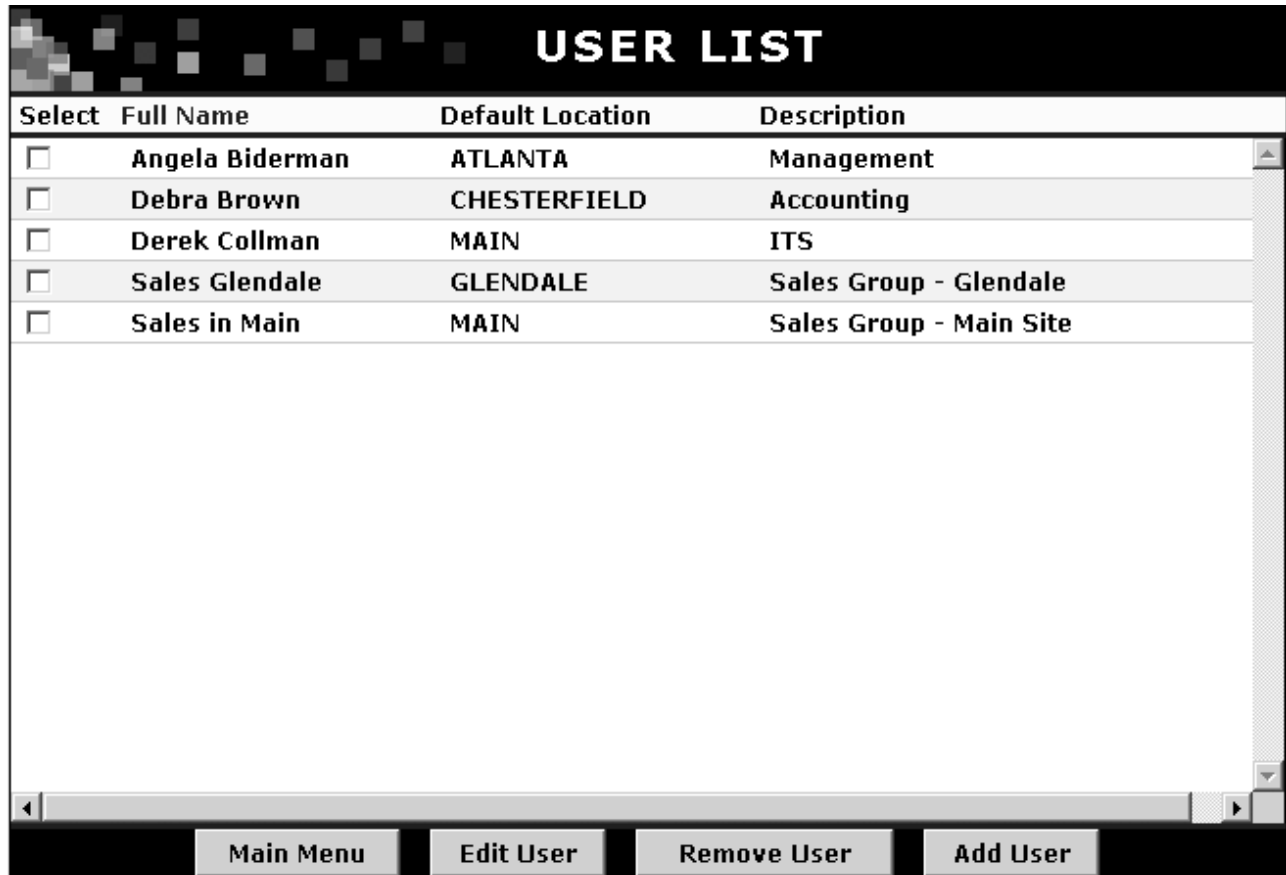
Main Menu **Back To User List** **Save**

7. To set up another user click the **Go back to User List** button and repeat steps 2 to 6.
To quit, simply close the browser window.
To go to the main menu, click on the **Main Menu** button.

Using User List Screen

User List screen is a list of the current Tapit Web Report users. It allows you to add/edit/remove users.

The list can be sorted by clicking on the **Full Name**, **Default Location** or **Description** headers correspondingly.



Select	Full Name	Default Location	Description
<input type="checkbox"/>	Angela Biderman	ATLANTA	Management
<input type="checkbox"/>	Debra Brown	CHESTERFIELD	Accounting
<input type="checkbox"/>	Derek Collman	MAIN	ITS
<input type="checkbox"/>	Sales Glendale	GLENDALE	Sales Group - Glendale
<input type="checkbox"/>	Sales in Main	MAIN	Sales Group - Main Site

To enter the User List screen click on the **Permissions** option on the **Main Menu**.
User List screen appears.

To add a new user click on the **Add User** button. The **User Profile** screen is displayed.

To edit a user double click on users **Full Name**. The **User Profile** screen is displayed.
You can also select this user by checking the **Select** box for the required record. The record is highlighted. Click on the **Edit User** button to bring up the **User Profile** screen

To remove a user, select a user by checking the **Select** box for the required record. The record is highlighted. Click on the **Remove User** button. Click **OK** to the confirmation message. The user is removed from the list.

Using User Profile Screen

User Profile screen allows you to enter users information and set up users permissions.

To open the **User Profile** screen, depending on what you want to do, use the **Edit User** or **Add User** options from the **User List** screen.

If you are adding a new user, only users information part of the screen is displayed at first.

To add a new user, follow instructions from the section above - **Setting up Permissions for the first time**.



The screenshot displays the 'USER PROFILE' screen. At the top, there is a decorative header with a pattern of small squares. Below the header, the title 'USER PROFILE' is centered. The main area contains several input fields: 'Login User Id:', 'Password:', and 'Confirm Password:' are in the first row; 'Full Name:' and 'Default Location:' (with a dropdown menu showing 'MAIN') are in the second row; and 'Description:' is in the third row. At the bottom, there are three buttons: 'Main Menu', 'Back To User List', and 'Continue'.

If you are editing a user, users information as well as Location/Department Security Setup is displayed.

USER PROFILE

Login User Id: Password: Confirm Password:

Full Name: Default Location:

Description:

Location/Department Security Setup for Debra Brown

<input checked="" type="checkbox"/> Full Control Assign FULL CONTROL over all locations.	<input checked="" type="checkbox"/> View ALL Reports Allow viewing AUTHORIZATION CODE reports and reports for ALL DEPARTMENTS for all locations.	<input checked="" type="checkbox"/> View All EXCEPT Trunk Analysis Allow viewing reports for ALL DEPARTMENTS, but NO TRUNK ANALYSIS reports for all locations.	<input checked="" type="checkbox"/> Deny All DENY ALL access to all locations.
---	---	---	---

X - access denied ✓ - loc. options open ○ - unavailable

☐ RESTRICT Debra Brown to view reports for ONLY ONE TAPIT USER. or set permission options below.

☐ ALLOW Debra Brown FULL CONTROL over all locations. or set permissions for locations below.

✓ MAIN (location)

- ☒ Allow Debra Brown to view Authorization Code reports
- ☒ Allow Debra Brown to view Trunk Analysis reports
- ☒ Allow Debra Brown to view reports for ALL departments

✓ ATLANTA (location)

- ☒ Allow Debra Brown to view Authorization Code reports
- ☒ Allow Debra Brown to view Trunk Analysis reports
- ☒ Allow Debra Brown to view reports for ALL departments

INSTRUCTIONS

- [Open printable version of Instructions.](#)
- [Permissions Overview](#)
- [Setting up Permissions for the first time](#)
- [Using User List Screen](#)
- [Using User Profile Screen](#)
- [Using Location/Department Security Preset Options](#)

Main Menu Back To User List Save

Entering user information

Login User Id - enter the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long and it has to be a unique value. If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

Password - enter the password that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. This field is required.

Confirm Password - reenter your password here. This field is required.

Full Name - enter a name identifying a user. This name appears on the User List screen. It may be a first and a last name, or a name of a user group. This field is required.

Default Location – select a value from a list of available locations.

TAPIT EX Multi-User WITHOUT Remote Manager option - only one location is available - MAIN.

TAPIT EX WITH Remote Manager option - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.

For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen.

A user must be allowed access to his default location - a location must be open (✓) and appropriate permission options within a location must be checked. If no permission boxes are checked, a location is interpreted as denied.

This field is required.

Description - enter a short description of a user/user group. This field is optional.

Using Location/Department Security Setup

Using preset options

Location/Department Security Setup for Debra Brown			
<input checked="" type="checkbox"/> Full Control Assign FULL CONTROL over all locations.	<input checked="" type="checkbox"/> View ALL Reports Allow viewing AUTHORIZATION CODE reports and reports for ALL DEPARTMENTS for all locations.	<input checked="" type="checkbox"/> View All EXCEPT Trunk Analysis Allow viewing reports for ALL DEPARTMENTS , but NO TRUNK ANALYSIS reports for all locations.	<input checked="" type="checkbox"/> Deny All DENY ALL access to all locations.

There are four preset options located below the user information part of the screen (they are not displayed right away when entering a new user). You can set the same permissions for each location by clicking the icon for the appropriate option. Each option has a description displayed below it.

Using the location/department tree:

By default the location/department tree displays permission options for all available departments.

When adding a new user, the top **Restrict..** and **Full Control** boxes are unchecked and access is denied **✗** to all locations.

✗ - access denied ✓ - loc. options open ⛔ - unavailable

☐ **RESTRICT Debra Brown** to view reports for **ONLY ONE TAPIT USER**.
or set permission options below.

☐ **ALLOW Debra Brown FULL CONTROL** over all locations.
or set permissions for locations below.

- ✗ **MAIN** (location)
- ✗ **ATLANTA** (location)
- ✗ **CHESTERFIELD** (location)
- ✗ **CINCINNATI** (location)
- ✗ **GLENDALE** (location)
- ✗ **GRAND RAPIDS** (location)
- ✗ **GREENVILLE** (location)
- ✗ **KANSAS CITY** (location)

To restrict user to view reports for ONLY ONE TAPIT USER, check the Restrict ... to view reports for ONLY ONE TAPIT USER box on the top of the location/department tree.

✗ - access denied ✓ - loc. options open ⛔ - unavailable

☒ **Debra Brown is ALLOWED** to view reports
for the **selected TAPIT User ONLY**.

TAPIT Users for the 'Default Location'- **MAIN**:

Arnold Brad

Tapit User name must be selected.
To select TAPIT User from a **different remote site**, switch to a desired location using 'Default Location' field above.

The box description changes to **...is ALLOWED to view reports for the selected TAPIT User ONLY.**

Select the TAPIT User name from the list below. This list contains user names for TAPIT installed at the **Default Location**. In our case the default location is MAIN.

If we select another **Default Location**

Default Location:

the user list populates with TAPIT Users for that location.

✗ - access denied ✓ - loc. options open ⊖ - unavailable

☒ **Debra Brown is ALLOWED to view reports for the selected TAPIT User ONLY.**

TAPIT Users for the 'Default Location'- **CHESTERFIELD:**

Tapit User name must be selected.
To select TAPIT User from a **different remote site**, switch to a desired location using 'Default Location' field above.

The TAPIT User must be selected. In our case (for the Main location above) Debra Brown can view reports ONLY for Brad Arnold.

Note: Tapit Web Reports user restricted to view reports for only one TAPIT User does not have access to Trunk Analysis, Most Active and Consolidated Locations (Remote Manager only) reports.

To assign full control rights to a user, check the **Allow ... Full Control** box located below the **Restrict ... to view reports for ONLY ONE TAPIT USER** option.

To allow access to a location open a location by clicking on a ✗ icon to the left of its name. Location options are displayed and a ✗ changes to a ✓.

✗ - access denied ✓ - loc. options open ⓪ - unavailable

☐ **RESTRICT Debra Brown** to view reports for **ONLY ONE TAPIT USER**.
or set permission options below.

☐ **ALLOW Debra Brown FULL CONTROL** over all locations.
or set permissions for locations below.

✓ **MAIN (location)**

☒ Allow **Debra Brown** to view **Authorization Code** reports

☒ Allow **Debra Brown** to view **Trunk Analysis** reports

☐ Allow **Debra Brown** to view reports for **ALL departments**
or select from the following departments:

☒ Accounting

☒ Analytic

☒ General

Set up permissions for a location by checking appropriate location options.

If a location is open (✓) but has NO permission options checked, it is interpreted as a denied location.

The permission options for each location include: **Allow ... to view Authorization Code reports**, **Allow ... to view Trunk Analysis reports**, **Allow ... to view reports for All Departments** and a list of locations departments.

Check the **Allow to ... view Authorization Code reports** box if you want a user to be able to view this kind of reports for a location. The same applies to the **Allow ... to view Trunk Analysis reports** option.

Note: to prevent fraud, **Authorization Code** reports should not be accessible to everyone. **Trunk Analysis** group reports on call traffic. Such reports are NOT of interest to everyone and since they take time and resources to generate, you may decide to deny access to average users.

Note: if a location name has a ⓪ to the left of it, then this location has no departments. A location must have at least one department, otherwise no permissions can be assigned to it and it is not accessible for users.

To let a user view reports for all departments within a location click on the **Allow ... to view reports for All Departments** box. Otherwise, check the appropriate department boxes within a location.

To deny access to a location close it by clicking on ✓ icon to the left of it. The icon changes to ✗.

Note: when you deny access to a location all previously set permissions for this location are cleared.

Forgot Password?

1. If a user forgets the user id/password then an administrator (user with full control) has to create a new user id/password for this user.
2. If a full control password or user id is forgotten or lost, an administrator can use the generic password (old Administrator Password) to open Tapit Web Reports with full control. The generic password needs to be entered in both **Login User Id** and **Password** fields on the **Login** screen.

Glossary of terms

Login User Id is the user id that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long and it has to be a unique value. If a duplicate user id is entered, the record is not saved and the page is returned to the browser for correction. This field is required.

Password is the password that is going to be used to log in to the Tapit Web Reports. It can be up to 8 char long. This field is required.

Confirm Password - reenter your password here. This field is required.

Full Name is a name identifying a user. This name appears on the User List screen. It may be a first and a last name, or a name of a user group. This field is required.

Default Location is a list of available locations.

TAPIT EX Multi-User WITHOUT Remote Manager option - only one location is available - MAIN.

TAPIT EX WITH Remote Manager option - all active locations are available. The selected location becomes users default location Tapit Web Reports opens for report viewing after a user logs in.

For example: Location New York is selected as a default location for user John Smith. John Smith logs in to the Tapit Web Reports. The report filter screen opens on New York location. He can run reports for New York. If he has access to any other locations, he can switch to any of them using the location list box on the report filter screen.

A user must be allowed access to his default location - a location must be open (✓) and appropriate permission options within a location must be checked. If no permission boxes are checked, a location is interpreted as denied.


This field is required.

Description is a short description of a user/user group. This field is optional.

Restrict ... to view reports for ONLY ONE TAPIT USER option

check this box to restrict user to view reports for ONLY ONE TAPIT USER.

Note: Tapit Web Reports user restricted to view reports for only one TAPIT User does not have access to Trunk Analysis, Most Active and Consolidated Locations (Remote Manager only) reports.



Full Control option gives a user full control over all locations. A full control user is the Tapit Web Reports administrator. Full control user can maintain passwords/permissions for all users and view all available reports for all available sites. Check the preset **Full Control** option  or the **Full Control** box on the top of the location/department tree to assign full control to a user. If a full control password or user id is lost, an administrator can use the generic password (which is the administrator password used before permissions were set up) to open Tapit Web



Reports with full control. The generic password needs to be entered in both Login User Id and Password fields on the Login screen.


Allow to ... view Authorization Code reports - check this box if you want a user to be able to view **Authorization Code** reports for a location. To prevent fraud, **Authorization Code** reports should not be accessible to everyone.

Allow ... to view Trunk Analysis reports - check this box if you want a user to be able to view **Trunk Analysis** reports for a location. These are call traffic reports. Such reports are NOT of interest to everyone and since they take time and resources to generate, you may decide to deny access to average users.

Deny All - click on this preset option if you don't want to delete user information and at the same time you want to prevent this user from entering Tapit Web Reports.

 = access denied. Click on  to open permission options for a location.

 = location permission options are opened. Access is allowed to this location provided appropriate option boxes are checked. Clicking on  denies access to a location as well as clears and hides its permission options.

 = unavailable location. Location is unavailable because it does not have any departments assigned to it. A location must have at least one department to allow access. You can save user information. After departments for a location are set up in TAPIT EX, you can go back to this record in Tapit Web Reports to set up permissions.

TROUBLESHOOTING WEB REPORTS

For troubleshooting information see the TapitWebReports.pdf on Trisys Software CD in Tapit Web Reports folder or find it on the Web at <http://www.trisys.com/documents/WebRepsDoc/TapitWebReports.pdf>

Error Message: "Script Time Out" error occurs when a report is generating longer than the maximum allowed processing time. Sometimes the specified time frame contains too much data and the report takes too long to run. You can remedy this by going back to the filter screen and trying to run the same report again for a shorter time period.

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