








Basic Installation Instructions:

WIN-SENSE 32

- 1. Install WIN-SENSE 32** on your computer. Insert the WIN-SENSE 32 CD and double-click on Setup, if it doesn't automatically start up. Go through the Install Wizard until the program is installed. Click Finish upon completion.
- 2. Copy files.** If you are upgrading from a demo install, you can copy the setup files from the demo version (C:/Program Files/WINSENSE32_DEMO) and paste them into the full version (C:/Program Files/WINSENSE32). Copy these folders: *smdr files, tables*. Once completed, skip to step 6.
- 3. Determine** how your Phone System (PBX) will interface with the call accounting system. The WIN-SENSE 32 can collect SMDR data using an IP, Serial, or File collection method. If you are not sure which collection method to use, refer to your PBX manual or talk to a telecom professional.
- 4. Setup SMDR Data.** Go to Start > All Programs > WIN-Sense32 > Setup SMDR.
 - On the left side, select *Site Information*. Enter your site ID, along with your area code and exchange.
 - Setup your PBX settings. Go to File > Setup PBX. Choose your PBX and select OK. If you do not see your PBX listed, please call 800-748-5022 x87 and ask to have a file created for your specific PBX.
 - On the left side, click on the + sign next to *Collection Points*. Select the desired collection method.
 - IP collection: Enter the IP Address, Port, and any passwords needed to access the SMDR data.
 - Serial collection: Select the Port, Baud Rates, and any handshaking requirements. Make sure your computer is connected to the PBX using a serial cable or something similar.
 - File collection: Select the File to read and decide on the collection frequency.
- 5. Setup Organization Lists.** Go to Start > All Programs > WIN-Sense32 > Setup Organization.
 - On the left side, click Billing Class. Setup markups and surcharges for different types of users.
 - Click Departments. Setup department names. Click Add to add new departments or import a department list by going to File > Import > Departments. Importable files need to be .csv or .txt files.
 - Click Extension. Manually add or import employee extensions. File > Import > Extensions.
 - Click Account. Accounts are used to track specific phone numbers or customers. Manually add or import lists.
 - To import your company logo, go to File > Company Logo.
- 6. Run SMDR Collection Module.** Open the desired collection module. Go to Start > All Programs > WIN-Sense32 > IP Collect SMDR or Serial Collect SMDR or File Collect SMDR.
 - Click Connect/Enable to start collecting.
 - Right click and select Setup for additional options.
 - Click the X on the top right hand corner to minimize the module. The collection module must always be running for the WIN-SENSE to work.
- 7. Run SMDR Process Module.** Go to Start > All Programs > WIN-Sense32 > Process SMDR.
 - Select the Collection module(s) you will be using and deselect the rest (IP/Serial/File).
 - If you see SMDR data strings processing, the WIN-SENSE is setup correctly.
 - Right click for more options and to setup Alarms.
 - Click on the X and minimize the module. The SMDR Process module must always be running.
- 8. Setup Email and Scheduler.** To have reports manually or automatically emailed to you, you will need to setup the Email (RBE). Go to Start > All Programs > WIN-Sense32 > Email (RBE).
 - Make sure you see a green light that reads ACTIVE. If it's not active, click on the button to activate it.
 - Click the Servers button. Setup up the SMTP/POP email settings (same as Outlook settings).
 - Right click on the white space on the left. Select Add Profile to setup specific email templates.
 - Open the Scheduler module. Go to Start > All Programs > WIN-Sense32 > Scheduler. Nothing needs to be done here, but it needs to be running in order to schedule reports.
 - Click on the X in the corner and minimize the two modules. The Email (RBE) and Schedule modules must always be running to automatically schedule and email reports.
- 9. Double Check.** Make sure that the following three icons are located in your task bar:    and that your desired collection module is located there as well. IP:  Serial:  File: . These need to be running for full functionality.
- 10. Run Reports.** Once the SMDR and Organization have been setup correctly, you are ready to run reports. Go to Start > All Programs > WIN-Sense32 > Reports.
 - Select a report from the home screen or by using the menu at the top.
 - Enter the parameters of the report and click OK.
 - Click on the  button to view PDF reports or to change the report viewing method.
 - For help with reports, view the WIN-SENSE 32 [Video Presentation](#) on TEL's website (www.tel-electronics.com).
 - For ideas on how to use reports to save money, view the ["Cutting Telecom Expenses"](#) presentation on the WIN-SENSE Product Page.
- 11. For additional questions,** refer to the [WIN-SENSE 32 v3.0 Manual](#) (found in Support section of the website)