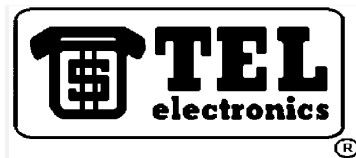# WIN-SENSE 32 v3.0

Operation Document

Call Accounting and Management Software

May 2009

TEL electronics, inc.
705 East Main St.
American Fork, UT 84003

(800) 748-5022

TABLE OF CONTENTS

CHAPTER 1

Before beginning the installation process, make sure that you have reviewed the system requirements for WIN-SENSE 32 ™.

- PC with a 233-MHz CPU
- 64 megabytes (MB) of RAM or higher
- 1 gigabyte (GB) of free hard disk space (Call record storage is limited by available hard drive space)
- Ability to read a CD-ROM
- Keyboard and Mouse or compatible pointing device
- Microsoft Windows XP (Home, Pro, or Media Center), NT 4.0, 2000, or Vista

INSTALLING WIN-SENSE 32

Included on the WIN-SENSE 32 CD are:

- WIN-SENSE 32 install set
- WIN-SENSE 32 Client Reporting install set
- WIN-SENSE 32 Operating document
- License agreement

To install WIN-SENSE 32

Step 1.   Insert the WIN-SENSE 32 Installation CD into the CD or DVD drive.

Step 2.   Click on the "Install WIN-SENSE 32 v3.0" link.

Note: If the WIN-SENSE 32 install page does not display automatically when you insert the CD, auto-play may not be enabled on your PC. In this case you will need to open My Computer or MS Explorer, navigate to the CD drive, and double click either the WS32_setup_index.html file (this will display the install selection menu) or the Setup.exe file (this will begin the install of WIN-SENSE 32 v3.0).

Installation will begin, and you will be prompted with the appropriate dialog boxes as the installation progresses.

During the installation, you will be presented with the license agreement. Please take a moment to read the license agreement for WIN-SENSE 32. If you accept the conditions and provisions given in this agreement, please click on the accept button and press next. The installation will then proceed. However, if you choose to not accept the terms of the license agreement, you may indicate this and installation will halt. You must then return the software to your place of purchase.

Once installation is complete, a new WIN-SENSE 32 Program Group will be created in the Program Manager, and two new program shortcuts will be added to the Startup Group. Those programs are:

> WS32 Process SMDR
> WS32 Serial Collect SMDR

The following is a list of the directories created on the drive you installed the software to, which is typically drive C.

> \Program Files\Winsense32
> \Program Files\Winsense32\alarms
> \Program Files\Winsense32\cpltab
> \Program Files\Winsense32\error
> \Program Files\Winsense32\log
> \Program Files\Winsense32\profiles
> \Program Files\Winsense32\quickemail
> \Program Files\Winsense32\report
> \Program Files\Winsense32\rptformats
> \Program Files\Winsense32\schedrpt
> \Program Files\Winsense32\setup
> \Program Files\Winsense32\smdrfiles
> \Program Files\Winsense32\tables

REGISTERING WIN-SENSE 32

At the end of the installation process, you will be asked to register your WIN-SENSE 32 with *TEL electronics*. If you choose not to register at this time, you will be able to run WIN-SENSE 32 for 24 hours, after which you will have to register the system. This will enable you to set-up the system and test functionality without having to interrupt the process waiting for registration information. However, 24 hours after installation, several modules will fail to run until you register the system. You may register WIN-SENSE 32 by phone or by email.

To register by Phone

Step 1. Call *TEL electronics'* Technical Support at 801-756-9606 extension 0 and tell the operator that you wish to register a WIN-SENSE 32.

Step 2. Give the technical support representative the number displayed at the top of the registration dialog.

Step 3. The technical support representative will give you a registration number. Enter this number in the field at the bottom of the dialog.

Step 4. Read the number you entered back to the technical support representative and ensure that it is correct.

Step 5. Click on OK. You should see a dialog box thanking you for registering WIN-SENSE 32. Click OK once again to complete the registration

To register by Email

Step 1.   Email the number displayed at the top of the registration dialog, along with your site information to registration@tel-electronics.com. You must include the installation site information (site name, site phone number, and complete site address) in order for your registration to be processed.

Step 2.   A technical support representative will email your registration number. Enter this number in the field at the bottom of the dialog.

Step 4.   Ensure that the number you enter is correct by comparing it to the email you received.

Step 5.   Click on OK. You should see a dialog box thanking you for registering WIN-SENSE 32. Click OK once again to complete the registration

If you do not register at installation, you can do so later

Step 1.   Start the Register module by clicking Register in the WIN-Sense32 program group.

Step 2.   Follow the remaining steps in either of the above sections depending on whether you wish to register by phone or by email.

UNINSTALLING WIN-SENSE 32

To uninstall WIN-SENSE 32

Step 1.   Locate and launch the Uninstall program in the WIN-Sense32 program group.

You will be prompted with a dialog asking, "Do you want this application removed from your system?"

Step 2.   Click *Yes* to remove WIN-SENSE 32.

Uninstall will not always completely remove all WIN-SENSE 32 software from your system. To insure complete deletion, you may have to use MS Explorer to remove undeleted WIN-SENSE 32 files and directories.

CHAPTER 2

THE WIN-SENSE 32 APPLICATIONS SUITE

In all, there are twelve applications as a part of the WIN-SENSE 32 product, and it is important to have a basic understanding of each of them before beginning the setup process.

WIN-SENSE 32 PROGRAM GROUP

REGISTER

The Registration program is run during the initial installation of the WIN-SENSE 32 application. The user can choose to delay the registration process by canceling the dialog; however, the application will need to be run again at a later date in order to register.

SETUP SMDR

The *Setup SMDR* application is used to establish how the SMDR (Station Message Detail Record from the phone system) is received; how it is recognized as a call record; the parsing or examination of that call record; setting up call types, default costs, and grace periods; and the location of the various tariff files.

SETUP ORGANIZATION

The *Setup Organization* application is designed to establish the department information; extension information; create custom markups and surcharges; and assign account information.

Note: The next three applications are known as the SMDR Collection modules. Any or all may be used at the same time but at least one must be running in order to properly process call records.

FILE COLLECT SMDR

This module will read SMDR records from selected text files either on a scheduled basis or on a one time basis.

SERIAL COLLECT SMDR

This is the typical collection module and will read SMDR records from the specified serial port on the PC, which are also known as COM ports.

IP COLLECT SMDR

This module will gather SMDR records using the Internet Protocol over a network. Once the proper port has been defined, it will connect to the SMDR server (the PBX) located at a specified IP address and watch for SMDR IP packets.

PROCESSING

This application will process the collected SMDR records by parsing, costing and storing these call records for later reporting.

REPORTS

The *Reports* application is used to generate reports based on call records stored in the database. It also can be used to set up scheduled reports which are generated on a given schedule, and for setting up the automatic emailing of reports.

SCHEDULER

This module works in conjunction with the Reports module and provides a way to generate reports automatically at specified times and on a recurring basis

EMAIL (RBE)

Email (RBE) is the application that provides the other WIN-SENSE 32 modules with the ability to send QuickEmails containing WIN-SENSE 32 information such as alarms, reports, etc.

WS 16 UPGRADE

This module is used when upgrading from the older WIN-SENSE product.

TABLE RESTRUCTURE

This module may be used when upgrading from prior WIN-SENSE 32 versions. If the database structure in the new version has changed this module is used to convert existing databases to the new structure.

WIN-SENSE 32 SETUP

In order to use WIN-SENSE 32 effectively, you must first do some basic configuration. Several different steps may be required before WIN-SENSE 32 will be able to collect, process, and

report call records. The required steps depend upon the user's situation and the setup of their PBX.

It will help speed the setup process to know the answers to the following questions. WIN-SENSE 32 has default values for many of these questions, so if you do not know the answer, then leave the setting at the default value.

☐ Are you updating from the older WIN-SENSE?

☐ How will SMDR be received from the PBX?

☐ What brand and model is the PBX?

☐ What call types do you want to capture and report on?

☐ What grace period(s) do you want to allow for each call type? (The grace period is the time given between the dialing of a called number and when the call is answered.)

☐ What default costs do you want to use for each call type?

☐ Do you want extension names to appear on the reports?

☐ Do you want to create department reports?

Note: If you are replacing an older WIN-SENSE, then please contact your dealer for assistance before doing any of the following steps. Most of the SMDR setup, parsing and pricing from your previous WIN-SENSE installation can be converted to WIN-SENSE 32 using the WS 16 Upgrade module. This conversion **MUST** be completed **BEFORE** any other setup in WIN-SENSE 32 is done.

SETUP SMDR COLLECTION

FOR SERIAL / COM / RS232 COLLECTION

Step 1. Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2. On the left side select:
Collection Points | Serial/COM

Step 3. The right panel will change. Enter a name for the connection, e.g. "SMDR Port". This is just for you to reference the port by. Then select the serial / COM port that the cable from the PBX will attach to on the PC (see note below). Then select the correct baud rate, parity, stop bits, and data bits (typically these would be 1200 baud, None, 1 and 8). Then enter any handshaking requirements the PBX may have. This is usually None.

Step 4. We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

Note: You will need to make sure that you have connected your computer's COM Port to your PBX's SMDR Port, and that you are receiving data from your switch. You may have to refer to the manual for your PBX to decide what type of cable and connectors are necessary.

You will need to attach the cable coming from your PBX, to an available COM Port on the back of your computer using the appropriate connectors. The cable coming from the PBX may be equipped with an RJ11 jack. If this is the case, then an RJ11 to DB9 or DB25 adapter may be necessary.

FOR FILE COLLECTION

Step 1.   Start the Setup SMDR module. On the PC go to:
            Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   On the left side select:
            Collection Points | File

Step 3.   The right panel will change. Five different read schedules can be assigned. Select the schedule in the "File:" box at the top of the right panel.

Step 4.   Enter a name for the connection, e.g. "SMDR File". This is just for your reference. Then select the File Read Frequency as to how often you would like this file to be read. Note: This must be done before the system will allow you to set any of the other settings on this panel. Likewise, if this setting is set to Disable, then you will not be able to change any of the settings.

Step 5.   Enter the file name along with the directory path as to what file is to be read. This file is usually created by another application. Wild card characters ("*", "?") can be used in the file name. If wild cards are used then all files that match will be read/processed at the scheduled time.

Step 6.   Select the file format. Set whether each SMDR record ends in a CR/LF (carriage return and line feed), is of a set length, or ends with an EOL (end of line character).

Step 7.   Since the file will be deleted after it is read, set the number of backup copies you would like to keep. If 0 is entered for the number of backup copies then no copy of the original will be maintained.

Step 8.   We recommend that you save these settings before going on to other settings. Do this by selecting:
            File | Save Changes

FOR IP COLLECTION

Step 1.   Start the Setup SMDR module. On the PC go to:
            Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   On the left side select:
            Collection Points | IP

Step 3.   The right panel will change. Enter a name for the connection, e.g. "SMDR IP". This is just for your reference.

Step 4.   If the PBX is not acting as the IP server then check the TCP/IP Server box. In most cases the PBX will be the IP server and this box should NOT be checked.

Step 5.   Next enter the IP address and port to connect to the PBX on (see your PBX manual to determine these values). The Authorization ID and Password are not used at this time.

Step 6.   Select the Auto Connect options (we suggest you leave these at their default values).

SETUP SMDR PARSING AND PRICING

We will now setup the way the SMDR data from the PBX is recognized, parsed and priced. WIN-SENSE 32 contains default values for a large variety of PBX models. It is wise to start with these default settings since they give a good base to start from. If any fine tuning or customization needs to be done for your particular PBX, it can be done using this module.

IMPORT VALUES FROM ANOTHER SETUP FILE

Note: If you have an SMDR parsing setup file (typically named "cplsettings.ini") from another installation, you can import those settings directly into this WIN-SENSE 32 setup. Any/all of the settings in the current setup will be overwritten when you import settings, so use CAUTION. What is overwritten depends on what data the import file has in it. An import file can be edited to contain all fields or just a few fields within a section. It can also be edited to overwrite all fields within a section ("Replace=1") or append the new fields to a section ("Replace=0")

Step 1.   Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   From the main menu select:
File | Import …

Step 3.   Click on the Yes button to continue.

Step 4.   Select the import file that contains the SMDR parsing settings you would like to import. Click on the Open button. Note that any previous changes you made to SMDR parsing may be overwritten.

Step 5.   We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

You now can edit any of the settings as needed.

SET PBX DEFAULT VALUES

Step 1.   Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   From the main menu select:
File | Setup PBX …

Step 3.   Select the PBX from the list that matches (or most closely matches) the PBX you are connecting to WIN-SENSE 32. Click on the OK button. Note that any previous changes you made to SMDR parsing will be overwritten.

Step 4.   We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

The default settings for the selected PBX are then imported into WIN-SENSE 32. You now can edit any of the settings as needed.

SETUP SITE INFORMATION

Step 1.   Start the Setup SMDR module. On the PC go to:
    Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   On the left side select:
    Site Information

Step 3.   In the Site ID field, enter a name which will represent this WIN-SENSE 32 installation. This ID will be stored along with the priced calls in the database. It is best to keep it short but as unique as possible.

Step 4.   Next enter a description of this site, along with its Area Code and exchange.

Note: The Site ID and Site Description are both included in the body of scheduled report emails.

Step 5.   Enter the path to the tariff tables. The default location is
    "C:\Program Files\WINSENSE32\CPLTAB"

Step 6.   We recommend that you save these settings before going on to other settings. Do this by selecting:
    File | Save Changes

The other fields on this panel are not necessary to setup at this time. You can revisit them later, if desired.

SETUP SMDR PARSING

Step 1.   Start the Setup SMDR module. On the PC go to:
    Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   On the left side select:
    SMDR/CDR Parsing

Note: SMDR stands for Station Message Detail Record and CDR stands for Call Detail Record. They are used interchangeably in this document.

Note: When SMDR is received from the PBX it is checked against the settings you enter here (see Step 7). Matching begins with the first SMDR parsing type and continues until a match is found. Order is important.

Step 3.   On the left side, select the SMDR parsing type you would like to fine tune.

Note: The right panel will open to display the information for that particular SMDR parsing type. Notice that on the left side of this panel there are three vertical tabs. These tabs will display different pages of information in the panel for this particular parsing type.

Note: You can copy the parsing settings from a different SMDR parsing type. Select the correct type from the drop down next to the "Copy From…" button. Then click the "Copy From…" button. This will replace ALL settings for this SMDR parsing type with the settings from the type selected in the drop down. This is helpful if SMDR parsing type settings are very similar. Set up one of the SMDR parsing types, then copy it to other SMDR parsing types, then fine tune the settings for each.

Step 4.   Edit the name of the SMDR parsing type if desired. This is just for your reference.

Step 5.   Select the vertical tab labeled Identification.

Step 5.   Enter how many lines of SMDR data make up one complete call record. For many PBX types this will be 1.

Step 6.   Assign a default call type. This will be used if the number does not match a particular dial pattern.

Note: If "Incoming" is selected then call records parsed from SMDR matching this format will be labeled as "incoming" regardless of a match to a particular dial pattern.

Step 7.　You may now enter up to 3 locations in the SMDR record that contains a character or series of characters that would help identify the record as being of this particular parsing type. For each matching location you must enter the character position to begin matching at. Then you may enter up to 5 different match patterns for this particular position.

Note: The patterns ARE case sensitive so "a" is different than "A". Also, the match patterns can be one or multiple characters long and can include spaces.

Step 8.　Select the vertical tab labeled Parsing.

Step 9.　Name each field that will be parsed from the SMDR data. Then enter the beginning character position for that field, along with the length of the field.

　　　　If another field is to be appended to the current field, select Append under the App/Repl column, then enter the beginning character for the field to append and it's length. If another field is to be used instead of this one, select Replace under the App/Repl column. Then enter the position and length of the field to use. **Note**: Replace will only use the Replace field from the SMDR if it is not blank. If it is blank then the original field settings will be used.

　　　　Certain field types require masks. These types are the Date, Time and Duration fields. The possible masks are indicated below.

　　　　　　　　Date fields
　　　　　　　　　　YY = year (also YYYY)
　　　　　　　　　　MM = month
　　　　　　　　　　DD = day
　　　　　　　　　　E = Epoch date (use the appropriate number of "E"s for the
　　　　　　　　　　　　length of the field to parse). Epoch time is an integer
　　　　　　　　　　　　value of the number of seconds since a given date,
　　　　　　　　　　　　typically (default) Jan 1, 1970.

　　　　　　　　Time and Duration fields
　　　　　　　　　　HH = hours
　　　　　　　　　　MM = minutes
　　　　　　　　　　SS = seconds
　　　　　　　　　　A = am / pm (otherwise 24 hour is expected)
　　　　　　　　　　T = tenths of minutes
　　　　　　　　　　JJJJ = Julian date / time
　　　　　　　　　　E = Epoch time (use the appropriate number of "E"s for the
　　　　　　　　　　　　length of the field to parse). Epoch time is an integer
　　　　　　　　　　　　value of the number of seconds since a given date,
　　　　　　　　　　　　typically (default) Jan 1, 1970.

Note: The first 7 fields **MUST** be in the following order: Extension, Trunk, Date (enter a 0 for position and length if the WIN-SENSE 32 PC date is to be used), Time (enter a 0 for position and length if the WIN-SENSE 32 PC time is to be used), Duration, Dialed Number, and Account Number (if used).

Step 10.　Select the vertical tab labeled Misc Settings.

Step 11.　If your PBX reports just the start and stop time for a call instead of the duration, then check the "Duration is End Time" box and make the Duration field (see Step 9) point to the stop time.

Step 12.　If your PBX reports the call time as the time when the SMDR is sent to WIN-SENSE 32 OR if you are using the PC time for parsed calls (see Note: under Step 9) then check the "Adjust Call Time by Duration" box. When checked, the call time parsed from the SMDR, or used from the PC, will be adjusted backwards by the duration of the call.

Step 13. If some SMDR records do not report complete call data because it was reported in the previous SMDR record, then check the "Use Previous SMDR Record Data as Filler" box. Any parsed fields that are blank in an SMDR record will keep the values that were parsed from the previous SMDR.

Step 11. We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

SETUP CALL TYPES

Note: Generally there isn't a need to make changes to call types and you should fully understand what you are doing before making any changes.

Step 1.   Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2.   On the left side select:
Call Types

Step 3.   Select one of the Call Types listed on the left side.

Step 4.   To add a call type click the add button at the bottom of the right panel. To delete one click the delete button. To edit an existing call type just re-enter the correct data in the fields.

Step 5.   On the right panel, enter the name of this particular call type. Then select the Call Category for this type. This is so WIN-SENSE 32 can group various call types for reporting purposes. Next set the grace period for this type of call. This is the minimum duration of a call before WIN-SENSE 32 prices it. Set the duration adjustment if desired. This is the number of seconds that will be subtracted from the call duration AFTER the grace period has been met or exceeded. Next, enter the default costs which will be used if no tariff table information is found. You can then enter a cost adjustment percentage to be applied to the call AFTER it has been priced via the tariff tables or the default costs. Finally, enter the tax percentage. The tax is calculated from the cost AFTER all other adjustments have been made.

Step 6.   We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

Note: Dial Patterns and Trunk Associations are how a call is assigned a call type. The dialed number is matched to a dial pattern and the trunk is matched to a trunk group. Then both of these are used together to determine the call type and how it is processed.

SETUP DIAL PATTERNS

Note: Generally there isn't a need to make changes to dialing patterns and you should fully understand what you are doing before making any changes.

Dial patterns are used by WIN-SENSE 32 to match the phone number dialed and apply appropriate costing information. After a dialed number has been parsed from the SMDR, the digits are matched, digit by digit against the dial patterns, beginning with the first dial pattern. It is **EXTREMELY IMPORTANT** to have the dial patterns in the proper order since matching stops when a match is found. If an exact dial pattern

like (801)555-1212 follows a more general pattern like (NXX)NXX-XXXX, the intended pattern will never be matched since the program will stop with the first match found, in this case the general pattern.

Valid characters in the match patterns and their meanings are:

0 – 9	Dialed number must match the exact number given
N	Dialed number can be any number, 2 through 9
X	Dialed number can be any number, 0 through 9
P	Dialed number can be either 0 or 1
A	Dialed number can be any number, 1 through 9
*	Match any dialed number for any length

Step 1. Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2. On the left side select:
Matching | Dial Patterns

Step 3. On the right side panel, name the dial pattern. Then using the characters given above, enter the respective fields, considering the match desired.

Note: You may insert or delete dial patterns by using the buttons at the bottom of the panel. You may also move the order (as indicated in the left panel) of the selected dial pattern by using the up and down arrows located in the bottom left corner of the panel (seen above).

Step 4. We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

SETUP TRUNK GROUPS

Note: It is **VERY IMPORTANT** that the First Trunk in Range and the Last Trunk in Range numbers in a trunk group match the length of the trunk number parsed from the SMDR record. If the length of the number parsed from the SMDR record is 3 characters and the First and Last Trunk in Range numbers are 2 characters, there will never be a match.

Step 1. Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2. On the left side select:
Matching | Trunk Groups

Step 3. In the right panel, enter the name of the trunk group". This is just for your reference. Then enter the First Trunk in Range characters and the Last Trunk in Range characters. Finally assign a call type to this trunk group.

Step 4. We recommend that you save these settings before going on to other settings. Do this by selecting:
File | Save Changes

SETUP DIAL PATTERN /TRUNK GROUP ASSOCIATIONS

Step 1. Start the Setup SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup SMDR

Step 2. On the left side select:
Matching | Pattern/Trunk Match

Step 3.   In the right panel, enter the name of the pattern/trunk association". This is just for your reference. Enter the dial pattern and trunk group for this association. Then select the call type to be used by this association.

Note: The following files are found in the Tariff Tables Path that you entered when setting up the Site Information. Please refer to that section if necessary.

Step 4.   Select the appropriate V&H lookup table. This is the table that will be used to provide the city / state or city / country information. The names of the various tables and their purpose are:

       NPANXXVH.TBL – used for interstate LD and calls to Canada call types
       LOCALVH.TBL – used for local call types
       MEXICOVH.TBL – used for calls to Mexico call types
       USINTRT.TBL – used for all other international call types

Step 5.   Select the appropriate rate table. This is the table that will be used to provide tariff based costing information. The names of the various tables and their purpose are:

       STANDARD.RTS – used for US, calls to Canada, and Mexico call types
       -- or --
       0npa0nxx.RTS – npa is the area code and nxx is the exchange of the WIN-SENSE 32 location and is used for US, calls to Canada, and Mexico call types (use this rate file if present)
       USINTRT.RTS – for all other international call types

Note: If you want calls to price at the default costs (see Setup Call Types, Step 5) then leave this field blank.

Step 6.   Select the time of day table. This table provides the time of day information for costing calls. This table is always named STANDARD.TOD and is used by all call types.

Step 7.   We recommend that you save these settings before going on to other settings. Do this by selecting: File | Save Changes

SETUP ORGANIZATION

WIN-SENSE 32 will collect and process calls without doing the organizational setup. However, if you want to be able to generate department reports, show extension names on reports, associate phone numbers with account codes, or apply markups and surcharges to calls; you will need to setup the organization.

GENERAL OPTIONS SETUP

Step 1.   Start the Setup Organization module. On the PC go to: Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   From the main menu select: File | Settings…

Step 3.   Make any desired setting changes per the following instructions:

    Import/Export delimiter char:
       Enter the character (if Char is selected) or decimal ASCII value (if ASCII is selected) for the delimiter char used in import/export csv files.

    Extension:

Check the "Use Acct, Dept, & Bill Class settings?" box if you want extensions to inherit settings from the Billing Class, Department, or Account that you assign to the extension. If not checked then extensions will keep their current settings when a new Billing Class, Department, or Account is selected for them.

Check "Ask user each time?" if you want to be prompted to accept the Billing Class, Department, or Account settings for the extension.

Check "Add new extensions from processed call records." if you would like the WIN-SENSE 32 Process application to add an extension to the list when a record is processed for an extension not already in the list.

Check "Save parsed acct code with auto add extension." if you want the account code parsed from the call record to be automatically associated with the extension.

Check "Parsed acct code saved as department." if you want the account code parsed from the call record to be saved as a department name and automatically associated as the department for the extension.

Department:
Check the "Use Consolidate & Bill Class settings?" box if you want departments to inherit settings from the Consolidate Dept or Billing Class that you assign to the department. If not checked then departments will keep their current settings when a new Consolidate Dept or Billing Class is selected for them.

Check "Ask user each time?" if you want to be prompted to accept the Consolidate Dept or Billing Class settings for the extension.

Activity Logging:
Select the level of activity to add to the log file for the Setup Organization application. Select the name for the log file and the maximum size the file can become. (Once the file reaches the maximum size it is copied to a backup name and logging continues.)

Step 4.   Click the OK button.

COMPANY LOGO SETUP

Step 1.   Start the Setup Organization module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   From the main menu select:
File | Company Logo…

Step 3.   Click the New Logo… button and select the image file (.bmp, .jpg, or .ico) to use as the company logo on Activity reports. Click No Logo to remove the selection (no logo will be used).

Step 4.   Click the OK button.

SETUP BILLING CLASSES

Step 1.   Start the Setup Organization module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   On the left side select:
Billing Class

Note: You can sort the Billing Class list that is displayed in the left side panel. Right-click on "Billing Class". A list of available sort orders will be displayed. Select the order you would like the billing class list to be displayed in.

Note: You may insert or delete billing classes by using the buttons at the top of the right hand panel.

Step 3.   Select the billing class you would like to edit / delete.

Step 4.   Enter a name for the billing class for reference when setting up the departments and extensions later on. Enter a description of the billing calls. This is optional as it is for your reference only. If you want a summary of local calls in detailed reports, select the Summarize Local Calls option. Also, if you want to blank out the last 4 digits of the number called when processing and storing calls, then select the Executive Override option.

Note: If selected, the "Roll-up" option allows multiple billing class settings to affect a specific call. The billing class assigned to the extension, department, and account codes can cumulatively affect the price of the call (and equipment charges).

Step 5.   Enable or disable equipment charges and set the amount and frequency that the charges should be applied. These settings will be applied to departments and extensions as they are added.

Step 6.   Enter the default markup percentage for this billing class. This markup percentage will be used when billing the call, unless there is a different markup percentage specified for a call category. Next, enter the surcharge amount in dollars, that you wanted added for this billing class. Once again, the surcharge specified for a call category will override this.

Step 7.   You can now enter markups and surcharges for specific call categories which will override the default markups and surcharges that you entered in Step 5. If you don't enter a markup or surcharge for a call category, then the defaults from Step 5 are used.

SETUP DEPARTMENTS

Step 1.   Start the Setup Organization module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   On the left side select:
Department

Note: You can sort the Department list that is displayed in the left side panel. Right-click on "Department". A list of available sort orders will be displayed. Select the order you would like the department list to be displayed in.

Note: You may insert or delete departments by using the buttons at the top of the right hand panel.

Step 3.   Select the department you would like to edit / delete.

Step 4.   Enter a name for the department for reference when setting up extensions later on. This name is also included in department reports. Enter a description of the department. This is optional as it is for your reference only.

Step 5.   Select a type for this department. Types go from dept to corp with the lowest being dept and the highest being corp. The lower types can be consolidated (see Step 6) into the higher types for reporting. This will provide hierarchal processing and reporting that will aid in multi-level organizations. Department types are included in department reports.

Step 6.   Select a department that you would like this department to be consolidated into (if any). Any department with a higher type can be selected as the consolidated department. Depending on the

application settings under "File | Settings ….", the billing class can be rolled from the consolidated department into this department.

Step 7.   (Optional) Enter the name of the contact person for this department and their email address. This is for your reference only.

Step 8.   Select a billing class to be used with this department. The billing class will affect markups and surcharges for any extensions assigned to this department.

Step 9.   Enable or disable equipment charges and set the amount and frequency that the charges should be applied. These settings will be applied to extensions as they are added. The department settings do NOT add charge records to the WIN-SENSE 32 database.

SETUP EXTENSIONS

Step 1.   Start the Setup Organization module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   On the left side select:
Extension

Note: You can sort the Extension list that is displayed in the left side panel. Right-click on "Extension". A list of available sort orders will be displayed. Select the order you would like the extension list to be displayed in.

Note: You may insert or delete extensions by using the buttons at the top of the right hand panel.

Step 3.   Select the extension you would like to edit / delete.

Step 4.   Enter the extension number. This number must match exactly what will be parsed from the SMDR record and may include alpha as well as numeric characters. Enter a description of the extension, which is for your reference only.

Step 5.   Enter the first and last name of the contact (owner) for this extension. These names will be used in reports.

Step 6.   Select a department that this extension will belong to. Depending on the application settings under "File | Settings …" the billing class information from the department will be rolled into this extension. This extension will appear in reports for this department. Also, depending on the application settings under "File | Settings…" the department will be used to uniquely identify this extension

Step 7.   Select an account code for this extension. Depending on the application settings under "File | Settings…" the account code will be used to uniquely identify this extension. This option should only be used if there are duplicate extension numbers that are differentiated by account code only.

Step 8.   Select the billing class for this extension, if the billing class information wasn't inherited from the department (depends on the application settings) or if you want to change the inherited billing class. The billing class selected will affect the markups and surcharges for this extension.

Step 9.   Enable or disable equipment charges and set the amount and frequency that the charges should be applied. If enabled a charge record will be added to the WIN-SENSE 32 database for this extension at the frequency selected..

Note: You can add or delete a range of extensions at a time. Select the extension in the left hand panel that you want to start the range add after, or the one you want to start the range delete with.

To add a range:
> Click the "Add Ext Range…" button in the lower left of the right hand panel.
> Accept or change the extension number for the start of the range and click the OK button.
> Accept or change the extension number for the end of the range and click the OK button.
> The range of extensions will be added.

To delete a range:
> Click the "Delete Ext Range…" button in the lower left of the right hand panel.
> Accept or change the extension number for the start of the range and click the OK button.
> Accept or change the extension number for the end of the range and click the OK button.
> The range of extensions will be added.

SETUP ACCOUNTS

Step 1. Start the Setup Organization module. On the PC go to:
> Start | All Programs | WIN-Sense32 | Setup Organization

Step 2. On the left side select:
> Account

Note: You can sort the Account list that is displayed in the left side panel. Right-click on "Account". A list of available sort orders will be displayed. Select the order you would like the account list to be displayed in.

Note: You may insert or delete accounts by using the buttons at the top of the right hand panel.

Step 3. Select the account you would like to edit / delete.

Step 4. Enter the account number. It must match exactly the account field parsed from the SMDR data. Leading and trailing spaces will be stripped from the parsed record. It can contain both alpha and numeric characters. Enter a description, the name of the contact person, and the contact's phone number and email address. These last four values are optional and for your reference only.

Step 5. Select the billing class which will affect the markups and surcharges for calls with this account. Be aware that account markups and surcharges will override extension markups and surcharges.

Step 6. Enter address information for the account. This information will appear on account reports.

SETUP DIALED NUMBER ACCOUNTS

Step 1. Start the Setup Organization module. On the PC go to:
> Start | All Programs | WIN-Sense32 | Setup Organization

Step 2. On the left side select:
> Dialed Number Account

Note: You can sort the Dialed Number Account list that is displayed in the left side panel. Right-click on "Dialed Number Account". A list of available sort orders will be displayed. Select the order you would like the dialed number account list to be displayed in.

Note: You may insert or delete accounts by using the buttons at the top of the right hand panel.

Step 3. Select the dialed number account you would like to edit / delete.

Step 4. Enter a description for the dialed number account. This is just for your reference.

Step 5.   Enter the Area Code, Exchange, and Number exactly as they will be parsed from the SMDR. These settings must match the data from the phone call to be able to associate the account number.

Step 6.   Select the account code to associate with this dialed number.

IMPORTING ORGANIZATION SETUP

Step 1.   Start the Setup Organization module. On the PC go to:
Start | All Programs | WIN-Sense32 | Setup Organization

Step 2.   From the main menu select:
File | Import… | (the type of data you are importing)…

Step 3.   Select the delimited file that you want to import records from. Typically this file will be comma-delimited (.csv) but other delimiters can be used. (See "Import/Export delimiter char" in General Options Setup above.)

Step 4.   If the first line of the import file contains field names that define the fields in the following records, Check the "First line contains column headers" box.

Step 5.   Select the desired action for duplicate records. Overwrite the existing record with data from the import file. Skip the import, leave the existing record as it is. Query User for overwrite or skip on each duplicate record.

Step 6.   Drag fields from the Import Columns: to the Association: column to add them to the data that will be imported. Or from the Association: to the Import Columns: column to remove them from the data that will be imported.

Step 7.   Line up the fields in the Association: column with the correct Table Columns: field by dragging them up or down into the correct position.

Note: The Sample Input Record: column shows how the data will look as it is imported. If a table field should be filled with a default value for EVERY record being imported, double-click that field name in Table Columns: column. You will be able to enter the default value.

Step 8.   Click the Begin Import button to import the records from the selected file into the organization setup.

Note: You may save a particular import setup for future use (or select an import format previously saved). To save the format, once you have the fields lined as you desire, click the Save… button. Give the import template a name and click the Save button. To open a previously saved import format click the Load… button, select the desired import template name and click the Open button.

WIN-SENSE 32 SMDR COLLECTION

In order for WIN-SENSE 32 to do its job it needs to receive SMDR (Station Message Detail Record), also known as CDR (Call Detail Record), from the PBX. This data is sent by the phone switch to other devices and includes information about the calls made in a given time period. WIN-SENSE 32 receives or collects this data and then processes and stores it for later reporting.

WIN-SENSE 32 provides three different modules for collecting this data from the PBX. They are:

Serial Collect SMDR
File Collect SMDR
IP Collect SMDR

The Serial Collect SMDR module will receive the SMDR data from a serial connection. Serial connections are also known as RS232 connections (the technical reference number for the specifications of serial communication). On PCs serial ports are typically called COM ports. In order to set this module up for use, see the Setup SMDR section earlier in this document. This will be the typical module to run for most WIN-SENSE 32 installs.

File Collect SMDR is the module for reading SMDR data from a text file. Once again, you would set the parameters for this module using the Setup SMDR application discussed earlier in this document.

The IP Collect SMDR is used for those phone switches that send their SMDR via an IP (Internet Protocol) or network connection. Once again, you would set the parameters for this module using the Setup SMDR application discussed earlier in this document.

NOTE: It may be helpful to place a shortcut to the proper collection application(s) into the Windows Startup program group so that the module will start automatically when the user logs on to Windows. (A shortcut to the Serial Collect SMDR module is placed in the Windows Startup program group by default when WIN-SENSE 32 is installed.) See your Windows documentation for instructions on how to do this.

RUNNING SERIAL COLLECT SMDR

FOR SERIAL / COM / RS232 COLLECTION

Note: Setup for serial collection is done in the Setup SMDR module discussed earlier in this document. Once setup is complete SMDR can be collected by running the Serial Collect SMDR module as follows.

Step 1.   Start the Serial Collect SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Serial Collect SMDR

Step 2.   If the button in the upper left hand corner of the window says DISABLED and is red, then double click it in order to ENABLE the module. Once enabled, this button should be green. This makes it easy to see if the module is in operational mode. If you can't enable the module, then there is most likely some problem with the selected COM port or its setup. You must resolve the COM port problems first.

Note: In order for WIN-SENSE 32 to process the calls collected by Serial Collect SMDR, the Call Process module must be running. You can tell if it is from the Serial Collect SMDR module by looking at the "Processing App" message at the top center of the window. If it is red then the processing module is not running. Start it and in 5 to 10 seconds the "Processing App" message should change to green.

Step 3.   If the module is enabled and the COM port appears to be working but you still are not able to receive data from the phone system, try enabling or disabling the RTS and DTR options. You do this by double clicking on RTS or DTS which will cause them to toggle between enabled and disabled. Also be sure that your serial cable from the phone system is connected to the correct COM port on the PC.

The rest of the items on the main window of this module are for informational purposes only. On the right there is a box that shows how many SMDR records have been received by the module. If you click on the title "Last nn Hours" a dialog box will open that will allow you to set the number of hours that you want to keep this statistic for. The large box at the bottom of the window will allow you to view the SMDR as it is received.

By right clicking anywhere on the main module window, the main menu will pop up. The items on this menu are:

> Help – About …
> Help – Contents …
> Setup …
> Stats …
> COM Info …
> Clear Memory …
> Reload CPL Settings
> Reset COM Port …
> Clear Received View …

The Help options present information about the module.

The Setup option allows you to setup various options for this module. It should not be confused with the Setup SMDR module. See the section below for more detail.

The Stats and COM Info options present information about the status of the module and its operation.

The Clear Memory option will clear any calls that have been collected / received but have not yet been processed by the Call Process module.

Reload CPL Settings reinitializes the system with the various setup options selected in the various setup modules.

Reset the COM Port, shuts down the selected COM port and then reopens it.

The Clear Received View option clears the lines of data from the SMDR Received view box on the main window.

SERIAL COLLECT SMDR MAIN MENU SETUP OPTION

Note: This option should not be confused with the module setup that must be done from the Setup SMDR module discussed earlier in this document. This option merely adjusts several of the display features and the character translation feature of the Serial Collect SMDR module.

The Setup Option allows the following items to be set:

Turn on or off the display of the received SMDR in the SMDR view area. If seeing the SMDR as it is being received isn't necessary, turning this display off will slightly increase processing speed.

Set the maximum number of display lines to keep in the SMDR Received view area. Once the maximum number of lines according to this setting has been reached, old lines will be dropped as new lines are added.

Enter the displayable character to represent those characters that can't be displayed. Almost all SMDR records have characters that are not displayable (such as line feeds, stx, etx, etc.). If you leave this field blank, then the ASCII value of the non-displayable character is displayed in hexadecimal notation.

Turn word wrap on or off in the SMDR received view area.

Setup the logging of serial collection activity. This option is rarely used.

Characters received can be translated to a different character as they are sent to the call processing module. This option is rarely used. Setup of the translation characters is done in the cplsettings.ini file. You should **NOT** edit this file without the help of a trained technician.

TERMINATING SERIAL COLLECT SMDR

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively collecting SMDR data. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the Serial Collect SMDR module down. Once terminated, you will no longer be collecting calls records from the serial port even if other WIN-SENSE 32 applications are running.

RUNNING FILE COLLECT SMDR

FOR FILE COLLECTION

Note: Setup for file collection is done in the Setup SMDR module discussed earlier in this document. Once setup is complete SMDR can be collected by running the File Collect SMDR module as follows.

Step 1.   Start the File Collect SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | File Collect SMDR

Step 2.   If the button in the upper left hand corner of the window says DISABLED and is red, then double click it in order to ENABLE the module. Once enabled, this button should be green. This makes it easy to see if the module is in operational mode. If you can't enable the module, then there is most likely some problem with the file setup. You must resolve these setup problems before the module will be enabled.

Note: In order for WIN-SENSE 32 to process the calls collected by File Collect SMDR, the Call Process module must be running. You can tell if it is from the File Collect SMDR module by looking at the "Processing App" message at the top center of the window. If it is red then the processing module is not running. Start it and in 5 to 10 seconds the "Processing App" message should change to green.

After the File Collect SMDR module reads a text file, whether automatically based on the schedule setup for it or from using the Read Now button, that file is in effect deleted. Based on the options setup for backups, the file may actually be renamed and saved. However, the file named in setup must be recreated with new SMDR data before File Collect SMDR can read it again.

Step 3.   The Read Now button forces the file to be read and parsed immediately, regardless of the scheduled read time. The Next time the file will be read will be recalculated based on the schedule settings. Thus, if a file is scheduled to be read every 30 minutes and you click the Read Now button, the Next time the file will be read is 30 minutes from now.

Step 4.   The New File button allows you to select a different file to read, overriding the file specified in the Setup SMDR module. This change is only in affect as long as File Collect remains open. If you terminate the File Collect SMDR module and then restart it, the file to be read will revert back to the file specified during setup.

The rest of the items on the main window of this module are for informational purposes only. The Last field shows when the module last read the data file. It will display red if it failed to read the file for any reason. If the read was successful then it will be green.

By right clicking anywhere on the main module window, the main menu will pop up. The items on this menu are:

> Help – About …
> Help – Contents …
> Setup …
> Stats …
> Clear Memory …
> Reload CPL Settings
> Read ONE record at a time …
> Read file, do NOT delete
> Clear Received View

The Help options present information about the module.

The Setup option allows you to setup various options for this module. It should not be confused with the Setup SMDR module. See the section below for more detail.

The Stats option presents information about the status of the module and its operation.

The Clear Memory option will clear any calls that have been collected / received but have not yet been processed by the Call Process module.

Reload CPL Settings reinitializes the system with the various setup options selected in the various setup modules.

Read ONE record at a time will open the selected file and adds a Read One button at the top. Clicking this button reads one text line for the file and then stops. The selected file is NOT deleted when it is read.

Read file, do NOT delete option will read the entire specified file but will not delete it when it has finished reading the file.

The Clear Received View option clears the lines of data from the SMDR Received view box on the main window.

FILE COLLECT SMDR MAIN MENU SETUP OPTION

Note: This option should not be confused with the module setup that must be done from the Setup SMDR module discussed earlier in this document. This option merely adjusts several of the display features and the character translation feature of the File Collect SMDR module.

The Setup Option allows the following items to be set:

> Turn on or off the display of the received SMDR in the SMDR view area. If seeing the SMDR as it is being received isn't necessary, turning this display off will slightly increase processing speed.

Set the maximum number of display lines to keep in the SMDR Received view area. Once the maximum number of lines according to this setting has been reached, old lines will be dropped as new lines are added.

Enter the displayable character to represent those characters that can't be displayed. Almost all SMDR records have characters that are not displayable (such as line feeds, stx, etx, etc.). If you leave this field blank, then the ASCII value of the non-displayable character is displayed in hexadecimal notation.

Turn word wrap on or off in the SMDR received view area.

Setup the logging of file collection activity. This option is rarely used.

Characters received can be translated to a different character as they are sent to the call processing module. This option is rarely used. Setup of the translation characters is done in the cplsettings.ini file. You should **NOT** edit this file without the help of a trained technician.

TERMINATING FILE COLLECT SMDR

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively collecting SMDR data. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the File Collect SMDR module down. Once terminated, you will no longer be collecting calls records from the selected file even if other WIN-SENSE 32 applications are running.

RUNNING IP COLLECT SMDR

FOR IP COLLECTION

Note: Setup for ip collection is done in the Setup SMDR module discussed earlier in this document. Once setup is complete SMDR can be collected by running the IP Collect SMDR module as follows.

Step 1. Start the IP Collect SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | IP Collect SMDR

Step 2. If Auto Connect | Connect/listen on start-up option is selected then IP Collect will attempt to connect to the PBX automatically on startup. If the option is not enabled, click the Connect… (Listen…) button.

Step 3. If a connection is made the IP address and port fields will be green. If these areas are yellow, it means a connection is being attempted, and if they are red then no connection was made (or the user has terminated the connection by clicking on the Disconnect… button).

Note: If the IP or Port entries are incorrect you can enter new values directly in those boxes. These changes are only in affect as long as IP Collect remains open. If you terminate the IP Collect SMDR module and then restart it, the IP and Port settings will revert back to the settings specified during setup.

Once connected, the lower display area in the window will show SMDR received from the PBX while the upper display area shows activity related to the IP connection. Right clicking in either display area will pop up the following menu:

Clear View
Wrap
Save To …

Clear View will erase all the lines from the display area.

The Wrap option will toggle word wrap in the display area on or off.

Save To … will allow you to select a text file to save the current text of the display area to.

IP COLLECT SMDR MAIN MENU EDIT | OPTIONS

Note: This option should not be confused with the module setup that must be done from the Setup SMDR module discussed earlier in this document. These options merely override temporarily (while this instance of IP Collect is running) the Setup SMDR options, adjust several of the display features, and allow for the character translation feature of the IP Collect SMDR module.

The Edit | Options allows the following items to be overridden while IP Collect is running:

Auto Connect Group:

Connect / Listen on Startup can be selected so the module will attempt to establish a connection or listen for a connection when it first starts.

If connection lost, retry every nnn seconds sets the number of seconds the module will attempt to try and reconnect to the SMDR server after the connection has been lost.

If no activity for nnnn minutes tells the module to renew (disconnect and then immediately reconnect) the connection after the set number of minutes passes with no activity.

Disconnect & reconnect at hh:nn:ss daily allows you to force the module to renew (disconnect and then immediately reconnect) the connection at a specified time each day.

Received View Group:

Nnnn Maximum lines in Received View will limit the number of SMDR history lines that are able to be viewed in the lower display area to the set number. Once the number has been reached, the older lines will be deleted and newer lines will be added.

Char to replace non-displayable sets a displayable character to represent those characters that can't be displayed. Almost all SMDR records have characters that are not displayable (such as line feeds, stx, etx, etc.). If you leave this field blank, then the ASCII value of the non-displayable character is displayed in hexadecimal notation.

Convert CR to CR / LF will convert any carriage return to a normal carriage return / line feed combination for viewing purposes.

Characters received can be translated to a different character as they are sent to the call processing module. This option is rarely used. Setup of the translation characters is done in the cplsettings.ini file. You should **NOT** edit this file without the help of a trained technician.

COM Port Setup Group:

Note: Setting the items in this group are only necessary if you are sending the SMDR out a serial port to another device or to the Serial Collect SMDR module.

Select the COM port to resend the received data out on.

Select the baud rate which the selected COM port will use to send the data. This must match the baud rate of the receiving port or device.

Select the protocol settings for the select port. This will include data bits, parity bit, and stop bit values.

Activity View Group:

nnnn Maximum lines in Log View will limit the number of activity log history lines that are maintained in the upper display area.

Append to SMDR:

Enter up to 20 characters that will be appended to the SMDR line received from the PBX before the line is sent on to the Process SMDR module. This can be used to identify SMDR from a particular IP Collect module if multiple IP Collect modules are being used to collect SMDR.

Minimum SMDR Length:

Any SMDR from the PBX that does not meet this minimum length will be padded on the right with spaces. Note that padding to the minimum length will occur BEFORE the "Append to SMDR" characters are appended to the SMDR.

Setup the logging of ip collection activity. This option is rarely used.

IP COLLECT SMDR MAIN MENU – OTHER ITEMS

File | Save Received…   This menu option allows received SMDR to be saved a text file for use by other programs. If the menu option is checked then it is already enabled and the file name the SMDR is being stored to will b displayed between the Activity View and Received Data sections of the main window. If it is NOT checked then the words "NOT Storing." are displayed in this area. Selecting this menu option will either: Disable storing SMDR to a text file (if the menu item was checked), OR display a file selection dialog where the file name and path to store received SMDR to can be entered.

File | Send to Com Port… This men option allows received SMDR to be resent via an RS232 port (also known as: serial port, COM port, etc.). The COM port setup is done in the options setup (see File | Options… above). If the menu option is checked then this option is enabled. The status of the COM port and its' current settings will be displayed on the status bar at the bottom of the IP Collect window. Selecting this menu option will either: Disable forwarding the SMDR to a COM port (if the menu item was checked), OR enable forwarding the SMDR to a COM port.

File | About…   Shows information about IP Collect including the IP address of this PC.

TERMINATING IP COLLECT SMDR

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively collecting SMDR data. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the IP Collect

SMDR module down. Once terminated, you will no longer be collecting calls records from the IP server even if other WIN-SENSE 32 applications are running.

WIN-SENSE 32 PROCESS SMDR

Once the various SMDR collection modules have obtained the data from the phone switch, the information needs to be sent to the Process SMDR module so that it can parse (break apart into the various components, like phone number dialed, extension that placed the call, etc.), price, cost in some cases, and store the phone call for later reporting.

NOTE: It may be helpful to place a shortcut of this application into the Windows Startup program group so that the module will start automatically when the user logs on to Windows. (A shortcut to the Process SMDR module is placed in the Windows Startup program group by default when WIN-SENSE 32 is installed.)   See your Windows documentation for instructions on how to do this.

RUNNING PROCESS SMDR

Step 1. Start the Process SMDR module. On the PC go to:
Start | All Programs | WIN-Sense32 | Process SMDR

Step 2. Near the middle of the application window there will be a list of the SMDR collection modules. If any one of these modules is running, its light will be green. Place a checkmark next to any of the running collection modules that you want Process SMDR to receive phone records from. Note, that SMDR from any active collection module that is not selected will be discarded and lost.

The upper part of the window is a display area that shows the SMDR as it is being received and processed from the selected collection modules, as well as messages from the process module itself indicating errors or other information about the module's operation.

New entries are added at the bottom of the display area. If the cursor is not on the last line added, the display area will not scroll down automatically. This is so you can look at past data in the window without the bothersome interruption that automatic scrolling would cause. To permit the automatic scrolling of the display, click at the very end of the last line of data or simply press CTRL END to jump to the bottom.

The lower display area shows how the process module parsed and priced the last valid SMDR data record. If the record was not valid or was less than the allowed grace period for that particular call, the display area will not change.

Step 3. Right click any where on the main window and the main menu will pop up. The items on this menu are:

> Help – About …
> Setup …
> Call Record Storage …
> Alarms …
> Stats …
> Clear Memory
> Pack ALL Tables …

Add Number Bar
Clear Received View

The Help options present information about the module.

The Setup option allows you to setup various options for this module. It should not be confused with the Setup SMDR module. See the section below for more detail.

Call Record Storage, displays additional storage options for the processed records. See below for more information.

The Alarms option displays the alarm setup window. See below for more details.

The Stats option presents information about the status of the module and its operation.

The Clear Memory option will clear any calls that have been collected / received but have not yet been processed.

Pack ALL Tables will remove deleted or temporary records from the various database tables and push all the records into a contiguous set of data. This will help conserve disk space and also improves the efficiency of retrieving records from the databases. The tables that are packed are: Callrecs, Extension, Department, Billclass, Account, Dialnumacct, Security, and Schedule.

The Add Number Bar option will add a number line at the current cursor line in the upper display area. This number bar is used to help identify SMDR field positions and lengths of these fields for fine tuning these settings in the Setup SMDR module.

The Clear Received View option clears the lines of data from the upper display area.

PROCESS SMDR MAIN MENU SETUP OPTION

Note: This option should not be confused with the module setup that must be done from the Setup SMDR module discussed earlier in this document.

The Setup Option allows the following items to be set:

Turn on or off the display of the received SMDR from the collection modules. If seeing the SMDR as it is being received isn't necessary, turning this display off will slightly increase processing speed.

Set the maximum number of display lines to keep in the upper display area. Once the maximum number of lines according to this setting has been reached, old lines will be dropped as new lines are added.

Turn on and off displaying the original csv SMDR from the PBX. This only affects display of the original SMDR IF it is in csv format. If this option is NOT selected and the SMDR is in csv format then only the reformatted, flat SMDR line will be displayed, not the original csv formatted SMDR.

Set a character to replace characters that can't be displayed. Almost all SMDR records have characters that are not displayable (such as line feeds, stx, etx, etc.). If you leave this field blank, then the ASCII value of the non-displayable character is displayed in hexadecimal notation.

Turn on and off displaying the collection module name ("Collector") with each line of data received from that module. This will only affect the display of the lines after this option has been set. This option is obviously not needed at all if you are only running one collection module.

Turn on and off displaying the date/time ("Rcvd Time") the SMDR was received from the collection module. This will only affect the display of the lines after this option has been set.

Turn on and off word wrapping in the upper display area and will affect all lines currently displayed.

Turn on and off display of processed call information in the lower display area. If seeing this information isn't necessary, turning this display off will slightly increase processing speed.

Turn on and off display of technical data in the lower display area. Such technical data includes RecType, MatchNum, TrunkNum, and GroupNum. This information can be important during initial setup, but is of little use under normal operating conditions.

Control the logging of the process module activity.

Set an idle time alarm. If the Max Idle Minutes is set to 0 then this alarm is disabled. Otherwise you can set the number of minutes where the process module received no SMDR data. Set the time of day that this alarm is active. (Example: Many businesses only expect active phone usage between 8:00am and 5:00pm. Any idle time outside those hours is expected and you would not the alarm to be active.) You can set the notification of this alarm to sound and or display the alarm, as well as including it in the activity log. You can also have this alarm emailed once the Email module has been properly set up and is running.

Max idle seconds and max pending records control the utilization of memory shared by the various applications. **NOTE**: Unless instructed by technical support you should **NOT** change these settings.

Enable automatic packing of the call record database at a selected time of day. Packing frees up unused space and optimizes the database.

PROCESS SMDR MAIN MENU CALL RECORD STORAGE OPTION

Processed SMDR (what WIN-SENSE 32 refers to as call records) are automatically stored in the Callrecs database table for reporting. The Call Record Storage options make it possible to store call record and SMDR data in formats that can be used by other applications.

The Call Record Storage option allows the following items to be set:

Store priced call records to delimited (csv) file:

Turn on and off what is called delimited storage of processed call records. This format is typically one that is widely accepted for export into other applications. It is a text file where there is one record per line, with the fields separated (delimited) by a specific character, which is usually a comma. To use this function, you must specify the delimiting character. If the character you want to use is a non-displayable character, check the ASCII box and enter the ASCII code for the character. For example, if you want a tab to delimit the fields, check the ASCII checkbox and enter 9 which is the ASCII code for a tab character. Then you must enter the filename and path of the file to store the data in. You may use a filename that will always be the same or you can use variables in the filename that will be replaced with date and time values. These variables are:

<yyyy> -- replace with the PC's 4 digit year
<mm> -- replace with the PC's 2 digit month
<dd> -- replace with the PC's 2 digit day

<hh> -- replace with the PC's 2 digit hour
<nn> -- replace with the PC's 2 digit minute
<ss> -- replace with the PC's 2 digit second

Alternatively, you may select the Store by date? checkbox and the Process SMDR module will automatically append the current date to the file name you select.

The format of the data stored to the delimited file is:

- Call date: mm/dd/yyyy
- Call time: hh:mm:ss
- Extension: "extension number"
- Dialed number: "(NPA) NXX-XXXX"
- Destination of call: "city state"
- Duration of call: minutes.tenths of minutes
- Cost of call: dollars.cents
- Trunk: "trunk number"
- Call type: "call type"
- Account code: "account"
- Name: "name assigned to extension"
- Tax: dollars.cents
- Charge: dollars.cents
- Department: "department name"
- Department type: "department level"
- Trunk group: group number
- Category: call type category number
- Dialed number account: "account"
- Alt1:   "alt1"
- Alt2:   "alt2"
- Alt3:   "alt3"
- Billing class   "billing class name"
- Site: "site id"
- Collector: "smdr collector module"
- Ring time: minutes.tenths of minutes
- Hold time: minutes.tenths of minutes
- Record type: smdr record type

Store SMDR to text file:

Turn on and off SMDR storage. This option stores the SMDR in the same format that it was received from the collection module in. Select the filename to use for storing the SMDR. You may select the option to append the collection module name to the filename. This enables you to have a unique filename for each collection module used. You can also set whether the PC date is appended to each file name, making a unique file for each day. And, as in the Delimited Storage, you can enter your own date and time variables into the selected file name. (See above)

PROCESS SMDR MAIN MENU ALARMS OPTION

The process module can be set to alarm on various call record conditions. The Alarms window is where most of the alarm setup is done and where information about alarms that have been triggered is displayed.

Note: Care should be taken in the number of alarms you set, as each one will increase the time needed to process each SMDR received.

You can globally turn all alarms on or off by using the Enabled / Disabled button in the upper left corner of the window.

The Silence button is NOT visible unless there is an alarm that has been triggered and the sound notification for that alarm is set. If an alarm with sound notification is notifying you, the Silence button will appear and clicking it will stop the alarm sound.

If a call record triggers more than one set alarm condition, then multiple alarms are triggered unless the One Alarm / Call is checked. Then only the first alarm triggered for a call is logged, displayed, and / or emailed.

You can limit the number of Recent Alarms shown in the display area. When this maximum number of lines is reached, then the oldest lines are discarded when a new line is added.

Triggered alarm information is shown in the Recent Alarms display area. Entries will show the alarm number, the alarm description, the date and time that the alarm was triggered, and call record information.

The area under the Recent Alarms display area is used to manage alarms. Use the Previous and Next buttons to move from alarm to alarm. **Note**: If you make changes to an alarm you MUST click either the Previous or Next button in order for the changes to be saved.

The field between the buttons, indicate how many alarms have been defined.

The Add and Delete buttons are used to add a new alarm definition or to delete a defined alarm that is currently being viewed.

The Alarm Settings:

> \# -- this is the record number for this alarm and is used in visual notifications set up for this particular alarm.

> Enabled – if NOT checked then this alarm is not active and will not be used as a trigger for any call records.

> Description – enter a description of the defined alarm which will be displayed in the visual notifications of the alarm. This description will also be included in alarm email notifications.

> Notification – check the boxes for all the notifications you would like to establish for this alarm. If you select Email To: then also enter the email address to send the alarm to. You may enter multiple email addresses separated by a semi-colon (;).

Alarm Conditions:

> In Call Time – if this is checked then the alarm is only for calls during the time specified. If it is not checked then the alarm is for any calls outside the time specified.

> Other alarm conditions are self explanatory. Please note that inputting an asterisk (*) in a condition field is considered a wildcard and any value will match it. Any condition field that is **not** selected by a checkmark will **not** be used as part of the test for the alarm. To test against several values in the same condition field, separate the values by commas.

> Calltype condition – The condition values are numbers representing the call types you want to match. The call type number can be determined by opening the Setup SMDR module, expanding the Call Types section in the left display area and counting down to the desired call type starting with zero for the first one listed (first in the list is 0, the second in the list is 1, … etc.).

TERMINATING PROCESS SMDR

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively processing SMDR data. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the Process SMDR module down. Once terminated, you will no longer be processing calls records from the collection modules, even if other WIN-SENSE 32 applications are running.

WIN-SENSE 32 REPORTING

One of the main features of WIN-SENSE 32 is the ability to present all the call record data it has collected, priced and stored, in meaningful and helpful ways to the end user. Most find the reports to be easy and intuitive to use.

The reporting package of WIN-SENSE 32 is comprised of three modules: Reports, Scheduler and Email (RBE or Reports By Email). Reports is the main reporting module. Scheduler is a module that actually runs the Reports module with parameters that will generate defined scheduled reports. Email (RBE) is necessary only if reports, including Process SMDR alarms, are to be emailed out.

NOTE: It may be helpful to place shortcuts of Scheduler and Email (RBE) into the Windows Startup program group so that these modules will start automatically when the user logs on to Windows. See your Windows documentation for instructions on how to do this.

RUNNING REPORTS

The Reports module requires very little setup to begin reporting on call records from WIN-SENSE 32's database.

Step 1. Start the Report module. On the PC go to:
        Start | All Programs | WIN-Sense32 | Reports

You are presented with a window that includes the Main Menu that runs along the top and quick access buttons in the bottom panel.

The main menu includes two (2) selections that are simply icons: the Home icon (the left most menu selection) and the Cycle icon (the right most menu selection).

The Home icon returns the main window to the quick access button view.

The Cycle icon cycles between report selection criteria, a text view of the report, and a PDF view (if Create report in PDF is a selected option – see below) of the report.

REPORTS MAIN MENU FILE OPTION

The File option has several submenus from which to choose. They are as follows:

Open report … -- Allows you to view a report that was previously saved. This is an actual report and not a report format.

Save report … -- Save the report that is currently being viewed. Again, this is not the report format that you are saving but the actual report.

Email report … -- If the Email (RBE) module is setup, you can email the currently viewed report. You may enter multiple email addresses separated by a semi-colon (;).

Printer setup … -- Typical Windows printer dialog.

Print … -- Prints the current report.

DB Maintenance … -- Performs several maintenance items on the WIN-SENSE 32 databases. They are:

> Open … -- Select a different Callrecs database table to generate reports from. This will allow you to pull reports from archived data. This table selection is only in effect as long as the Reports module is open UNLESS you click the Yes button on the dialog that asks, "Do you want this folder to be the default for Reports in the future?" When Reports is closed and then restarted, the table reverts to the active table that Process SMDR is storing call records to UNLESS you clicked the Yes button on the confirmation dialog.

> Archive … -- Using a reports like dialog, you can select which call records to archive AND delete from the Callrecs table currently being viewed. After the selections are entered, an archive report is generated showing which call records will be archived and deleted. A confirmation window is displayed which tells you how many records will be archived and the name of the file they will be archived to. The file name is "ARCHIVE_callrecs_yyyymmdd.adt", where the yyyy is the current year, mm the current month, and dd is the current day. This file will be located in the WIN-SENSE 32 tables folder.

> Pack … -- Pack all the database tables used by WIN-SENSE 32. The tables that are packed are: Callrecs, Extension, Department, Billclass, Account, Dialnumacct, Security, and Schedule.

Setup … -- Set the default path where reports will be saved to. Set the default path for report format files. Add report generation time to the report footer. Include a line in the report footer showing how long it took to generate the report. Add report statistics to the report footer, including Callrecs table name and how many total records are in the table. Select whether durations will be displayed in minutes.hundreths or hours:minutes:seconds format. Select PDF format for reports (if not selected then reports will simply be created in text format). Control logging of the Reports module activity.

Exit – Closes the report window and shuts down the Reports module.

REPORTS MAIN MENU MANAGEMENT OPTION

The Management option has two submenus from which to choose. They are as follows:

Custom Reports… -- Allows you to create, edit, save and generate a custom report for which you define the parameters. See the Custom Report section for more information.

Save Report Format… -- Save the report format. This report format can then be used to produce the same type of report with the same settings, but with different data.

Open Report Format… -- Retrieves a report format, including selection criteria, that has been previously saved.

REPORTS MAIN MENU – ALL OTHER OPTIONS

All other options on the Main Menu are for various types of reports. Since the report generation dialog is very similar for most of the reports, it will be discussed here generally for all of them.

Description – Enter a description of the report being generated. It displays in the report header.

Call Date – Select the date range to search and report call records. You can type a date in directly or use the drop down menu next to both the From and Through input boxes. The drop down will display a calendar selection box. A second drop down gives a quick selection for some common report date ranges.

Auto Inc? – If selected the dates will automatically be adjusted if the format is saved and retrieved at a later date.

Call Time – Select the time range to search and report call records. You can type a time in directly or use the up / down arrows next to both the From and Through input boxes. A drop down by both the From and Through input boxes gives a quick selection for some common report time ranges.

Exclusive – If selected, and the From and Through dates are not the same date, then only call records that are between those times each day will be reported. If **NOT** selected, then all calls starting with the From date and time until the Through date and time will be reported on.

The next three fields relate to the type of report being generated. For instance, if this is an extension report, then the next three fields will be the extension selection criteria. These fields can be used in any combination.

If a value is entered in ONLY the From field, then calls with that value or greater will be reported. Likewise, if a value is entered ONLY in the Through field, then calls with that value or less will be selected. However, if values are entered in BOTH fields then the calls selected will be between and matching both the values.

To the right of the Through field, there is a list of values for this field that have been entered in Setup Organization. Any combination of these values can be selected to include in the report. The number to the left of the list indicates how many items have been selected. Right clicking on the list will display a popup menu that allows you to Clear All selections, Select All items, or Invert Selection.

Include: -- allows further selection of calls to include in the report.

Dur >= and Dur <= -- Set a call duration range in minutes. A zero indicates that there is no limit.

Charge >= and Charge <= -- Select a dollar range for the call. Again, a zero means that there is no limit.

First nnnnnn calls – This setting will limit the number of calls reported for each extension, department, etc. to the set value. Zero indicates that there is no limit.

Total of nnnnnn calls – Limit the total number of calls on the entire report to nnnnnn calls. If you want no limit then set this to zero.

Call Category OR Call Type – Select Call Category to see a list of call categories to choose from. Select Call Type to see a list of call types to choose from. Limit the report to those calls of a set of Call Categories or a set of Call Types. The number to the left of Call Category or Call Type indicates how many items are selected. Right clicking in the

selection box displays a pop up menu that allows you to Clear All selections, Select All items, or Invert Selection.

GENERATING REPORTS

Click the OK button once you are ready to generate the report. You will see the report in the window on your screen. Or you can click on the Schedule button to setup the report to generate at a scheduled time (see Schedule below).

When you generate a report, it is displayed in the view window. The Cycle button on the menu bar (to the right of the Help menu selection), toggles between the report display, the PDF view of the report, and the report selection dialog.

Any viewed report can be Saved (see File | Save Report option above), Emailed (see File | Email Report option above), or Printed (see File | Print option above). You can also highlight and copy all or a portion of the report to the Windows Clipboard, for pasting into another application.

SCHEDULING REPORTS

Use this option to schedule a report format to generate a report at a set time and on a recurring basis. When you press the Schedule button, you will be shown the Schedule dialog box. The options are:

Name – Enter a name for this report. It is displayed in the Scheduler module and also in the generated report.

Description – Enter a description of this report. It is for your reference only and will not be displayed on the report.

Enabled – When this option is checked and the Scheduler module is running, the report will be generated based on the scheduled settings.

Scheduled Begin Date / Time – Set this to the date and time when you want to run the report. If the report is recurring this will be the first time it is run. A drop down next to the date displays a calendar date selection box. The up and down arrows next to the time can be used to adjust the time. However, you can type the date and time directly if wished.

Repeat – Set these options if you want the report to recur on a scheduled basis. The first report will be generated on the Scheduled Begin Date / Time (see above). After that the next scheduled time is based on these settings.

Every nnn Minutes/Hours/Days/etc. – Set this to the frequency (based on the remaining items) of the report.

Time of Day – This means different things depending on the frequency. For a report with a frequency based on hours, the report will generate on this minute of the hour. For a report based on days, weeks, etc. then the report will be generated at this hour and minute of the day.

Day of Week -- This means different things depending on the frequency. For a report with a frequency based on weeks, the report will generate on this day of the week. For a

report based on months or years the report will be generated on this day of the week IF Week of Month is set (see below).

Day of Month – With a frequency of months or years, the report will generate on this day of the month.

Week of the Month – With a frequency of months or years, a report will be generated on this week of the month IF Day of the Month is not set.

Month of the Year – Using a year as the frequency, the report will be produced on this month.

Print checkbox – If checked the report will print to the Windows default printer.

Email checkbox – If checked the report is emailed to the email address entered in Email Address (see below). The report is saved to a temporary file AND a QuickEmail profile is created using the specified email address. The temporary file is sent as an attachment. You may enter multiple email addresses separated by a semi-colon (;).

Save checkbox – If selected then the report is saved to the file specified in File Name (see below).

Email Address – Enter an email address where the report is to be sent to. Multiple email addresses can be entered if separated by a comma and space. There is a limit of 500 characters.

File Name – Enter the path and filename to store the report to. You may use a filename that will always be the same OR you may use variables in the filename that represent the PC date and time. These variables are:

<yyyy> -- replace with the PC's 4 digit year
<mm> -- replace with the PC's 2 digit month
<dd> -- replace with the PC's 2 digit day
<hh> -- replace with the PC's 2 digit hour
<nn> -- replace with the PC's 2 digit minute
<ss> -- replace with the PC's 2 digit second

RUNNING SCHEDULER

Scheduler is the module that generates reports from report formats at pre-scheduled times. Creating scheduled reports should be done in the Reports module. Scheduler can be used to adjust the schedule and recurrence settings for a report. Setup the Scheduler module to process WIN-SENSE 32 scheduled reports as follows:

Step 1.   Start the Scheduler module. On the PC go to:
Start | All Programs | WIN-Sense32 | Scheduler

Note: If the processing of scheduled reports on an on going basis is required, then a shortcut to this module should be placed in the Startup group so that it starts automatically when the user logs in to Windows. See your Windows documentation for the steps on how to do this.

The top display area is a grid showing items that have been scheduled. The columns in the grid can be moved by dragging and dropping them to a different position in the grid. This new position is only valid during this session of Scheduler. Closing Scheduler and reopening it will cause the columns to revert back to their default positions.

The highlighted row in the grid is the currently selected item. This is important to understand when you start editing or deleting items. Double clicking on a row in the grid will open the Edit window (see Edit below). This is the same as selecting Setup | Edit from the main menu.

SCHEDULER MAIN MENU REPORT OPTION

The Report option has four items from which to choose. They are as follows:

Edit – This will allow you to edit the selected or highlighted item in the selection grid. You can make changes to the schedule and recurrence settings for a report. You can NOT define a report or change report format parameters here (with the exception of the From and Through date and time). You must make those types of changes in the Report module.

Delete – Deletes the selected or highlighted scheduled report. A confirmation dialog will open, showing you some basic information about the scheduled report and will ask you if you are sure you want to delete this item.

Run Without Update – Allows you to generate the selected or highlighted scheduled report now. No changes will be made to the From and Through date and time of the report or to the last run or next run date/time after the report is generated.

Run With Update – Allows you to generate the selected or highlighted scheduled report now. The From and Through date and time of the report and the next run date/time will be updated appropriately.

SCHEDULER MAIN MENU SETUP OPTION

The Setup option has two items from which to choose. They are as follows:

Options – You can set where Scheduler looks for the various report formats to monitor and process. The Reports module will use this path to store the defined report formats. You can also set the number of lines to keep in the lower display area. Once the specified number of lines has been met, old lines are deleted and new lines are added to the bottom of the display area. Word wrap will turn on or off word warp in the lower display area. You can also control the logging of Scheduler activity here.

Enabled – If this is checked, the Scheduler will process the items in the grid area as defined by their respective schedules. The status bar at the bottom of the window will show ENABLED and will be green. If Enabled is not checked, Scheduler will not process any items. The status bar will be red and say DISABLED. Also, the time on the left of the status bar will stop and a message on the right side of the status bar will show the date and time that the module was disabled. Note: Individual items can be enabled / disabled as well. However, the individual item setting only applies if the Scheduler module is enabled – it supersedes the individual settings.

TERMINATING SCHEDULER

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively processing scheduled items. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the module down. Once terminated, you will no longer be processing scheduled reports, even if other WIN-SENSE 32 applications are running.

RUNNING EMAIL (RBE)

Email (RBE) module is the SMTP (Simple Mail Transport Protocol used by the majority of email systems) that connects to a selected SMTP server and sends QuickEmails that are generated by other WIN-SENSE 32 modules.

Note: Email (RBE) can be set up to send emails with attached files on a scheduled basis. Please see the module's own help file for more information on this and other advanced features.

Sending QuickEmails using Email (RBE) can be enabled or disabled. Make sure the Send QuickEmails checkbox is checked for WIN-SENSE 32 QuickEmails to be processed properly.

Setup includes selecting a valid, accessible SMTP server, login ID and associated password. You must also know the type of authentication used by the server. You should contact your email administrator for this information before attempting to set up this module.

Set up Email (RBE) to route WIN-SENSE 32 QuickEmails as follows.

Step 1.   Start the Email (RBE) module. On the PC go to:
              Start | All Programs | WIN-Sense32 | Email (RBE)

Note: If using the email feature of WIN-SENSE 32 on an on going basis is required, then a shortcut to this module should be placed in the Startup group so that it starts automatically when the user logs in to Windows. See your Windows documentation for the steps on how to do this.

Step 2.   Right click in the left side of the display area. This will pop up a menu.

The following are the menu items needed to setup WIN-SENSE 32 for QuickEmails:

> Add/Edit Servers – Enter the SMTP server that will be used for QuickEmails. This same setup can be accessed by clicking on the Servers button at the top of the window. See the Servers section below for more information.

> Setup – This will allow you to setup module logging and QuickEmail options. Many of the items in Setup do not apply to WIN-SENSE 32 QuickEmails and are not covered here. You may click on the Help button to learn more about these items.

>> Send Timeout – If a connection to the SMTP server can't be established within this many seconds, the email will not be sent out. Email (RBE) will halt the connection attempt to the server so that additional emails can be sent.

>> QuickEmail – There are four items for this setting:

>>> Path to Profiles – This is the path where WIN-SENSE 32 modules will store QuickEmail profiles. A QuickEmail profile contains all the information necessary for Email (RBE) to send an email to that particular profile.

>>> Default SMTP Server Profile – This is the path and filename to the profile for the SMTP server that will be used for QuickEmails. This server profile is set up in the Servers dialog window (see Servers below).

>>> Administrator Email – This email address will show as the From: email in the sent email. Some servers require this to be a valid email address.

>>> Keep Completed for nnn days – Completed QuickEmail profiles are copied to the Complete folder. QuickEmail profiles in the Complete folder more than nnn days old will be deleted automatically from the Complete folder.

Servers -- This is the setup dialog for the SMTP server information. When this setup window is first opened, the Server defaults to NewServer.aes. Click on the folder icon to the right of the Server name and select the path and server name that was entered in Default SMTP Server Profile (see Setup above). This filename does not have to already exist since it will be created when you click on the OK button. However, if it does exist, the server information from that file will be displayed in the other fields on this window. Other fields that you should understand are:

Description – Enter a description of this server. This is just for your reference.

Host – Enter the IP address (numeric) or URL (name and domain) of the SMTP server that you want to connect to.

Port – This port number is used for communication with your server. Most SMTP servers and applications expect this to be port 25, but your server may differ. When in doubt ask your email administrator.

Local Address – This field is not used at this time.

Username – Enter the authorized login name used to access the SMTP server.

Authtype – This is the type of authorization this particular server uses. Most often smtp Authlogin will work. If not contact your email administrator for help. (Note: Exchange Server often requires the Authtype to be AuthNone.)

Password – Login password assigned for the Username specified above, for the SMTP server access.

Test – Use this button to send a test email through the SMTP server with the settings you have just entered. When prompted enter the email address where you want the test email to be sent to and click OK. If the test is successful, an email with the subject line, "SMTP Server test … <date> <time>" will be received at the email address you entered. Right click anywhere on the window to bring up a popup menu.

> Wrap – Turn word wrapping on or off.

> Clear – Clear all lines from the display area.

> Debug – Toggle debug logging to the display area on or off.

OK – Clicking on this button will accept the entries you've entered for this SMTP server profile and will save them to the file indicated.

Note: Another way to test whether a SMTP server is accessible on port 25 from this PC is to use Telnet. It is beyond the scope of this document to explain Telnet and how to use it for testing, but there are numerous examples and help documents on the Internet that may be used.

TERMINATING EMAIL (RBE)

Closing the application by using the X in the upper right hand corner of the main window, **does not** terminate the application. It minimizes it to the toolbar at the bottom of the Windows Desktop and it is still actively processing emails from other WIN-SENSE 32 modules. If you need to shut the application down, you must right click on the icon in the toolbar and select Exit. A dialog box will open asking for confirmation before shutting the module down. Once terminated, you will no longer be processing emails, even if other WIN-SENSE 32 applications are running.

CUSTOM REPORTS

If the information you want to view is not available in a standard report format then a custom report can be created, edited, saved, and generated.

To generate a report from a custom report format, select Management | Open Report Format… from the Reports module main menu. Then select the filename of the custom report format that was previously created and saved.

To create or edit a custom report format, select Management | Custom… from the Reports module main menu.

The WS32 Report Customization window consists of 4 different areas:

> File Menu
>
> Report Setup
>
> Additional Breaks
>
> Report Fields

Note: The Report Setup, Additional Breaks, and Report Fields sections can be expanded/collapsed by clicking on the "+" or "-" signs next to the section title.

FILE MENU

This section is found at the top of the window and contains a File button and the name of the file currently being edited. If a new report is being created then the file name field will be blank.

Clicking on the File button will show the menu of options available for custom reports:

> New – Initializes all fields to allow creation of a new report format.
>
> Open… – Open an existing report format to view/edit.
>
> **Note:** The WS32 standard report formats cannot be changed. If you open one of the standard report formats to edit then the filename field will be highlighted in red, indicating you cannot save to this file name. You can save the edited format to a different name using the Save As… menu option.
>
> Save – Save changes made to the current report format.
>
> Save As… – Save changes made to a new report format file name.
>
> Sample… – Display a sample of what the current report format will look like.
>
> About… – Display information about this module.
>
> Close – Close the WS32 Report Customization window.

REPORT SETUP

This section is used to select the overall look of the report.

"Type" field – NOTE: This is the first selection box in this section, it is not labeled. This field is used to select the report type. Most often you will select "Custom", unless you are creating a report based on one of the standard formats.

Detail – Determines whether the report will show detail or summary data for the Key Field.

Report Width – Information only. Shows the character width of the report based on the fields selected for viewing (See Report Fields below).

Description – Information line that will be displayed in the report header.

Key Field – This is the field that will be used to sort the data.

Ascending – Sort order for the Key Field data.

Max Items per – Field: The maximum number of call records displayed for each Key Field entry. Report: The maximum number of items display for the entire report.

Break on field change – Display field footer and new field header information when the value of Key Field changes. Only applies to detail reports.

Page feed on break – Force a page feed and new report headers when the value of Key Field changes.

Include break field stats – Display cost/call, cost/min, and min/call in the field footer when the value of Key Field changes.

Duration in HH:MM format – Display duration formats in HH:MM (hours:minutes) format. If not checked then display in MMMMM.T (minutes.tenths) format.

Format break totals – This field will change automatically based on the "Include break field stats" selection. You can edit this field but it is recommended that you don't. (Edits will be lost when you click "Include break field stats" – this field will be returned to default values.)

To edit this format line, double click in the field.

You should not remove any of the "%nns" values.

You can change the nn value to change the minimum display width of the field.

To make a field right justified, add a "-" (minus) sign in front of the nn.

To make a field left justified, remove the "-" (minus) sign from before the nn.

Other spaces and text can be changed as desired.

Include report stats – Display cost/call, cost/min, and min/call in the report footer.

Include generation time – Display the time it took to generate this report in the report footer.

Include database stats – Display the database filename and total number of call records found in the call records database this report is generated from.

ADDITIONAL BREAKS

This section allows additional fields to be selected to break on and show totals for.

Break – Up to 3 additional fields can be selected.

Field – Select the call record field that will cause this break to occur.

Break description – Display additional information about this Break Field.

Page feed on break – Force a page feed and new report headers when the value of Break Field changes. Only applies to detail reports.

Sub-total – Display footer line when Break Field value changes. Only applies to detail reports.

Include break field stats – Display cost/call, cost/min, and min/call in the field footer when the value of Break Field changes.   Only applies to detail reports.

Format break sub-totals – This field will change automatically based on the "Include break stats" selection. You can edit this field but it is recommended that you don't. (Edits will be lost when you click "Include break stats" – this field will be returned to default values.)

To edit this format line, double click in the field.

You should not remove any of the "%nns" values.

You can change the nn value to change the minimum display width of the field.

To make a field right justified, add a "-" (minus) sign in front of the nn.

To make a field left justified, remove the "-" (minus) sign from before the nn.

Other spaces and text can be changed as desired.

Display header on break – Display detail header line again when the Field Break value changes. Only applies to detail reports.

Separator line width % – Length of separator line displayed before header line when Field Break value changes. The length of this line is a percentage of the width of the report. Only applies to detail reports.

REPORT FIELDS

This section is used to select and format the report fields that will be displayed in the report detail. As report fields are added/deleted the Report Width value (See Report Setup above) will be changed.

On the left, the report fields to be included in the report are displayed in the order they will appear on the report. The Insert, Up, Down, and Delete buttons can be used to add/delete report fields and adjust their order. A report field can also be added by clicking on the first empty space at the end of the report fields list and then entering the information for the new report field in the entry fields on the right side of this section.

Field – Select the report field name to include at this position in the report.
When a field is selected, default formatting information is automatically entered in the other input fields. Any entries that were made previously for this field will be lost.

Label – Enter the label text to display for this report field column in the detail header line.

Length – Enter the length for the label to be displayed in the detail header line.

Right justify – Right justify the label in the detail header line.

> **Note:** If you select to right justify the label you will most likely want to add a space at the end of the Label text.

Format field – Edit the display format for this field. Double click on this field to see the format edit box.

> **Note:** Select the correct Format As before editing the Format field. This important so the correct formatting character will be included in the Format field data.

The Formatting for field… window is displayed to change formatting of report field data.

> **Note:** If you want to edit the formatting string directly, select Date in Format As before double clicking on the Format field box.

Format As – Select data type of field.

> **Note:** Normally this should not be changed. (It is defaulted to the correct type when the Field is selected.)

CLIENT REPORTING

If there is a need to generate call reports from a PC other than the one where WIN-SENSE 32 is installed, client reporting can be set up on that PC. The following requirements must be met for the client PC to be able to generate reports:

- The client PC must be on the same network as the WIN-SENSE 32 server

- The Tables folder, in the c:\program files\winsense32 folder, on the WIN-SENSE 32 server must be shared.

- The user at the client PC must have read/write access to the shared Tables folder on the WIN-SENSE 32 server.

Note: Client reporting can be installed on up to 5 PC's.

INSTALLING WIN-SENSE 32 CLIENT REPORTING

Step 1.   Insert the WIN-SENSE 32 Installation CD into the CD or DVD drive.

Step 2.   Click on the "Install WIN-SENSE 32 v3.0 Client Reporting" link.

Note: If the WIN-SENSE 32 install page does not display automatically when you insert the CD, auto-play may not be enabled on your PC. In this case you will need to open My Computer or MS Explorer, navigate to the CD drive, and double click either the WS32_setup_index.html file (this will display the install selection menu) or the WS32_Client_Install\Setup.exe file (this will begin the install of WIN-SENSE 32 v3.0 Client Reporting).

Installation will begin, and you will be prompted with the appropriate dialog boxes as the installation progresses.

During the installation, you will be presented with the license agreement. Please take a moment to read the license agreement for WIN-SENSE 32. If you accept the conditions and provisions given in this agreement, please click on the accept button and press next. The installation will then proceed. However, if you choose to not accept the terms of the license agreement, you may indicate this and installation will halt. You must then return the software to your place of purchase.

Once installation is complete, a new "WIN-Sense32 Reports" Program Group will be created in the Program Manager.

The following is a list of the directories created on the drive you installed the software to, which is typically drive C.

> \Program Files\Winsense32 Client
> \Program Files\Winsense32 Client\error
> \Program Files\Winsense32 Client\log
> \Program Files\Winsense32 Client\report
> \Program Files\Winsense32 Client\rptformats
> \Program Files\Winsense32 Client\schedrpt

WIN-SENSE 32 Client Reporting does not require registration.

Once the install is complete you must run WIN-SENSE 32 Client Reporting and setup the new default call record database location by selecting the location of the WIN-SENSE 32 server shared Tables folder.

Step 1.   Start the Client Reporting module. On the PC go to:
          Start | All Programs | WIN-Sense32 Reports | Reports

Step 2.   From the main menu select File… | DB Maintenance… | Open…

Step 3.   Navigate to the shared Tables folder on the WIN-SENSE 32 server, select the callrecs.adt file, and click the Open button.

Step 4.   Click the Yes button. This will make the call record database in the WIN-SENSE 32 server shared Tables folder the default for all further reporting on the WIN-SENSE 32 Client Reporting PC.

Note: If you click the No button then the selected call record database will only be used while this instance of Reports is running. The next time you start Reports on the Client Reporting PC it will revert to the previous default database.

UNINSTALLING WIN-SENSE 32 CLIENT REPORTING

Step 1.   Locate and launch the Uninstall program in the WIN-Sense32 Reports program group.

          You will be prompted with a dialog asking, "Do you want this application removed from your system?"

Step 2.   Click *Yes* to remove WIN-SENSE 32 Client Reporting.

Uninstall will not always completely remove all WIN-SENSE 32 Client Reporting software from your system. To insure complete deletion, you may have to use MS Explorer to remove undeleted WIN-SENSE 32 Client Reporting files and directories.

RUNNING CLIENT REPORTING

See the WIN-SENSE 32 Reporting section above.