CDR Search™ 4.0

User Guide for CDR Search™

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CDR Search 4.0

CDR Search 4.0 is a separate client application that allows you to search a Call Detail Reporting database. You can install CDR Search on either the AltiServ server or on an administrator client desktop. CDR Search works only with AltiWare OE Release 4.0

CDR Search

Installing CDR Search on a Client System

Make sure AltiWare OE Release 4.0 has been installed on the AltiServ system and the link to TCP/ IP is enabled before continuing with CDR Search setup.

1. Log in to the client machine using a domain account and make sure it is connected to the network on which AltiServ is running.

2. Exit any/all Windows applications.

3. Insert the CDR Search CD into the CD ROM drive.

4. Run the **Setup.exe** program by selecting Start ➞ Run and typing **D:/** Setup.exe, where D is the letter of your CD ROM drive. Follow the step by step installation instructions as they appear on the screen. (If your system does not have DCOM 95 installed already, it will be installed automatically.)

5. On Windows 95, you'll need to reboot your computer.

You are now ready to log in to CDR Search as the administrator or as a workgroup supervisor.

CDR Search vs. WG CDR Search

CDR client offers two ways to search call records.

• **CDR Search** allows you to define a search by the type of call—incoming or outgoing. To perform this search, you must log in as the administrator.

• **WG CDR Search** allows you to specify a search by workgroup. To perform this search, you can log in as the administrator or as a workgroup supervisor.

Administrator Log In

Before you log in

When you log in for the first time, you need to know either the IP address or the name of the server you'll be linking to. (If you use the server name rather than the IP address, CDR Search replaces the name with the IP address the next time you log in.)

To obtain the AltiServ IP address, ask your IT administrator.
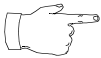
☞ If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet Service Provider.

Logging in

1. From the Windows **Start** menu, select **Programs ➤ CDR Search 4.0 ➤ CDR Search 4.0**. The Login window appears.
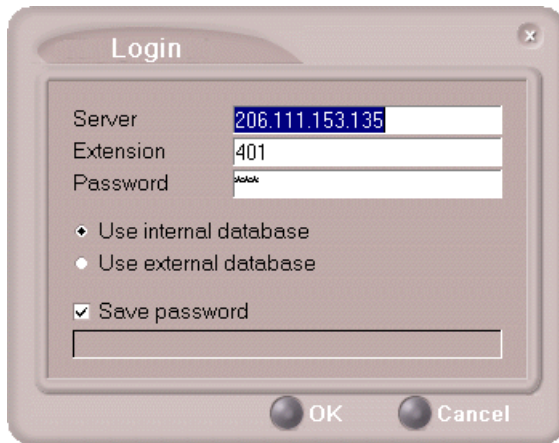

Figure 1.   Login window

1. Enter the IP address or name of the AltiServ server.

2. Enter your **Extension** and **Password**.
   Optionally, you can check the **Save password** check box to store your log in password for the next time you access CDR Search.

3. Select the database containing the data you want to access:

- **Internal database**—DBF database on the AltiServ server

- **External database**—SQL database set up to log call records
  This option is available only when the external logger service is installed on the SQL Server, and External CDR Logging is enabled (AltiWare Administrator's System Configuration dialog | Call Reports tab). Refer to the AltiWare System Administration Manual for more information.

4. Click **OK** to open the User Mode window.

Figure 2. User Mode window

5. Select Administrator login, and click **OK** to open the CDR Search main window.
   CDR Search permits only one administrator extension. This extension is set in AltiWare Administrator's System Configuration dialog, on the General tab, in the Manager Extension field. Refer to the AltiWare System Administration manual for more information.

CDR Search

Running a CDR Search

The CDR Search main window has two tabs: WG CDR and CDR. Logging in as the administrator enables you to run either a CDR search or a WG CDR search (explained on page 9).

Figure 3.   CDR tab of the CDR Search main window

1. Select the time range for the search:

    *   **User Define**—The From/To fields default to a range that includes the ten previous days. Edit the date and time for a custom range.

    *   **Today**—Sets the From/To fields to the current date

    *   **Last 7 Days**—Sets the From/To range to the previous 7 days

2. Select the Type of search:

    *   **Calls & Messages**—Calls either answered or directed to voice mail

    *   **Calls**—Calls answered by a human

    *   **Messages**—Calls directed to voice mail

    *   **All Trunks Busy**—Calls aborted due to busy signals

3. Define the type of calls in the Caller/Callee fields:

   • **All**—searches for both incoming and outgoing calls

   • **To search for outgoing calls only—**Set Caller to Extension and Callee to Trunk, then enter the appropriate numbers.

   • **To search for incoming calls only—**Set Caller to Trunk and Callee to Extension, then enter the appropriate numbers.

4. **To search for a Tenant**, enter the name in the field provided.

5. **To search for an Account Code**, enter the code in the field provided.

6. Select to Sort by:

   • **Date/Time**—sorts day-by-day (or hour-by-hour if you select Today as the time range for the search)

   • **Extension**—sorts by extension

   • **Trunk**—sorts by trunk

7. Click **Search**. During the search, a progress window appears. To cancel the search, click **Cancel**.
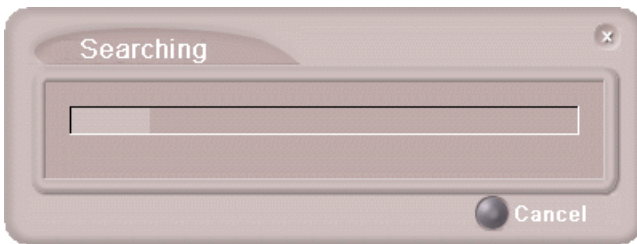

Figure 4. Search progress bar

8. Search results appear in the Summary window. Refer to page 11 for details on working with search results.

WorkGroup Supervisor Log In

Before you log in

When you log in for the first time, you need to know either the IP address or the name of the server you'll be linking to. (If you use the server name rather than the IP address, CDR Search replaces the name with the IP address the next time you log in).

To obtain the AltiServ IP address, ask your IT administrator.
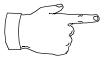
☞ If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet Service Provider.

To log in as a workgroup supervisor, the option-pack license must be installed on the AltiServ server. For information on obtaining a license, please contact your Authorized AltiGen dealer.

Logging in

1. From the Windows **Start** menu, select **Programs** ➤ **CDR Search 4.0** ➤ **CDR Search 4.0**. The Login window appears.
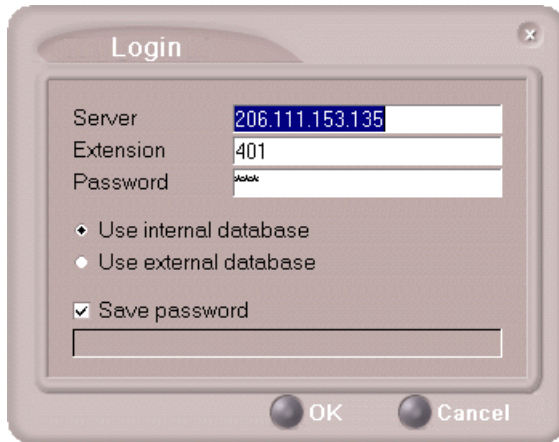

Figure 5.   Login window

2. Enter the IP address or name of the AltiServ server.

3. Enter your **Extension** and **Password**.

4. Optionally, you can check the **Save password** check box to store your log in password for the next time you access CDR Search.

5. Select the database containing the data you want to access:

    •   **Internal database**—DBF database on the AltiServ server

    •   **External database**—SQL database set up to log call records
        This option is available only when the external logger
        service is installed on the SQL Server, and External CDR
        Logging is enabled (AltiWare Administrator's System
    Configuration dialog | Call Reports tab). Refer to the AltiWare System
    Administration Manual for more information.
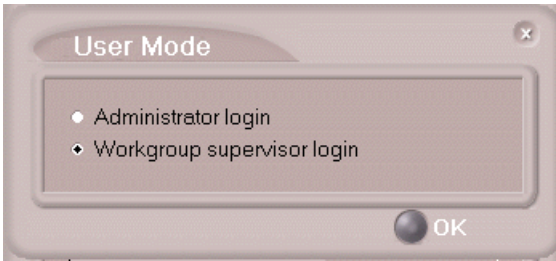
6. Click **OK** to open the User Mode window.

Figure 6.   User Mode window

7. Select Workgroup supervisor login, and click **OK**.

Figure 7.   The Password window

8. Select the workgroups you want, enter the password for each, and click
    OK to open the CDR Search main window.

If you type an invalid password, the Password window
reappears. A red X appears before the problem
workgroup (s). Re-enter the password and click **OK**. If
the password remains incorrect, CDR Search eliminates the
workgroup from CDR Search main window.
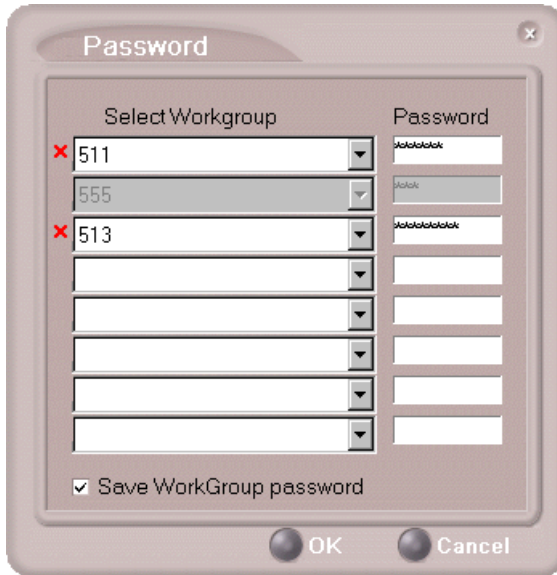
Running a Workgroup CDR Search

The CDR Search main window has two tabs: WG CDR and CDR. Logging in as a workgroup supervisor enables you to run only the WG CDR search. Logging in as the administrator enables you to run the CDR search as well. (Refer to page 4.)

Figure 8.   WG CDR tab of the CDR Search window

1. Select the time range for the search:

    • **User Define**—The From/To fields default to a range that includes the ten previous days. Edit the date and time for a custom range.

    • **Today**—Sets the From/To fields to the current date

    • **Last 7 Days**—Sets the From/To range to the previous 7 days

2. Select the Type of search:

    • **Calls & Messages**—Calls either answered or directed to voice mail

    • **Calls**—Calls answered by a human

    • **Messages**—Calls directed to voice mail

    • **All Trunks Busy**—Calls aborted due to busy signals

    • **Agent Login/out**—Calls sorted by the login/out times of workgroup member extension numbers.

3. If desired, select the Workgroup whose call records you want to search.

4. In the Search by field, select one of the options listed below, then type the appropriate information in the underlying text box.

   - **Extension**—searches by extension.

   - **Phone Number—**searches by caller number.

   - **User Data—**Searches any information in the User Data fields in the call records. The User Data field contains information culled from Form Data, IVR, and URL history.

   The Search by fields are all automatically wildcarded. That is, if you type "5" as the extension, CDR Search returns all extensions beginning with that digit.

5. **To search for a Tenant**, enter the name in the field provided.

6. **To search for an Account Code**, enter the code in the field provided.

7. Select to Sort by:

   - **Date/Time**—sorts day-by-day (or hour-by-hour if you select Today as the time range for the search).

   - **Agent**—sorts by agent

   - **Workgroup**—sorts by workgroup

   - **Trunk**—sorts by trunk

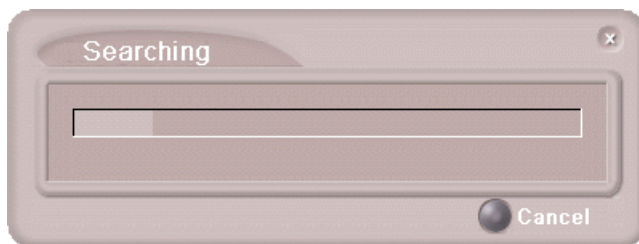8. Click **Search**. During the search, a progress window appears. To cancel the search, click **Cancel**.

Figure 9.   Search progress bar

9. Search results appear in the Summary window. Refer to the following section for details on working with search results.

The Summary Window (Search Results)

The summary window displays the results of your search.

Figure 10. The summary window displays search results

Summary window buttons

- The **Detail** button opens the Detail window for a selected call. Refer to the following section for details.

- The **Delete** button deletes selected calls. Refer to page 13 for details.

- The **Export** button exports selected calls to a csv file. Refer to page 14 for details.

- The **Print** button prints the selected calls. Refer to page 15 for details.

CDR Search 4.0
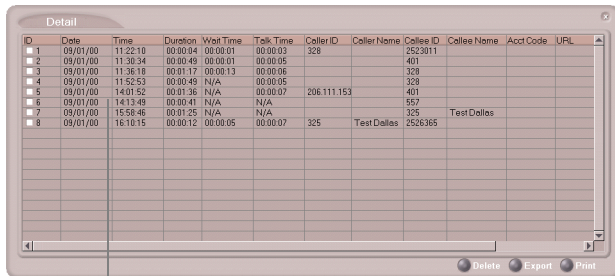
Getting Call Details

From the Summary window, you can drill down for detailed information on a call record.
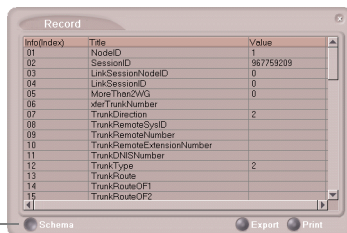
The Summary window
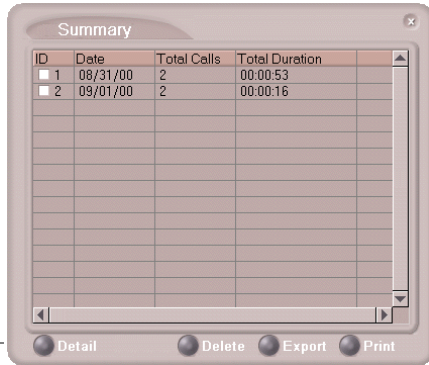
1. To open the Detail window, select a record and click **Detail**.

The Detail window

2. To open the Record window, **Double-click** a record in the Detail window.

The Record window

3. To view raw data, click **Schema**. Click Schema again to return to the record view.

Deleting Records

You can delete records from the Summary and Detail windows.

To delete records

1. Do one of the following:

   • To delete all records, click **Delete**. In the Select window that appears, select Delete all records.

   • To delete specific records, select the records you want, then click **Delete**. In the Select window that appears, select Delete only selected records.
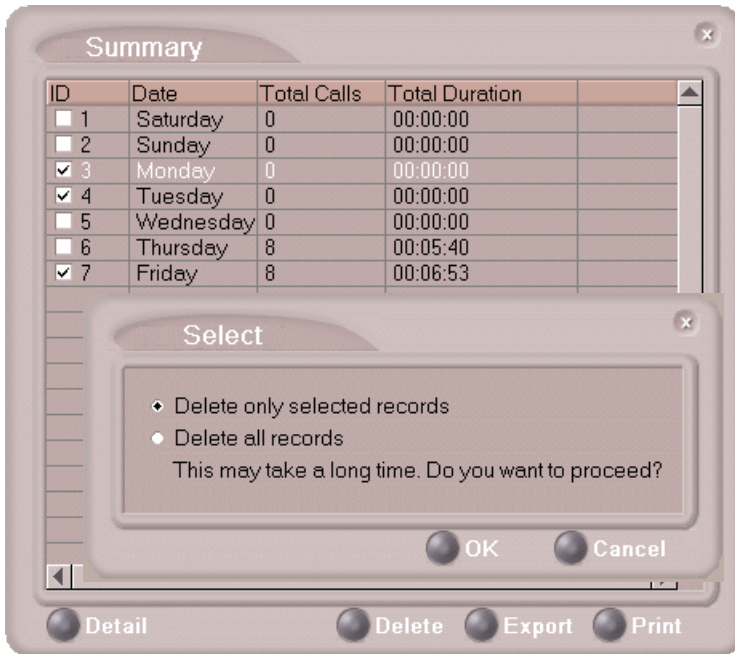

Figure 11.   Deleting selected records from the Summary window

2. Click **OK**.

Exporting Records

You can export records in CSV format from the Summary, Detail and Record windows.

To export records

1. Do one of the following:

   • To export all records, click **Export**. In the Select window that appears, select Export All Records.

   • To export specific records, select the records you want, then click Export. In the Select window that appears, select Export only selected records.
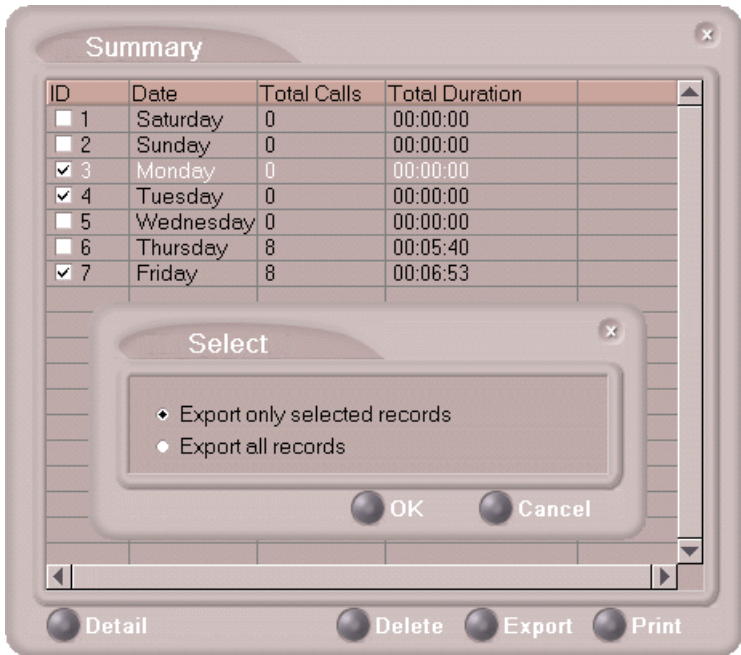

Figure 12.   Exporting selected records from the Summary window

2. Click **OK** to open the Save As dialog box.

Printing Records

You can print records from the Summary, Detail and Record windows.

To print records

1. Do one of the following:

    • To print all records, click **Print**. In the Select window that appears, select Print out all records.

    • To print specific records, select the records you want, then click **Print**. In the Select window that appears, select Print out only selected records.
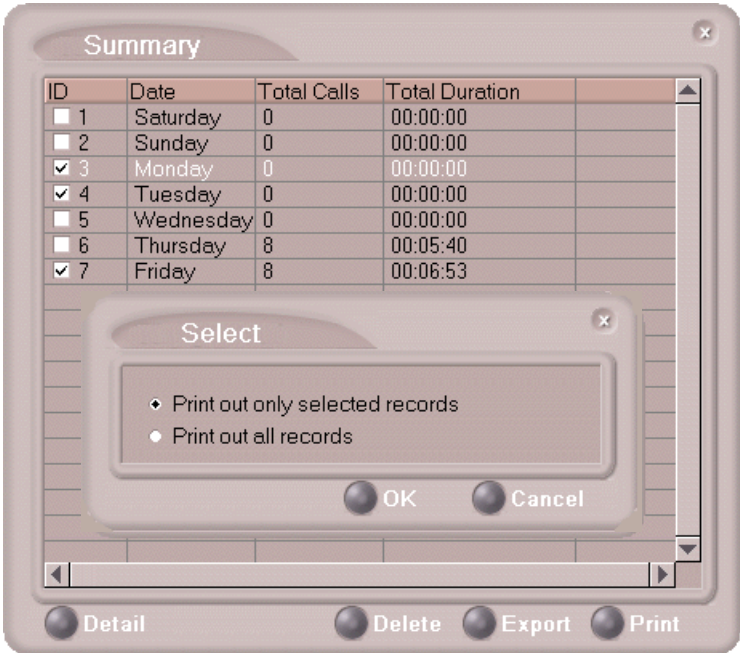

Figure 13.   Printing selected records from the Summary window

2. Click **OK** to open the Windows Print dialog.

Uninstalling CDR Search

1. From the Windows **Start** menu, select **Programs** → **CDR Search 4.0** → **CDR Search 4.0**.

2. Click **OK** when the dialog box asks if you want to uninstall the program, and respond to any additional prompts.

Alternatively

1. In the Control Panel, select **Add/Remove Programs**.

2. Choose **CDR Search 4.0** and click the **Add/Remove** or **Change/ Remove** button, depending on which version of Windows you are running.

3. Click **OK** to in the dialog box to confirm you want to remove the service, and respond to any additional prompts.