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

Registration Settings:

SERIAL NUMBER:	
COMPUTER ID:	
REGISTRATION NUMBER:	

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

PORT:	
SPEED:	
PARITY:	
DATA BITS:	
STOP BITS:	
PBX TYPE:	
DATE SELECTION (PBX OR COMPUTER):	

Contents

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

System Requirements

Minimum System Requirements

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

Assumptions

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

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

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

View Tapit Slide Demo
View Tapit Help
Install Remote Manager

Tality

Install Tality
View Tality Slide Demo
View Tality Help

Exit StartUp

2. Click on **Install TAPIT 2000**. TAPIT 2000 Setup screen appears.
3. Click on **Continue** button. TAPIT 2000 is searching for the installed components.
4. Click on **OK** button on the next screen to install TAPIT 2000 in TAPITW32 folder on drive C: or click on **Change Folder** button to change a destination drive or folder (must be local drive with available required free disk space). **TAPIT 2000 Setup** screen appears.
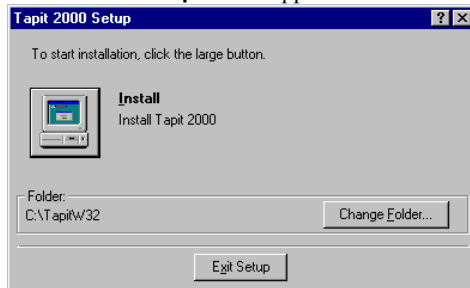
5. Click on **Install** button/icon to continue (or click on **Change Folder** button to change a destination drive or folder). Program installs TAPIT files and updates your system.
6. Program displays a message asking if your TAPIT software has a serial number. If you have a serial number click on **YES**, otherwise click on **NO** and TAPIT will be installed as a trial version.
7. TAPIT displays **Enter Serial Number** screen. Enter your TAPIT software's serial number consisting of 5 alphanumeric characters followed by 4 digits, followed by 3 more digits.
Click on **OK**
8. TAPIT 2000 processes the serial number. Product information message is displayed. Click on **OK**.
9. Setup program displays a registration message as a reminder to register TAPIT software.
It is very important to register your TAPIT 2000 promptly since it will stop functioning if you fail to do so

phone system correctly.

Open **Setup** program by clicking on **Start/Programs/Tapit 2000/Tapit Setup**.

A message with product information is displayed. Click on **OK.**

Setup program will ask you if you would like to store call records database in the default directory. We recommend that default directory is accepted (which is where program files were installed). However, different drive and/or directory may be specified if for example there is not enough free disk space on the drive where program files were created.

2. To accept default directory where program files are installed, click on **Yes.**
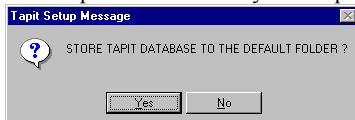
3. To change drive and/or directory click on **No**, find the database file in a file browser window, select it and click on **Open**.

4. **System Parameters** screen is displayed

5. Click on the **down arrow** in the **Port** field to select a port the SMDR cable is connected to.

6. Click on the **down arrow** icon in the **Speed** field to select a transmission speed the phone system is set at.

7. Click on the **down arrow** icon in the **Parity** field to select a parity setting of the phone system.

8. Click on **7** or **8** in the **Data Bits** fields to select data bits setting of the phone system.

9. Click on **1** or **2** in the **Stop Bits** fields to select stop bits setting of the phone system.

10. Click on the **PBX** or **Computer** in the **Use Computer or Telephone System Date?** Field to specify whether date information for the call records is going to be processed based on the computer or PBX date.

    You can use PBX date only if it is a three-part date (i.e. mm/dd/yy).

    In case your phone system is not generating date information (or is generating an incomplete date information) you must specify Computer date.

11. Click on the **down arrow** icon in the **PBX Type** field to select from the list a telephone system type the computer is receiving data from

    Data will not be processed correctly or not at all if incorrect selection is made.

12. Click on the **Telephone Number** field and enter your main telephone number (do not use 800 number).

13. Click on **OK.**

    Setup program will ask if you have V&H Data Diskette. This is an optional pricing table that can be purchased with TAPIT.
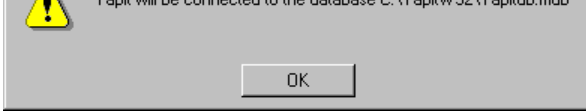
19. Upon completion of this process Tapit 2000 is ready to use.

Installing Tapit Multi-User

Server Installation

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. Administrative station is the only computer that has to go through TAPIT registration process.

To prepare the database folder go into Windows Explorer, find the TapitW32 folder, under TapitW32 create a new folder called **DATA**. This folder **DATA** must be shared with read/write access on the network. Under **DATA** create a new folder called **MAIN**; this is the folder where the Tapit database has to be stored.

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

1. Follow instructions from **Installing Tapit Single User** section above pt. 1 through 7.
2. TAPIT 2000 processes the serial number. Product information message is displayed followed by the message:
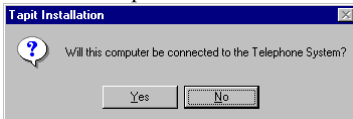
    Click on **Yes ONLY** if this particular machine is, or will be connected to the SMDR output from the PBX system.
    In case the computer is not going to be connected to PBX (client installation) click on **NO**.
3. Setup program displays a registration message as a reminder to register TAPIT software.

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

Setting up Server Station

1. The next step is to configure TAPIT 2000 on the administrative station, so it will communicate with the phone system correctly.
    Open setup by clicking on **Start/Programs/TAPIT 2000/TAPIT Setup**. Product information screen is displayed.
    Click on **OK.**

4. Follow instructions from **Setting up TAPIT** section pt.4 through 19 (page 4 of this manual).


Note that Users, Clients and Maintenance options can be accessed only on the TAPIT Server Computer. Also when making any changes on the Maintenance Screen (i.e. Reindex or Data Maintenance) make sure that all users on Client computers are not running TAPIT (they have to be disconnected from TAPIT's Database).

Client Installation

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

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

1. Follow instructions from **Installing Tapit Single User** section above pt. 1 through 7.
2. TAPIT 2000 processes the serial number. Product information message is displayed followed by the message:
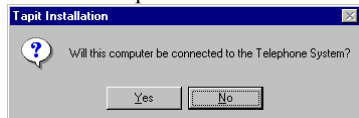
   Click on **NO** since this is a client computer and is not going to be connected to PBX.

3. Setup program displays a registration message as a reminder to register TAPIT software.
   ONLY computer running SMDR monitor needs to be registered. None of the client machines are required to go through the registration process.

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

Setting up Client Station

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

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

2. Setup program displays the following message
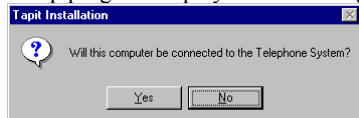
   Click on **NO** since this is a client computer and is not going to be connected to PBX.

NOTE FOR NOVELL NETWARE 3.11 USERS

Access Locking and Novell NetWare 3.11

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

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

set maximum record locks per connection = 10000

set maximum record locks = 200000

The first parameter is the most locks any single connection can have, and the second is the most the entire server can keep track of. These values (10,000 and 200,000) are the maximums that NetWare 3. 11 can accommodate. By setting the maximum record locks per connection to 10,000, Access can handle a transaction up to 20MB. To fix the server abend problem, you need to download the latest NetWare 3.11 patch file. It can be found on CompuServe in the NOVFILES download area, as of this writing, the current version is 311PTD.ZIP. You will need to load two of the NLMs from this file, either directly from the server console or in your AUTOEXEC.NCF file:

load patchman.nlm

load ttsfix.nlm

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

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

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

1. Click on the **Maintenance** icon on the TAPIT 2000 Main Menu of a current version of your software.
2. Click on **Data Maintenance**. **Data Maintenance** screen opens up on **Export** tab by default.
   Click **All** in the **Export** field for all data to be exported. The default folder is your current TAPIT 2000 folder. You may choose another folder if you wish. <u>DO NOT Check "Delete Existing Data from Database"</u>. Click **Continue**. You will receive "Data Export Completed" message.
3. Click on **Call Records Maintenance** tab. Click on **Export & Keep Call Records**. Then specify the filename for the call records: Calls.txt. Click on **Continue**. At the filter screen, you **must enter the date range for the records you wish to keep** and click on **Continue**. You will receive "Call Records Export Completed" message. Exit from **Data Maintenance** screen.
4. Close TAPIT 2000 and TAPIT SMDR Monitor.
5. Go to Windows Explorer and locate the TAPITW32 folder. Rename the folder as TAPITOLD (if prompted with a warning by the operating system click on OK). Find TAPIT.INI and SERIAL.TXT files. TAPIT. INI file resides in the same folder where **TAPIT database is located**. If you are not sure of its whereabouts open TAPIT program and press CTRL + F1 keys at the Main Menu screen. Copy both files to another folder as a backup.
6. Proceed with a new installation of TAPIT 2000.
   a. Insert TAPIT 2000 CD into the CD ROM drive. Trisys StartUp Manager screen is displayed.
   b. Click on **Install TAPIT 2000**. TAPIT 2000 Setup screen appears.
   c. Click on **Continue** button. TAPIT 2000 is searching for the installed components.
   d. Click on **OK** button to install TAPIT 2000 in TAPITW32 folder on drive C. (Note that **Change Folder** button allows for setting TAPIT destination path to different than default.) TAPIT 2000 Setup screen appears.
   e. Click on **Install** button to continue. (Note that **Change Folder** button allows for setting TAPIT destination path to different than default)
      Program installs TAPIT files and updates your system.
   f. Program displays a following message: "Setup has found Serial Number (*your current serial number*). Is it your current valid Serial Number?" Click on **YES**.
   g. Setup program displays a message "TAPIT 2000 Setup was completed successfully". Click on **OK**. (If prompted by system restart the computer.)
7. Copy TAPIT.INI file from TAPITOLD folder into new TAPITW32 folder (where your TAPIT database files reside). Let it overwrite the existing file.
8. Go to **START/Programs/TAPIT 2000** and run **TAPIT Setup.** Note that while running TAPIT Setup, System Parameters screen reflects settings from your previous version of TAPIT. Do not change anything unless required. (For setup instructions see Setting up TAPIT on page 4 of this manual.)

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option and click on **Continue**. Do not interrupt this process.

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

13. If everything is running smoothly after you have completed all the above, you may go back to Windows Explorer & delete the TAPITOLD folder.

Reinstalling TAPIT 2000

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

1. Open your Windows Explorer.

2. Go to **TAPITW32** folder.

3. Select **Setup** folder and delete it.

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

Upgrading TAPIT for Windows to TAPIT 2000

In case you are upgrading TAPIT on the same computer:

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 wish. <u>DO NOT Check "Delete Existing Data from Database".</u> Click **Continue**. You will receive "Data Export Completed" message.

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

4. Close TAPIT for Windows and TAPIT SMDR Monitor.

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

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

7. Copy TAPIT.INI from TAPITOLD folder into new TAPITW32 folder (whre TAPIT database files reside). Allow to overwrite an existing file.

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

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

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

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

In case you are upgrading TAPIT on the different computer:

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. <u>DO NOT Check "Delete Existing Data from Database".</u> Click on **Continue**. You will receive "Data Export Completed" message.

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

4. Close TAPIT for Windows and TAPIT SMDR Monitor.

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

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

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

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

9. After completing Setup program, go to **START/Programs/TAPIT 2000/TAPIT 2000**.
TAPIT 2000 provides the following message: "TAPIT will be connected to the database…". Click **OK**.

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

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

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

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 2000 – complete the instructions on page 3 of this manual**.**
9. Run TAPIT Setup – see the instructions on page 4.
10. Copy exported files from the floppy disk to TAPITW32 directory.
11. Start TAPIT 2000 - Programs/TAPIT 2000/TAPIT 2000
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 programs, and exit out of Windows & reboot the computer.

Registration

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

The Trisys, Inc. Software registration process consists of two steps:
Step A: Obtaining a Registration number.

Click on it if you need registration instructions.

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

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

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

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

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

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

   When registering by phone:
   Call Trisys Technical Support at 973 360 2300 to obtain a registration number.
   Note: To expedite the registration process, please have the registration form completed prior to calling Trisys Technical Support.
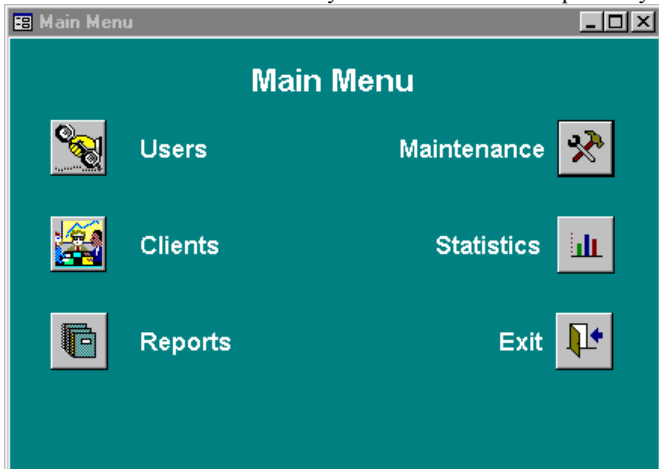
Step B.
To complete registration:

1.   Once you have obtained a registration number, click on the **Register** button located on either **Online**

The **Main Menu** screen is displayed as soon as you start TAPIT.

Buttons/Icons on the menu allow you to access different options by clicking on them.

Main menu option also offers access to each part of Tapit program.

Window menu option gives a standard Windows' functions:

Tile, **Cascade**, **Arrange Icons**, **Hide**, **Unhide and Size to Fit.**

Help menu option lets access TAPIT's Help Screen alternatively to pressing **F1** key.

Clicking on the **Exit** button closes Tapit application. Make sure that **Main Menu** is the only screen open within Tapit before exiting.

The **Users/Departments** screen is used to define employees' names and their extensions as well as to define and assign department information.

It is divided into two sections. The left section of the screen has 3 tabs: **Hierarchy**, **Departments**, **Users**. The right section is a detail information section and it is dependent on a selection made in a list(left) section. When clicked, **Departments** and **Users** tabs, display departments and users screens correspondingly. A list of departments, or users appears on a left-hand side. 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 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. Left section is a list of users. 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 user's detail information This screen allows you to change, add, or delete user's data.

or **Surcharge Per Call** field and enter dollar amounts 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 that 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 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. In order 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**. 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**.

data.
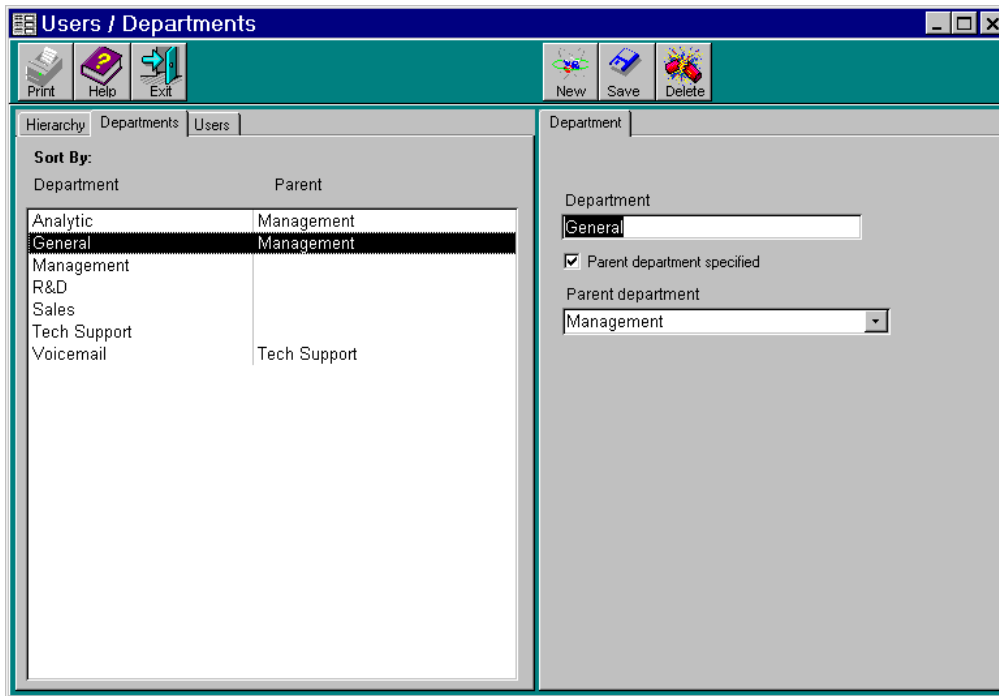
Adding new departments

1. Click on the **Departments** tab. The left section of the screen displays 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 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**.

parent department click on a down arrow next to **Parent department** text box. Departments' list opens. Select appropriate department and click on it.
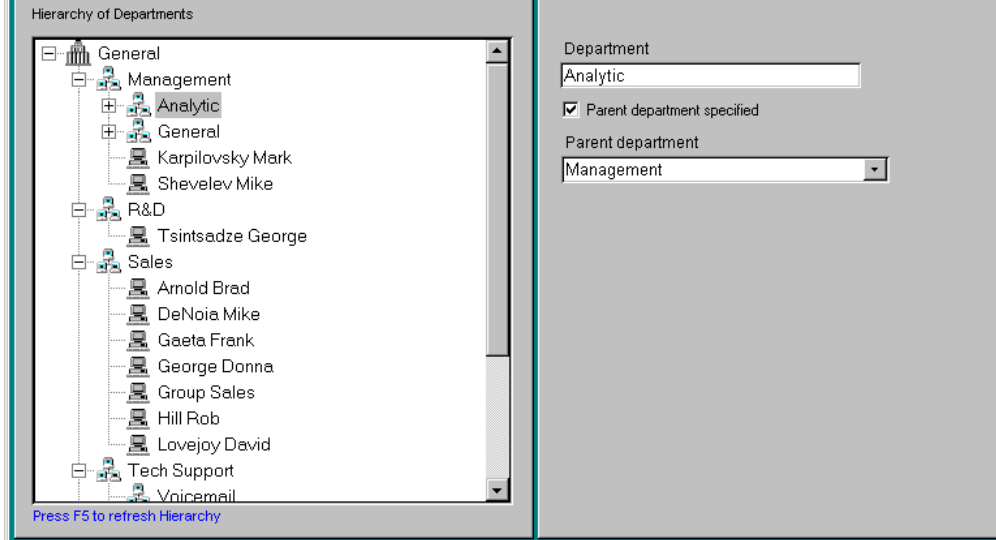
To remove parent department click on the **Parent** check box to uncheck it. Click on **Save**. Note: unlike proceeding cases, removing parent department is not reflected in the left-hand side departments' list right away. You have to click on **Save** button to update the left section of the screen.

5. In order 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 of Departments

- General
  - Management
    - Analytic
    - General
    - Karpilovsky Mark
    - Shevelev Mike
  - R&D
    - Tsintsadze George
  - Sales
    - Arnold Brad
    - DeNoia Mike
    - Gaeta Frank
    - George Donna
    - Group Sales
    - Hill Rob
    - Lovejoy David
  - Tech Support
    - Voicemail

Press F5 to refresh Hierarchy

Department
`Analytic`

☑ Parent department specified

Parent department
`Management` ▾

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 always have to update **Hierarchy Tree** when finished. In order to do it 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.

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.

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).

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**.

The **Report Selection** screen lists available report groups and individual report names that may be generated. We recommend that you try all of the reports at least once to see the difference among the reports, and then choose reports that you will be running in the future.Note **Other Reports** button located on the bottom of the **Report Selection** screen. Click on it to invoke **Special Reports** screen. These additional reports cannot be modified or used with **Report Scheduler**.

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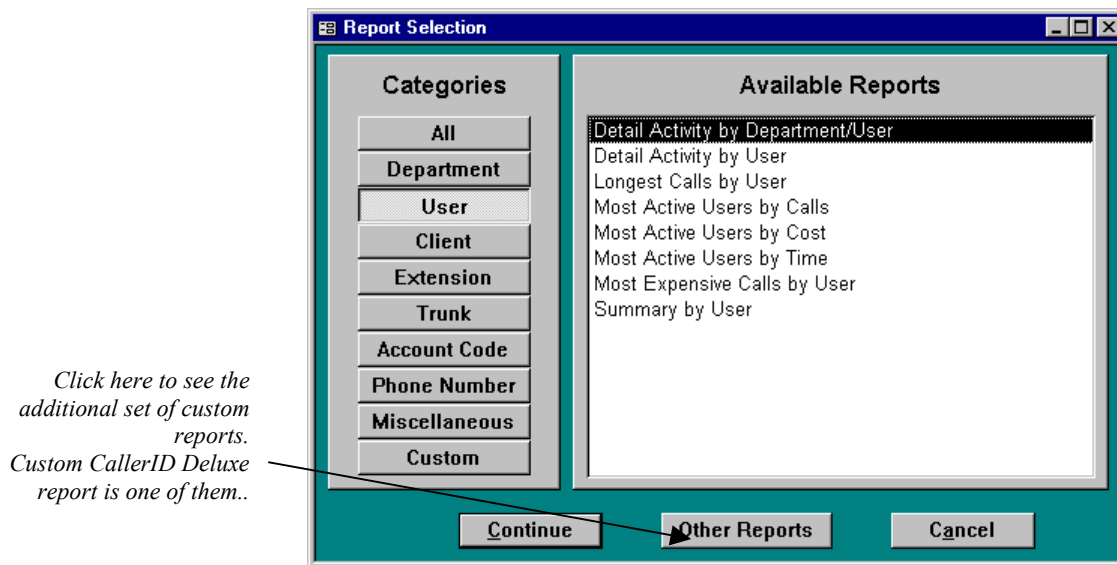
Go back to the **Reports Selection** screen.
Click on the report group buttons to see available reports. For example: **All** button displays all reports, **User** button brings up only user related reports and clicking on **Custom** button displays reports built with a **Report Designer** (see **Report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

Running a report

1. Select a report (by clicking on its name) and click on **Continue.**
2. Filter screen is displayed. Please note that the same screen is used in other parts of TAPIT, so please read the following section carefully.

Available options are:

1. **Date**

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

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

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

2. **Time**

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

3. **Direction**

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

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

4. **Extensions**

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

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

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

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

   Click here to remove selected extension from the list

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

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

Tapit   **Reports • 23**

To remove extension selection

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

5. **Duration**

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

For example:

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

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

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

6. **Department**

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

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

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

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

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

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

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

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

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

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

To edit department selection

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

To remove department selection

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

7. **User**

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

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

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

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

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

To edit user selection
Click on the button next to the word **User**, make the modifications and click on the **OK** button.
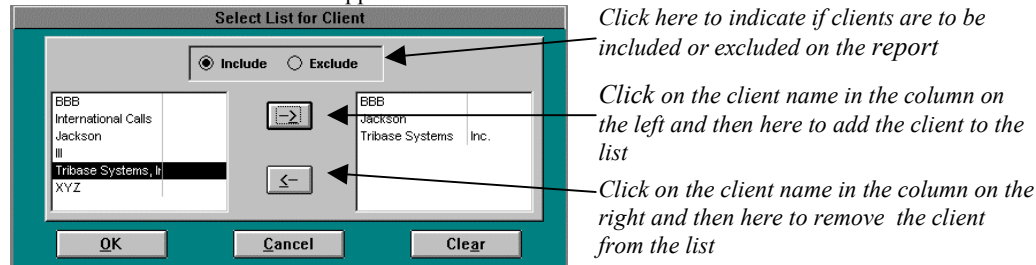
To remove user selection
Click on the button next to the word **User**, click on the **Clear** button and click on the **OK** button

8. **Client**
To include all clients on the report leave both fields empty.
To include or exclude clients, click on the button next to the word **Client**.
The **Enter List for Client** screen appears.

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

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

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

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

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

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

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

To edit client selection
Click on the button next to the word **Client**, make the modifications and click on the **OK** button

To remove client selection
Click on the button next to the word **Client**, click on the **Clear** button and click on the **OK** button

9. **Account Code**
To include all account codes on the report leave both fields empty.
Otherwise, enter a range of account codes that would appear on the report or for more flexibility click on the button next to the word **Account Codes**.
The **Enter List for Account Code** screen appears.

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

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

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

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

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

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

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

10. **Trunk**

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

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

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

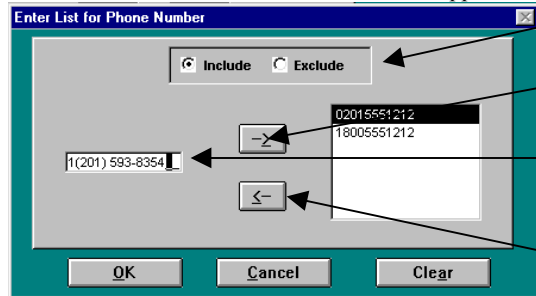This screen allows you to create the list of trunks to be included or excluded from the report.

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

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

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

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

Phone Number

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

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

Click here to add phone number to the list

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

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

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

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

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

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

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

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

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

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

To edit phone number selection

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

To remove phone number selection

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

12. **Cost**

Enter dollar amount values for call records to be included on the report
For example:
Enter .50 in the first field and 5.00 in the second field to display calls with cost over $.50 and less then $5.00.
Enter 1.00 in the first field and leave the second field blank to display all calls with cost over $1.00.
To clear both fields click on the button next to the word **Cost**.

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

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

Predefined

Continue – click on it to run the report.

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

Cancel - click on it to exit filter screen

Click on **Predefined** button to save your selection for the future use (such filters come handy when setting **Report Scheduler**). Enter the name of the filter in a **Save Filter** screen and click on **OK**

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

Click on the filter name in the list to recall previously saved selection and then here to generate a report.
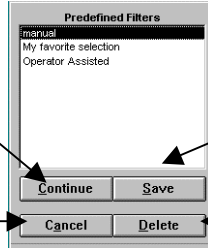
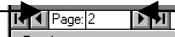*Click here to save current selection. You will be prompted to enter anew name.*

Click here to close this screen

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

Click on **Continue** to generate a report, **Cancel** if you do not want to run a report, **Delete** if you would like to delete a filter. You can also make some changes to the filter criteria and click on **Save** to overwrite old filter or create a new one by giving it a different name.

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

Click here to go to the previous page of the report ———— Page:2 ———— *Click here to go to the next page of the report*

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

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

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

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

Zoom will control the size of the displayed report.

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

Exit will close the report window.

Statistics 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 20 values

Report Group

- ⦿ Top 20 values
- ○ Date / Time
- ○ Date/Time-Detail

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

   Report Categories
   - ○ Department   ○ Date
   - ○ User   ○ Trunk
   - ○ Client   ○ Account Code
   - ⦿ Extension
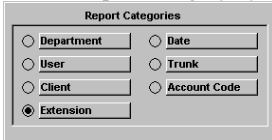
3. Select a report type by clicking on its name on the **Report Type** screen.

   Report Type
   - ⦿ Most Active
   - ○ Longest Calls
   - ○ Most Expensive

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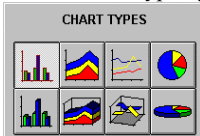
   CHART TYPES

5. Click on Continue.
6. Enter criteria on the filter screen.
   How to use filter screen(see pg.17 on how to use filter screen)

7. Click on **Continue.**
   Chart will be displayed on your screen in a few moments.

---

3. Select a report type from the **Report Type** group.

4. Select a chart type by clicking on one of the icons in **Charts Type** selection group.

5. Click on **Continue**.

6. Enter criteria on the filter screen.
   How to use filter screen(see pg.17 on how to use filter screen)

7. Click on **Continue.**
   Chart will be displayed on your screen in a few moments

8. For Date and Time - Detail

9. Click on **Date and Time - Detail** in the report group

10. Select a report category by choosing from **Report Categories** group.

11. Note that in addition to the category, you may select time or days category.

12. Select a **report type** by clicking on its name.

13. Select a **chart type** by clicking on its picture.

14. Click on **Continue**.

15. Enter criteria on the filter screen.
    How to use filter screen(see pg.17 on how to use filter screen)

16. Click on **Continue.**
    Chart will be displayed on your screen in a few moments.

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

System Maintenance - Overview

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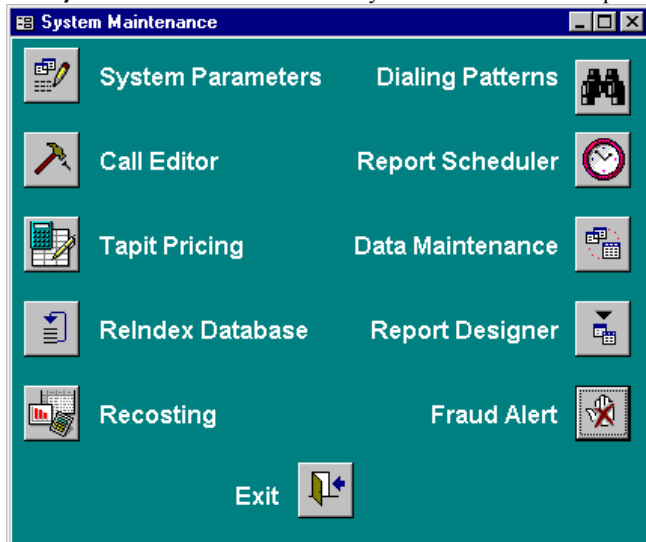

Clicking on the **Exit** button gets you back to the **Main Menu** screen.

System Parameters screen will allow you to configure various settings of TAPIT system.
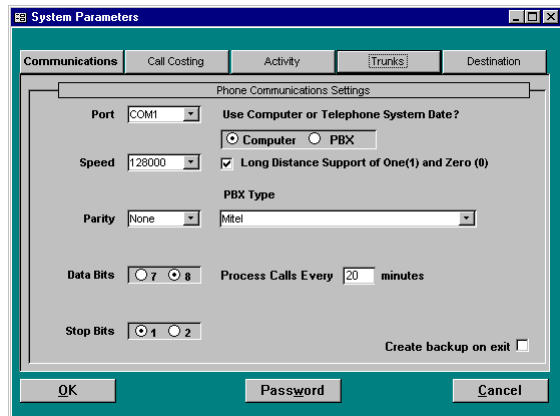
Click on the **Maintenance** icon on the Main Menu and then click on the **System Parameters** icon.

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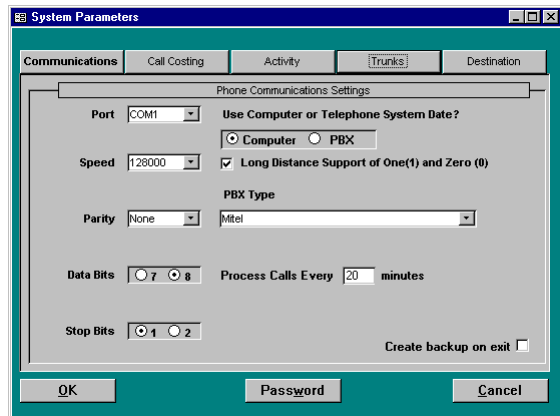
Communications

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

1. Click on the **down arrow** icon in the **Port** field to select a port on the computer the SMDR cable is connected to.
2. Click on the **down arrow** icon in the **Speed** field to select a transmission speed the phone system is set at.

receiving data from.
Data will not be processed correctly or not at all if incorrect selection is made.

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

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

9. **Create Backup on exit**
   When this box is checked TAPIT will create a backup copy of the main database every time you exit the software. When exiting TAPIT make sure that within the TAPIT application <u>only</u> **Main Menu** window is open.
   We recommend that you leave this box checked to secure the integrity of the database.

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

---

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

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

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

Enter the system password here

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

Would you like to surchage calls which cost $0.00? ☑

	Per Call	Per Min	Multiplier %
Default Surcharges	$0.00	$0.00	0
Zero Plus Pricing @	$0.00	$0.00	0

Account Code Field Processed as: **Matter Code Length**
◉ Client Code   ○ User Authorization Code   2

OK   Cancel

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

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

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

---

Activity

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

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

2. Check the **Local Calls** (default) box if you want local calls to be stored.

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

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

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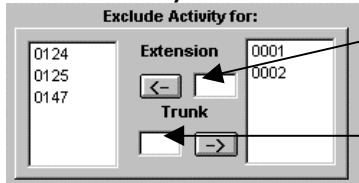
*Enter here an extension you do **not** wish to store activity for, then click on the arrow pointing to the left*

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

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

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

Trunks

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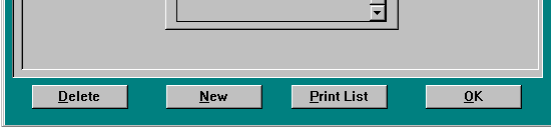
Adding new trunks

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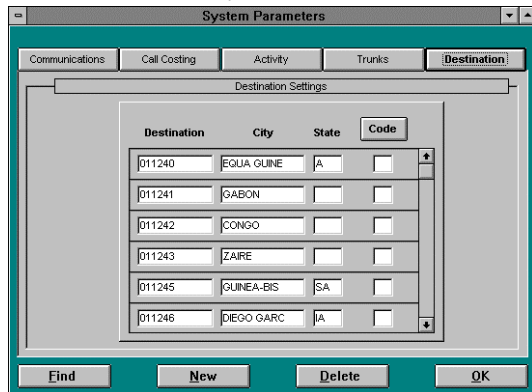
Deleting trunks

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

Printing a list of the trunks

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

Destination

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

Adding new destination record

1. Click on **New.**
2. Enter area code and exchange of the new record in the **Destination** field, press **Enter.**

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

2. Click on **Delete** button

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

Editing destination records

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

2. Edit field value.

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

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

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

 *To remove ALL **L** codes click here*

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

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

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

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

| New | Delete | Exit |

Adding new call record

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

Editing call records

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

Deleting call records

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

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

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

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

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

Find   Delete   New   Exit

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

Adding new pricing record

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

In our example:

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

Deleting pricing records

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

Finding specific record in the Number Dialed field

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

This facility will allow you to reassign pointers in TAPIT's Databases.
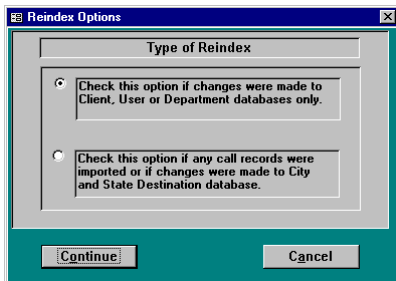
It is strongly recommended that your run this program after making any changes in User, Client, Department, Pricing or Destination Databases.

1. Click on the **Maintenance** icon on the **Main Menu** and then click on the **Reindex Database** icon. After clicking **Reindex Database** icon filter screen appears(see pg.17 on how to use filter screen).
   Enter filter criteria information and click on continue

2. While your Database is being Reindexed it is very important that you do not reboot or shut down your computer. The reindex process can sometimes take 20 to 30 minutes depending on your computer resources as well as the size of your database. If you interrupt this process your entire database will be corrupted.

3. When the reindexing is finished status screen appears with the appropriate message.

4. Click on **OK**, TAPIT's database has been reindexed.

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

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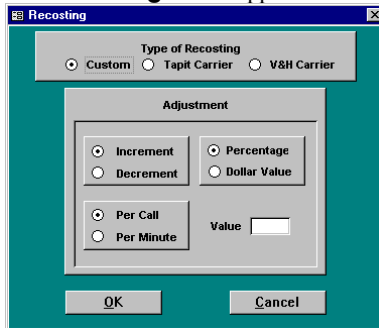
Using Custom option

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

Using Tapit Carrier option

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

Using V&H Carrier option

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

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.
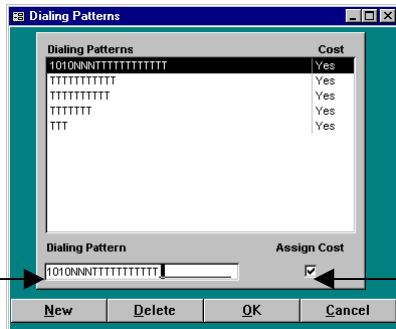
Enter/Edit Patterns in this field ——— *Cost Indicator*

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 NNNTTTTTTTTTTT.

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

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

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

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

Report Scheduler						
Scheduled Report	**Applied Filter**	**Frequency**	**Time**	**Print**	**File Name**	
Detail Activity by User	Outgoing	Weekly - Friday	17:00	☐	default.rpt	
Longest Calls		Daily	3:45	☑		

| Report | Frequency | Delete | New | Exit |
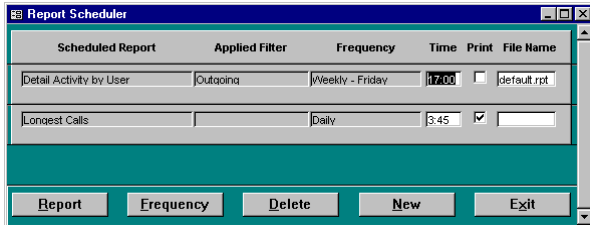
Adding new report

1. Click on **New** button.
    The **Report Selection** screen is displayed.
2. Select the report name you want to add.
3. Click on **Continue.**
    The filter screen is displayed. It is the same screen used to filter data in **Reports** module of TAPIT software however it works a little differently in this section. In order to apply filter criteria to reports generated by **Report Scheduler** you have to save a filter as **Predefined** or use an existing **Predefined** filter. Click the following link to obtain more information on how to accomplish this task (see pg.15 on how to use a filter screen).

4. Click on **Continue.**
    Report Selection screen will close. The name of a selected report and filter (if used) will appear on the Report Scheduler screen in **Scheduled Report** and **Applied Filter** fields.
5. Enter time for the report to be generated in **Time** text box.
6. Check the **Print** box if you want the report to be output to printer. Otherwise the report will be sent to a file Default.rpt (you may click on **File Name** field and enter different file name).
7. Confirm that both **Scheduled Report** and **Applied Filter** fields have the correct values entered.
8. Click on **Frequency** button and select a frequency (how often) the report will be generated with.
    Daily - a report is going to be generated every day at the specified time.
    Weekly - a report is going to be generated once a week at the specified time and day of the week.
    Monthly - a report is going to be generated once a month at the specified time and day of the month.
9. Click on **Exit** to leave the screen and save the changes

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

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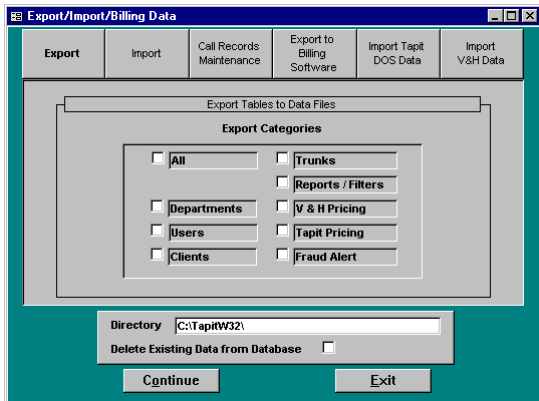
1. An **Export/Import/Billing Data** screen will be displayed. It consists of six different sections: **Export**, **Import**, **Call Records Maintenance**, **Export to Billing Software**, **Import Tapit DOS Data**, **Import V&H Data**

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.
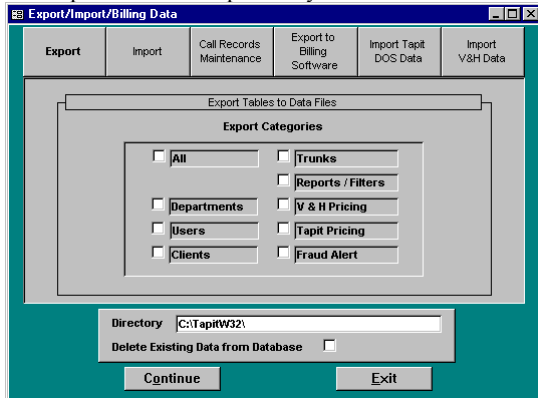
2. Select data category to be exported in the **Export Categories** box (select **All** if you wish to export all categories).

Import

Import feature allows you to import TAPIT's data after it was exported as describe in **Export** section
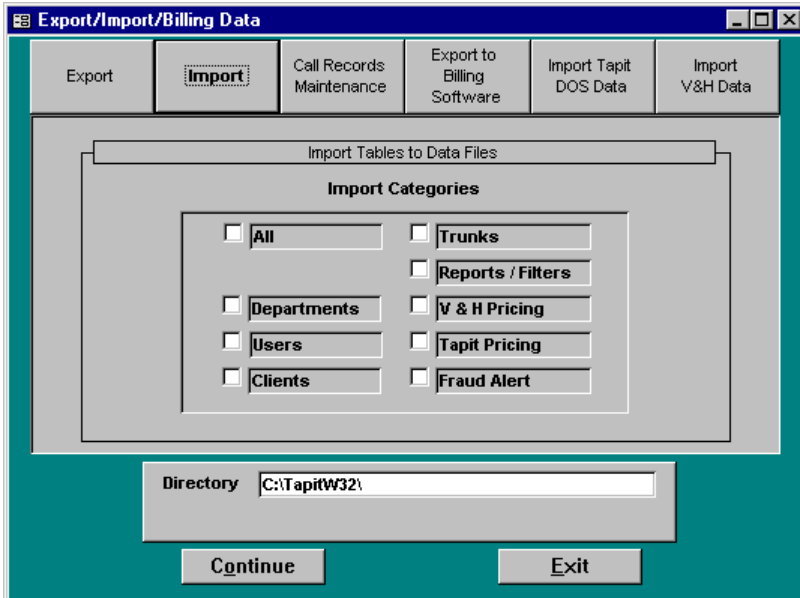
Select a category to be imported in the **Import Categories** box (select **All** if you wish to import all categories)

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.

| Directory | C:\TapitW32\ |
| File Name | calls.txt |

Continue   **Exit**

1. Select **Type of Calls Maintenance**
   Available options are:

2. **Purge Call Records** - selected call records (a filter screen will be displayed in the next step) will be deleted permanently from TAPIT database.

3. **Export and Remove Call Records** - selected call records will be copied to the specified directory and deleted from TAPIT database. A file name for exported records must be entered in the **File Name** box (i.e. 0896.txt for exported records for August 1996). We recommend a .txt extension for this file.

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

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

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

5. **Import Call Records** - choose this option to import call records that have been exported using either **Export** or **Remove Call Records** or **Export and Keep Call Records** utility. Type in the directory name in the **Directory** box where file with call records are stored and the file name that was used when exporting call records in the **File Names** box.

6. After the selection has been made click on **Continue** button.

7. A filter screen will be displayed, enter criteria on the
   filter screen and click on **Continue**. (see pg.19-28 on how to use filter screen)

We do not recommend exporting call records directly to floppy diskettes. The possibility exists that there will be not enough room on the floppy disk when exporting and the results may be unpredictable. It is a better practice to export data to a hard drive and then copy it to an alternate location for extended storage (i.e. floppy disk, tape drive, file server, etc.)
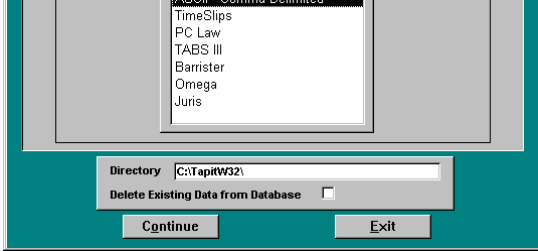
1. Select an application format in the **Data File Format** field.
2. Click on **Directory** field and enter a destination path (do not enter anything if you wish to accept **C:\TAPITW32** destination).
3. Check the **Delete Existing Data from Database** box if you wish to remove call records data while exporting.
4. Click on **Continue** button .
5. A filter screen may be displayed, enter criteria on the filter screen and click on **Continue.** (see pg.19-28 on how to use filter screen)
6. TAPIT will create a file with an appropriate extension for the output format (i.e. DBF for Dbase, XLS for Microsoft Excel) in the specified destination.

Import Tapit DOS Data

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

Import V&H Data

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

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

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

Click on the **System Maintenance** icon on the Main Menu and then click on the **Report Designer** icon.
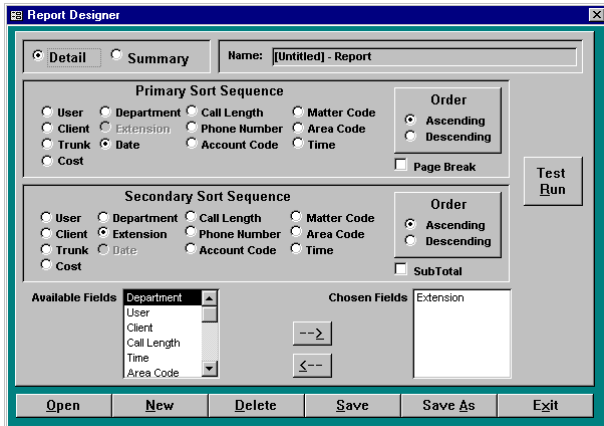
Creating a new detail report

1. Click on **New** button.

2. Select a primary sort sequence (Date is a default) by clicking on the appropriate field in the **Primary Sort Sequence** box.

3. Click in the **Order** box on either **Ascending** or **Descending** to choose whether sort is to be ascending or descending.

4. Check the **Page Break** box if you wish to have a page break inserted after each field that has been selected as a primary sort sequence.

5. Select a secondary sort sequence by clicking on the appropriate field in the **Secondary Sort Sequence** box.

6. Click in the **Order** box on either **Ascending** or **Descending** to select whether secondary sort is to be ascending or descending.
   Check **Subtotal** box if you want to see secondary field to be subtotaled.

7. **Available Fields** box lists all fields available for the reports.
   Click on the field name to be included on the report and click on the right arrow to move field to **Chosen Fields** box (you may also double click the field name to add it to the list).
   You can select as many fields as you wish (Page may print landscape in order to fit wide reports. Please note that the order of selection is reflected in the order of columns on the report).
   If you make a mistake click on the field name in the **Chosen Field** box and click on the left arrow to remove a field from the **Chosen Fields** list (you may also double click the field name to remove it from the list).

8. Click on **Save** button.
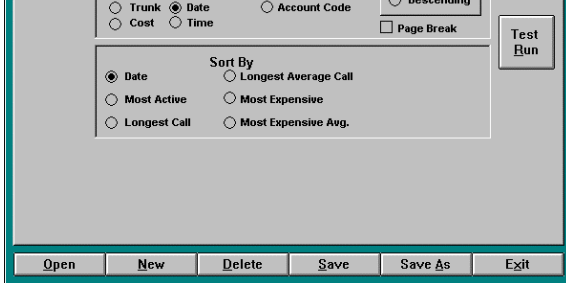
1. Click on the **Summary** field .

2. Select a field the summary report is going to be grouped by (Date is a default) by clicking on the appropriate field in the **Group By** box.

3. Click in the **Order** box on either **Ascending** or **Descending** to choose whether sort is to be ascending or descending.

4. Check the **Page Break** box if you wish to have a page break inserted after each **Group By** field.

5. Select a sort sequence for the summary report by clicking on the appropriate field in the **Sort By** box.

6. Note that there is no fields selection on summary reports.
   Fields that are included on summary reports are: Field you have selected in the **Group By** box, Number of calls, Time, Average time, Cost, and Average cost.

7. Click on **Save** button.

8. Enter report name and click on **OK.**

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

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

Creating reports from templates

1. Click on **Open.**

2. The **Report Selection** screen comes up.

3. Select a report you would like to base your new report on and click on **Continue**.

4. The **Report Selection** screen disappears and the **Report Designer** screen reflects the criteria of the open report.

5. You can edit the report's criteria in any way you need (refer to sections on creating detail and summary reports above) and save the report using **Save As** option.

Editing custom reports

1. Click on **Open**.

2. The **Report Selection** screen comes up.

3. Select a report that needs edited and click on **Continue**.

Deleting existing custom reports

1. Click on **Open** button.
   Report Selection screen appears.

2. Click on the report you wish to delete and click on **OK** button.

3. Click on **Delete** button.

**Note that Standard TAPIT Reports cannot be modified or deleted.**

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

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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
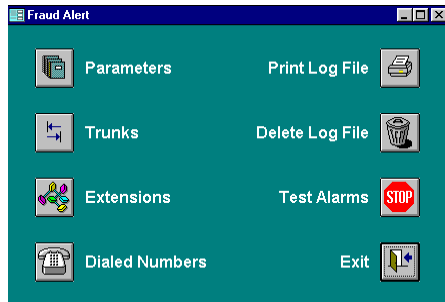
Parameters

This facility allows you to define the parameters that will control Fraud Alert.

To access Parameters click on the **Parameters** icon.
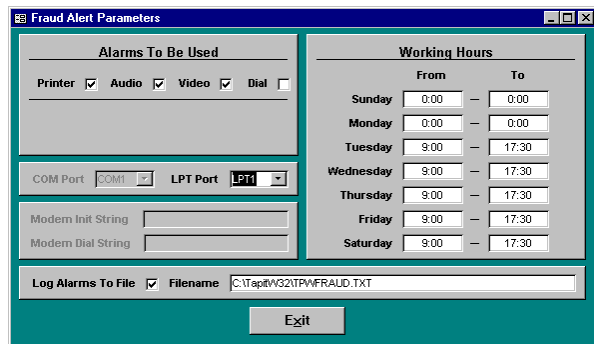
Fraud Alert will not function if the parameters are NOT defined or are not properly defined!

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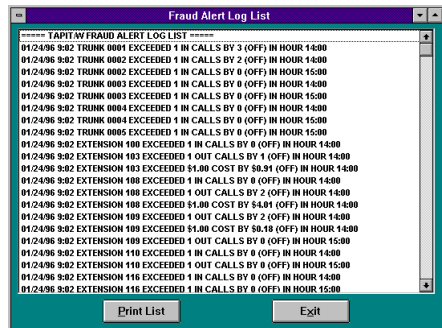
Every time that an alarm condition is triggered, a message based on the condition will be written to **"TPWFRAUD.TXT"** file.

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

Example:

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

Test Alarms

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

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

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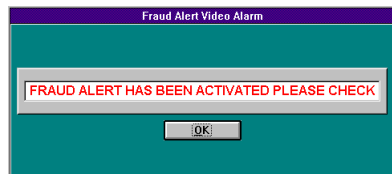
Trunks

This facility allows you to specify a condition for a particular Trunk which, if met, will trigger an alarm (please see "Alarm" section). You can use TAPIT Call Accounting software to get a feel for your normal Trunk activity prior to setting up these conditions.
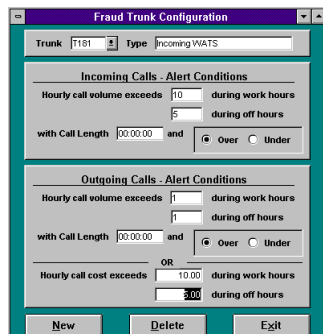
You may define several conditions for each trunk. Depending on the type of business you are in, there is an acceptable number of calls (incoming and outgoing) as well as the cost that occurs on a trunk during any particular hour (please remember the difference between work-hours and off-hours).

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

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

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

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

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Extensions

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

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

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

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

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.
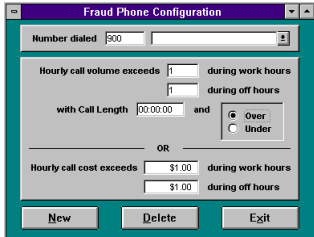
Deleting extension records

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:

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.

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

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

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

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

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

Tapit 2000 Repair Utility Screen appears.

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.
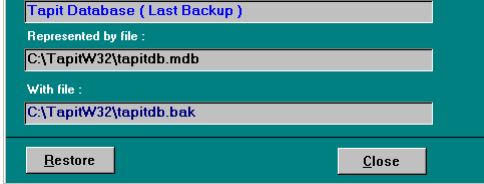
Restoring damaged file:

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 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 call records data.

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

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

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.

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 files reside).
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
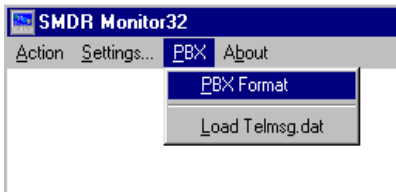
☐ eXtended Processing (Note: This option is NOT available for all PBX formats)

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

Load Telmsg.dat -
Click on it if you would like to load data from Telmsg.dat file.

Loading Telmsg.dat may result in duplicate records in your TAPIT database.

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

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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

Our **Fax on Demand** option can provide you with answers to many common tech support questions. You can reach Fax on Demand by dialing
973.360.2121.

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.

reinstallation of the software when the proper sequence wasn't followed.

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

"NPA Summary"

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

Error 3075 - Tapit 2000

It mentions an illegal function but the program still loads.

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

Error 3197 - "Data has changed - Operation Stopped"

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

Error Message "CONNECTION FAILED" when Monitor opens

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

Monitor shows gibberish for call records

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

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

DO NOT CHANGE THE COMPORT SETTING!!!

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

Error 2202 There is no default printer.

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

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

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

To Prevent Data Loss

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